



Excerpt from Successful Minute Taking - Meeting the Challenge, by Heather Baker,

For more details see www.UoLearn.com/minutesofmeetings/minutesofmeetings.html

Checklist for successful meeting organisation

The suggested timings work for most meetings but this will depend on the nature of your business and how well your systems work so you need to fill in your actual timings.

Before the meeting:

	Details	Suggested timing before	Your timing
1	Arrange meeting with all attendees	3-4 weeks	
2	Book room, refreshments and equipment (be aware of any special needs)	3-4 weeks	
3	Nominate chairperson and minute taker	3-4 weeks	
4	Draft agenda	2 weeks	
5	Get informed on topics to be discussed	2 weeks	
6	Speak to or meet any attendees who can increase your knowledge	2 weeks	
7	Meet with the chairperson to discuss requirements for the meeting and the minutes and agree agenda	1 week	
8	Distribute agenda and papers	1 week	
9	Email to remind people to bring papers from the previous meeting, such as minutes	1 week	
10	Start writing your minutes on the template now saved as a word document	1 week	
11	Prepare your dress and behaviour (what shall I wear, what might I say)	1 week	
12	Check refreshments are OK	2 days	
13	Seating plan, if required	2 days	
14	Ensure you have plenty of paper and pens (or a laptop – is there plenty of battery time left?)	1 day	
15	Arrive at the meeting room early to set up and check – select your and the chairperson’s seats if not already assigned	On the day	
16	Greet people as they arrive. Unless it is specifically part of your role, don’t get involved in making/serving drinks as this is a distraction from minute taking. If it is your role, you may want to question this.	On the day	

During the meeting:

	Details
1	Keep an eye on the time for the chairperson; timings can be included on the agenda
2	Listen
3	Take notes, not minutes
4	Interact assertively when required
5	Assist the chairperson as agreed

After the meeting:

	Details	Suggested timing after	Your timing
1	Review your notes as quickly as possible	On the day	
2	Start typing the minutes – just a rough draft first of all	On the day or 1 day later	
3	Summarise the meeting and convert your notes to minutes	Next 2-3 days	
4	Proofread your minutes	Day after writing minutes	
5	Ask the chairperson to check the minutes if necessary	Next 3-4 days	
6	Distribute as appropriate	As soon as ready	
7	Go back to beginning of this list for the next meeting!		