



PRESENTATION

Introduction to Note-Taking

NYSTEC

YOUR INDEPENDENT TECHNOLOGY ADVISOR

PHS Planning & Design

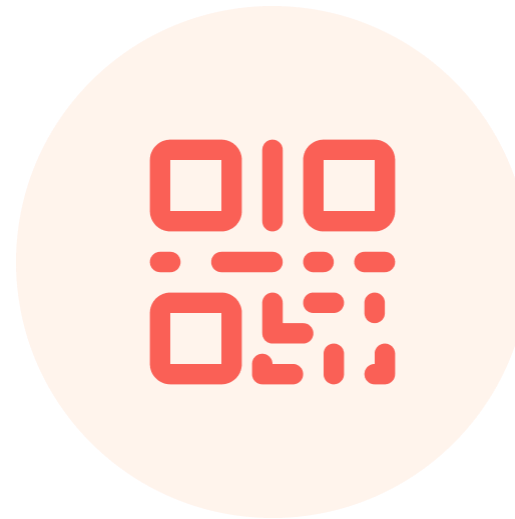
Prepared For: NYSPHC March Consortium

3/1/2023

Speaker: Elizabeth Whelan

Agenda

- **The Benefits of Good Note-Taking**
- **Taking Notes for Yourself**
- **Formal vs. Informal Notes**
- **Before the Meeting**
 - Setting Expectations
 - Formal vs. Informal Notes
 - Templates and Consistency
- **During the Meeting**
 - Helpful Tips
- **After the Meeting**
 - Organizing Meeting Minutes & Agendas
- **Questions**



**Join at slido.com
#3123**

Why is it important to take good notes?

- Memory is not perfect
- People may be absent
- To identify action items, decisions, risks, and next steps
- Can be referenced in the future

What does a good note-taking system look like?

Before How easily can you start taking notes?

During How quickly and accurately can you write everything down?

After How easily can you find past relevant notes?

slido



**Join at slido.com
#3123**

ⓘ Start presenting to display the joining instructions on this slide.

slido



What kind of notes do you take most often in your Fellowship role?

ⓘ Start presenting to display the poll results on this slide.

Quadrant Method:

This method works best for updates and team meetings where the main objective is keeping track of assignments or follow-ups you don't want to forget.

Questions:

Document any questions that come to mind during the meeting and make sure to get an answer or someone to follow up with before leaving

Personal to-dos:

Deadlines, projects, and milestones you're responsible for delivering

Notes:

Document the discussion in the meeting as well as any other insights, decisions, or next steps

Assign to others:

Information you need to pass along to others. This might include tasks that others volunteered for during the meeting or tasks that are most appropriate for a specific person/role

24 pages of notes. I think I got everything.

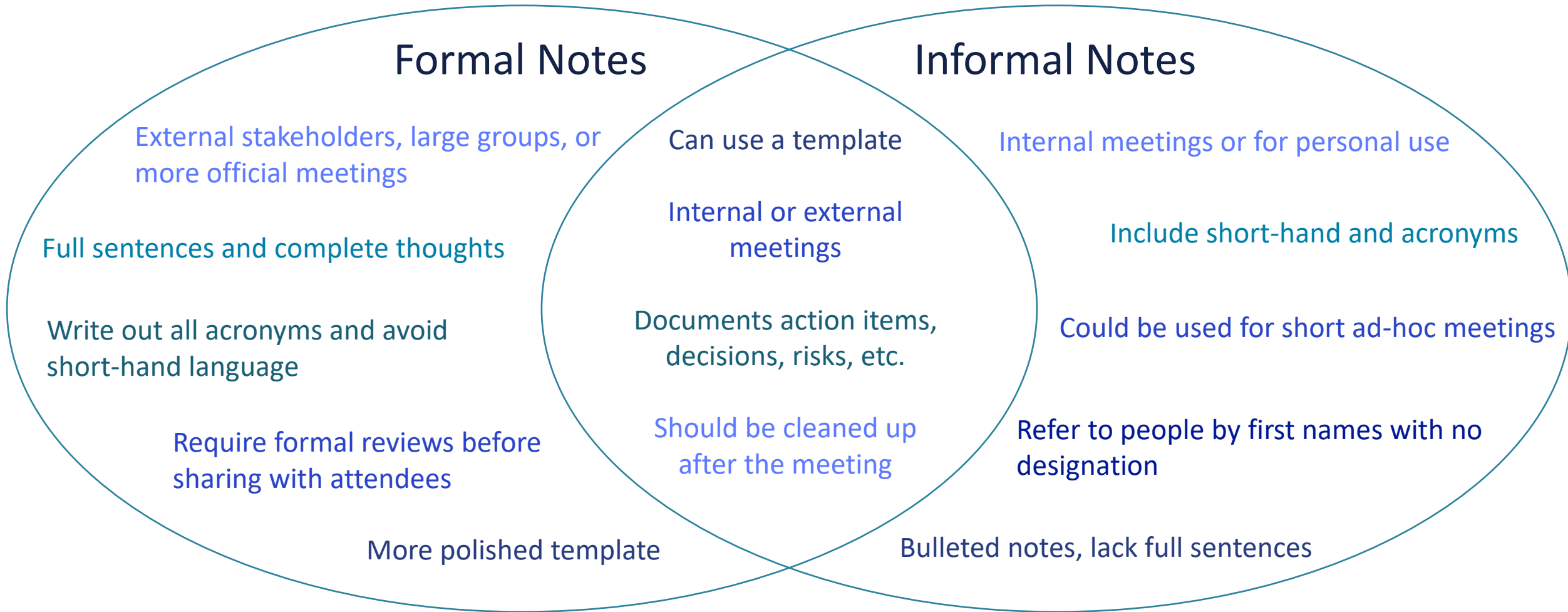


But did you get this?



fresh spectrum

Formal vs. Informal Notes





Before the Meeting

slido



What type of information do you need prior to taking notes in a meeting?

What expectations may your client/audience have?

ⓘ Start presenting to display the poll results on this slide.

- Have a checklist of what the client/audience is looking for in the minutes
 - Ask these questions →

- Confirm the process for the meeting minutes following the meeting:
 - Turnaround expectations
 - Review process
 - Are the notes shared with attendees and by whom?

Would they like the notes in an informal or formal style and what does that look like?

Do they have a predetermined format or template for meeting minutes?

Do they prefer a short summary of the key points or a more detailed dialogue of the discussion?

Would they like to record the names of who said what?

How should you refer to various groups in the notes? Are acronyms or short-hand acceptable?

slido



What should be included in meeting minutes templates?

ⓘ Start presenting to display the poll results on this slide.

- Templates are important for recurring meetings
- An organization may have standard meeting minute templates that should be used across all meetings
- Templates may include:
 - Meeting name
 - Meeting date & time
 - List of attendees (and invitees)
 - Agenda (including owners and time blocks for each item)
 - Action items section

Meeting Minutes		DATE:	
		TIME:	
		PLACE:	
MEETING CALLED BY:		TYPE OF MEETING:	
FACILITATOR:		PROJECT:	
NOTE TAKER:			
ATTENDEES:	DOH: NYSTEC:		
<i>The information contained in this document represents the author's interpretation of the events that occurred during the meeting. Please forward revisions and/or corrections to the author no later than 48 hours after receipt.</i>			

AGENDA TOPIC	
Presented By:	
Discussion:	
Conclusions:	

Action Items	Responsible	Deadline

- Prep note-taking documents ahead of the meeting
 1. Make a copy of the meeting minutes template and rename it for the date and purpose of the meeting, according to your organization's standards
 2. Pull items from the agenda into the meeting minutes template and fill in the date, attendees, agenda items, etc. before the meeting begins

This allows you to see the structure of the meeting and organize thoughts in a readable way while taking notes



During the Meeting

- If virtual, consider recording the meeting to refer to if something was not captured in the minutes
 - Meeting attendees should be made aware of the recording and its purpose
 - Recording meetings can impact the candor and engagement of attendees
- Have a back-up note taker to supplement or fill any gaps in the notes
- Don't be afraid to ask someone to repeat themselves or ask for clarification
 - It will allow you to fully understand the discussion and lead to better minutes
- Use acronyms and shorthand during the meeting and fix it later

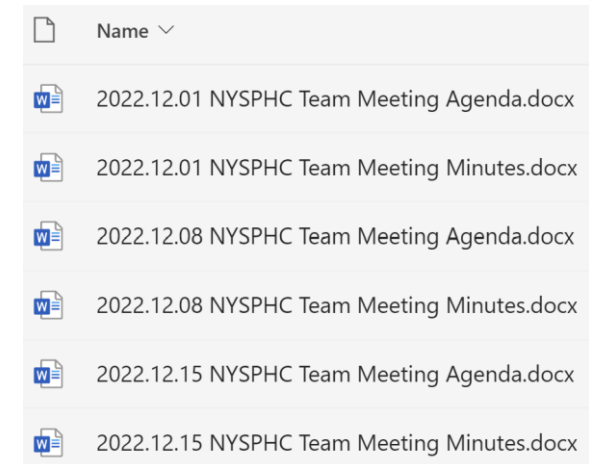
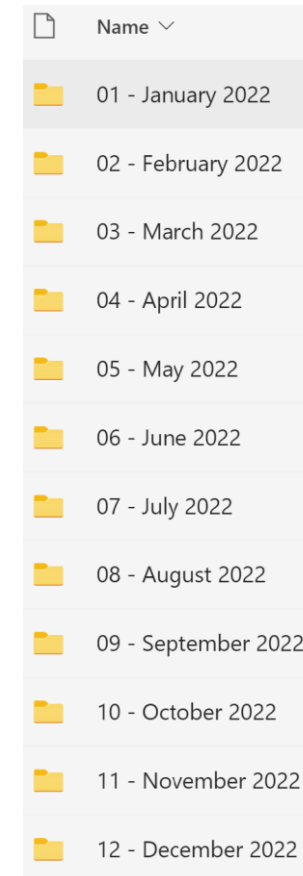
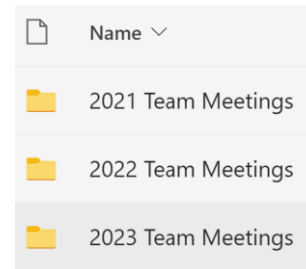
- In more formal meetings, an individual should be assigned to take notes and should not have any other roles (facilitation, technical support, etc.) in order to focus on capturing the full discussion with no distractions
- In virtual meetings with breakout rooms, you may need to consider having multiple people assigned to take notes for each room



After the Meeting

- After the meeting, the note-taker should review the notes to ensure they are well organized and free of spelling or grammatical errors
 - Even if there is not a formal review/approval process, it is good practice to have a colleague review the minutes if they are being shared with attendees
- Identify decisions, risks, and next steps and include those in a separate section that clearly shows owners and deadlines
- Save minutes to a central location and name the files consistently across all meeting minutes documents
- Minutes should be shared with appropriate individuals in a timely fashion, based on the expectations set ahead of the meeting

- Being organized will help everyone when looking for notes to refer back to
- Organization Tips:
 - Create a shared folder for all minutes and agendas
 - Create subfolders for each year or month, for recurring meetings
 - Be consistent when naming documents
 - Starting the file name with the date (YYYY.MM.DD) will sort all files in chronological order



Questions?



slido



What did you learn today that you will take with you?

ⓘ Start presenting to display the poll results on this slide.