

Efficient minutes taking and report writing



J. Aderonke Asiwaju Mrs.,
Director, Staff Training And Development Unit,
University Of Lagos.
jasiwaju@unilag.edu.ng

Outline

- Introduction
- Learning objectives
- Definition of minutes
- Definition, purpose and types of report
- Qualities of efficient minutes and report
- Best practices in minutes taking and writing
- Best practices in report writing
- Template for minutes
- Template for reports
- Conclusion



Learning objectives

At the end of this session, the participants should be able to:

- discuss the importance of minutes and reports;
- appraise the characteristics of efficient minutes and reports;
- recommend best practices in minutes writing and report writing;
and
- apply recommended templates for writing minutes and reports.



Introduction

- Effective documentation is crucial in any organization. Two essential tools for achieving this are minutes and reports.
- Accurate, objective, unbiased, concise, and timely minutes and reports facilitate informed decision-making, promote transparency, and enhance accountability .
- Efficient minutes and reports are well structured, error free, have clarity, context, content with proper grammar, spelling, and punctuations.
- In this session, we will explore best practices in minutes and reports, as well as the templates for writing both.

Introduction cont'd.

- The University operates a committee system which allows members of its community to participate in its administration and management by bringing their expertise and experience to various decision-making processes and activities.
- Decision-making and implementation activities are handled by bodies such as the University Council, Senate, boards, committees, panels which are documented in minutes and reports.
- Reports guide the decisions, policies of the University Management and other activities. This underscores the importance of ensuring that reports are efficiently written.

Definition of minutes

- Minutes are a written record of the correct proceedings of a meeting.
- Minutes achieve accountability, transparency, and follow-up on decisions and actions.
- Minutes of meetings in most cases form the crux of the report and are sometimes attached to reports. Hence the need for efficient minutes.

Definition, purpose and types of report

- A report is a detailed document or presentation that provides information, analysis, and/or recommendations on a specific topic, project, activity or situation.
- Reports are for the purpose of record keeping, retrieval for future reference and implementation.
- Among others, types of reports in the University are:
 - i. Activity report or report of events
 - ii. Progress report
 - iii. Fact-finding/investigation report.
 - iv. Operational report

What Makes Minutes and Reports Effective?

- Accuracy: Minutes and reports must be accurate and reliable.
- Clarity: Minutes and reports should be clear and concise, avoiding jargon and technical terms.
- Relevance: Minutes and reports should be relevant to the audience and purpose.
- Timeliness: Minutes and reports should be produced in a timely manner.
- Error-free: Minutes and reports must be error-free.
- Compliance: Minutes and reports must comply with institutional standards.
- Organized Structure: Use headings, subheadings, and bullet points to facilitate easy reading.

What are the requirements for efficient minutes taking?

Efficiency of minutes will be determined by the proficiency of the administrator at these three stages:

- efficiency in pre-meeting preparations;
- efficiency during the meeting; and,
- professionalism in the post meeting activities.
- These will be discussed as best practices in minutes taking.

Best practices in minutes taking: Efficiency in pre-meeting preparations

To ensure accurate and effective minutes taking, it is essential to prepare ahead of the meeting. Here are some steps to help you prepare:

- Confirm the meeting details such as the meeting time, date, location, and attendees.
- Review the meeting agenda and identify any supporting documents or materials that may be relevant.
- Plan to sit beside the chairman for easy consultation, on a seat that allows you to see and hear all attendees clearly

Best practices in minutes taking: Efficiency in pre-meeting preparations

- Gather all relevant documents, reports, or data that may be referenced during the meeting.
- Review the list of attendees, their roles, responsibilities, and areas of expertise.
- Review minutes from previous meetings to ensure continuity and to identify any outstanding actions or decisions.
- Prepare your equipment, e.g. a reliable pen, notebook, or laptop, and a fully charged and functional recording device.
- Understanding the meeting's objectives e.g. voting, selection, report writing, etc.

Best practices in minutes writing Cont'd.

- efficiency during the meeting; and
 - professionalism in the post meeting activities
- i. Record or take good notes
 - ii. Review your notes, and seek clarification as expedient.
 - iii. Capture the main decisions, action plan, actions, and discussions.
 - iv. Use a template
 - v. Edit and proofread

Best practices in report writing

- Clearly define the purpose of the report, and identify the target audience.
- Provide background information and context to help readers understand the content of the report.
- Be guided by your terms of reference
- Use clear, simple and concise language: KISS your report
- Use visual aids like tables, charts, and graphs to illustrate key points
- Ensure good packaging of appendices, sharing of links etc.
- Editing and Proofreading

Template for minutes

- The Heading
- Attendance
- Opening prayer (optional)
- Chairman's Opening Remark/Call to order
- Adoption of Agenda
- Adoption of Minutes of the last Meeting (if applicable)
- Matters Arising from the Minutes
- New Business/Business of the Day/Deliberations
- Any Other Business (AOB)
- Action Plan
- Adjournment
- Closing Prayer (Optional)
- Signatures of the Chairman and Secretary

Template for minutes cont'd.

- The Heading: This should reflect the name of the meeting, date, time and venue of the meeting.
- Attendance : This comprises information about those present at the meeting classified as follows:
 - i. Present

This contains the list of members present .
 - ii. Absent

Names of members who were absent without permission would be listed here.

Template for minutes cont'd.

➤ Apology

Names of members who sought permission to be absent would be listed here.

➤ In Attendance

This is a term used to indicate the status of the people who attended the meeting but who are not members of the panel/committee meeting, e.g. secretariat staff, invited persons and observers, where applicable.

Template for minutes cont'd.

➤ Chairman's Opening Remarks

This is the Chairman's short opening statement. Most times, the Chairman uses the opportunity to welcome members and draw their attention to the purpose of the meeting.

➤ Adoption of Agenda

This contains the items for discussion at the meeting as amended/approved for deliberation by the committee/group members.

Template for minutes cont'd.

➤ Reading and Adoption of Minutes of the Last Meeting

This is a record of the reading of the minutes of the last meeting and necessary corrections and /or amendments (if any) made before the minutes were accepted / adopted.

➤ Matters Arising from the Minutes.

Under this heading, post-meeting activities after the last meeting, new developments, follow-up actions are reported by the relevant members.

Ideally, the secretary would have discussed this with the Chairperson and incorporated his or her inputs before the meeting.

Template for minutes cont'd.

- New Business/Business of the Day/Deliberations : The discussions of the items on the agenda are presented under this sub-heading. This is reflected in separate paragraphs, that is, each item per paragraph. Each agendum with its sub-title and number of the resolutions/decisions reached must be captured effectively as well as how the decisions were reached (e.g. by consensus or voting).
- Any Other Business (AOB) : Any matter not listed on the agenda, which a member considered important and raised, and which was discussed, is reported under this heading.

Template for minutes cont'd.

- Action Plan : The activities agreed on at the meeting that should be executed before the next meeting and the names of persons assigned to facilitate them are reported under this sub-heading. It is best presented in a tabular form as exemplified below:

S/N	ACTION	ACTION BY

Template for minutes cont'd.

- Adjournment : The names of the members that moved the motion for the adjournment, a new date, time and venue for the next meeting, are recorded under this heading.
- Closing Prayer (Optional)
- Signatures of Chairman and Secretary: This gives authenticity to the contents of the minutes

Template for report writing

- Title Page
- Table of Contents
- Executive Summary
- The Heading
- Introduction
- Membership
- Terms of Reference
- Number of Meetings Held
- Modus Operandi/Method of work
- Actions Taken
- Observations
- Findings
- Conclusion
- Recommendations

Template for report writing cont'd.

Title page

- This is essential because it reflects the subject matter and date of the report which must be stated clearly.
- This is the cover page of the report. The title page is the first page of the report that succinctly describes the report.
- This page should include all the information necessary for a reader to identify the contents of the report, its author(s), origin of the report and the date of submission.

Template for report writing cont'd.

- The heading: This is essential because it reflects the subject matter and date of the report which must be stated very clearly.
- Table of contents: This is the list of divisions or sections of the report under different headings with their corresponding page numbers.

It is presented on a separate page at the beginning of a report. It outlines sections and subsections and their headings.

Template for report writing cont'd.

Executive summary

- This is an abridged version of the report which provides an overview to the Executive. It highlights key points for its readers, saving them time and preparing them to understand the overall content. This will apply when a report exceeds ten pages.

Introduction

- This is where the instrument which enabled the constitution of the Panel or Committee is stated. It may also include information that provides the context for the report.

Template for report writing cont'd.

➤ Membership

Names and positions of members of the Panel or Committee must be stated in the Report.

➤ Terms of reference

Terms of reference as contained in the instrument that constituted the Panel/Committee should also be stated clearly in the Report

➤ Number of meetings held

Number of all the meetings held from the inaugural, must be listed.

Template for report writing cont'd.

➤ Modus operandi/method of work

This is a record of the adopted ways of carrying out the assignment before the Panel/Committee.

It may include information about what methods were used for information gathering e.g. review of written and other physical materials, interviews, visits to locations.

Template for report writing cont'd.

➤ Actions taken

The activities/actions taken in the course of the assignment will be stated here. This reports on the implementation of the strategies/method of work adopted by the Committee/Panel.

➤ Evidence obtained/observations/deliberations

This section presents the report of the evidence obtained from oral testimonies, observations and facts elicited from documents read during the assignment. It may also include the summation of deliberations of the members of the body around the evidence.

Template for report writing cont'd.

- Observations: This is a record of “intangibles” that are relevant and could be useful in decision making.

- Findings

Findings are the facts that were found in the course of the assignment/investigation in line with the terms of reference.

Findings are different from observations.

Findings will only apply to Reports of fact finding and /or Investigative Committees /Panels.

- Conclusion: This states the conviction of the members

Template for report writing cont'd.

- Recommendations: Recommendations are generated from the observations, findings and conclusion. They must be clear and unambiguous.
- Appreciation: The members express their gratitude to the Management for the opportunity given to serve.
- Signature: All members append their signatures under this heading.
- Appendices: These come at the end of a report. It is the compilation of attachments that served as source documents during an assignment/investigation or evidence. They are numbered serially in the order of reference to them in the report.

Conclusion

This presentation dwelt on the following:

- The importance of minutes and reports in organisations and the characteristics that make them efficient. Minutes and reports should be accurate, complete, clear, objective, timely, concise, and well-organized.
- Best practices in minutes and report writing were discussed such as the use of templates, focus on key points, definition of purpose and scope, and use clear and concise language.
- The importance of editing and proofreading for accuracy, completeness, clarity, and concision, and use of grammar and spell checkers.
- Applying these takeaways will make minutes and reports efficient.

Questions



