

SKIDMORE

C O L L E G E

Office of Leadership Activities

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Skill Building – Record Keeping

Introduction

Being a secretary for a club is not a job to take lightly. The following criteria are important when considering who will best fulfill this role:

- Is this person reliable; will they keep appointments?
- Is this person well organized; will they complete tasks on time?
- Is this person a good listener; can they be objective, and hear both sides of an issue?
- Is this person on top of what is going on; can they appropriately weed out the trivial information and record the important facts for the record?

A Record Keeper's Role and Tasks

The record keeper is, in effect, the historian. Current members will refer to what they record as a reminder of finished and unfinished business, what needs follow-up and what actions were taken. It will also be kept for future members to read to gain an understanding of where the club has been and why. Many organizations make it the secretary's responsibility to notify the membership about upcoming meetings—time, date, location—as well as any important items to be discussed.

The record keeper should be present at all meetings. If they are unable to attend, a substitute person, preferably with the characteristics defined earlier, needs to be appointed. It is also helpful for the record keeper to prepare themselves before each meeting. A record keeper should be sure to read the minutes of previous meetings, paying attention to style and format and review the agenda and any attached documents. If the organization has agreed upon a standard format for minutes, a standardized form can be used and fill in discussions, etc. as they occur.

If your organization has a structure that includes committees there always needs to be a record keeper present to accurately record what transpired. It is not necessary to take down everything unless someone requests that their remarks be entered for the record. It is necessary, however, to take complete notes. Motions and resolutions do need to be taken verbatim and should be read back during the meeting to make sure they have been accurately recorded.

Minute Taking Methods

There are several ways to take meeting minutes and each club needs to choose the most appropriate method for them. A practical option is to record a summary of debates, agreements and disagreements with a succinct, explanation of the character of each. The second method is to take action minutes when decisions are reached and responsibilities are assigned. In either of these cases make note of the following:

- The names of the people proposing any action
- Take down word-for-word any agreements, suggested changes, decisions or conclusions
- Whether or not an agreement was met

It is often helpful for both minute taking and for those attending the meeting if the chair or the record keeper summarizes decisions that are reached. The summarizer should be most careful in clarifying those points of greatest controversy.

It is the record keeper's responsibility to signal the president or chairperson and ask questions regarding the subject being discussed if unsure. A record keeper should not wait until the meeting has been adjourned to get clarification; individuals can lose their perspective, issues can become less important and one's memory can alter what actually occurred. Immediately after the meeting, the secretary must go over the notes while everything is still fresh, checking their notes for the following information:

- Type of meeting (executive, standing committee, etc.)
- Date, time and place
- List of attendees and those absent
- Time
- Approval and/or amendments to previous meeting minutes
- Record of reports from standing and special committees
- General matters
- Record of the meeting, also record of vote
- Name of person taking minutes

Once the minutes have been transcribed into draft form, they should be submitted to the chair for review and/or correction. Finally, once they are returned, they need to be prepared in a formal form—preferably agreed upon beforehand—for final approval at the next meeting. These minutes should be sent out to all members within 3 or 4 days of the meeting. This allows members time to read the minutes for accuracy before the next meeting and while the previous meeting is still fresh in their minds.