

How to Take Meeting Minutes



What to write down and what not to, plus tips to make the job easier.

[by Christy Forhan, PTO Today \(10/25/2022\)](#)

Minutes are the official permanent record of the business of your parent group. It is the PTO secretary's job to make sure they are accurate yet concise. Minutes are intended to document the outcome of business decisions (i.e., motions), not every word of discussion leading up to the decision, so you don't need to learn shorthand to take minutes.

It is appropriate to take minutes at every formal meeting of the PTO, including executive board and general membership meetings. Some large committees might also find it helpful to take minutes during their meetings to ensure there is a record of important decisions made by the committee and to help with internal communications, especially communicating back to the full board. Minutes also help future PTO leaders understand how the PTO has operated in the past.

Structure every set of minutes with this standard format:

- Name of your PTO
- Date of meeting
- Time of meeting
- Place of meeting
- Name of presiding officer (“meeting was called to order by President Amy Johnson at 7:05 p.m.”)
- Members in attendance and whether a quorum was reached
- Names of any guests in attendance
- Time of adjournment
- Name of secretary who prepared the minutes

To Make It Easier

If you take your notes on paper during the meeting, start with a preprinted page with the heading already filled out.

Prepare a template file on your computer with the standard headings and major section titles already inserted. Use this blank file to start each new set of minutes.

Identify new sets of minutes on your computer by naming the file with the type of meeting and the date of meeting (e.g., "EXEC BOARD 051510"). Save the files in a folder on your computer reserved just for PTO minutes.

Use a laptop to take notes during the meeting only if you are comfortable and quick on the computer. You don't want to miss anything important because you are struggling with the keyboard or spell-checker.

Don't be afraid to interrupt the meeting to ask for the proper spelling of names. It is far more awkward for a member to see her name butchered in last month's minutes than it is for you to ask her to spell it correctly while you are taking notes.

Proper Content of Minutes

Following Robert's Rules of Order, the business of a PTO is conducted by proposing, discussing, and voting on motions. Under this format, the minutes of a meeting focus on the content and outcome of the motions. With motions, there's a clear "yea" or "nay" vote that makes it obvious to all whether a proposal has been approved or denied.

However, many parent groups operate more informally and don't use motions to drive their meetings. In this case, it is more difficult to decide what should be and what shouldn't be included in your minutes. If your group runs its meetings without motions, keep in mind these basic rules:

- Be concise.
- Be accurate.
- Don't try to summarize discussion or who said what.
- Document major decisions and ensure that the participants agree with your understanding of the decision. If you're in doubt, speak up to clarify whether a decision has been made.
- Finalize the minutes in a timely fashion.

For each motion, list the complete wording of the motion and the outcome of the motion (approved, defeated, and tabled). You may also include the name of the person making the motion, but it's not necessary. If you do decide to include names, be consistent and include them for all motions.

Do not include the name of the person who seconded the motion. Do not summarize the discussion of the motion. Do not attribute discussion or comments to individuals. Do not include editorial comments about the nature of the discussion. Just indicate whether the motion passed or not.

Do include the name of the speaker and the name of any committee that presents a report, along with a very brief (one or two sentences) summary of the committee's report. Attach a copy of any committee's formal report as part of the permanent record of this meeting.

Do include the name and title of any guest speaker at your meeting, along with the topic of the speaker's presentation. Do not try to summarize the speaker's presentation in your minutes. Attach any handout from the speaker as part of the permanent record of the meeting.

After the Meeting

Finalize your minutes quickly, preferably within 24 hours of the meeting. The faster you return to your notes, the easier they will be to decipher.

Send a copy of your draft minutes to the executive officers for preliminary approval. They should be on the lookout for errors or omissions.

Print a copy of your minutes and file them chronologically in a binder reserved just for your PTO's minutes.

File an electronic copy in a folder on your computer reserved just for PTO minutes.

Distribute the minutes after the meeting using email or through your PTO's website. Bring a copy to the next meeting for review and approval. Technically, the minutes are not finalized until the membership votes to approve them at the next meeting.

If you need to make corrections after you have finalized the minutes, be sure to update the copy in your permanent secretary file, too.

Save a copy of any handouts or reports presented by committees or guest speakers at your PTO meeting. Include those documents with the corresponding meeting minutes in your permanent files.