

UNDERSTANDING THE FUNDAMENTALS OF MINUTES AND REPORTS

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ABSTRACT

In addressing the theme of this conference "Best Practices in Minutes Writing and Reports", organized by the Centre for Human Resource Development (CHRD) FUTO, this paper titled "Understanding the Fundamentals of Minutes and Reports" aims to differentiate between reports and minutes. It goes ahead to elucidate the features and characteristics of report and postulates that reports are characterized by such parameters as systemic presentation of facts, self-explanatory document, permanent record and provides information and guidance. Minutes on the other hand have been described as the instant record of a meeting or hearing. Minutes describe the events at a meeting. The paper equally goes ahead to introduce the importance of agenda to minutes taking in a meeting. The paper concludes by listing out the basic requirements for writing good minutes and reports.

INTRODUCTION

1.0 Preamble:

To have a better understanding of the theme "Understanding the Fundamentals of Minutes and Reports", we have to define and differentiate between Minutes and Report.

2.0 Report; Definition

The Oxford Dictionary of Current English defines Report as a methodical and well planned document which outlines and evaluates a subject or problem, and which may include:

- The record of an order of events
- Explanation of the implication of these events or facts
- Evaluation of the consequences of a conclusion or course of action
- Conclusions
- References

Reports must therefore always be:

- * Correct
- * Crisp
- * Clean
- * Well-structured

3.0 Features or Characteristics of a Report:

3.1 Complete and Compact Document:

Report is a complete and compact

written document giving updated information about a specific problem.

3.2 Systematic Presentation of Facts:

Report is a systematic presentation of facts, figures, conclusions and recommendations. Report writers closely study the problem under investigation and prepare a report after analyzing all relevant information regarding the problem. Report is supported by facts and evidence. There is no scope for imagination in a report which is basically a factual document.

3.3 Prepared in Writing:

Reports are usually in writing. Writing reports are useful for reference purposes. It serves as complete, compact and self-explanatory document over a long period. Oral reporting is possible in the case of secret and confidential matters.

3.4 Provides Information and Guidance:

Report is a valuable document which gives information and guidance to the Management while framing future policies. It facilitates planning and decision making. Reports are also useful for solving problems faced by a business enterprise.

3.5 Self-explanatory Document:

Report is a comprehensive document and covers all aspects of the subject matter of study. It is a self-explanatory and complete document by itself.

- Laboratory reports
- Book reports
- Progress reports
- Justification reports
- Compliance reports
- Annual reports
- Policies and Procedures

3.6 Acts as a Tool of Internal Communication:

Report is an effective tool of communication between top executives and subordinate staff working in an organization. It provides feedback to employees and to executives for decision making. Reports are generally submitted to higher authorities. It is an example of upward communication. Similarly, reports are also sent by company executives to the lower levels of management. This is treated as downward communication. In addition, reports are also sent to shareholders and others connected with the company. It may be pointed out that report writing/preparation acts as a backbone of any system of communication.

Reports therefore can fulfill four different, and sometimes related, functions. They can be used as controls to ensure that all Departments are functioning properly, to give information, to provide an analysis, and to persuade others to act (*H.Dan O'Hair, James S. O'Rourke, and Mary John O'Hair*) "*Business Communication: A Framework for Success*". South-Western College Publishing, 2001.

3.7 Acts as Permanent Record:

A report serves as a permanent record relating to certain business matters. It is useful for future reference and guidance.

4.0 Importance of Reports:

Unless one is able to communicate effectively, the knowledge and skills you acquire is of little use to others. (University of Waterloo, Faculty of Science). You have to be able to collect information, organize it, and present it in a logical and concise form. Irrespective of the target audience of the report, the structure and organization must convey the exact meaning you intend. A well written report can be helpful to one's career while a poorly written report calls into question the credibility of one's work and frustrates the reader. (<https://www.quora.com>).

3.8 Time Consuming and Costly Activity:

Report writing is a time consuming, lengthy and costly activity as it involves collection of facts, drawing conclusions and making recommendations.

Reports can equally be of great help when it comes to controlling all business monitoring needs. The judgment will be better when one is in possession of the key metrics that show the capacities and performance of the workers and, at the same time, provide you a measurable insight of the business and all related processes in order to improve.

3.9 Types of Reports:

Sharma and Mohan in the Book "*Contemporary Business Reports*, 5th ed. South-Western Cengage" 2013 argue that there are nine types of reports. These are:

- Memos
- Minutes

Reports in a nutshell provide the chance to record activities and analyze the performance of staff for statistical

purposes.

5.0 Minutes; Definition:

Minutes are the instant written record of a meeting or hearing. Minutes typically describe the events of a meeting and may include a list of attendance, a statement of the issues considered by the participants, and related responses or decisions for the issues (*Oxford Learners Dictionary*).

5.1 Purpose of Minutes of a Meeting:

Taking minutes forms an essential part of most meetings. The purpose of minutes is firstly to record action points, i.e. what actions have been decided upon, who is responsible and what the milestones and deadlines are.

Secondly they record summaries of the discussions held at the meeting.

5.2 The Importance of Minutes at Meetings:

Taking minutes is a skilled job because the minutes taker has to follow what can be confusing and inarticulate debates and summarise accurately what was said. Minutes are therefore important because they:

- Confirm any decisions made
- Record any agreed actions to be taken
- Record who has been allocated any tasks or responsibilities
- Prompt action from any relevant attendees
- Provide details of the meeting to anyone unable to attend
- Serve as a record of the meeting's procedure and outcome

5.3 Agenda in Meetings and its Importance:

An agenda is a meeting program designed to enable all important and relevant points to be dealt with in good order and good time.

An agenda is also a form of courtesy. It informs the Chairperson and other participants of the refined purpose of the meeting. This gives them time to prepare for the tasks, and enables them to make meaningful contributions.

A well planned agenda can:

- Provide a logical guide for business and discussion.
- Bring harmony and efficiency to a meeting.
- Help restrain participants from speaking out of turn.

5.4 Why is it called Minutes of the Meeting:

Minutes in this sense first appeared in the early 18th century, possibly directly from the latin "*Minuta Scriptura*", meaning "*Small Notes*" or just "*Minuta*", meaning "*Small*". (<https://en.m.wikipedia.org>). Minutes, meaning "Meeting notes" can be likened to condensing something down.

5.5 How to Record Minutes of a Meeting:

- Distribute an attendance sheet
- Listen to reports and obtain copies
- Record actions taken or assigned
- Record all points of order and rulings

5.6 Steps to Taking Effective Minutes:

A. Prepare in Advance:

As the minutes taker, you need to familiarize yourself with the order of proceedings for that particular committee.

This is helpful in answering specific questions thrown at you by the Chairman. You need to know your role well. Some Secretaries of Committees do not participate in the meeting, while others take minutes while contributing to the discussion (this is obtainable where the Secretary is also a member of that Committee). In either case the Secretary should not be someone who has another

major role such as the Chairman.

B. Get a Template in Advance:

Each meeting's minutes will contain much of the same information. A template creates a consistent format for ease of reference. Include space for the following information at minimum.

Name of Institution:

Type of Meeting:

State whether it is a regular weekly, monthly or annual meeting, a Committee meeting, or a meeting convened for a special purpose.

Date, Time and Place:

Leave space for the start and end times (convening and adjourning).

Name of Chairman and name of Secretary (or their substitutes).

List of "attendees" and "Apologies of absentees" Check whether a quorum is present (this is the number of people sufficient to carry out votes).

Leave Space for your Signature:

As the Secretary of the Committee, you will always sign your work. An additional signature is required when the minutes are approved.

C. Distribute an Attendance Sheet:

As soon as everyone is in attendance, distribute a single piece of paper with space for each person to write their name and contact information. This can be used after the meeting to fill out the section on attendance or attach the signed attendance sheet to the completed minutes.

While waiting for the meeting to begin, record the name of your Committee, and the type of meeting, e.g. statutory meeting or emergency meeting. When the meeting begins, note the time it started.

D. Note the Result of the First

Motion:

Most meetings will begin with a motion to adopt an agenda. However, if the meeting begins with a different motion, ensure to record all the relevant information such as:

- The exact wording of the motion beginning with "I move for the adoption of this agenda".
- The name of the person who proposed the motion.
- The result of that motion e.g. "motion carried" or "motion failed".
- Equally record the seconder of the motion, e.g if someone says "I second the motion", you must record that person's name as the seconder.

E. Listen to Reports and Obtain Copies:

Whenever a report or a similar item is read aloud, record the name of the report and the person reading it (or the name of the subcommittee that drafted it).

It is very important to obtain a copy of the report or submission at the end of the meeting. Ensure that you ask the Chairman for a copy of the report at the end of the meeting.

If however the report is verbal, make sure that you write a brief, objective summary of the report and endeavor to obtain a written report from the Chairman at the end of the meeting.

F. Record the Actions taken or Assigned:

This includes the matters arising from the previous meeting. You are equally expected to include a brief mention of the rationale behind a decision if one is given. When taking minutes be as objective as possible. Include concrete and specific points, not opinions, and minimize the use of adjectives and adverbs. Dry, factual boring writing should really be your goal. Avoid flowery language. Do not refer to people by name during the observations. This is very important during heated arguments that might cause offense.

G. Adjournment:

Record the time the meeting adjourned. Equally check your minutes to ensure that you did not miss anything that needs clarification from the Chairman. If for any reason you need to ask someone a question, it is expected that you do so at this time before the members leave.

5.7 Developing the Minutes:

It is advised that you start writing the minutes as soon as possible, ideally immediately after the meeting when the points made are still fresh in your memory.

a. Some Points to Note when Writing Minutes:

- Use correct spelling and grammar
- Use the same tense throughout. Use the past or present tense, but never switch between them in the same document.
- Be as objective as possible. Your own opinion should never be deduced from the minutes.
- Use simple, exact language. Any vague language should be replaced with precise wording.
- Number the pages for ease of reference.
- Send the draft copy of your typed minutes to the Chairman of the Committee for vetting.

6.0 Difference between Reports and Minutes:**6.1 Reports:**

Reports are an efficient way of facilitating discussion and decision-making.

Reports should:

- Be clearly addressed such as "To:, From:, Date: and Title".
- Provide an introduction to report (e.g. who wrote it, what the terms of reference were, membership of the sub-committee);
- Be written in clear simple language;
- Have a logical sequence to make it

easy to follow;

- Use bullet/numbered points where possible to assist with quick comprehension and reference; and
- Have clear recommendations, if such are being made.

Reports from Committees and individuals tabled at a meeting can be either adopted or received. A meeting adopts the reports when it accepts the reports' findings or recommendations.

6.2 Minutes:

Minutes are a more legal and formal record of a meeting. They will state the date of the meeting, the time it began as well as when it ended. They will also state who is present and who is absent. In addition, it will almost be a verbatim report of discussions and decisions.

The report of a meeting, however is less formal and detailed. It may state the date of the meeting without giving the time.

Minutes are particularly useful where the records of the discussion are required by law and/ or will be referred to from time to time in future to show that certain decisions were taken.

Reports are more applicable in businesses and organizations therefore the focus will be more on the decisions, action plans and deadlines.

7.0 Conclusion:

Whereas a report is a summary of a meeting, often including the implications of what was discussed, the minutes are a word for word transcript of the meeting meant for typing out and distributing to members of the committee.

A basic requirement therefore for writing good minutes and reports is the use of English. The language used must be concise and clear and should not in any way render the understanding of what is written ambiguous. To be able to better understand the fundamentals of minutes

and reports, the University Administrator must:

- i. Be fluent in the written English language.
- ii. Organize himself properly before taking minutes.
- iii. Have an agenda ready before the

- commencement of the meeting.
- iv. Ensure seating arrangements are organized before commencement of the meeting.
- v. Ensure that you have adequate and correct information to be able to write a proper report.

Thank you for listening.

REFERENCES

1. Oxford Dictionary of Current English
2. Contemporary Business Reports, 5th Ed. South Western Cengage, 2013
3. H.Dan O'Hair, James S. O'Rourke and Mary Jane O'Hair in "Business Communication: A Framework for Success". South Western College Publishing, 2001.
4. <https://www.quora.com>
5. Oxford Learners Dictionary
6. <https://en.m.wikipedia.org>

QUESTIONS

1. Give an example of when a report of a meeting rather than minutes is required
2. How do you determine what items are included in the agenda for a meeting which you have summoned?
3. Why are minutes necessary?
4. Why is an agenda important in a meeting?
5. Why is it encouraged to develop your minutes immediately after the meeting?
6. List three features of a report
7. List five types of report
8. Define the word "minutes"
9. List some of the steps in taking effective minutes
10. What is the importance of minutes at meetings?

