Making the Most of Boundary Spanning Meetings: Action-Oriented Note-Taking

Brittany Gay & Whitney Becker, last revision: 6.3.23

The goal of this resource is to provide insights on action-oriented note-taking to increase boundary spanners' capacity for capturing actionable information during meetings with policymakers. Between planning and scheduling, boundary spanning meetings can take a lot of time and effort for meeting attendees. To make the most of the time invested into these, it is important that the main topics of the meeting discussion and any resulting action items are well documented; good note taking is a key part of making this happen.

Meeting notes help to document **what was discussed** in a meeting and any **action items** coming out of the meeting. They can also be useful to refer to over time for **organizational memory**. For example, being able to mention information from previous meetings with a policymaker (gleaned from previous meeting notes) can show that you are invested in collaborating with them. Since meeting notes should be used for various purposes, it is important that they:

1. Contain enough summarized information for them to be useful; and
2. Are written in a way that can be understood by someone who was not at the meeting.

This guide delineates 1) things to consider and 2) actions to take before, during, and after a meeting.

Before the Meeting

- Before the meeting begins, it is important to be clear about the **purpose of the meeting** so that note takers will be primed to capture the most important and pertinent information. Questions to consider before the meeting:
  - **Whose words are most important to document?**
    - Sometimes meetings include many different people, which can be overwhelming to capture verbatim. Knowing which attendee(s) to prioritize in note-taking can help to ensure that the most relevant information is collected.
  - **What type of content is most important to capture?** (e.g., verbatim phrases, themes, bill numbers)
    - This should be guided by the goals of your project and how you intend to use the information gathered from the meeting.

- Assign a **designated note taker** to the meeting. Although anyone present in the meeting can take notes, the designated note-taker will bear the most responsibility for capturing and cleaning notes.

During the Meeting

- **Document main points** that happen during the meeting, including, but not limited to:
    - Important pieces of information the policymaker says about what they or their office are working on.
        i. *Tip:* pay close attention to when they **ask for something** or when someone **offers to do something** and **when** the information is needed and/or was promised by. These are action steps and need to be easily identifiable.
    - Timelines for action items
    - Policymaker's position on a relevant issue or topic
    - Importance of any bills the office just passed or introduced
    - Names of any abbreviations the policymaker mentions
    - Specific language the policymaker uses when referencing an issue (e.g., "opioid epidemic" vs "opioid crisis;" "victims of violence" vs "survivors of violence")What specifically they are looking to get help with right now *or* in the future. This may come up in the meeting when the staffer identifies important topics or priority efforts the office is working on.
        i. *Tip:* Pay close attention to statements such as:
            1. "XYZ is really important to the congresswoman - we've been doing a lot of work on these issues"
            2. "Since the representative used to work on this topic prior to entering politics, XYZ."
            3. "Since the XYZ Act is ending soon, this issue will be really important to us moving forward."
            4. "We've been doing a lot of work alongside XYZ office."
            5. "We're really interested in information on XYZ that we can send to other congressional officials."
            6. "We just introduced the XYZ bill which looks to address the XYZ topic."

- **Listen, digest, and summarize!** Capture the gist of the conversation without attempting to write everything that is said verbatim. Spend time listening and understanding, then note substantive, key points.
    - **Why?** In a policy context, timeliness is key. Leaving the meeting with a good understanding of the main points and actions will likely be more meaningful than having 10 pages of hyper-detailed yet less actionable notes. Reading through irrelevant information can take time and potentially delay the response to the policymaker.
    - **What might this look like?** The notetaker and a facilitator meet with a policymaker interested in intergenerational debt and higher education. The office shares information on a current bill, the types of information they are looking for, and the month in which they hope to have the information. As a notetaker, your key points/takeaways may be as follows:
        i. Notes
            1. The office recently introduced the XYZ bill, which focuses on…
            2. The office is currently interested in research and information on how this intergenerational debt affects parents' decision-making regarding their child pursuing higher education.

            3. The office would like this information by X month.
        ii. Next Steps:
            1. [Policymaker] will send a draft of the XYZ bill to meeting attendees.
            2. [Facilitator] will send a reminder to [Policymaker] if the bill is not received within 1 week.
            3. [Facilitator's organization] will provide resources/information to [Policymaker] by DATE.
            4. The facilitator will reach out to network to explore XYZ topics.
        iii. Post-meeting reflection:
            1. The office is very well-versed in research and have used research evidence in prior bills they've introduced.

- The notetaker may **judiciously ask clarifying questions**.
    - The role of a notetaker is surprisingly powerful because this person documents the history of how the meeting occurred, what was discussed, and decided. Use clarifying questions to (naively) prompt for further clarity on statements, especially on follow-up steps.
    - To a large extent, the facilitator will ask clarifying questions. However, there may be times where the lack of clarity is not obvious to the facilitator but is clear to the person documenting the progress of the meeting. The notetaker is able to see most plainly when something that was said is not clear, is incomplete, or requires follow up.
        i. Example 1
            1. Policymaker: "We are really interested in reducing red tape for small businesses."
            2. Note taker: "What kind of red tape barriers are you referring to?"
        ii. Example 2
            1. Policymaker: "We are concerned about pipelines and are currently working a lot in that space."
            2. Note taker: "What type of pipelines are you most interested in?"
    - Be judicious about what note takers ask for clarification on.
        i. If it is something that can be looked up on the internet after the meeting, do not interrupt the meeting. But if it is something that's going to influence interpretation and follow-up, it is helpful to exercise the notetaker role to clarify and shape the meeting around some concrete main points
            1. Example: "I just want to make sure I got that - you said… Does that sound right, or did I miss something?"
        ii. If you realize you need clarity on an item after the topic of conversation has shifted, simply note this in your notes (e.g., using a comment or another symbol that will signal to come back to the point later) and wait until the end of the meeting to ask for more details.
            1. Example: Before wrap up, the note taker may say something like, "Earlier you mentioned X…I was wondering if you could explain what you meant when you said Y?
        iii. We recognize knowing when and how to interrupt takes practice - do not worry about getting things right the first time. It is a learning process and

the more note taking you do, the more comfortable you will become with knowing when and how to interrupt when appropriate.

- Leverage techniques during the meeting to make note-taking easier.
  - Use bullet points and sub-bullets to organize the document.
  - Use shorthand (e.g., bc for because and btwn for between) so that you can type faster.
  - Don't try to make every sentence complete or grammatically correct until after the meeting ends.

After the Meeting

- Note-takers will ***always*** need to spend additional time after the meeting to clean their notes. It is generally best practice to clean notes shortly after the meeting occurs so that important context about the meeting can be added before it is forgotten.
  - The note-taker and meeting facilitator (if separate individuals) should discuss the timeline for when notes should be cleaned. The timeline for action items can be differentiated from the timeline for the fully cleaned notes document.

- Things to be on the lookout for during post-meeting note cleanup:
  - When discussion has been circular (i.e., returning to a previous topic), **organize the notes by concept or main** point (using sub-bullets) rather than by sequence or when it was said. This makes the notes more linear and easier to clearly grasp all pertinent information about a particular topic.
    i. Practice tip:
      1. You can create a new document to open alongside your original notetaking file. Copy snippets of text from the notetaking document, then paste into the new version in thematic sections. This can help with reorganizing without losing any content.
  - Clean up any abbreviations and use complete sentences
    i. For example, SBA = Small Business Administration
  - **Hyperlink** any specific bills or programs that were talked about
  - Use additional **formatting** to make reading through notes easy for readers.
    i. Consider: **Bold** and, if possible, change to red text any action steps or specific inquiries/questions from policymakers.

Example Scenario

- Mari, someone supporting the implementation of the Research-to-Policy Collaboration model, is assigned to take notes for a needs assessment with a policymaker.
  - **Before the meeting:**
    i. Since Mari was told the meeting purpose beforehand, they know to document and clearly denote the policymaker's policy priorities, evidence needs, and any specific requests or questions from the policymaker in their notes.

ii. Mari will also make sure to listen attentively during the meeting for bill numbers, the names of any offices the policymaker is collaborating with, and the specific phrases the policymaker uses to refer to issues.

- **During the meeting:**
  i. Mari did not hear the number of a bill the policymaker mentioned. Although they knew the facilitator might have jotted it down, just to be safe Mari asked the policymaker for clarification before the conversation moved on too far from the topic: "*Apologies, I wasn't able to catch the bill you had mentioned - would you mind repeating that?*"
- **After the meeting:**
  i. Mari confirms with the meeting facilitator what the turnaround time is for 1) action items and 2) cleaned meeting notes.
  ii. Mari spends time:
    1. updating the shorthand they had used
    2. providing additional context where needed
    3. using formatting (e.g., bold text, text colors) to clearly denote important questions and action items
    4. adding reflections about the general tone and climate of the meeting