TAKING NOTES
at Employer Meetings
CHECKLIST

WHAT
to Document

- [ ] The basics (cover page)
  - [ ] Date, time, & location
  - [ ] Attendees & their roles
  - [ ] Who is taking notes (for Employer & Union)
  - [ ] Start & end times
- [ ] Speakers (can use initials)
- [ ] Questions, responses, & discussion (can use abbreviations & acronyms)
- [ ] Important points or wording verbatim where possible
  - [ ] Identify when notes are verbatim (or not verbatim, if they are typically verbatim)
- [ ] Caucuses (identify if notes are from a caucus)
  - [ ] Start & end times
  - [ ] Main points
- [ ] Requests for documents by either party (& add to cover page)
- [ ] Documents shared by either party (& add to cover page)

Ask speakers to slow down/repeat themselves as needed.

AFTER
the Meeting

- [ ] Note the end time of the meeting
- [ ] Add any missing information into your notes immediately following the meeting
  - [ ] Anything added after this must be added on a separate page, identified as an addition, & dated
- [ ] Ensure your notes are dated & identify you as the note taker
- [ ] If handwritten,
  - [ ] Number your notes pages
  - [ ] Transcribe and/or scan your notes
- [ ] Email your notes to the LRO for filing in DMS

Once notes are with the LRO, the Local can appropriately discard its copy (shred/delete) when no longer needed.