The role of the chair

The chair's role is vital in ensuring an effective meeting and a good chair can be a minute taker's best ally. Unfortunately, a bad chair can make a minute taker's job very difficult. Below we look at the role of the chair and examine some ways in that minute takers can encourage good practice in the people who chair their meetings.

The chair's role: before the meeting

Decide on the purpose and objectives of the meeting
The chair should have a clear idea, before the meeting starts, as to the nature and purpose of the meeting and of each agenda item*. 'It's Tuesday and we always meet on Tuesdays*' is not good enough!

Clearly this is not possible if an agenda has not been prepared beforehand. Even an informal team meeting should make the effort to prepare an agenda in advance, perhaps by asking people to email the chair or the minute taker with points they want to raise. If this is not done, it is difficult to see how you could tell whether or not the meeting was necessary.

One example of the chair's role in preparation might be an agenda item headed 'Budget Report'. This could be a report back on performance against an existing budget or it could be a consultation item so that the group could make decisions about future budgets or it could be an information item on decisions made elsewhere about the team's budget. The chair needs to be clear about these kinds of differences so that they can steer the meeting through the appropriate kind of discussion. When they do this, the minute taker has a clearer idea of the kinds of decision the group is being required to make and it is easier to record the decisions

Reflect on other participants objectives
The chair needs to have an understanding of the perspectives and 'agendas' of all the participants at the meeting. For example, in a discussion about next year's budget, the finance officer might want to keep staff salaries low in order to stay within financial limits whereas the personnel officer might want salaries to rise in line with staff expectations. If the chair is aware of these kinds of differences, they can moderate the discussion so that everyone has a say and all points of view get heard. When this is done, the minute taker has a clearer idea of the discussion points and how they relate to the decision taken.

Draw up the agenda, grouping connected items together
Once the items for the agenda have been received, the chair will decide how to group them in a logical order. In some organisations, this job may fall to the minute taker. If this is the case, do try to get the chair to review and approve the agenda before it is circulated. They are going to have to run the meeting and it makes sense for them to have a clear understanding of the agenda beforehand.

Some meetings group agenda items by subject, for example all the finance items together, then all the staffing items. Others group the decision items first and then the less important information items. It is the job of the chair to decide this in accordance with the needs of the meeting.

Draw up rough timing for the meeting – overall and for each agenda item
The chair should have a clear idea, before the meeting begins, of how long the meeting will take and how long to allow for each agenda item. Once decided, the timings should be printed on the agenda. For example:

10.00am	*1. Welcome and apologies*
10.05am	*2. Minutes of the previous meeting held on 20 June 2009*
10.10am	*3. Matters arising*

This should not be seen as set in stone. However, if the printed agenda indicates timings for each item, it makes it much easier for the chair to ensure that all the business is reached within a reasonable time. If this is impossible, then agenda planning and the length, and perhaps the frequency, of the meeting may need to be reviewed.

Go through the agenda with the minute taker
As discussed in the chapter on preparing for a meeting, the chair should take time to brief the minute taker on the agenda. Many minute takers (and some chairs) think of this as an unimaginable luxury. However, in a local authority setting for example, the chair of a Council Committee would not dream of chairing a meeting without a full briefing from the officers. This kind of preparation is just as important for minute takers who need, as we have pointed out, a good understanding of the meeting context in order to record its proceedings.

The chair and the minute taker are going to work together during the meeting. The few minutes briefing at the start is a way of making this partnership begin to work and helping each to appreciate the other's important role.

Where the meeting is either lengthy or particularly important (such as for an AGM), a 'chair's briefing' is sometimes prepared. This is like a very detailed version of the agenda which spells out exactly what is required at each stage of the meeting. If this is done, the minute taker should have a copy.

For example:

> Section of chair's briefing
>
> *….*
>
> *<u>Nominations for Executive</u>*
>
> *Three nominations have been received so far. There are five places to fill. Nominations can be taken from the floor of the meeting. You should get a mover and a seconder and the names should be written down and handed to the chair/minute taker. Put each nomination to the vote and count votes for, against and abstentions. John Smith and Abdul Mohamed will act as tellers. Go on to the next item when the vote has been put and announce the vote to the meeting when the tellers have finished counting.*
> *…..*

The chair's role: during the meeting

Open the meeting, welcome participants and, where appropriate, introduce people

The chair should declare the meeting formally open and get everyone to settle down before formally starting the meeting. If some or all of the participants are not known to the group, the chair should encourage introductions, either by welcoming people personally or by asking them to introduce themselves. As minute taker, it is a good idea to look carefully at each person you do not know and say their name, in your head, as loud as you can. This kind of mental repetition will help you remember who they are later on.

Announce each item and give a brief summary of what the meeting needs to do about it

It is up to the chair to make sure that the meeting knows the purpose of each agenda item, as discussed above. This should be shared with the meeting at the beginning of the item so that the discussion is kicked off to a good start.

For example, the chair might say:

"The next item is the budget report. We're being asked to consider and approve the draft budget submitted by the finance department. On page four of the report there are three options and we need to choose one."

When the chair summarises the subject matter and purpose of the agenda item in this way, the minute taker knows exactly what to listen for and note down in order to record the significant items of discussion.

Ensure that discussion stays focused and keeps roughly to time

It is the chair's job to ensure that discussion stays focused and does not stray away from the item on the agenda. Where participants are keen to discuss another related topic it is sometimes a good idea to 'park' this – i.e. agree to discuss it but at another time, perhaps under Any other business. The chair should also prompt the meeting to move on where necessary, ensuring that business is dealt with promptly without dominating the meeting inappropriately or rushing discussion. A timed agenda will help this process enormously (see above).

Ensure that all participants have a say

The chair should ensure that everyone who wants to can contribute to the discussion. This means keeping a reasonable level of control so that the meeting is not dominated by two or three strong people and so that quieter people can make their voices heard. The minute taker can help by quietly drawing the chair's attention to a person who seems to want to speak but can't get in to the discussion.

Damp down participants who are dominating the discussion
This is part of the same requirement that the meeting conduct its business in a fair and respectful way so that everyone's voice is heard and no one can overwhelm the meeting with their own point of view. When the chair does this well, the minute taker finds it much easier to follow the discussion and to record it.

Sum up the decisions made at the end of each item
At the end of the discussion, the chair must tell the meeting what has been decided. This is particularly important in consensus style meetings where no vote is taken but agreement is assumed at the end of the discussion. It is in these circumstances that minute takers have great difficulty as they often have no idea what decision, if any, has been taken. Unfortunately, neither does anyone else! It is essential that the chair summarises what they believe the decision to be so that the meeting can agree this and move on. When this is done, the minute taker can be certain what decision to record and has a much better notion as to what were the significant and relevant points during the discussion. If necessary, the minute taker must be prepared to prompt the chair to summarise in this way.

Ensure minute taker has noted all relevant points
After summarising and before moving on to the next item, a good chair will quietly check with the minute taker that they have all the information they need for the minute. This need be no more than a very quick visual check to see if the minute taker is looking relaxed and confident. If you need help at this point, a panic-stricken or rueful facial expression will usually do the trick and prompt a further summary. Some chairs will expressly ask the minute taker "are you all right on this for the minutes?" but most of the time this should not be necessary.

The chair's role: after the meeting

Allow a realistic but short deadline for the production of the draft minutes
The chair should be mindful of the time constraints on the minute taker. On the other hand, they should be aware of the need to produce minutes quickly. Since the chair must check draft minutes, they too will need a good memory of the meeting and they are unlikely to have taken such copious notes! It may be important for there to be some negotiation between the minute taker's line manager and the chair to ensure that expectations on both sides are clear and understood.

Read the minutes in draft and correct them
It is the responsibility of the chair to ensure that the minutes are as near correct as possible before they are presented to the next meeting. Where the minute taker is the formal secretary of the group or where both the chair and the minute taker are team members taking their turn on a rota, this is less important. In most situations, the minute taker is not a member of the group. The chair must therefore be responsible for the minutes on behalf of the group and present them to the group at the next meeting.

Minute takers often feel that chairs are unnecessarily ‘picky’ with the minutes. It is certainly the case that some managers cannot resist the temptation to mark up any document on which they are asked to comment. However, your chair, as a member of the group, has the right to frame the minutes as they feel appropriate. If they want more detail, try to give them this. If they consistently cross out a lot of what you have written, try to summarise more.

It is also the case that the chair will have a clearer understanding of the need for sensitivity than you might have. In one organisation, the minute taker accurately recorded:

‘The Board noted that the organisation was no longer trading while insolvent.’

‘Trading while insolvent’ is unlawful and organisations that do this can be penalised heavily. The chair rewrote the minute:

‘The Board noted the improved financial position of the organisation.’

While the original phrase was undoubtedly an accurate record, the revised version was the correct one in the circumstances.

Note that the minutes are still ‘draft’ after the chair has checked them. Only the meeting can approve or agree the minutes. However, once the chair has approved the minutes, they should not be altered again, except at the meeting. This will ensure that, at the meeting, everyone is correcting the same copy!

Return them to the minute taker promptly
Do not allow the chair to sit on the minutes for a long time. Even if you do not need to circulate the draft minutes quickly, it is bad practice for the minutes not to be signed off quickly and may lead to papers getting lost. It is best to give the chair a reasonable deadline – a few days at most – and politely but firmly indicate that you will expect this to be adhered to.

Take responsibility for the minutes at the next meeting
Having checked the minutes, the chair is now responsible for them as we have discussed above. If the meeting decides the minutes are incorrect, this is as much the responsibility of the chair as it is of the minute taker since they have checked them and taken responsibility for them – not all chairs realise this!

Take responsibility for chasing up action
It sometimes happens that the minute taker is expected, since they wrote the Action Points, to follow them up and ensure they happen. This is not necessarily part of the minute taker’s role. It is for the chair to ensure that actions agreed by the meeting are carried out. This task is sometimes delegated to the minute taker but this remains a delegated responsibility and should not be assumed to form part of the minute taker’s duties.