

Secretary's Role

Role of Officers

Most Committees have a Chair, Secretary and Treasurer.

The Chair is responsible for the smooth and fair running of the organisation. Their main job is to chair the meetings of the organisation.

The Treasurer has overall responsibility for the organisation's finances.

Their main job is keeping financial records.

The Secretary is responsible for keeping people informed about the organisation's activities. Their main job is taking minutes of meetings.

This information sheet looks at the Secretary's job. There are separate sheets on the 'Chair's job' and 'The Treasurer's job'.

What does the Secretary do?

The exact work of the Secretary will vary from organisation to organisation. It is worth having a discussion in your group to agree what the responsibilities of all the Management Committee members should be.

This list can be used as a guide to the Secretary's job: -

- ★ Taking minutes in meetings.
- ★ Keeping files of past minutes and reports.
- ★ Letting people know when and where the next meeting is and what it is about.
- ★ Helping to prepare agendas for meetings with the Chairperson.
- ★ Writing and receiving letters on behalf of the group.
- ★ Keeping members informed of what correspondence has been sent out and received.
- ★ Keeping a record of membership.
- ★ Keeping a record of important phone numbers.

How you organise this work is up to your group to decide. You may want to divide the jobs up amongst a number of people. You could have a minutes secretary, a correspondence secretary, a membership secretary.

Or you may want to have a Secretary and Chairperson who work closely together, and share some of these tasks.

It just depends on the size of your group, the amount of time people have available, the skills people have, and what people like doing.



Secretary's Role

The Resource Centre's information sheet 'Taking Minutes' has more detailed advice and tips.

Taking Minutes

Taking minutes is an important part of the job, and can be a bit daunting when you first start.

The basic tasks for the minute-taker are:

- ★ Taking rough notes during your meetings.
- ★ Writing up these notes neatly or typing them out.
- ★ Copying and distributing them to relevant people.
- ★ Keeping all minutes together in a file for future reference.

Tips on being a good secretary

Organisation

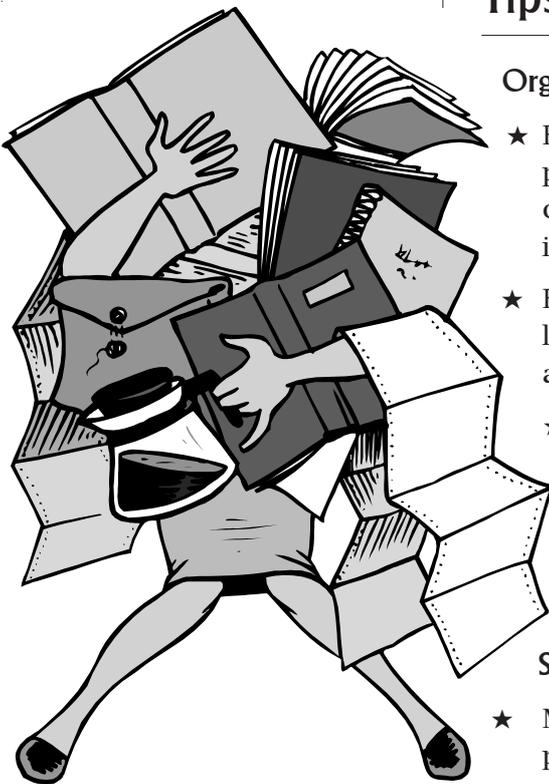
- ★ File things! This is *very* important - you need to be able to find papers and reports quickly and easily. Get a stack of cheap cardboard folders and label them. Have a separate file for every important issue.
- ★ File things *quickly*. Don't let huge mounds of papers you haven't looked at build up. If you sort them out regularly it is a small and manageable job.
- ★ Have a 'to do' list or notebook. It helps to have everything you need to do written down in one place. Don't rely on your memory.
- ★ Get a book to record correspondence the group receives.
- ★ Get a diary to record dates of future meetings.

Share information

- ★ Make sure information that comes to you gets passed on, or publicised more widely. Often things for a group are sent to the Secretary and never get any further.
- ★ Work closely with other Committee members, particularly the Chair.

Don't take on everything

- ★ A common complaint from Secretaries is that they end up doing everything. Be clear with your Committee about what tasks you will do.
- ★ If you start to feel overburdened, talk about it with your Committee, and see if jobs can be shared out more.



The Resource Centre also produces information sheets on
Chairing a meeting
The Chair's role
Taking Minutes
The Agenda
Treasurers job



See also the sample agenda at the end of this information sheet. This gives a guide to a longer and more detailed agenda

The Agenda

Quick and easy guide to preparing an agenda.

An agenda is simply a list of the things you want to discuss in your meeting. It is useful because: -

- ★ It helps you plan the meeting.
- ★ It helps you to get through the business of the meeting efficiently.
- ★ It helps people at the meeting follow what is going on.
- ★ It gives people the opportunity to think about the meeting in advance.

It is formally the Chair's job to prepare the agenda. However, in a lot of groups the Secretary and the Chair work together to produce the agenda. This can make life a lot easier.

Some very small and informal groups simply work out the agenda together at the start of the meeting. This is fine if you don't need a lot of structure or advance planning for the meeting.

A basic agenda

An agenda can be very simple. Here is an example:

1. Apologies for absence
2. Item 1
3. Item 2
4. Any other business
5. Date of next meeting

Who decides what's on the agenda?

Often agenda items are just decided by the Chair and the Secretary. However, if you can it is useful to find ways of giving your members the opportunity to contribute. Some ways of doing this are: -

- ★ Put up a suggestion sheet on a notice board.
- ★ At the meeting, ask for items for the next meeting.
- ★ When you send out the notice of the meeting, ask for suggestions for the agenda. Remember to put a contact address and the date you need them by.



See the Resource Centre
Information sheet
'Chairing a Meeting'

Agenda

Items for your agenda

- ★ The bulk of your agenda will simply be the items you need to discuss. Make each important matter a separate item.
- ★ Look through the minutes of your last meeting. Are there any things to report back on? Are there items that need to be discussed again? Put each issue down as a separate item.
- ★ Have you received any information – for example about meetings or other events – you need to tell everyone about?
- ★ Some groups always include an item 'minutes of the last meeting'. The purpose of this is to agree that the minutes of the last meeting are accurate and reflect what happened. If your group is very small and informal you may decide you don't need to do this.
- ★ Some groups have 'standing items' on their agendas. These are items that are always on the agenda at every meeting. They are usually reports from officers such as the Treasurer, or reports from sub-groups.
- ★ 'Any Other Business' is a regular item at the end of most agendas. It allows people to raise issues that aren't already on the agenda.
- ★ Try to avoid 'Any Other Business' taking up the majority of the meeting. If you can, it's better to find out beforehand what people want on the agenda. This allows you to organise the meeting more efficiently.

How long will each item take?

- ★ It is useful for the Chair and Secretary to look at the agenda before the meeting, and work out how long they think each item is going to take. This can really help with the chairing and general smooth running of the meeting.
- ★ Try to make sure the important discussions get all the time they need, and the minor issues don't expand to take over the whole meeting.
- ★ It's hard to estimate exact times, but you can get a rough idea. For example, if you have 6 items to discuss in an hour's meeting you could give each item 10 minutes, or one important item 35 minutes and the rest 5 minutes each.
- ★ If this looks impossible you need to have fewer items on the agenda, or a longer meeting!



*See the Resource Centre
information sheet
'Organising your AGM'*

*The Resource Centre also
produces information sheets on
Chairing a meeting
The Chair's role
Taking Minutes
The Secretary's role*

Agenda

What order do items go in?

- ★ It is general practice to put the short, easy to deal with items at the start of the agenda. You get them out of the way quickly, and can concentrate on the important issues.
- ★ There are no hard and fast rules about this. It depends on what you think will work best at any particular meeting.

When do you prepare the agenda?

- ★ The crucial thing is to think about the agenda in advance. It's a tool to help you plan the meeting.
- ★ The agenda for a large public meeting will need careful advance planning and thought, while a small committee meeting can be prepared the day before.
- ★ If you are having speakers at the meeting, or need background papers or information, remember to prepare the agenda enough in advance to give yourself time to organise these.
- ★ Think about whether you want to mail the agenda out in advance, or give it to people at the meeting.

Annual General Meeting

- ★ The agenda for your Annual General Meeting will have to include specific items such as elections and yearly reports. Check your constitution to see what these are.

Some other things to think about

- ★ Think about whether an item needs an introduction and if so who will do this. It doesn't necessarily have to be the Chair.
- ★ Make sure you have background papers prepared in advance if an item needs them and distribute them to the group if necessary.
- ★ Be informative: describe each item in sufficient detail so that members come prepared and interested.
- ★ Make sure you have a good idea what each item is about; you may need to refer to past minutes or discussions.



The Resource Centre also produces
information sheets on
Chairing a meeting
The Chair's role
The Secretary's role
The Agenda



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Taking Minutes

Quick and easy guide to taking minutes

Minutes are simply notes taken during the meeting to remind you what was discussed and agreed. They don't need to be long or complicated, in fancy language or perfect grammar. They do need to record clearly and simply what decisions were made at the meeting and who is going to carry them out. Some sample minutes are attached to the back of this sheet.

It is the Secretary's job to take minutes.

Why is it important to have minutes?

- ★ It is useful to have a written record of the meeting, what you've decided to do and who is going to do it – memories are unreliable! This is true even if the meeting is very small and informal.
- ★ Minutes keep members of the group who weren't able to attend a meeting informed about what went on.

What tasks are involved in taking minutes?

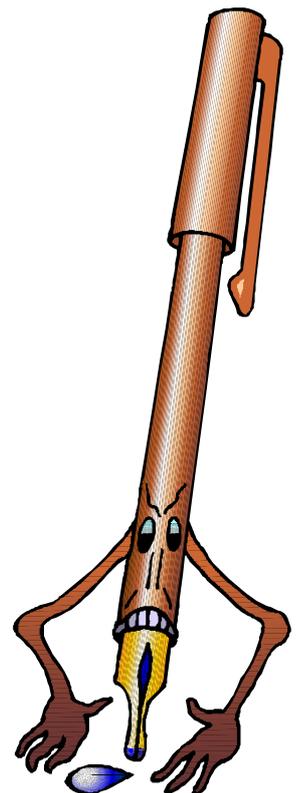
The basic tasks for the minute-taker are:

- ★ Taking rough notes during your meetings.
- ★ Writing up these notes neatly or typing them out.
- ★ Copying and distributing them to relevant people.
- ★ Keeping all minutes together in a file for future reference.

What should you write down?

One of the most difficult things about taking minutes is knowing what to write down and what to leave out. Keep these three central points in mind:-

- ★ Don't try to write everything down - it's impossible and not useful.
- ★ Concentrate on WHAT has been decided and WHO is going to do it. These are the most important things to have records of.
- ★ Don't worry about producing the perfect minutes - it's not a test or a competition.



See the Resource Centre information sheet 'The Agenda' for more information on producing an agenda.

Taking Minutes

Sort out the basics

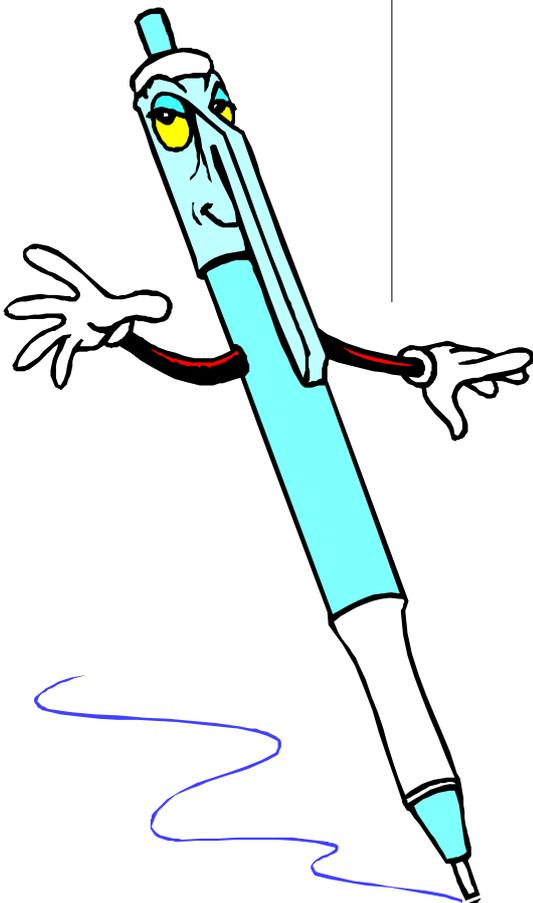
- ★ Make sure you have a copy of the agenda to follow. If the agenda is produced in advance of the meeting, read it carefully and if possible go over it with the Chair.
- ★ Get a decent pad of paper and some good pens.
- ★ Make up an attendance sheet in advance, and pass this around for people to sign.
- ★ Have the file of past minutes with you, in case any questions come up about decisions from previous meetings.



Writing rough notes

The rough notes you take at the meeting need to be clear enough for you to make sense of them when you come to write them up! The following things can help: -

- ★ Start the page with the name of your group, date and place of meeting.
- ★ Always put an underlined heading for each separate item.
- ★ Leave a few lines space between one item and the next, so you have room to add other points if the discussion comes back to it later in the meeting.
- ★ Underline or highlight decisions and who has agreed to do what.
- ★ Try dividing the page so you have a narrow column down one side for recording who has agreed to do what.
- ★ Remember that the minutes need to be understood by someone who wasn't at the meeting, so you need to give a bit of background. For example, put 'the people in Hargreave Court were disgusted by the rubbish in the street' rather than 'they all thought it was disgusting'.
- ★ The most important thing is to write the minutes up *quickly*. Don't put the job off for weeks - it makes a *huge* difference if the meeting is still fresh in your mind.



Taking Minutes

Some common problems

There are some things that make every minute-taker's life difficult. Here are some of the most common problems: –

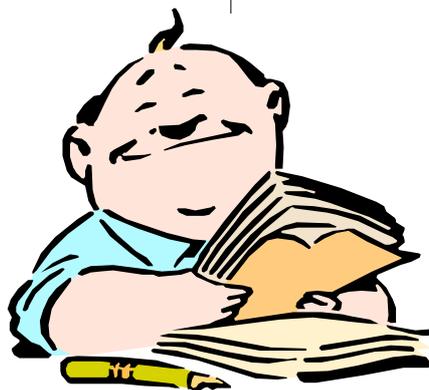


- ★ It is difficult to know exactly what *has* been agreed. No one is sticking to the point and lots of different suggestions are being made about what to do.
- ★ The discussion jumps from one item to another before any of them are finished.
- ★ Everyone is talking at once, and you can't follow the discussion.
- ★ There is a long, confusing discussion and you don't know which bits are important to get down.
- ★ You have been very involved in a particular issue and want to say things, but can't minute at the same time.
- ★ You are nervous about getting it right.

Some solutions

- ★ If a meeting is well run it makes taking minutes much easier. It's the Chair's job to keep the meeting in order – but they can only do this with the co-operation of everyone at the meeting.
- ★ One idea is to discuss and agree together some guidelines by which you'll run your meetings - for example not interrupting, putting your hand up if you want to talk, keeping to the agenda item under discussion.
- ★ Feel free to point out that is impossible to take minutes if everyone is talking at once and not following the agenda.
- ★ If it's not clear what decision has been made, ask the Chair to clarify this.
 - ★ If there is a particularly important or controversial decision it can be useful to check what you are writing down with the meeting. For example; 'so the meeting wants it minuted that we have agreed to boycott all Council meetings until they meet our demands.'
 - ★ If you are concentrating on taking minutes it does limit how much you can join in the meeting – it goes with the job. If there is an item where you have been centrally involved and have a lot to say, think about asking someone else to take minutes just for that item.

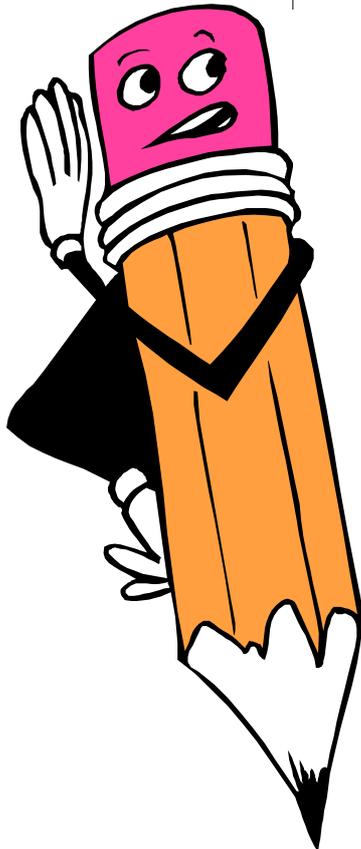
See the Resource Centre's
information sheet
'Chairing meetings'
for more ideas



Taking Minutes

Some more solutions.....

- ★ If there is a long discussion try to pick out the main points and just list them. For example; 'There was a long discussion about rubbish collections and the following points were made...'
- ★ Discuss the agenda with the Chair before the meeting – the clearer you are about the content of the meeting, the easier it is to minute it.
- ★ Go through your minutes with the Chair after the meeting. It can be helpful to check through what you've written with someone else.
- ★ Don't worry if your minutes aren't perfect – this won't really matter, and like everything it gets easier the more you do it.



Golden Rules

The main things to remember when you are taking minutes are:

- ★ Don't try to write everything down.
- ★ Concentrate on writing down *what* has been decided and *who* is going to do it.
- ★ Give each item a separate heading.
- ★ Write your rough notes up *soon* after the meeting.

The Resource Centre has computers you can use for typing up your minutes. You can also get your minutes copied cheaply at the Resource Centre.



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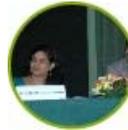
Role of the Secretary in a Successful Meeting

Tips for an Effective Conduct of Secretarial Obligations

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Mar 16, 2009

After the chairperson, the secretary is the most important official at a meeting. The role of a secretary in a successful meeting is reviewed in this article.



A meeting, small or large, requires a person to carry out the secretarial obligations in an effective manner. In most organizations and meetings, the secretary's role is a very influential one. Most of the time it is a legal requirement to have a secretary for the meeting, at other times it is a formal requirement.

Role of Secretary in a Successful Meeting

An effective secretary can assist the chair in planning, conducting and concluding a meeting. The secretary can take much of the load off the chair, so that the chair can spend his time more effectively and efficiently.

The role of the secretary starts before the meeting, continues during and beyond the meeting. Thus the preparatory, administrative, clerical and follow up work falls under the jurisdiction of the secretary.

Role of Secretary Before the Meeting

1. Discussion with the chair regarding the purpose of the meeting is the first responsibility of the secretary. How to make the meeting more effective?
2. Preparation of agenda in consultation with the chair.
3. Make a list of members to be invited for the meeting.
4. Send meeting invitation to all members concerned. The constitution and bylaws of the organization may stipulate a certain time period before which the meeting intimation should be sent. For example, a general body meeting may have to be informed one month before, a director board meeting, one or two weeks and an election meeting one month prior to the meeting.
5. Send minutes of the previous meeting and agenda to all concerned.
6. A reminder about the meeting to all members, either through e-mail or SMS. SMS is the most effective medium for this purpose.
7. Help chair in making the meeting arrangements; contacting the guests, if any; contacting the committee chairs and others who have to present reports during the meeting.
8. Prepare the report handouts, copies of the minutes of previous meeting, agenda printouts etc. for distribution during the meeting.
9. Get the stationery required for the chair and members and set it in front of each seat.
10. Keep the attendance register, minutes book etc. ready before the meeting.

Role of Secretary During the Meeting

1. Recording the minutes is the most important responsibility of the secretary during the meeting. This may be done in many ways: taking shorthand notes, recording the proceedings with a voice recorder or entrusting a short hand clerical staff to record the minutes. While using voice recorder, it is always safe to take down notes also; the recorder should be used as a review reference source. These recording should be copied to discs, labeled and filed soon after the meeting is over.
2. He should present the minutes of the previous meeting and also present the follow up action taken on each item.
3. Secretary will take the roll call or circulate the attendance register to be signed by the members.

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4. In addition to the constitution and bye laws of the organization, the secretary should also have a copy of the Robert's Rule of Order and assist the chair in keeping the order and decorum of the meeting.
5. Secretary should supervise the provision of refreshments, stationeries etc during the meeting.

Role of Secretary after the Meeting

1. After the meeting is over, the secretary should help the treasurer to pay off the bills, help the chair to send thank you notes and collect the stationeries and other movable assets of the organization from the meeting places. In most organizations, the secretary is the custodian of movable assets.
2. The minutes should be prepared within a couple of days after the meeting. It should be done when the memory is still fresh. Send a copy to the chair for suggestions. Once approved by the chair, prepare a plan of action and follow up notes depending upon the decisions reached at the meeting.
3. Contact persons responsible for carrying out the plans and projects discussed in the meeting; send notes whenever necessary.

The secretary, thus, is the facilitator of a successful meeting with lots of important responsibilities of his own.

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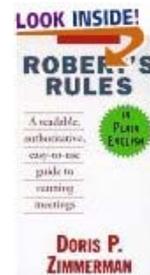
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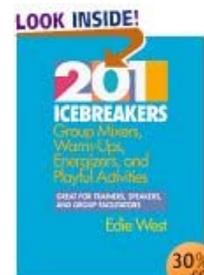


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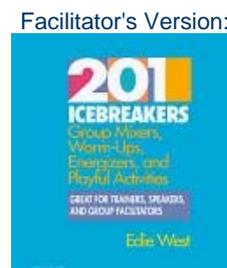
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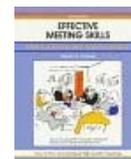
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Taking Minutes

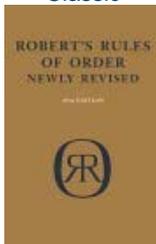
These days, many of us find ourselves in the position of taking minutes without a clue of how to go about it. The following is a guide for making this task easier:

- Ensure that all of the essential elements are noted, such as type of meeting, name of the organization, date and time, venue, name of the chair or facilitator, main topics and the time of adjournment. For formal and corporate meetings include approval of previous minutes, and all resolutions.
- Prepare an outline based on the agenda ahead of time, and leave plenty of white space for notes. By having the topics already written down, you can jump right on to a new topic without pause.
- Prepare a list of expected attendees and check off the names as people enter the room. Or, you can pass around an attendance sheet for everyone to sign as the meeting starts.
- To be sure about who said what, make a map of the seating arrangement, and make sure to ask for introductions of unfamiliar people.
- Don't make the mistake of recording every single comment. Concentrate on getting the gist of the discussion and taking enough notes to summarize it later. Think in terms of issues discussed, major points raised and decisions taken.
- Use whatever recording method is comfortable for you, a notepad, a laptop computer, a tape recorder, a steno pad, or shorthand. It might be a good idea to make sound recordings of important meetings as a backup to your notes.
- If you are an active participant in the meeting, be prepared! Study the issues

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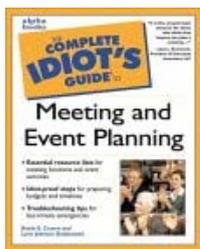
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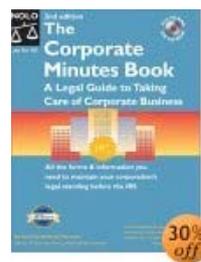
Managing Meetings That Get Results



to be discussed and have your questions ready ahead of time. If you have to concentrate on grasping the issues while you are making your notes, they won't make any sense to you later.

- Don't wait too long to type up the minutes, especially while your memory is fresh. Be sure to have the minutes approved by the chair or facilitator before distributing them to the attendees.
- Don't be intimidated by the prospect of taking minutes. Concise and coherent minutes are the mark of a professional. The very process of recording minutes can give you a deeper understanding of the issues faced by your organization along with ability to focus on what's important.

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Purpose of Meeting:			
Date/Time:			
Chair:			
Topic	Discussion	Action	Person Responsible
1.			
2.			
3.			

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