



How to Take Great Notes in a Lobby Meeting

Reason for taking notes

Notes are used to keep a record of where our elected officials stand in relation to our ask, to inform future conversations, and to ensure useful and effective follow-up. Notes also enable us to respond to action items we otherwise might forget, and help KAIROS get a sense of the national or provincial picture and how an elected representative's position has evolved.

Common problems:

- The note-taker writes down too much of what KAIROS volunteers are saying and not enough of what the elected official is saying.
- Abbreviations that are not defined.
- Illegible handwriting.
- Not enough detail.

Important things to capture:

- **Concerns** of the elected official with respect to our ask.
- **Questions** the elected official has about our ask.
- **Recommendations** the elected official has about our ask or strategy.
- Points about our strategy or ask the elected official **found interesting**.
- Who the elected official works well within their own party and in other parties.
- **Separate** (using parentheses or brackets), your sense of the elected official or staffer you met with in relation to these questions. Were they engaged? Were they interested? Were they hostile? Did they want to be anywhere but in that meeting? What was their body language saying? Discuss this with others after the meeting to see if your impressions match.
- **Action items** for the elected official.
- **Action items** for your group.

Tips for effective note-taking

- While it is useful to capture what KAIROS members were saying for context, if the choice is between writing down what the KAIROS member says and what an elected official says, always pick the elected official.
- Use initials to designate when someone from KAIROS or the office is talking. i.e. For John Smith, write "JS: KAIROS is great!"

- To capture more, consider leaving out vowels. But fill them in as soon as possible after the meeting so you don't forget.
- You don't need to record every word of the interview verbatim, just those parts you may want to quote. With experience, you'll get better at recognizing what is quotable. Focus on that and don't worry if you miss the exact wording of less quotable material.
- Use the note-taking form provided by KAIROS to remind yourself what's important to record.
- Be sure to have plenty of extra paper and pens on hand.

After the conversation

- Review your notes with your group right after the meeting, fill in blanks, and clean up any mistakes or illegible patches.
- As soon as you are back at a computer, type up your notes, and submit them to Shannon Neufeldt: sneufeldt@kairoscanada.org. By typing them the day of your meeting or day after, you'll remember things you didn't write down, and you'll still be able to remember what your scrawls mean.
- Use complete sentences.
- Define abbreviations.
- Record the Ask and the Response.
- Make sure you list the topics of interest/concern of the elected official.
- Highlight or emphasize the juiciest quotes or points so they are easier to find.

Champion scale

A – Elected official does not feel that your issue is important and will not support your ask.

B – Elected official is ambivalent about your issue or thinks it's somewhat important, but will not support your ask.

C – Elected official believes that your issue is important but is ambivalent about your ask.

D – Elected official believes that your issue is very important and will champion your ask.