

FILE NOTES



Anglican Diocese of
Canberra & Goulburn

In the course of ministry there are times when you will have important or significant conversations, and information from these meetings will need to be recorded for future reference.

A FILE NOTE SHOULD COVER

WHEN

the conversation took place (date and time, and if possible, the duration of the meeting).

WHERE

the conversation took place (location, online, on the phone).

WHO

was present.

WHAT

was discussed.

TIPS

- Record the key elements of the conversation.
- If possible, use dot points or numbers to outline the issues or flow of the conversation or meeting.
- Save as a PDF—not simply as a Word document.
- If appropriate you may want to confirm with others attending that your record was accurate. If this is not possible, or it would not be either appropriate or safe to do so, you do not need to do this.
- It may be that you need to initially create notes in your diary or phone to preserve information as soon as possible after a meeting. Record when the notes were taken. You can enlarge these initial notes when possible to create a fuller briefing, but record Notes to Diary as discrete items also, and do not discard them upon completion of a more complete record as they can be important in establishing the immediacy and reliability of the notes.

This may relate to an important issue of governance for your Ministry Unit or may relate to a Safe Ministry issue or a Professional Standards incident.