

# Evaluation Method: meeting records

## Overview

You might meet with partners, decision-makers or others as part of your work. It is easy to forget who you met and how this contributed to your outcomes. Keeping a simple record of your meetings allows you to more easily recall and count this activity and note evidence of outcomes as you go.

## Process

Develop a simple template to fill in online or on paper. You might also use Excel or a page on your database.

Fill in the template during or after the meeting. It's a good idea to note which outcomes are being evidenced as you go, so having a list of outcomes and indicators to hand is helpful (or drop-down list if using Excel or a database).

Reportable meetings Edit  
New Reportable meetings

Reportable meetings Edit [Save] [Save & New] [Cancel]

Event Name [ ]

Event Type [ ]

Date [ ]

Purpose [ ]

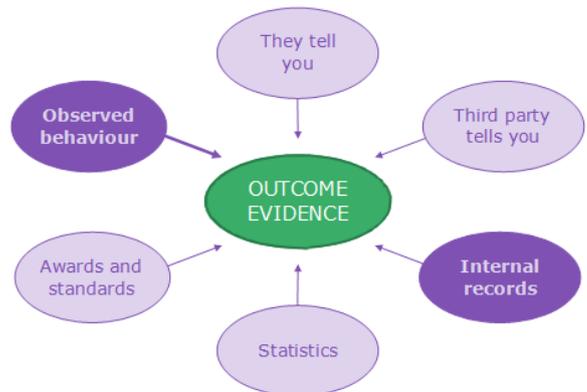
Summary of discussion [ ]

Follow up date [ ]

Evidence of outcomes [Date] [Outcome] [Summary of evidence]

## Capturing evidence

This is not necessarily a minute of the meeting, it's a brief summary for easy retrieval. You don't have to include all of your evidence, a summary and a link to where more detail is kept might be enough. If something significant or surprising was said, try to record the actual words used. Later on, this might be used for personal reflection or for quotes.



## Useful for

For some types of work, meetings are particularly important, for example policy or community development. These meetings might be planned or be opportunistic.

You also might want to use the meeting record to remind you and others of the discussion and to note any follow up action.

For planned meetings, thinking about the purpose of a meeting, is in itself useful. It helps you to think about the outcomes you want to achieve.



## Example of meeting record from an intermediary organisation

(in red are the different codes they could select from for easy counting later).

|  |
|--|
| Name and date of meeting   |
| Purpose (type of meeting: <b>training consultation/ relationship building</b> )                      |
| Attendees: numbers and types of people ( <b>public, private or third sector</b> or link to contacts) |
| Location: (which <b>local authority area</b> )   |
| Background/ context  |
| Action points/ suggestions   |
| Relates to which outcomes (refer to <b>outcomes/ indicators</b> list)                                |
| Follow up date (link to calendar)  |
| Evidence of outcomes achieved (fill in later: date and actual evidence)                              |
| Unexpected outcomes  |

If this was on an Excel spreadsheet or your database and you used set codes or linked to other lists (for example contacts), you would be able to get the following reports:

- Number of meetings/ by type/ outcomes/ local authority
- Number of individuals attending meetings by type/ outcomes/ local authority
- Evidence report by outcome/ type/ local authority
- Unexpected outcomes
- Prompts to follow up people and see if any change has happened