Do you want to learn how to take comprehensive yet concise minutes that fulfill legal requirements and operational standards? Then this program is for you! If you take minutes for your council, board, or other organization and want to learn administrative best practices this program is a must. Recognize your role in creating a successful meeting, going beyond taking notes for minutes, and ensure that your minutes have legal force and effect.

**Course Format:** This online course consists of three modules which include live, interactive webinars, assignments, and coaching. Participants attend the webinars; review additional resource documents and participate in on-line discussions; work on the assignments on their own time; and submit their assignments for review, coaching, and direct feedback before the next assignments are due.

**November 15**  
**Module 1: Before the Meeting Organization** (webinar and assignment)

**November 22**  
**Module 2: During the Meeting** (webinar and assignment)

**November 29**  
**Module 3: After the Meeting** (webinar and assignment). Final assignment is to be completed by December 12, 2022.

Each interactive webinar is a 90-minute (10 – 11:30 a.m.) facilitated online workshop with Q&As and an overview of the assignments. Participants will have five days to complete their assignments for each module and will receive written feedback and coaching.

**Cost:** $590 +GST LGMA member and $675 + GST Non-member

**Registration:** [Register online](#) for all three modules before November 8, 2022. Information will be sent to registered participants before each module. Maximum 25 participants

**Instructor:** Lisa Zwarn

**Cancellation Policy:** No refunds will be provided after November 8th, although substitutions within your organization are permitted.

**INSTRUCTOR: Lisa Zwarn**

Lisa Zwarn has been working in and with local governments for more than 30 years. A former Corporate Officer, she has been actively involved in the Local Government program with Capilano University, teaching courses in the areas of Administration, Services and Corporate Administration and with Coast Mountain College, teaching courses in the areas of Law and Services. Lisa is also a frequent presenter at LGMA training events in subject areas within Corporate Administration, including bylaw drafting and freedom of information and protection of privacy.
November 15 - MODULE 1: Before the Meeting Organization

Module 1 is focused on:

- how to review the material in order to develop familiarity with the topics to be discussed and to summarize content for the minutes;
- identifying and establishing an organization’s minute taking standards to ensure consistency between the organization’s committees; and
- becoming familiar with how parliamentary procedure impacts the content of the minutes.

The webinar and assignment will highlight the role and expectations of the minute taker, the purpose and types of minutes, how to prepare as well as how to determine what type of minutes to take (formal or informal), and parliamentary procedure for minute taking.

Assignment:
You will be asked to prepare minute taking standards policy for your organization using a template provided by the instructor.

Time: 5 days to complete assignment; 5 days for instructor feedback

November 22 - MODULE 2: During the Meeting

Upon completion of this module, you will understand:

- how to prepare material and resources for meetings to ensure the efficient and effective use of meeting time;
- how to create useable main motions and learn how to assist Governing Body/Committee members to do the same
- how amendments impact the recording of main motions
- Ensure that the minutes have legal force and effect

The module will provide an overview of how to distill the essence of the motion, create content for different types of main motions in Council/Board Meetings, the proper use of recitals, and the difference between “receiving”, “accepting” and “adopting” recommendations and reports.

Assignment:
You will be required to identify what is wrong with motions as they are drafted.

Time: 5 days to complete assignment; 5 days for instructor feedback

November 29 - MODULE 3: After the Meeting

The final module will focus on how to follow up on work and action item lists, proofing your minutes using a systematic approach, handling specific parliamentary tools (consent agenda, division of the question, notice of motion, appeals), as well as provide general pointers.

Assignment:
Your final assignment will be to provide a copy of open meeting minutes that you have prepared for feedback or prepare minutes from a narrative story.

Time: 5 days to complete assignment; 5 days for instructor feedback