



INTRODUCTION

This module focuses on writing general correspondence, documents of record and summaries of events and longer documents. These types of documents are a routine part of work at WHO, and our goal is to help you write them effectively.

Module 1 introduced strategies for effective writing, including analysing your reader, using active constructions, keeping documents concise, and proofreading. Writing effective general correspondence, records and notes requires these skills, plus good planning. Good planning is based on knowing what your reader needs and focusing your purpose to meet those needs. This is true whether you are writing an e-mail to a colleague, a letter to a government official, minutes of a meeting, or notes for briefings and presentations.

In this module you will apply the concepts introduced in Module 1 to specific types of documents. You will prepare a personal portfolio of correspondence, records and summaries, based on writing that you are currently working on in your job. In the process, you will work through the stages of writing we introduced in Module 1: prewriting, organizing, drafting, revising and proofreading.

The portfolio of examples of correspondence, records and summaries is your assignment for this module. As you complete the learning activities, you will complete the required components of your portfolio; by the time you have finished the module, you will be ready to submit your completed portfolio to your tutor.

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Learning outcomes

By the end of this module, you will be able to:

- address readers' needs, writer's purpose, and the main message in planning, drafting, and revising correspondence, records, and summaries;
- identify different types of correspondence and plan according to these types;
- revise documents to improve structure, mechanics, and style;
- plan and draft "bad news" correspondence;
- prepare accurate minutes;
- apply strategies for writing effective summaries.

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Types of documents

This module focuses on a variety of short documents that reflect common written communication activities at WHO. You will consider three main types of documents:

- correspondence: e-mails, letters, faxes and memos
- records: minutes, notes for the file
- summaries: briefing notes

Each of these types has its own set of rules and guidelines for style and presentation. However, even though the rules and formats differ, they are all correspondence media, through which you communicate with your colleagues. Writing them effectively involves two common elements: defining your purpose, and focusing on your readers' needs. With these two elements as your foundation, you can feel confident that you can engage your readers, and make your meaning and message understood.

You can write each type of document effectively by following the steps of the writing process we introduced in Module 1:

- prewriting
- organizing
- drafting
- revising
- proofreading.

Note: We will focus on writing the different types of documents, rather than on formatting requirements. Departments and regions often have different guidelines and/or use customized templates. As you work through this module, you will find it helpful to gather your own resources, appropriate to your situation.

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PREWRITING

Goals and purposes

Let's look first at general office correspondence. The goal of correspondence is to send a message to a particular reader or group of readers. That message can be delivered in any of several forms: inter-office memos, letters, faxes or e-mails. Some forms (like inter-office memos) go only to readers within WHO (internal readers). Other forms (like e-mails, letters and faxes) may go to either internal or external readers.

To write effectively in any of these forms of correspondence, you need to know:

- o your purpose; that is, what you as the writer wish to achieve through your message;
- o your reader's needs, as clearly as possible.

As we discussed in [Module 1](#), determining your purpose is the first step to planning an effective document. You can identify the purpose of your correspondence by reflecting on these two questions:

- o Writer – "Why am I writing this?"
- o Reader – "Why am I reading this?"

Once you know the purpose of your message you can organize your ideas into coherent sentences and paragraphs. The purpose determines all other choices about how to convey your message. Knowing your purpose helps you:

- o identify your main message;
- o determine the scope of your message;
- o adopt an appropriate tone.

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Responding and initiating

In general terms, correspondence can be sorted into two types of purpose: responsive, and initiative. One of your first planning tasks is to determine whether your purpose is to respond to a piece of correspondence you have received, or to initiate something new. This is true of all correspondence, no matter whether you are writing an e-mail, a memo or a letter.

Practice: Initiative or responsive

Read through these brief scenarios and decide whether the correspondence described is responsive or initiative.

Example 1

A staff member wants to apply for a leave of absence.

initiative responsive

Click here to reveal our comments.

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Purpose and main message

In Module 1, you considered the purpose and main message of various documents. Here's a quick review.

Purpose: Your purpose is your statement of what you want the reader to do once they have finished reading your document. The purpose statement is the answer to the question: "Why am I writing this?" Another way to think of it is that it answers the reader's question: "Why am I reading this?"

Main message: Your main message is the central idea of your correspondence, expressed in one or two sentences. [link to Main Message in Module 1]. It answers the reader's question, "Why do I need to do what you are asking me to do?"

Your main message is equally important whether it is a responsive or initiative document.

Practice: Purpose and main message

Consider these brief correspondence scenarios; write the purpose and the main message of each document. (You may not be able to write complete main messages for each example, since some details are not provided.) Compare your responses to ours when you are finished.

Example 1
You want to apply for a leave of absence.
Purpose: As a result of reading this correspondence, my reader will ...
Main message:
Click here to see our suggestions.

Subject lines

Once you have determined your purpose in writing the correspondence and drafted your main message, you can write your subject line. Formal and informal letters do not include subject lines; memos and emails do. The subject line is particularly important for email. Many readers scan subject lines to determine how quickly they should read and respond to a message, and rely on subject lines for accurate filing and retrieval of messages. Subject lines that are too vague are frustrating for readers, and may even be ignored.

Practice: Memo and email subject lines

Look once more at the five correspondence scenarios we have been working with. This time, write an appropriate subject line for each piece of correspondence. When you have done so, compare your responses to our suggestions. Remember, your responses will likely not be identical.

Example 1
You want to apply for a leave of absence.
Main Message: I am applying for a leave of absence from [date] to [date].
Subject Line:
Click here to see our suggestions.

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Planning

Think about the correspondence you are going to write to include in your portfolio. For each one:

- What is the purpose of the correspondence?
- What is the main message?
- Who is the primary reader?

Portfolio preparation

Your assignment portfolio for this module will include at least one example of **initiative** correspondence, and one example of **responsive** correspondence. We've developed a planning document— a Correspondence Plan – to help you organize the correspondence you will include in your portfolio. You will recognize most of the questions on this planning document; it is an expansion of the Reader Analysis document you worked with in Module 1. Complete two Correspondence Plans now, one for your responsive correspondence, and one for your initiative correspondence.

Use this [Correspondence Plan template](#).

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ORGANIZING

As with any other document, time spent organizing your thoughts and your required content before you begin your correspondence is repaid in ease of drafting. [Module 1](#) provided some guidance for organizing your thoughts and determining the appropriate structure for your document.

There are additional considerations in the organizing phase of writing correspondence. Things to consider include level of formality, and appropriate openings and closings. These are discussed in the next few screens.

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Levels of formality

Before you start drafting your correspondence, consider how formal it should be. The required level of formality is generally determined by the position of the correspondents (the reader, and either you as the writer or the person who will be signing the letter). We can separate WHO correspondence into two broad categories: informal and formal.

The correspondence you write at work is most likely to be informal memos, emails or letters; that is, day-to-day correspondence with people inside and outside WHO. The majority of WHO letters are informal letters of inquiry, request or information.

Formal letters may be addressed to heads of state, ministers of Member States, ambassadors or other dignitaries. Formal letters are usually about matters relating to the duties and responsibilities of the Director-General or a Regional Director. They are often signed by a Regional Director, the Assistant Director-General or the Director-General. Formal letters are governed by strict protocol rules and approval processes.

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Formal letters

If you have to write a formal letter, you must ensure that the letter meets all protocol requirements. WHO has very specific requirements for openings and closings in formal correspondence. Salutations, first paragraphs and closings vary according to the position of the person with whom you are corresponding, and the position of the person for whom you are writing. Always consult the appropriate set of formal guidelines before you complete a formal letter.

Even formal letters vary in their degree of formality, depending upon both the addressee and the sender. Some formal WHO correspondence is not highly formal, and protocols may allow use of the first person (I, we, my) rather than the third person (he, his, she, her).

However, letters to dignitaries such as heads of state, ambassadors and ministers require the highest level of formality. For these addressees, WHO uses the formal closing 'Please accept, Sir (Madam), the assurance of my highest consideration'. This statement is followed by the signature but without 'Yours sincerely'. It is not our purpose here to show you all the possibilities for formality in letter-writing; rather, our intention is to make you aware that there are very specific requirements for many types of letters, and that being unaware of these formalities will delay the delivery of your message.

WHO headquarters maintains an Official List of Addressees, known as the OLA. The OLA specifies the protocol requirements of each member state for:

- o language of written communications (English, French or Arabic)
- o title and form of address for heads of state, ministers and other dignitaries of that state.

You can find a web-enabled version of the OLA on the WHO intranet.

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Planning formal letters

If you are writing a formal letter, usually it will be a letter signed by someone in a superior position at WHO. Formal letters must be approved by the office of the signatory to the letter.

The approval process can include several stages, depending upon the position of the signatory to the letter. Approval will be delayed at each stage by any errors, including errors in the form of address, opening, closing, and tone or diction. Formatting is important, and specific; make sure you know where each component of the letter belongs on the page. Punctuation and spelling are also critical. Follow the steps below to help ensure you don't delay the approval process.

1. Refer to the resources for requirements on salutations, openings and closings: the Guide to Official Correspondence, and the OLA Official List of Addressees.
2. If there is a deadline for your letter, make sure you build in revision time to your timeline for the task.
3. Proofread closely (more than once) before you submit your letter for approval and signature.

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Opening and closings for informal letters

Opening and closing sentences can be challenging to compose. However, your purpose and your main message provide a focus for introducing the topic and for ending the communication. There are some standard kinds of sentences, too, that may provide you with some ideas about how to open and close your informal letter.

Responsive Letter	
Openings	Closings
Thank you for contacting me regarding your concern over [situation X]	If you have further questions, please contact me [give contact information]
We are sending the information about XX that you requested in your letter of [date]	Thank you for your interest in WHO [our programme, this project, this area]
I was pleased to receive your invitation	Thank you for your assistance [or cooperation, or invitation]
I'm writing to express appreciation for your cooperation (support, assistance)	I hope this information will be of assistance
Initiative Letter	
Openings	Closings
I would like to inquire about ...	We would appreciate any information [assistance] you can provide.
Could you send me some information about ...	Since there is some urgency in this matter, I would appreciate receiving an answer from you by [date].
I am writing to ask for your help in ...	Please call me [telephone contact number] to discuss this further.
	Thank you for taking time to consider this request.

The format of an informal letter will vary according to the standards and established practises in your region. You can find styles and standards in the WHO Style Guide, and many regions have their own style guides.

WHO style is to use set pairs of standard salutations and closings, according to whether or not the name of the addressee appears in the salutation.

Letters – Standard Salutations and Closings	
Name is used	Name is not used
Dear Mr [Ms or Dr] [name]	Dear Sir [Madam],
...	...
Yours sincerely,	Yours faithfully,
[signature]	[signature]

Responsive and initiative openings

Your opening should answer the reader's first question – "Why am I reading this?" – whether the correspondence is responsive or initiative.

Responsive openings

A responsive document should begin with a reminder – a statement that acknowledges the original request. This opening helps you capture interest and prepare the reader for your message. Consider these typical responsive reminders:

- As you requested, I have ...
- I'm writing in reply to your memo of ...
- Thank you for your letter of 12 August.

Initiative openings

When you initiate the dialogue, you must provide your reader with some background or context for your communication. Examples of initiative openings:

- As you are all aware, there have been significant delays in packages arriving to our regional office. This memo is a reminder about how to ensure speedy delivery when dealing with FedEx couriers.
- Because of the extra feedback we received on the training programme, I would like to propose that we extend the launch date by two weeks.
- I am writing to request a leave for the period 2 September to 15 December of this year.

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Closings

The purpose of a closing is to bring your document to an appropriate conclusion. You do not want your reader to wonder what to do next or end on a note of uncertainty. Your closing might suggest actions, summarize agreements, restate the main message, thank the reader, or offer further help.

Your closing depends on your purpose, whether your document is responsive or initiative. For example, if you are asking the reader to take an action, the closing should specify that; if there is a deadline, you should state it.

Examples of closings:

- I have additional information for anyone who is interested.
- Please send your comments to [X] through [A] before 5 p.m. Thursday.
- I would like to meet to discuss situation X in more detail. Please suggest a time that is convenient for you and I will see to it that I am available.
- We appreciate your support in this matter.

Considering your opening and closing before you begin writing will help you draft the correspondence efficiently.

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Practice: Openings and closings

For each of the examples we have been working with, we have drafted an opening and a closing. Try this yourself first, then compare your responses with ours.

Example 1
You want to apply for a leave of absence.
Main Message: I am applying for a leave of absence from [date] to [date].
Subject Line: Leave of absence request [Your Name]
Purpose: As a result of reading this correspondence, my reader will grant me the leave of absence I am requesting.
Opening:
Closing:
Click here to see our suggestions.

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DRAFTING

The principles of writing effective correspondence are the same, whether you're writing a formal letter or an informal email, a responsive letter or an initiative memo: focus on your purpose, your main message, and your reader's needs.

Here are some guidelines to help you draft your correspondence.

1. Explain your reason for writing and the relevance of your correspondence to the reader early in your correspondence.
2. Be brief, concise and specific, but make sure you have included all essential information.
3. End with a clear statement that tells the reader what to do next, or tells the reader what you will do next, and builds goodwill.
4. For formal letters, consult the appropriate guides for the correct protocols of salutations and closings, and opening and closing statements.

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Reflection: Drafting

Here is an example of an initiative letter, with our comments on some of the major components.

Dear Dr. Park,

WHO has the pleasure of inviting you to participate in a one-day meeting on Health Impact Assessment (HIA) in Geneva on 7th May 20XX.

You are invited to be a panelist in a roundtable discussion about health impact assessment of extractive industry projects. As a member of this panel, you will be given an opportunity to present your country's experiences with the identification and management of health impacts associated with oil and gas extraction projects. I will provide you with more details of the roundtable format closer to the meeting date.

The overall purpose of the WHO/IAIA HIA meeting is to bring together experiences in the use of HIA in improving the health performances of policies, plans, programs and projects in two main sectors: urban planning/development and extractive industries.

This event is being jointly organized with the International Association for Impact Assessment (IAIA). The IAIA Conference is taking place in Geneva on the 8th to 11th May. At the conference HIA will be discussed in conjunction with other Impact Assessments in five key sectors: agriculture, industry, cities, tourism and transport.

As an invited participant, WHO will pay for your travel costs and your accommodation costs for your stay in Geneva, from 6 to 11 May 20XX.

Please confirm your attendance by 15 February 20XX by emailing Michelle PXXX (mpxxxx@who.int).

I hope to see you at both the meeting and the conference.

Yours sincerely,

Dr. BXXX DXXX
Coordinator, joint day on HIA

Reflection

Review one or more of the pieces of correspondence you have written at work recently with the guidelines below in mind. What characteristics does your example have? Was there any component missing?

- The relevance to the reader is clear.
- It is as brief as possible.
- It includes all essential information.
- It concludes by asking for action, or informing the reader of action the writer will take.
- The closing builds goodwill.

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Tone

Consider your feelings as you read these two examples of correspondence about an unpaid invoice.

1. "You have not paid your invoice. This is a very serious matter! You must pay it immediately."
2. "Perhaps you have overlooked this outstanding amount owing, or perhaps your payment has gone astray. In any case, please contact us immediately to confirm or arrange payment."

The tone of the first example suggests that the writer feels you have deliberately not paid your invoice. The tone of the second example suggests that the non-payment is an error. In this situation, a polite and understanding tone is more likely to be effective than a rude, demanding one. Tone evokes a reaction from the reader; finding the appropriate tone is a question of putting yourself in the reader's position.

Tone is partly determined by style and diction (choice of words). You considered tone indirectly when we discussed [long-winded, indirect and overly formal writing](#); think about the likely reaction from the reader to long-windedness, and the different reactions evoked by passive voice and active voice. Overly formal language may seem condescending to some readers. Writing that is too chatty or careless, on the other hand, might suggest that you do not respect the reader.

Even a well-written document may not be well received if your readers take offense or feel threatened or belittled. Effective writing communicates your message without prompting feelings of insecurity or defensive reactions in your readers. You must be aware of the possibilities pitfalls, and decide on an appropriate tone for each document you write.

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Practice: Tone

Read the correspondence plan below, then click the link to review a sample email. Is the tone appropriate? Once you've made notes, view our comments.

Correspondence Plan	
1. Describe the document	
What type of document is this (email, letter, memo...)?	Email
Is it responsive or initiative correspondence?	Initiative
What is your purpose in writing the document?	When my primary readers read this document, they will be able to complete their expense claims properly.
What is your document's main message?	Follow the new expense claim procedure, and use the correct form.
If it is a memo, email or fax, what is the subject line?	New procedure for submitting expense claims
2. Identify your readers	
Who is (or are) your primary reader(s)? (Your primary reader is the person who has the power to take the action you want to see.)	All professional staff in the department
Who is (or are) your secondary reader(s)?	Administrative staff who assist others with expense claims
3. Analyse your primary reader(s).	
What does the reader already know about the situation?	Most of them know the current procedure, though not always very well.
What else does the reader need to know about the situation?	They need to know that they must follow the new procedure.
What additional questions might the reader have about the situation?	Basic how-to questions.
What barriers to communication might prevent your reader from acting on your main message?	Staff members do not always pay attention to new procedures and notices of new procedures. They are in the habit of doing it the old way. Many keep copies of printed expense forms in their desks.
What will you do in the document to overcome each of the barriers you identified?	I will tell them that expenses will not be reimbursed if they are submitted using the old form.
4. Analyse your secondary reader(s).	
What does the reader already know about the situation?	Administrative staff know a new procedure has been under development.
What else does the reader need to know about the situation?	If the old forms are used, reimbursement will be delayed since they will be sent back.
What additional questions might the reader have about the situation?	Since they are admin staff who are very familiar with admin processes, they could have some complex questions based on specific situations they have encountered.
What barriers to communication might prevent your reader from acting on your main message?	We use a lot of different forms – there may be some confusion.
What will you do in the document to overcome each of the barriers you identified?	I will direct them to the date stamp on the bottom of the expense claim form and remind them that this is the current form to be used.

[click to see sample email ►](#)

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Reflection: Tone

Look back once again at some examples of correspondence you have written. This time, think about the tone. Imagine yourself in your readers' position, and consider if your tone was appropriate.

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Portfolio preparation: Tone

Earlier you completed a Correspondence Plan for two pieces of correspondence, one initiative and one responsive, to include in your portfolio. Return to those correspondence plans now and think about the barriers to communication you identified. Are any of them particularly connected to tone? If so, note the tone you will take to overcome the barriers.

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Communicating in difficult circumstances

Correspondence sometimes takes place in difficult circumstances: for example, you may need to write to tell someone he didn't get the job he applied for, that her funding proposal was not successful, to clarify a misunderstanding with a colleague, or decline an invitation. In this course, we refer to such correspondence as a "bad-news" documents. If you have to give someone bad news, style, tone and the structure of the document are all important.

Writing an effective bad-news document requires that you recognize the reader's needs very clearly. You must explain why you are writing and convey your main message – in those two elements, writing a bad-news document effectively is no different than writing any other document. An additional challenge in conveying bad news is that you must try to anticipate the questions and/or objections your reader may have once he or she has absorbed the main message. Such questions can usually be answered by explaining the reasons for the decision – telling the reader "why". Since you will need to answer the "why" question, note the reasons for the decision or circumstance you are explaining as you organize your thoughts to convey and explain the bad news.

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Communicating bad news

Five components of bad-news correspondence are highlighted in this sample letter. See if you can identify each component and describe its function. Click the numbers for our comments.

Dear Ms Radison:

1 Thank you for your recent application for the position of administrative assistant in our Finance area, and for attending the interview to discuss the position. We were all impressed with your qualifications and your presentation. I am sorry to tell you, however, that the position has now been filled and your application was not successful.

2

3 We received many applications for the position, and those we interviewed were all highly qualified. We chose to hire an individual with more recent experience for this busy role.

4 We will keep your application on file for the next two years, and should an appropriate opening occur, we will consider you for it. In the meantime, we encourage you to continue applying for specific positions as they appear on the employment website.

Thank you for considering employment at the World Health Organization.

5 Sincerely,

Louise Park
Human Resources Officer

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Practice: Communicating bad news

Practice writing a bad-news letter based on the following situation:

Your manager was invited to be the keynote speaker at a luncheon held by a local community organization. Your manager had accepted the invitation, but now will not be able to attend due to an emergency requiring out-of-country travel. The community organization luncheon is scheduled to be held in two weeks.

Write to the president of the community organization to deliver this bad news. Use your imagination to provide the details.

We have not provided a sample response; there are many possibilities. Once you have written your letter, review it and be sure you have included:

- o a clear reason for writing
- o the main message
- o an explanation for the bad news
- o alternatives, if available
- o a closing that is positive in tone.

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Portfolio preparation: Drafting

Choose two pieces of correspondence to write: one initiative and one responsive document. These will be part of your portfolio. You also need to include the planning documents you use to create the correspondence.

You may choose to write e-mails, memos or letters. Each piece of correspondence should be at least three paragraphs in length. Preferably, these will be documents that you are writing at work (not made-up or hypothetical documents).

Since you will have an opportunity to get feedback from your tutor on this correspondence, we suggest you choose something challenging. A letter delivering bad news, for instance, will stretch you to do the best job you can with structure and tone. When you can write challenging correspondence well, everyday correspondence will seem much easier.

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RECORDS

Records document an organization's discussions and decision-making processes. Records focus on discussion points, decisions made and actions required or taken by participants at meetings or other events. A written record enables people to act on decisions made and refer to previous events, discussions and issues.

Minutes are the most common type of record; they document the events and decisions made in meetings. Minutes vary in length and complexity, depending on the type of meeting they document; they can range from a one-page summary of a staff meeting to a 30- to 50-page document of long, complex and important meetings.

Other types of records include notes for the file. These are short summaries of a conversation or decision; they are typically not circulated, but, as the name suggests, are kept in the file related to the group or topic. Notes for the file are used to document discussions and conversations in one-to-one or small group meetings between WHO officials and key people, often outside WHO. Notes for the file are usually issue-based.

Since minutes are both the most common and the most challenging type of record, this section of the module will focus on them. We will focus on the more common type of minutes documents, but will also discuss some of the fundamental skills required for documenting major formal meetings.

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Types of minutes

Meeting activities and decisions are recorded in many different ways throughout WHO. Document formats can vary according to group and region; minutes of staff meetings, interdepartmental meetings, inter-agency meetings and workshops may all have different document styles. Some regional offices have standard templates for recording important meetings, and formal meetings have historical documentation models that must be followed. When you are asked to record minutes at a meeting, an important part of the prewriting process is finding out what format is expected.

For the discussion in this module, we will categorize minutes as either agenda-based minutes or informal meeting minutes.

Agenda-based minutes or reports

These are a traditional type of record: minutes taken at scheduled meetings for which there is an agenda. An agenda is either distributed before the meeting or announced by the chairperson at the beginning, and the minutes follow the framework set by the agenda. At WHO, agenda-based minutes are now primarily records of formal governance meetings. These are highly specialized, complex and formal documents, and minutes are usually taken by professional minute-takers or précis writers.

Informal meeting minutes or summaries

Most departmental and team meetings at WHO do not require detailed minutes. Informal meeting minutes summarize decisions taken and follow-up actions and responsibilities. Typically, these minutes are circulated to all those who attended the meeting, and sometimes to others who have an interest in the meeting's decisions but were not able to attend. These records are sometimes produced using a simple template.

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Records: Prewriting

Purpose of minutes

Your purpose in writing a minutes document is to record:

- o what was discussed
- o what was decided
- o what actions are to be taken as a result
- o who is to take those actions.

Minutes are rarely word-for-word (verbatim) reports, unless the meeting is a highly formal one. Minutes are a record of what was done and what was planned, not what was said.

An effective minutes document reflects the two basic functions of a meeting:

1. to present information
2. to solve problems.

Therefore, an effective minutes document records the essential information related to those two functions, and writing minutes effectively requires strong skills in listening, analysing and summarizing.

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Features of minutes documents

Regardless of the document format, meeting records typically contain some standard information at the beginning of the document.

Points recorded include:

- o Name of the group holding the meeting;
- o kind of meeting (for example, weekly, monthly, special);
- o date (and possibly place if this is not always the same);
- o names of persons attending;
- o name of minute taker.

For each agenda item or issue discussed, minutes typically record:

- o A summary of the views expressed, attributed either to the speakers by name (or initial) or to the offices they represent;
- o a clear statement about how each issue was resolved; for example, agreement, no agreement, deferred for further consideration;
- o any follow-up action required and the name of the person responsible for the follow-up.

Please be aware that even these general guidelines are not universally followed. Some groups, for instance, record only items requiring follow-up. Others require detailed records of discussions. Before you begin note-taking, look at earlier examples to be sure you understand what is expected.

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Features of minutes documents: an example

Here is an example of a template for minutes used by some departments in WHO. Move your cursor over the document to see our comments on various sections.

[Name of group/department] Date of meeting	
Staff members present: Emily M____, Maria P____, Hyo-Tae P____, Lisa R____. Apologies: Farzhad B____.	
Budget planning	ACTION POINTS
<ul style="list-style-type: none">• <i>Action point from 2 May 20XX:</i> All those with responsibility for projects must provide updated estimates by 30 May.• All equipment requests must be submitted by May 20.	<ul style="list-style-type: none">• EM and MP to check with project managers this week to ensure estimates are in process.• HP check with IT department about server costs; whose budget?
Conference planning	
<ul style="list-style-type: none">• <i>Information item:</i> Plans for the venue are now complete, and 90% of accommodation is booked.• Document translation: Documents will be submitted over the next few weeks; translations must all be completed by August 12.	<ul style="list-style-type: none">• MP to coordinate translations

Features of notes for the record: an example

There is no standard format for notes for the record. It is best to follow other examples within your area. As with minutes, points such as the date of the meeting, those attending and the meeting purpose must be included.

To review our comments on this sample note for the record, move your cursor over the text.

Note for the Record Regional Consultation AFRO/AMRO on 21 Oct 2009

Participants: Dr A__ B__, ADG NMH
Dr C__ D__, Director TFI
E__ F__, Budget Portfolio Manager PRP
G__ H__, Planning Officer PRP
I__ J__, BFO NMH/TFI
Dr K__ L__, acting for Dr M____, SO6 focal point in AMRO
Dr N__ P____, SO6 focal point in AFRO

This consultation represents Stage Two in the operational planning process for 2010-2011 and its scope is to ensure the consistency between the HQERs and RER in SO6.

Workplans/alignment

- AMRO reported that no internal consultation took place so far for the alignment of the HQERs and RERs as the workplans were not ready yet. Another call will be scheduled at a later stage when the workplans will be ready. The need for consolidation and alignment with the HQ workplans was underlined.
- The SO6 focal point in AFRO described the process used to develop the plans together with the countries. This process is almost finalized. All workplans are available for consultation on intranet.
- It was suggested that the activities in AFRO should be more specific as now they are too broad.

Finances

- Dr P____ informed those attending that the breakdown of the budget per OWERs in AFRO is done in the Central Budget Department. It is also possible to shift the planned costs between the OWERs.
- The Financial Management Report for SO6 as of June 2009 was presented by PRP. Although the implementation is as of end June 2009, the calculated rate of 38% is contested as the implementation calculated with the data available in AFRO is showing a higher implementation.
- The proportion of funds available in the total budget ceiling in 2008-2009 implies that the budget allocation for 2010-2011 is satisfactory although it should be redistributed between the OWERs.

Staffing

- In terms of staffing, the SO6 focal point in AFRO informed that the shifting of the technical work and resources to ICPs is continuing. The trend is to keep only the core functions at the Regional level.

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Records: Organizing

Prepare to take notes

Here are some suggested steps to take when getting ready to take minutes and write the record of the meeting. Before the meeting:

1. Determine the required format for your minutes document. If you haven't taken minutes before, or not for this group, find out if there is a template you should use, or if there are any formatting requirements. Review a recent set of minutes made for the same group's meeting, and familiarize yourself with the layout or template.
2. Determine the type of information that must be included, and the level of detail required or expected. Review a recent set of minutes and note how significant items are recorded.
3. Find out who will read the minutes. For example, will they be circulated to all participants; will they be filed and not circulated?
4. Make a written list of participants' names, positions or titles, and organizations.
5. Obtain a copy of the agenda, if one has been prepared ahead of time. Prepare an outline based on the agenda items. If you are writing by hand, 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.
6. Be prepared! Study the issues to be discussed and ask questions ahead of time. If you have to fumble for understanding while you are making your notes, they won't make any sense to you later.

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Records: Drafting

Note-taking tips

Before you can prepare excellent minutes, you must take excellent notes. These general tips will help you do that.

1. Check off the names on your list of attendees as people enter the room.
2. Make a map of the seating arrangement, if possible, to help be sure about who said what.
3. Note the essential elements, such as type of meeting, participants' names, positions and organizations, date and time, and possibly location, and main topics. Refer to minutes from earlier meetings to determine what is essential.
4. Concentrate on getting the gist of the discussion and taking enough notes to summarize it later; don't try to record every comment. (Consider taping the meeting if you anticipate that it will be long and complex; however, you will need to have permission from each participant to do so. If you do record on tape, make sure you keep notes.)
5. Note agreements on follow-up action, including who is responsible for the follow-up.
6. If any participant asks for something to be placed on record, ensure that you write down the statement accurately. Confirm wording with the speaker, preferably as you write down the statement.
7. Collect copies of any documents tabled at the meeting; these may become attachments to the minutes.

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Note taking – noise

Consider the meeting for which you will be taking minutes. Do you anticipate any potential communication noise? What can you do in advance to overcome any potential barriers to communication?

Remember as you consider this point that barriers can be connected to:

- o the sender of communication (the people who will be speaking at the meeting);
- o the receiver of the communication (you, as the note-taker);
- o the situation (the meeting itself).

Consider each type of communication barrier. Record your thoughts on each type, and reflect on how you plan to overcome each barrier to create good minutes.

You have been asked to take minutes at the first planning meeting for a conference to be held next year. Three different project groups are involved in the planning: the group you normally work with, and project teams from two other departments whose staff are involved in research related to the conference topic. Four people from each group will be attending the initial meeting.

Because you have never been in the area of the building where the meeting will be held, you decide to go there the day before to become familiar with the location. It is a small meeting room on an interior hallway. The room has no windows and the air is rather stuffy. When you adjust the temperature control, you realize the fan is quite loud and squeaks.

Click here to reveal
our comments.

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Tone

Tone is a major consideration when writing minutes; the writing must remain impartial and neutral in tone even when discussions have been heated and emotionally charged. Diplomacy and tact are sometimes required. Records often include the names of speakers, and it is important to remain respectful to the meeting participants.

Your contribution as the writer is crucial to creating an effective document. Your job is to not only make some individuals more easily understood, but also to give coherence to a document that is the product of many voices.

In writing minutes, avoid:

- o emotive words (for example, vicious, frivolous, over-reacted);
- o interpretations of other people's states of mind (for example, He seemed very disturbed by the question);
- o unexplained jargon and acronyms;
- o discriminatory and gender-specific language.

When you are thinking about tone in minute-taking, you might find it helpful to revisit the section on non-discriminatory writing in [Module 1](#).

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Practice: Tone

Look at these examples of excerpts from minutes and notes for the file, and decide if the tone is appropriate or inappropriate. If you feel it is inappropriate, revise it.

Example 1

Despite the manager's disagreement, AB insisted that the report was correct.

appropriate *Your revision:*

not appropriate

[Click here to reveal our comments.](#)

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Portfolio preparation: Prepare minutes

You have the option of preparing a set of minutes to include as one of the documents in your portfolio. Please consult the [assignment page](#) for details of what is required.

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SUMMARIES

Summaries are short documents that give a main message or present information in a condensed, concise form. An executive summary at the beginning of a report, an abstract in a research paper, and a briefing note are all types of summaries. They convey meaning and provide focus, without detailed explanations, supporting arguments or editorial comment.

The writing process for summaries centres around the main message and the reader's needs, as for any other type of document. To write an effective summary, the writer must:

- o identify the main message;
- o select the most important points of information, relevant to the main message;
- o know the reader(s).

Summaries of long reports are discussed in [Module 3, Writing Effective Reports and Proposals](#). In this module, we'll focus on briefing notes.

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Briefing notes

A briefing note is usually written for someone else who requires concise background information on an issue or situation. Senior officers use briefing notes to prepare for meetings, conferences or similar events. The Director-General and Assistant Director-General both use briefing notes to prepare for meetings with ministers of Member States, ambassadors and other dignitaries. Briefing notes are often part of the preparation for high-level strategic discussions. However, they may also be used in more administrative settings: for example, a briefing note might make it possible for a manager to explain a complex new finance procedure to individuals who must use the procedure.

Typically the briefing note outlines an issue or situation, analyses the issues involved and offers solutions. The briefing note must provide just enough background for the reader to understand the situation, and should cover only the main issues to be addressed. Briefing notes may be as short as a few sentences, and typically are no longer than one page. Briefing notes never include details, nor do they include references. Your reader relies on you: that is, he or she must trust that there is supporting information for the points covered in the note even though that information is not included.

Each briefing note you write represents an opportunity to showcase information (e.g., findings of a study, successes of a programme), highlight the main points of a strategy or argument (e.g., recommendations) or focus attention on a particular programme or problem (e.g., in conjunction with a funding proposal) or focus attention on a new process or procedure (e.g., new reporting requirements or administrative policies).

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Readers of briefing notes

The key to a successful briefing note is empathy and anticipation. Imagine, in as much detail as possible, the situation where your reader will be using the brief and what they will be looking for. When you write a briefing note, you are contributing to a conversation. The person you are writing for will speak, but you are providing them with the words. As one WHO writer described it: "What can the DG say about this that only the DG can say?" If you are writing a briefing note for your supervisor or another staff member, your question will be similar: "What can my colleague say about this to people who may never have a chance to talk to me about it?"

You also need to think about why you have been asked to provide the brief. It is usually because of your expert knowledge of the issues and the outcomes that need to be achieved for WHO work to progress.

If you are writing about policies and procedures, it is particularly important to be aware of the level of detail that is required. Think about both the primary audience for the briefing note and those they will be speaking to; what do they really need to know? Tell them that much, and no more.

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Writing briefing notes with the context in mind

Briefing notes are never stand-alone documents. When drafting a brief, think of the context. The context includes a huge range of factors, including who will be attending the meeting, the reason they are discussing the issue you are writing about, and their expectations for using the information you present. As you review this list, reflect on why each of these questions might be important.

- Why is this issue being discussed at a meeting?
 - Is it in response to a crisis or specific event?
 - Is it part of an ongoing dialogue?
 - Is it a preliminary meeting, or is it announcing the completion of something?
- What is the purpose of the meeting?
 - Is it for information?
 - Is it for action?
 - Who requested the discussion take place at this meeting?
- What background material is already available?
 - Are there policy or procedure documents?
 - Are these commonly used, or have they been ignored?
 - Who is involved in the meeting?
 - Are those attending primarily administrative staff, or programme staff?
- What will the atmosphere of the meeting be like?
 - Will it be formal or informal?
 - How many people will attend?
 - Are those attending likely to welcome your contribution?

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Strategies for effective briefing notes

Brevity and precision are the primary qualities that make a briefing note effective.

Here are a few strategies that will help you write effective briefing notes.

- o Keep it short. An effective briefing note can be easily "scanned" for its main points – it may not be read in detail until the meeting begins.
- o Keep it simple. Your brief will be one of many documents read that week.
- o Stick to the issue. Don't include any extraneous information.
- o Analyse your readers. A briefing note always has multiple audiences: you write for one individual (the primary reader), and they deliver the message to others (the secondary reader).
- o Use plain English. Your readers (e.g. senior officers) typically are not discussing the technical details. Be particularly careful to be clear in references to other policies, procedures and forms.
- o Be specific. Avoid buzzwords and non-specific words like "quite," "really," and "basically".
- o Proofread carefully.

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Portfolio preparation: Briefing notes

You have the option of preparing a briefing note to include as one of the documents in your portfolio. Please consult the [assignment page](#) for details of what is required.

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REVISING AND PROOFREADING

Revising and proofreading are the last phases of the standard writing process we encourage you to follow: prewriting, organizing, drafting, revising and proofreading. Both are crucial steps to ensuring that all your work-related documents are effective; that is, that they communicate clearly, achieve their purpose, and meet the reader's needs.

As we discussed in Module 1, the revising process can be split into two categories: revising for style and mechanics, and revising for flow and consistency.

Since revising is essential to all documents you write, we offer you summaries of the primary things to consider, which apply to all the document types you've studied in this module. As you work through this final section of Module 2, you may find it helpful to refer to [Module 1's extensive discussion of revising](#).

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Document flow and coherence

Putting your information and/or ideas in a logical flow or sequence means that you achieve your purpose and convey your main message clearly. When a document flows logically, questions are raised in the readers' minds and then answered. The paragraphs of the document work together to provide a strong basis for accepting the main message. The logical flow is your way of helping your readers understand and remember what you want them to know. That logical flow will also help you meet your reader's needs by ensuring that your meaning and message are readily accessible.

Consider these questions as you analyse your document for flow and coherence.

- o Review the document structure
 - o Do my subject lines or headings focus on the core information I want to present?
 - o Is my main message obvious to the reader?
- o Review your paragraphing
 - o Do the paragraphs follow a logical sequence of ideas or information?
 - o Did I use a topic sentence to convey the paragraph's main message?
 - o Does the paragraph support the single main message?
- o Check the logic of the document
 - o Have I predicted readers' questions and answered them?
 - o Have I provided sufficient evidence to support my message?
 - o Have I used connector words to link ideas or information in sequence from one paragraph to the next?

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Getting a second opinion

It's not always easy to determine how well your document flows or how coherent it might be to your reader, especially if you have just finished writing it and are very familiar with the subject matter. Many times other people will notice strengths or weaknesses that you as the writer don't see. For this reason, it is often a good strategy to have someone else read the document before you finalize it.

When you ask a colleague to read your document, make it clear to them the type of feedback you are seeking. It can be helpful to get feedback focused on the logical flow of your document, on the mechanics or on minor points of proofreading. It can be frustrating for both you and your colleague if you are expecting one kind of assistance and they give you another.

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Style and mechanics

Revising for style and mechanics means analysing your document sentence by sentence. You may find it helpful to consult the relevant sections of Module 1 as you revise. Use the links in the left-hand navigation bar to return to the section you need. Revise your document based on the principles and questions below.

- Note general strengths.

Examine your document for its stylistic strengths; look for:

- verb-based writing
- active voice
- brevity

Refer to your most effective sentences when revising other, less effective sentences.

- Analyse any sentences in which meaning seems unclear.
 - Do they use passive constructions or noun-based phrases?
 - Are they overly wordy?
 - Do they use sentence branching incorrectly?
- Analyse your presentation of factual information, such as dates or times, events or locations, financial figures or statistics.
 - Have you provided precise information?
- Check any lists, whether they are bulleted lists or items in series in a sentence.
 - Are the list items written in parallel forms?
 - Are the topic headings or introductory phrases written consistently throughout the document?

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Proofreading checklist

Proofreading is the final phase of document preparation. In proofreading, you examine every word individually in order to find and correct errors in spelling, grammar, punctuation and capitalization. Below are tips for how to proofread effectively.

- Give yourself time to be thorough. If possible, take a break between finishing the writing and doing the proofreading.
- Assemble any resources to which you may want to refer – a dictionary, a grammar guide – whether those are printed or online. Bookmark the WHO Style Guide, which provides both guidelines and specific answers to questions of spelling, word usage, capitalization, and other WHO conventions and protocols.
- Print the document you have written, if possible. Mechanical errors are easier to see on paper than on a computer screen.
- Plan to go through the document several times, each time focusing on a different aspect: for example, once for repetition and omissions, once for spelling, once for grammar and punctuation, once for correct dates/numbers.
- Use a spell-check tool if you have one; it will find many typographical errors. However, remember that spell-check programs cannot find most usage errors.
- Read line-by-line so that you can focus on every word: Consider reading the document aloud to reinforce a word-by-word focus. Consider using a straight-edge (a piece of paper or a ruler) to reveal only one line at a time.
- Learn from your past mistakes. Refer to previous drafts or even other documents to see what sorts of errors you tend to make. Consider compiling a personal proofreading list based on your typical errors. For really important work, ask a colleague to proofread your document.

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Portfolio preparation: Revising and proofreading

Use the questions and suggestions provided in this module to review the four documents you have prepared for your portfolio. Once you have done so, refer to the assignment page to assemble the portfolio and submit it to your tutor.

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ASSIGNMENT 2

Your assignment for this module is a portfolio of four examples of correspondence, records and/or summaries. Each example requires supporting documents; see the next screen for complete descriptions of what you should submit. Remember, these documents should be authentic pieces of writing that you are working on in your job.

Your document portfolio must contain:

- one example of responsive correspondence (an email, memo, letter or fax);
- one example of initiative correspondence (an email, memo, letter or fax);
- two more documents of your choice (minutes from a meeting, notes for the record, briefing notes, responsive or initiative correspondence).

If you don't want to submit an example from each of these categories (the record or summary), you can submit two more pieces of correspondence. If you submit four types of correspondence as your portfolio, you should try to vary that correspondence. In other words, do not send four memos or four emails.

Feedback

Your tutor will review your work to determine if you have understood the principles of effective communication as described in the module, and how you can further improve aspects of your writing.

Resubmissions

Revising is an important part of the writing process, and making suggestions for revision is one way your tutor can help you learn. When your tutor asks you to revise and resubmit, rework the assignment using your tutor's feedback as a guide. You can resubmit your work for review up to two times. If after three submissions your tutor still finds serious problems with your writing that haven't been resolved, you will not have completed the course successfully. If you don't understand your tutor's comments, or if you have questions about the assignment, please ask; your tutor wants to help you succeed.

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Assignment 2 portfolio description

Your correspondence examples may be emails, memos, faxes or letters. Very brief correspondence is not generally useful as an assignment; it does not provide your tutor with an opportunity to give you feedback on your paragraphing and other skills.

TWO PIECES OF CORRESPONDENCE	TWO DOCUMENTS SELECTED FROM THE LIST BELOW:
<ol style="list-style-type: none">1. One example of responsive correspondence. This includes:<ul style="list-style-type: none">○ Responsive correspondence document (letter, memo or e-mail)○ Plus a correspondence Plan2. One example of initiative correspondence. This includes:<ul style="list-style-type: none">○ Initiative correspondence document (letter, memo or e-mail)○ Plus a correspondence Plan	<ol style="list-style-type: none">1. Minutes in a format appropriate to the department/setting where they were taken. Included with the minutes, you must submit:<ul style="list-style-type: none">○ A document signed by the meeting chair attesting to the accuracy of the minutes○ A communication barrier analysis of the circumstances of the minute-taking2. A note for the record<ul style="list-style-type: none">○ A communication barrier analysis of the circumstances of the note for the record3. A set of briefing notes<ul style="list-style-type: none">With the briefing notes, you must include:<ul style="list-style-type: none">○ Reader Analysis document to accompany each briefing note4. A second example of a responsive correspondence plus a correspondence plan5. A second example of an initiative correspondence plus a correspondence plan

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RESOURCES

Check the WHO intranet for the latest version of the following:

- WHO Style Guide
- Official List of Addressees (OLA)
- Guide to Official Correspondence at WHO

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SUMMARY

In Module 1, you studied the general principles of effective writing. In Module 2 you applied those principles to specific document types: correspondence, records and summaries. You practised analysing your readers and their needs and determining your purpose in each document category. You studied effective openings and closings for correspondence of different categories, and the qualities that make records and summaries effective. You worked through the following standard stages of the writing process to develop your writing portfolio: prewriting, organizing, drafting, revising and proofreading.

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Completing the course

Congratulations! Your Module 2 assignment marks the end of your work on this course. Your tutor will provide feedback on the assignment, and once you have submitted your revisions, if requested, your tutor will confirm that you have completed the course.

Following your assignment, we have a favour to request of you: Fill out a course evaluation form to be submitted anonymously. The COL course coordinator will send you a link to the questionnaire after you have completed your final revisions. We would be grateful if you would complete the evaluation within a week of receipt.

Once your tutor confirms that you have successfully completed the course, you will receive a certificate of completion. You will receive the certificate approximately one month after the course officially ends.

We hope that you have enjoyed this learning experience and found it beneficial for your writing needs at the World Health Organization. We wish you all the best in your writing endeavours at WHO.

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