

Note taking template

Use this template while recording a raised issue or during a meeting to discuss an issue. You may choose to add or remove questions as needed.

Date issue received:		Person recording the issue:	
Person raising the issue		Name:	
Leave blank if they wish to remain anonymous.		Role:	

Meeting Details:

If you're using this form to take notes at a meeting.

Who's present at the meeting:	
Date:	
Location:	

What's the issue?

Use this section to raise an issue in writing or to take notes when discussing an issue during a meeting.

When did this issue start?	
Include dates and times	
Where did this issue take place?	
Who does the issue involve?	
Include full names and roles	
Details about the issue	
Include factual evidence i.e. what happened, what was seen, said or felt	
Some useful questions:	
<ul style="list-style-type: none">• What happened?• How did this happen?• What did you witness or experience? What did the other person say? What did you see? How did it make you feel?• What else may be contributing to this issue?	

What are the possible solutions?

Include:

- Solutions that are proposed
- Who would be involved
- What impact this solution will have on the people involved and/or their volunteer role(s)

Some useful questions:

- What do you hope will happen now?
- What would be a good resolution to this issue?

Action Plan

If appropriate, complete the Action Plan table below. If not, use the space provided to write the actions that have been agreed.

What actions have been agreed?

Include:

- What needs to be done
- How will this be achieved
- By who
- By when
- How will everyone involved be kept informed

Some useful questions:

- Who needs to do what next?
- When will that be reviewed?
- What happens if the action plan isn't followed by one or all parties?

Action	Who	By when	Is any help required?