

Tool 5c: SBLT Note-Taking Template & Sample Agenda Item Tracker

Purpose

An important role identified in [Tool 1a](#) is that of note-taker. In this role, an important step is to discuss with the SBLT the method that the team will be using to document their time together. Establishing a system that will provide members of the SBLT to access notes between meetings as well as a tool for communicating with key stakeholders is essential.

The [SBLT Note Taking Template](#) is an optional tool designed to help teams document their work as well as provide a tool for communication for members that were unable to join the meeting. As a team, the SBLT should determine where notes will be stored (e.g., shared drive, google doc., etc.) and who will have access (SBLT, entire staff, etc.).

The [Agenda Item Tracker](#) portion of this tool is optional, but is meant to provide a coherent system to account for, track, and monitor action items from each SBLT meeting. Some of these action items should be connected to focus groups identified in the SIP.

Although these specific templates and tools are optional, schools should have documentation of their SBLT agendas and meeting notes.

When to Use

The SBLT member who has the role of note-taker may use these templates during meetings.

How to Use

For the Note-Taking Template

1. Have your SBLT decide the following questions:
 - How are we going to record our notes/agenda items? Will we use this template on paper? Electronically?
 - Where will notes/agenda items be stored after meetings (Google document, shared drive, etc.)?
 - Who will have access to documentation? SBLT members only, the entire staff, others?
 - How will the SBLT communicate the documentation plans to the school?
 - How will notes/agenda items be amended or changed when necessary?
2. Once these questions have been answered, download and use the [Note-Taking Template](#) from mmsd.org/sblttoolkit and share your notes as you decided above.

Next, track the status of your agenda items in the Agenda Item Tracker and share this information as you decided above.

1. During the SBLT meeting when appropriate, reflect on actions or agenda items that should be taken care of based on your discussion. You can download a Google Sheet version of the [Agenda Item Tracker](#) at mmsd.org/sblt.
2. Discuss what actions SBLT members should undertake after leaving the meeting.
3. For each possible item, identify an Agenda Item Lead who is the SBLT member primarily responsible for moving that agenda item forward.
4. Next, determine if a decision was made (this is applicable to logistical type school decisions) and/or the connection of that agenda item to the SIP.
5. Indicate a Starting Date for the agenda item, and then identify action steps to move the item forward.
6. Return to this document at subsequent SBLT meeting to identify progress made on the agenda item, and to identify next steps.
7. If needed, provide additional notes for the agenda item.

If you do not plan to share your agenda item tracker or notes and protocols from [Steps 6-8 \(Data Analysis](#)

Protocol, Root Cause), consider reflecting these activities in the notes you share.

Note that you may not need to record every detail and comment from the meeting in the notes or the agenda item tracker.

Mandatory Versus Flexible: SBLT Toolkit

Mandatory	Flexible
Notes should be taken at SBLT Meetings	<i>The format of these notes is flexible</i>
Agenda items should be tracked	<i>The format of tracking these action items is flexible</i>