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## **Initial Action at Incidents in Schools** - professional note taking

# Initial Action at Incidents in Schools

## - professional note taking

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Custom Training Network has prepared this document to describe and provide training in investigation. It will help investigators and managers, including criminal and corporate investigators and the general public, to understand, and apply professional investigative techniques to the investigations they undertake or oversee. Individual investigators and the organisations they work for are responsible for making local decisions, including compliance with any applicable statutes or regulations.

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Initial Action at Incidents in Schools  
- professional note taking

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# Contents

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Objectives .....	2
Introduction .....	2
Contemporaneous Notes .....	3
Why Take Notes.....	3
How to Make Notes .....	4
Errors .....	5
The Don'ts of Making Notes.....	5
Adopting Notes.....	5
Post Incident De-brief .....	6
Sketches / Diagrams / Photographs.....	7
Notes at Court or an Inquiry .....	8
Safety .....	9
Filing and Auditing .....	9
Conclusion .....	9

## Objectives

To provide the participant with the ability to:

- Explain Why Notes are Needed
- Be Able to Compile and Store Contemporaneous Notes
- Demonstrate Professional Note Taking

## Introduction

The importance of notes to a teacher conducting an investigation cannot be underestimated. Without professionally taken notes the teacher will be open to criticism in a court or an inquiry and will lack credibility. To compile professional notes is a simple task however inexperienced investigators seldom realise the importance of them and how they assist the investigator to maintain their credibility.

## Contemporaneous Notes

If we compare notes against memory we know that

“The  
shortest note  
will outlive the  
longest memory”

## Why Take Notes

When giving evidence in court or an inquiry it is wise to remember:

**Good** notes = **good** credibility

**Great** notes = **excellent** credibility

Notes form the basis of all investigations no matter how big or small. In order for them to be properly compiled they MUST be made either:

At the time or as  
soon as practical after.

## How to Make Notes

When compiling Notes, what MUST they be?

Detailed !!! and include?

Times, Dates, Places, Names & Addresses,

Contact Numbers (home, work and mobile).

If we are writing down a conversation either we had with someone or another person had with someone else and use the "I said, ....." "He said, ....." format what is this known as?

Direct conversation.

What else can we write about?

Actions Taken, Demeanour of the person responsible for the incident,

Gather intelligence on the suspect and the type of incident.

Can we write our notes in Pencil?

No!!

If no what would you write them in?

Pen !!

## Errors

In order to leave errors legible so they can later be read and explained what do we do?

Put a line through the error. Initial, time and  
date the error.

## The Don'ts of Making Notes

- Don't leave blank lines.
- Don't leave unnecessary spaces (slash if needed)
- **Don't write between lines!**

## Adopting Notes

When two people work together it is common practice for only one to compile the notes in collaboration with his colleague. So that the person not making the notes can refer to them in court they should adopt them. In order to do this they should firstly read them and if they agree the notes are true and correct they should:

- Sign on the last line,
- sign each page,
- initial mistakes,
- time and date the signing of notes,
- if someone has a different memory write it down and
- explain why.

## Post Incident Debrief

If we can't take our notes "at the time" then we must make them "as soon as practicable after". One of the best ways to do this is by a Post Incident Debrief. All staff members involved in the incident should have a meeting as soon as possible after regardless of how many were involved. In its simplest form this can be done:

In any office or classroom after the incident has been resolved or even in the school yard. Anywhere that the staff members can compile their notes is suitable.

If we have a number of people involved in the incident then who must attend the debrief?

Everyone!

What will they all do at this debrief?

Discuss and compile their notes.





## Sketches / Diagrams / Photographs

If a sketch or a diagram leaves a big blank area in your notes what should be done? Would you put a pen slash through the blank area to prevent a later allegation at court that you left spaces to add extra notes in later?

Yes / No ? Answer – Yes.

Should notes of the time and date the photographs are taken, who took them and a description of what is being photographed be made as the photographs are being taken?

Yes / No ? Answer – Yes.

Do sketches / diagrams / photographs help create an accurate “word picture” of an incident if used in conjunction with handwritten notes?

Yes / No ? Answer – Yes.

## Notes at Court or an Inquiry

In order to use notes when giving evidence in the witness box they must be proved to be:

- **Contemporaneous**
- **Accurate**
- **Needed**

We now know that contemporaneous means “at the time” or “as soon as practicable” (while the incident is still fresh in the memory). Accurate is self – explanatory.

If you find yourself in a court there are rules regarding when you can refer to your notes. If you are in the witness box giving evidence then the court will only consider them to be needed when your memory is exhausted and you have gaps in your memory. A witness does not have an automatic right to refer to their notes when giving evidence in court. Fortunately this is not the case when dealing with parents or making decisions about breaches of codes of conduct within companies and schools.

## Safety

When dealing with a volatile incident that may result in injury to a student or teacher taking notes should come second to safety. You put yourself at risk if facing a violent student and trying to take notes at the same time. Common sense should always prevail and safety put first.

## Filing and Auditing

Finally, what use are notes if once written you cannot locate them. If you are a government department then there are varying requirements for government documents (including notes) to be kept according to the Public Records Act. Sometimes however the Public Records Act allows notes to be destroyed within a time frame less than 7 years. This can be a problem due to the statute of limitations for civil action being 7 years. A method of filing and auditing notes is essential for any organisation involved in investigation.

## Conclusion

Taking notes is a simple but vital skill for an investigator. The problem with notes is not learning the skill but rather having the correct attitude to taking them. A professional attitude to note taking is essential to conducting a successful investigation and subsequent prosecution.