**MDRT Survey Information Sharing – Policy**

**MDRT Executive Committee** – The Executive Committee will be provided the following for all surveys:

* Executive Summary documents created by 3rd party researchers – specific results by demographic criteria will be included in this summary.
* Summaries/categories for verbatim comments, including a sample comment for each category.
* Speaker Scores and summary of verbatim comments, for speakers.
* Annual Meeting comparison document – includes ranking and 1975 - present comparisons.
* Raw survey data and information on individual’s responses will not be shared.

**Incoming PDC**

* Summary documents created by 3rd party researchers – specific results by demographic criteria should be included in this summary. Should not include specific speaker ratings.
* Summaries/categories for verbatim comments, including a sample comment for each category.
* Raw survey data and information on individual’s responses will not be shared.

**Outgoing PDC**

* Summary documents created by 3rd party researchers – specific results by demographic criteria should be included in this summary. Should not include specific speaker ratings.
* Summaries/categories for verbatim comments, including a sample comment for each category.
* Raw survey data and information on individual’s responses will not be shared.

**MDRT Staff**

* A paper version of the tabulated survey results will be shared with Executive staff and staff research team.
* Other staff may see any part of a survey upon request to MDRT Research Manager with Member Services Director approval.
* Staff are not permitted under any circumstances to directly distribute any information from the survey (summary or verbatim) to members. All information sharing is to come from the Research Manager. This sharing or distribution requires approval from the Member Services Director.

**MDRT members at large**

* Any questions regarding surveys should be reviewed by the MDRT Research Manager and presented to the Member Services Director to determine if appropriate to share.
* Raw survey data and information on individual’s responses will not be shared.

**Groups outside of MDRT (Companies, Publications/Press)**

* Raw survey data and information on individual’s responses will not be shared.
* Information will only be presented as trend data (i.e. 26% of MDRT Annual Meeting attendees were interested in attending presentation topics on succession planning).
* Any information shared must be approved by the Member Services Director, Marketing and Communications Director, CEO, and Executive Committee.

**MDRT Staff that is authorized to approve information sharing:**

**CEO –** May approve any information sharing, must approve and be aware of all information sharing outside of staff.

**Member Services Director –** Must approve any information sharing.

**Research Manager –** Must approve any information sharing.

**Marketing and Communications Director –** Must approve any information being shared with industry contacts or publications that could affect MDRT’s brand, image or messages.

**Delivery Method:**

* Survey documents will be distributed electronically to the Executive Committee in PDF format.
* Survey documents shared with committees will be provided in hard copy and will be gathered back at the end of the discussion.
* Survey documents shared with staff will be provided in hard copy.
* Survey documents will be accompanied by a cover sheet or email that includes a statement regarding the confidentiality of the contents.