

Reporting and Recommendations Overview

Reporting

It is the responsibility of all committee liaisons to ensure that all reports are accurate and completed according to the MDRT Monthly Reporting Schedule.

Four important documents must be generated during the committee year.

1. Committee Meeting Summary (Staff writes)
2. Committee Report 1 (Chair writes; GCM comments optional)
3. Committee Report 2 (Chair writes; GCM comments optional)

Recommendations

The Leadership Team (Executive Committee Liaison, GCM, Chair and Staff Liaisons) **MUST** be in agreement.

Recommendations are made for:

- Policy issues
- Major procedural change
- New projects within the scope of the committee but not a current charge/assignment
- Budget: Direct cost or financial implications

Recommendations are **NOT** something outside the scope of the committee. Recommendations outside the scope of the committee should be referred to the appropriate committee by the Chair or GCM.

Recommendations Key Questions

- How does the recommendation benefit the membership?
- What alternatives were discussed?
- Why the committee feels this was the best decision?
- What are the implementation steps and timeline?

Recommendations & Finance

DO NOT send a recommendation to Global Council or the Executive Committee if it impacts the budget without **FIRST** sending it to the MDRT Finance Committee.

ALL unbudgeted requests must first be sent to the Finance Committee for review/approval for any amount \$500 or \$50,000+

The Finance Committee can approve requests for \$10,000 or less. Requests of \$10,000 or more must also be approved by the Executive Committee.