

call to order

Reports

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Many organizations have reports from officers on their meeting agendas, for example a *President's Report* or *Treasurer's Report*. It is also not uncommon to have reports from committees such as a *Report of the Audit Committee* or *Report of the Special Committee on Siting a New Jail*. Further, a consultant may provide a *Space Needs Study Report* or an auditor, the *Audit Report*. What is the common mistake made at these meetings with reports on the agenda? *Adopting the Report*.

Reports from officers, department heads, committees, and consultants should not be approved or adopted. The report may make policy statements or recommendations that are not the position of the board and the board is in no position to amend the report because the report is just that – a report. Adopting a report leads to confusion. The expectation is that the body is in agreement with everything stated in the report and that recommendations may be enacted. The appropriate action is for the presiding officer to simply acknowledge the report and thank the presenter. The minutes can reflect the report was given.

The expressions “adopt,” “accept” and “agree” are all equivalent in terms of parliamentary procedure and should be avoided. Adopting a report has the effect of the body endorsing every word of the report, every fact, the reasoning, every conclusion, and every recommendation.

Another common mistake is to move that the report “be received” after it is given. This motion is meaningless since the report has already been received. The same can be said for a motion “to accept,” which further implies that the body has endorsed or agrees with the entire report.

Audit Reports are detailed reports conducted by certified public accountants. Board members cannot be expected to know if the report is accurate when the report is presented. Therefore, the board should not be expected to vote on adopting the report.

The purpose for having the audit report is for the auditor to provide the financial statements so that board members are apprised of the financial condition of the entity. The *Audit Report* may lead to motions or resolutions such as revising the investment policy, adding more controls, layoffs, etc. Reports often lead to motions or resolutions enacting recommendations from the report.

The only justification for adopting an entire report is if the report is to be published in the name of the whole organization.

Do not confuse informational reports with reports that require action. A *Claims Report* may be claims against the county for cracked windshields resulting from mowing operations or for tire damage due to potholes, or any other request for damages. These types of reports require action.

I am not asking anyone to adopt my report or article, just to read it.

Source: *Robert's Rules of Order Newly Revised, 11th Edition*