**Society of Actuaries (SOA) Research Institute’s Emerging Issues Research Pool**

**Application Form**

**Eligibility: Eligible applicants to the Emerging Issues Research Pool include researchers/organizations independent of the SOA and SOA entities (research committees, sections, etc.), that do not otherwise have access to funds through one of the Strategic Research Programs. Strategic Research Program Steering Committees should first seek funding through program channels prior to contemplating an application to the Emerging Issues Research Pool.**

**Applicants should complete the information below. If appropriate, you may refer to specific portions of your research proposal for any of the application items.**

**Submission: Please e-mail the completed Word document application to** [**REC@soa.org**](mailto:REC@soa.org)**. Alternatively, you may save and e-mail the completed Word document as a .pdf file. Please also e-mail the full research proposal for this application, if appropriate.**

**Review: Applications will be reviewed by the Research Executive Committee and other experts. Please review and answer the selection criteria at the end of this application before submitting this application. Please be sure to answer the criteria questions in that section of the application with sufficient detail and explanation**. **The answers form the primary basis for evaluating the application and proposal.**

Background Information: Please note the reviewers of this application have varying actuarial backgrounds and subject matter expertise. It is helpful to include a brief explanation/context related to the topic and proposed research with the varying backgrounds of the reviewers in mind. This should include an introductory paragraph(s) describing the topic for a reviewer unfamiliar with the area of practice under consideration.

**Questions may be directed to** [**REC@soa.org**](mailto:REC@soa.org)**.**

**Contact Information**

|  |  |
| --- | --- |
| Applicant (entity name) |  |
| Contact Name of Applying Entity |  |
| Contact Phone number of Applying Entity |  |
| Contact email address of Applying Entity |  |
| Brief title of proposed research |  |
| If specific researcher identified: |  |
| Name of Researcher |  |
| Contact Phone number of Researcher |  |
| Contact email address of Researcher |  |

**Budget and Funding Details**

1. Please provide detail on how the budget was developed:
2. Please provide the following funding details-

Total anticipated funding needed:

Amount from Pool Requested:

Amount already committed from other sources – please give detail

Additional amounts to be raised from other sources – please explain what the prospect of funding might be, if known

**Prior Submissions to Other SOA Entities**

Was this proposal submitted to other SOA entities (Sections, other Research Programs/Committees) for consideration? If yes, please list the entities.

**Application Details**

1. Please provide a brief research description, including any information on expected scope, anticipated deliverables, etc. Please also e-mail the full research proposal for this application, if appropriate. Please note the reviewers of this application have varying actuarial backgrounds and subject matter expertise. It is helpful to include a brief explanation/context related to the topic and proposed research with the varying backgrounds of the reviewers in mind. This should include an introductory paragraph(s) describing the topic for a reviewer unfamiliar with the area of practice under consideration.
2. To better ascertain the uniqueness of the proposal and where it would fall within existing research in this area, please describe (and list, if appropriate) existing literature that has been considered or reviewed in the course of preparing this application. In terms of existing literature, please further describe what differentiates this application from other efforts and how it supports the project’s purpose.
3. At what phase in the development process is the research?

\_\_\_ Idea generated

\_\_\_ Soliciting for a researcher (RFP issued)

\_\_\_ Considering a specific proposal

\_\_\_ Other (specify)

1. Describe the anticipated management and review process and the steps taken to implement that process.
2. If this application is from an SOA entity and at the RFP stage, does the entity have a qualified researcher or a group of researchers to be solicited for proposals in mind? If so, why is the researcher or group of researchers being recommended?
3. What is the expected length of time needed for the project? What is the expected completion date?
4. Is the completion or funding decision of this research time-sensitive because results need to meet a certain deadline or if available resources (ex. Graduate student availability, other work commitments, etc.) will be impacted? Please explain.
5. Describe the intended audience(s) including actuarial and non-actuarial:
6. With which practice area(s) or sections is this application most closely aligned?
7. To which country(ies) will the project have the most appeal? Provide any additional comments about this project crossing national boundaries.
8. Are other non-SOA partners beyond the applicants involved in the project (data, other resources, etc.)?

Please e-mail documentation as necessary.

**Criteria for Selection and Funding by the Emerging Issues Research Pool**

The REC has established 5 criteria for evaluating applications for selection and funding from the Emerging Issues Research Pool. Please describe how the application meets each of the following criteria. Applications are scored for each of the criteria with the respective weights.

1. **Impact:** What is the impact of the proposed research to the actuarial profession? Why will the research be deemed as significant in investigating current events and emerging topics for actuarial practice areas?Weight = 50%
2. **Cost-Benefit:** How is the total budget for the proposed project in line with desired outcomes? How does the research add value to the profession? Weight = 20%
3. **Uniqueness:** How unique is the proposed application to meet its objectives? Weight = 10%
4. **Viability:** How viable is the proposed project considering available researchers and data? Weight = 10%
5. **Quality:** What actions have you taken or plan to implement to ensure that the expected outcome(s) will be of high quality? Weight = 10%