



Volunteer Editor's Resource for Newsletter Excellence

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Dear Newsletter Editor,

Welcome to the Volunteer Editor’s Resource for Newsletter Excellence (VERNE). This publication has been developed for you, our section newsletter editors—both seasoned and new—who give your time and talent to ensure that the membership of your section receives a quality newsletter filled with important and relevant information about your individual section and the actuarial profession in general.

This handbook provides a detailed blueprint of how to efficiently and successfully guide your newsletter from start to finish. It also includes information on topics such as the roles of volunteers and Society of Actuaries (SOA) staff members, the overall production process and newsletter best practices. In addition, this document addresses specific details such as the importance of adhering to production schedule dates and securing permissions, and the editing and proofing process that the SOA staff editors perform.

We are delighted to be working with you on your section newsletter and hope that the information contained in this handbook provides practical and purposeful knowledge you can use when working on your next issue.

Many section surveys have shown that section members are highly satisfied with and see great value in section newsletters.

Thank you for taking the time to review this document so we continue the excellence.

Kind Regards,
The SOA Publications Staff

Roles and Responsibilities

Volunteer Editor

- Solicits potential authors and article topics along with section council members.
- Organizes and **reviews content for accuracy** as the **subject matter expert**, or alternatively, solicits feedback from another volunteer subject matter expert, and if necessary, provides feedback to authors.
- Collaborates with SOA staff editor regarding edits and works with SOA staff editor to publish articles on behalf of the section, based on the publication schedule.
- Provides updates to section council as needed.

SOA Staff Editor

- SOA staff editor copyedits articles for **style** (Associated Press and SOA style), **punctuation**, and **grammar**; oversees the scheduling and production; and serves as the point of contact.

SOA Staff Actuary

- SOA staff actuary serves as the **secondary** subject matter expert and reviews content for public policy implications and/or controversial material (see Controversial/Political Topics section below).

SOA Engagement Specialist

- Provides process guidance for section newsletter editors or additional resources if needed.
- Coordinates with volunteer editor to provide “teaser” information each article/issue; used in the issue’s table of contents.
- Coordinates providing email copy for section newsletters for distribution to section members.

Managing Content

Volunteer editors will review first drafts for suitability for the publication and provide feedback to the author by:

- Accepting the article as is (extremely rare, but it does happen).
- Providing recommended edits if necessary.
- Recommending rewrites to improve portions (e.g., some arguments not well-supported, some aspects unclear).
- Rejecting the article (by finding a polite way to reject the article and possibly suggesting a more suitable publication). This applies when the quality or level of sophistication does not match the readership or when the topic is not directly relevant to the publication.

Things that will contribute to an article being excluded from a publication include but are not limited to profanity; derogatory slang terms; bias in presenting research; political views; and negative statements about a fellow actuary, the profession or other actuarial organizations.

It is important to remember that the section newsletter **represents the entire SOA** and not just a specific section. As a general rule, you should keep in mind the usability of the content for its intended audience.

Please read the SOA's Author Guidelines for Section newsletters and send the link to authors after you have recruited them and before they begin to write: <https://www.soa.org/publications/writing-ops/section-author-guidelines/>

Controversial/Political Topics

Some topics are more controversial than others. When presenting a controversial viewpoint, it may be appropriate to include a counterpoint piece in the same or subsequent issue. SOA staff make every effort to allow the full expression of the newsletter contributors. However, we reserve the right to modify or amend articles as part of the publication process in the interests of preserving the SOA's brand identity and serving the mission of the organization. Although rare, this could include the exclusion of some submitted material. In such a situation, you and an author will be notified as soon as possible.

Public Policy

Newsletter content may be considered to have public policy implications. Determination of public policy implications can occur at any point prior to publication. Articles determined to have public policy implications undergo an additional review process. The review process includes several additional sign-offs beyond sign-off by the SOA staff actuary. Our public relations and governmental affairs consultants review as well. The purpose of such reviews is to ensure the article content adheres to the SOA's objectives to provide unbiased information that informs actuaries about public policy. Throughout the public policy review process, we may request edits to the article to ensure we keep to the SOA's objective, and in rare instances, decline to publish.

Number of Articles Per Issue and Article Length

- We require a two-article minimum per issue to publish, and we prefer one to be educational/substantive.
- Articles may be 2,500 words. The SOA staff editor may suggest breaking longer articles into two parts. An article longer than 2,500 words runs the risk of losing the readers' attention.
- Generally, there is a three article per issue limit; an occasional fourth article will be allowed. You may contact your SOA staff editor about content allowances.
- Issues of only one article are not permitted.

Production Schedules and Deadlines

To edit, produce and deliver the section newsletters on time and effectively use SOA resources throughout the process, the SOA annually develops a section newsletter production schedule.

Volunteer editors will receive from the SOA staff editor:

- A production schedule with various steps and key deadlines with dates.
- A three-month content due reminder with the submission deadline for articles.
- A one-month content due reminder.
- A follow-up email the day after the initial content due deadline if content not received.
- The production schedule includes a "final extension deadline," which is two weeks past the initial content due deadline.
- Content received after the final extension deadline will be saved for the next scheduled issue.

Metadata and License Agreement

We ask volunteer editors to ask SOA section newsletter authors to complete a metadata form and copyright licensing agreement.

- Metadata: <https://soa.wufoo.com/forms/z1wixcsf1eyl47u/>
- License agreement: <https://soa.wufoo.com/forms/r1evetau15pek6q/>

The metadata form requests an author's name, title of the article, a brief description of the content, key words and topics that define and/or explain an article. Asking your authors for this information ensures that visitors to the SOA website will find articles easily and quickly.

The Metadata form is for the author's benefit. It allows search bots to find the article more easily.

The SOA's copyright license agreement asks authors to verify they have not plagiarized and they are the original author of the article. It also gives the SOA the right to publish the article; it does NOT ask for copyright surrender.

Author Assistance

If an author you are working with has questions about the writing process or is looking for helpful hints, please refer them to the SOA's Author Guidelines (mentioned previously):

<https://www.soa.org/publications/writing-ops/section-author-guidelines/>. Volunteer editors should be familiar with the information in the Author Guidelines.

SOA's AI-created Content Policy

Authors are required to take responsibility for all AI-generated content. AI-based tools and technologies, including but not limited to, large language models (LLMs), generative AI, and chatbots (i.e., ChatGPT) cannot be listed as an author. Authors are required to acknowledge where AI tools are used, document the AI-generated content accordingly, and continue to sign Society of Actuaries publishing agreements.

Reprinting Articles and Other Content

Inform your staff editor upon content submission if any article has been previously published or if any reprinted material is contained in an article.

- **Permissions:** Authors will need to secure permission for any material (extended text, charts, tables) taken directly or slightly adapted from an outside source.
- In general, use reprinted articles judiciously. Original articles are preferred. An exact replica of a figure or table from a previously published item requires reprint permission. **Note: Permission to reprint information from non-SOA publications can take months to secure.**
- All material on the Internet is copyrighted and cannot be reprinted without permission from the copyright holder. Material that has been only slightly adapted and is clearly a derivative of the original source will also need reprint permission from the copyright holder.
- The copyright owner can usually be determined by scrolling to the bottom of a webpage. Most websites also post guidelines for securing reprint permission and often indicate the wording that should be used when crafting a permission line to accompany the reprinted material.

- If the copyright holder does not indicate specific language for the reprint credit line, you may create one using standard bibliographic information. For example, “From R. Frasca, All Great Things, copyright © 2000 Wiley. Reproduced by permission.”
- When using data from elsewhere within text or to create a new table or figure, a credit line to the original source will suffice (i.e., reprint permission is not needed).

Anonymous Articles

The SOA does not publish anonymous articles. All articles must include a byline from the appropriate author or coauthors. Articles submitted anonymously will be returned to you, requesting that a byline be added.

What to Submit

- **Article:** Send articles as a Word file (no pdfs). Include article title, byline, author bio and a 30-word description of the article that gives readers a hint of what your article covers, to be used in the issue’s table of contents. Articles should adhere to the 2,500 word limit. Author bios should include credentials, job title, company, and email address of each author. SOA style author byline example: Carolyn Turcot, FSA, is chief insurance officer at Actuaries Business Place. Carolyn can be contacted at cturcot@ABP.com.
- Ask authors not to insert images into the Word document. They should use comments to indicate image placement in the article. (i.e., insert Table 1 here)
- Ask authors to create charts or tables in PowerPoint, Word, or Excel. Authors must submit **original files** used to create the charts and tables.
- Inform authors that equations should be created directly in the article file using the Word equation editor or a Word-compatible equation editor such as Math Type. This will keep all the equations properly aligned, sized, and placed in the text even when other changes are made during the editing process.
- Inform authors that section newsletters use endnotes instead of an alphabetical reference list. Notes should be numbered sequentially in accordance with their appearance in text. If a source is used more than once, it is listed again with a new number—i.e., note numbers are never repeated. Text citations should be the endnote number in brackets, such as [1].
- **Images:** All images submitted with articles will undergo a review process for content and technical specifications. To ensure quality, all images need to be 773 pixels at **125 dots per inch (DPI)** and in color. Author submitted photos can only be used as secondary images; NOT main (hero)images. Group photos or interview photos can only be used as secondary images; not main (hero) images. They **must** be 400 pixels wide saved at 125 DPI in .jpg or .tif format and should also be professional subjects/poses. Color pictures are preferred as they create crisper images. (Stock images are provided by the SOA professional design staff. No cartoons, drawings or clip art will be used.
- Reprint permission, if applicable.
- Metadata: <https://soa.wufoo.com/forms/z1wixcsf1eyl47u/> and License agreement: <https://soa.wufoo.com/forms/r1evetau15pek6q/>

Publishing to *SOA.org*

Step 1: The volunteer editor sends content to SOA staff editor for copyediting. SOA editor sends to staff actuary.

Step 2: Articles will be reviewed for suitability for the publication by a staff actuary. If OK, copyediting by an SOA staff editor takes place. Things that could happen during this phase:

- **Edits**—The SOA staff editor recommends edits.
- **Rewrite**—The SOA staff could request rewrites.
- **Rarely, publication declined**—Though infrequent, this might happen, based on topic relevance, controversial content, or level of sophistication, i.e., academic or more suitable for an academic journal such as the *North American Actuarial Journal*.

Step 3: The Web Department shares the layout with the SOA staff editor and SOA graphic designer. The staff editor sends it to volunteer editor(s) and author(s).

1. Private publication on a staging site is shared with volunteer editor(s) and author(s) through a link provided by the SOA staff editor.
2. Correction(s) from author(s) or volunteer editor(s) are shared with the SOA staff editor.
3. A link to an updated article is resent to author(s) and volunteer editor(s) for verification that correction(s) have been made and the article is ready to publish.

Step 4: Once all issue articles are published on *SOA.org*, the SOA Marketing Department will create, schedule and distribute the newsletter email to the section members.

Questions

Volunteer editors may address questions to the Engagement Specialist who works with your section or the SOA Staff Editor for your newsletter.