A Guide for Project Oversight Group Members

Introduction

We are very grateful you have agreed to serve on the project oversight group (POG) for this effort, and sincerely appreciate the time and effort you are willing to devote to it. Your work experience and specialized knowledge will be invaluable to the researchers and the Society of Actuaries (SOA) as we all work together to produce a high-quality product that the profession can be proud of. One of our primary goals is to conduct research that contributes to the intellectual capital of the actuarial profession and advances the overall knowledge base. For many projects, the objective is to provide practical information to actuaries—and those in related fields—that can be applied in daily work. In other projects, the objective may be to further the dialogue on a topic of importance to many stakeholders including the general public. Finally, other projects may be focused on an issue that seeks to inform public policy. In all of our efforts, it is our hope that the research will bring positive recognition to the SOA, the actuarial profession, and those outside the profession who contribute to it.

Getting Started

Please think about what you can bring to the POG that will enrich this particular research effort. An advantage of the POG approach is that we can combine our skills and talents to create something better than any one of us could produce in isolation. Some individuals may have strength in statistical methods; others may bring business knowledge; and some may help shape the research project into a well-written report that does justice to the research itself.

Depending on the topic, it may be beneficial to do some reading on your own to get up to speed on prior research concerning the same topic or similar subjects. You may wish to speak with and gain insights from colleagues and contacts you know who are also experts.

Conference Calls

As a member of this POG, you will meet by phone several times over the upcoming months with the research team selected for this project, SOA staff, and your colleagues on the POG. We encourage you to attend each meeting and contribute to the ongoing work of guiding the research project by preparing prior to and contributing during these calls. We understand there may be times when your schedule does not permit your attendance. An occasional missed call is not a problem, and you may contribute by providing feedback at any time during the effort as your schedule permits. Typically, you will have several business days to prepare in advance of each call. However, there may be times when material is distributed close to a POG conference call. This will be acknowledged during the call and the discussion adjusted to allow further time to review.

Responsibilities

In partnership with the researcher(s) and SOA staff, the POG's responsibilities include some or all of the following (not all efforts will require all of these activities; for example, a POG may be recruited after a research team is hired):

- Develop the topic, objectives and goals of the research project.
- Draft solicitation documents—Request for Proposals (RFP), Call for Papers (CFP), etc.
- Work with SOA staff to evaluate proposals and select researcher(s).
- Attend and participate in periodic conference call meetings. Provide guidance in the form of insights, experience, expertise and knowledge.
- Help the project proceed in a timely manner by being responsive and cognizant of deadlines.
- Ensure the research material meets the quality standards—both from an overall quality perspective and per the terms of the contract with the research team—and determine whether payment conditions have been met.
- Provide any other research process ideas or suggestions to ensure a high-quality outcome.
- Advise on the most appropriate forms of dissemination of the results.
- Consider acting as a spokesperson to help the resulting material further reach desired audiences.
- Proactively raise concerns about the quality of the project work or other matters either on a POG conference call or, if more appropriate, in private communications (email, phone calls) with staff and the POG chair.
- Work with staff to determine options for communicating areas where you have a differing opinion than the final research material, such as a separate document written by members of the POG.
- SOA research efforts are a collaborative endeavor, and differing viewpoints are welcome and encouraged. POG members are considerate of the opinions of other members, and a respectful dialogue can promote synergies that vastly improve the ultimate work. On the other hand, personal diatribes and attacks have no place on a POG.
- Think about how the research and resulting material may support other SOA activities such as continuing education, examinations and meetings.
- Evaluate and document to what extent your involvement on the POG has qualified for continuing professional development (CPD) credit.

What a POG member does not do:

- Essentially, a POG member acts as an adviser on the project. This is a distinct role as compared to the research teams who are the ultimate authors. In matters of disagreement on content, the research team in its author role has the final decision on what appears in reports, etc. SOA staff is there to help resolve any disagreements over content.

- The primary focus of a POG member's review is on the appropriateness of the content and not the grammar or style in which it is written. SOA staff includes copy editors to ensure a polished product. However, copy-editing suggestions are always welcome.
- A POG member should not share draft material outside of the POG, unless permission is requested in advance and the project would benefit from such sharing of material.
- Unless otherwise noted, POG members represent only themselves and not their employers.

Volunteer Agreement

To maintain our goal of thorough and objective research, we ask each POG member to complete the SOA Volunteer Agreement form. The form covers important topics such as maintaining confidentiality, disclosure of any conflicts of interest, recognizing the SOA's ownership of work products and complying with antitrust laws. This greatly assists us in keeping the integrity of our projects.

POG Chair

One ingredient of a successful POG is having a conscientious chair of the group. The POG chair helps to lead the conference calls, works with SOA staff to resolve issues, and acts as the primary volunteer contact for the effort. Being a POG chair is a great way to either gain leadership experience or to champion an effort that is of particular professional interest. All POG members are encouraged to consider becoming chairs should the need arise.

Thank You!

Thank you again for your participation. Please read the attached pledge confirming your commitment to serve on this POG.

PLEDGE

I agree to serve as a member of the project oversight group for this effort.

_____

Throughout the course of the project, I will plan to attend meetings and prepare in advance, as my schedule allows.

In an effort to work collaboratively, I will contribute appropriately during meetings, and, if necessary, between meetings as well. I will assist the chosen researcher(s)— they are ultimately responsible for conducting the research and writing the report. I will respectfully provide professional guidance and assistance, and I will provide feedback and suggestions constructively and work together toward our common objective.

During the course of my participation, I will not use this volunteer experience to obtain data, information, models or tools for personal advantage, or the business advantage of my employer, prior to their becoming available in the public domain.