September 2014
CAS Working Party Manual

What Are Working Parties?
Under the leadership of members of CAS Research Committees, working parties are collective volunteer groups with the specific goal of producing a research product, such as a written paper or demonstration software within two years.[1] If the work cannot be completed within two years, the Working Party may ask for a one-year extension with approval by the Vice President – Research and Development as long as substantive progress has been made. They should produce cohesive, accessible material in a consistent format through the collective, controlled nature of the process. Working parties should help the CAS effectively address long-standing research problems and harness the creative energy of individual researchers.

Working parties are open to all interested researchers, and both CAS members and non-members are invited to participate. They have proven to be effective research mechanisms for GIRO, the general insurance research organization of the Institute and Faculty of Actuaries (UK).

Process for Developing Topics for Working Parties
Working party topics are typically created by research committees, or the Vice President – Research and Development, as they can best identify the problems of current importance and have access to the resources that best address those problems. While it is recommended that two committee members lead a proposed working party as co-chairs, it is not necessary.

Topics for working parties should be fairly narrow in scope and clearly defined. Working parties are not effective bodies for addressing broad topics.

After a topic is selected, a charge for the working party is developed. The charge should include the potential goal that will be produced by the working party. Working parties can deliver a variety of end-results:
- Survey papers:
    - Can include an overview of research published to date on a particular topic
    - Can also be used as syllabus material
- "White papers" on emerging issues
- Compendiums of papers by multiple authors
- Studies of industry experience based on special data calls
- Presentation templates
- Software

Once a topic is developed, the working party must be approved by the CAS Executive Council. An action paper explaining the topics and goals of the working party must be submitted through the Vice President – Research & Development.

Announcing New Working Parties/Recruiting for Working Party Volunteers
There are three primary ways to announce new working parties and recruit volunteers to join:

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[1] The two-year requirement begins on the date of the Working Party's first call.

- E-mail announcements, including those to our social media outlets: Facebook, Twitter, Linked In.
- Headline posting in the "Featured Items" section of the CAS home page.
- Annual Participation Survey

Please note that the third option can only be used if the timing of the new Working Party matches up with the timing of the Participation Survey, which usually occurs in late summer.

Volunteers frequently come from the committee responsible for the oversight of the working party as well.

Working Party Administration
A CAS staff member is assigned to each working party as a liaison to assist with the administrative work. The CAS staff liaison can help with the recruiting of volunteers. Upon formation, the working party co-chairs should send the staff contact member the roster of people who volunteered to take part in the working party. At that time, the staff liaison can establish an e-mail distribution list for the working party and create a roster and web page with information about the working party on the CAS website. Additionally, the working party will be added to the CAS membership database to record volunteers' involvement and ensure that the working party is included in the CAS Yearbook.

The CAS staff liaison can also help set up teleconferences for the working parties. Web teleconferences are another way for working parties to share information in the form of presentations, papers, or other documents without actually meeting in-person. If needed, the CAS staff liaison can record minutes of teleconference meetings.

The Working Party Chairperson is also expected to complete the CAS quarterly Cycle Reports tracking progress.

Research Paper Template
A research paper template was created for papers published in the CAS *E-Forum*. All CAS working parties are required to use the research paper template when submitting their papers. The template is available on the CAS website.

Review of Working Party Papers
Working party reports are educational documents and not position papers. Therefore, an internal review by the working party should be sufficient for publication. A caveat stating that the reports are not subject to a formal peer review process should be included with the paper. In addition, there should be a statement that the reports are not official positions of the CAS. This wording is included as part of the research paper template that working parties are instructed to use for their reports.

The review process for CAS working party papers should include an internal assessment consisting of thoughtful critiques from working party members during the report's development. An editorial review should also be performed by the research committee that is overseeing the working party.

Publication Outlets for Working Party Products
Material should be posted on the CAS website as soon as it is available regardless of when the next publication will be printed. This practice will ensure that the information is disseminated to membership promptly.

The *E-Forum* should be used as an outlet for working party reports. The *E-Forum* is published on the CAS website several times per year, and working party reports should be submitted for the next available *E-Forum* after the report is complete.

The working party end-results should also be publicized in the *Actuarial Review,* which is published quarterly.

Meeting and Seminar Presentations of Working Party Reports
Working parties should host sessions at CAS meetings and seminars to present the results of their work. Sessions can consist of final reports or updates on progress.

The meeting/seminar planning committees provide space on their programs for research-related sessions. In addition, the CAS Regional Affiliates are always open to ideas for sessions. Working party chairs are welcome to contact the chairs of the program committees directly, or delegate the task to a working party member. The CAS staff liaison can help facilitate placement on programs. Working parties should be cognizant of the lead time necessary to be included on a meeting/seminar program, which is usually five to six months.

Another option for presentation of reports is membership-wide webinars. The Webinar Committee oversees these webinars. The CAS staff liaison can help facilitate development of these webinars by contacting the Webinar Committee.

Recognition of Working Party Members
Responses to calls for volunteers to join the working parties have been strong, with a few working parties receiving interest from more than 25 people. Most working parties do not turn away volunteers, but it is common to have some extremely active working parties members, and some who are not so closely involved.

If your working party includes members who have not contributed, there are a few steps that a chair can take in order to solicit contribution:
- Assign tasks to individual members. If members are given a task and don't follow through they will often resign on their own accord.
- Contact non-contributors to find out why they have not contributed.
- Ask perceived non-contributors if they have participated in ways that you are not aware.

As the working party nears completion, we suggest the following course of action in order to properly recognize the work of the volunteers:
- When a final draft of the work product has been completed, circulate the draft to the working party e-mail list.

- In the e-mail with the report, note that working party members will be given the opportunity to withdraw their names from the final work product should they disagree with the outcome, i.e., there is an aspect of the project that they cannot support.
- Working party members should voluntarily withdraw their name if they have not contributed to the final work product.
- Working party members who did not contribute and who do not respond to the e-mail will automatically have their name withdrawn from the final work product.

Situations vary from working party to working party, so chairs are welcome to handle recognition of members in a way that best fits their situation. We believe that it is important to give credit only where credit is due, particularly in an organization like the CAS which places a high value on the contributions of volunteers.