

RESEARCH GUIDANCE DOCUMENT

The purpose of this Guidance Document is to assist chairs of existing and future research groups or communities of volunteers within the CAS in determining the best organization structure for their groups. This document addresses groups or communities with the expectation of a final product or not, information-sharing groups or communities, event-specific groups or communities (linked to a professional education event), and open or closed-membership groups or communities.

[Approaches for Conducting Research](#)

Standing Committee

- Research Committees report directly to the VP – Research & Development. [General Provisions](#) for Research committees are found in the Chairperson’s Manual.
- Has a particular charge or description.
- Typically aligned along insurance product lines, actuarial discipline or particular area of risk.
- May have subcommittees that further define the charge or description.
- Reports quarterly through the cycle reporting system.
- Chair: 3-year term; vice-chair: greater than one-year term but less than three.
- May meet at least once a year. Has frequent calls.
- Membership is open to CAS members with non-members by approval of the chair.
- Volunteers are recognized in the CAS database.
- Acts as an umbrella group with projects or work assigned to subcommittees or working parties/task forces.
- Has own online community.
- Resulting work: Serves as a clearinghouse for ideas and provides oversight for related research groups under its umbrella yet may undertake specific research project if not assigned to another group.

Working Party ([CAS Working Party Manual](#))

- Focused specifically on an area of research that is undertaken by its members to be completed within two years.* May ask for a single one-year extension only by prior approval of the VP-Research and Development. Must show substantive progress before the extension is permitted. (Thus the work is completed within three years.)
- Its oversight is on the committee level. Working Parties may report directly to a Committee, the Research Oversight Committee or the VP-Research and Development.
- May have sub-groups.
- Provides frequent reports to its supervisory committee through the CAS cycle reporting system.
- Chair: term is length of the existence of the group; the Working Party may be led by co-chairpersons
- Membership is open to CAS members with non-members by approval of the chair.
- Volunteers are recognized in the CAS database.

- Final reports are encouraged to be presented at CAS seminars and meetings and published in the E-Forum.
- Has own online community.
- Resulting work: Final product is internally generated research report, paper or demonstration software as a collaborative effort of members that addresses the specific charge for which the Working Party was formed. (It may also prepare a final report recommending further research be undertaken by a Committee or new Working Party with a focus to prepare a research product or it may end.) Has a particular charge or description.

NOTE: In rare situations, a research Task Force, in lieu of Working Party, may be formed as a short-term exploratory group (work completed in less than one year), or a “rapid response” team to address a particular research issue that needs immediate attention.

Online Community

- Online Communities not tied to a specific research group listed above may form for information-sharing purposes.
- This may be a seed-bed for future research activities (e.g. RESNET for P&C Actuaries in Reserving.)
- Led by a volunteer Online Community Manager for two years whose role is to monitor discussion, explore new ideas as future research activities, and funnel such ideas to the Research Oversight Committee for consideration.
- Membership is open to CAS members and to non-members by approval of the Manager.
- Members of an online community must belong to another research group in order to be recognized in the CAS database, except for Online Community Manager. Still any CAS member may join without being recognized in the CAS database.
- Resulting work: Viable projects identified by the Online Community Manager should be pushed to the Research Oversight Committee, which can then determine the best place to accomplish the project.

* The clock begins to calculate the year to completion when the first conference call of volunteers is held or when the first communication assigning tasks is sent by the chair to the volunteers.