



# Publications Policy

The implementation of this policy is the responsibility of the Executive Committee, with the assistance of the Branding & Communications Subcommittee. This Publications Policy deals with all formal IAA Publications.

Responsibility for originating Publications could be that of the Secretariat or committees, sections or working groups. To ensure adequate oversight, both technical and editorial, and to ensure that they are appropriately communicated outside the IAA, this policy deals with the following categories of IAA Publications and their due processes:

## Categories of IAA Publications:

1. **Statutes and Internal Regulations.** These are the responsibility of the Secretariat, with approval by Council. The regulations include the principles governing codes of professional conduct and formal disciplinary processes. Compliance with these principles is a membership requirement for Full Member Associations, with oversight from the Accreditation Committee.
2. **Education Guidelines and Syllabus.** These are included in the Internal Regulations and are developed by the Education Committee and approved by Council. Compliance with these guidelines and syllabus are a membership requirement for Full Member Associations, with oversight from the Education Committee.
3. **Guidelines for Member Associations.** These include additional non-binding professionalism and educational guidelines, normally developed by the Professionalism and Education Committees respectively and are approved by the Executive Committee and ratified by Council. These guidelines are intended for the use of member associations.
4. **ASTIN Bulletin – The Journal of the IAA.** The Journal of the IAA publishes papers that are relevant to any branch of actuarial science and insurance mathematics and encompasses all of the scientific sections of the IAA. Published papers are subject to the editorial policy of the Bulletin.
5. **Congresses, Colloquia and Seminars.** These include Transactions of the International Congresses of Actuaries and the presentations and papers of section colloquia and other IAA seminars. These are all subject to the editorial policies of those congresses, colloquia and seminars. All such papers and presentations must clearly indicate that they are the work of the authors and do not constitute a formal IAA publication.

6. **Public Statements.** These include statements submitted to multi-national organizations, such as those dealing with regulatory, legislative, professional and investigative issues. These statements are normally developed by an IAA committee or working group, with oversight from the Branding & Communications Subcommittee and are subject to Due Process for Making a Public Statement.
7. **International Standards of Actuarial Practice (ISAPs).** These are model standards, developed by the Actuarial Standards Committee and are subject to the Due Process for International Standards of Actuarial Practice.
8. **International Actuarial Notes (IANs).** These are normally developed by an IAA committee, with oversight from the Professionalism Committee and are subject to the Due Process for International Actuarial Notes. These notes include any educational document published physically or on-line as an IAA Publication, including monographs and books, other than those Publications described elsewhere in this policy. IANs could supplement existing ISAPs or address other non-regulated fields of work, as well as non-traditional fields of actuarial practice and so encompass any area of actuarial work in practice.
9. **Public Relations Publications.** These include all other public relations material, including news and press releases, newsletters and the annual report. The Secretariat, with the oversight of the Branding & Communications Subcommittee, is responsible for the delivery of these Publications.

### **Committee and Section Papers**

Although listed here for completeness, these papers are not regarded as formal IAA Publications. Committees, tasks forces, working groups and sections produce these papers, including working papers. The development and distribution of these papers are subject to the Guidelines for the Publications of Committees and Sections. They are intended for discussion only within the committees and limited external distribution for discussion purposes only. They should be clearly identified as discussion or working papers and not as formal IAA Publications. They will be put on the Members-only website on the committees' respective webpages. Some of these papers may subsequently be developed into formal IAA Publications, following the relevant due processes of one of the categories of formal IAA Publications.

### **Guidelines for all Publications**

1. **Definition.** All documents produced within the IAA must comply with this policy. Every document must identify how it is categorized according to this policy. This policy applies whether the documents are published physically or electronically.
2. **Branding.** All IAA publications should comply with the IAA Branding policy (currently still in development by the BCS).
3. **Website.** Publications are normally made directly available from the IAA website. Once completed or approved, as applicable, most IAA publications are available on the publicly

available website. In most cases during their development they would be appropriately indicated as being draft and either not be available on the website or available only on the Members-only website. The website will indicate how the various publications can be accessed.

4. **Languages.** Article 5.4 of the IAA Internal Regulations indicates that “The Secretariat shall arrange for translation of governance documents into English and French.” In some cases, IAA member associations have prepared translations of other IAA documents into other languages. Although the IAA will disclaim liability associated with such translations, these will be encouraged, as appropriate, with links from appropriate places in the IAA website.

**Copyright.** The IAA claims copyright wherever practical on all of its publications and papers; this is achieved by adding ©, the year and the IAA name. The IAA copyright may be exclusive or non exclusive, according to whether the paper originates from an individual or from an IAA entity such as a committee, or is a sponsored paper.

5. **Pricing of publications.** Pricing is determined by the IAA Secretariat. In some cases, external funding of the development of a publication is appropriate; this is dealt with on a case-by case basis.
6. **Form of documents.** Although in many cases the publications are in pdf form, some are in other forms, such as Word documents. Official documents in their electronic form will be in a non-modifiable form, the primary example of which is the pdf. Standard formats are used that vary by category of document, to make them easily distinguishable. On a case-by-case basis, it can be decided to make a publication available in print form.
7. **Authorization.** Authorization to quote, reproduce or translate IAA material, with requirements to indicate its source, may be provided according to the circumstances (e.g. for teaching purposes or to our member associations). All requests must be approved by the Director of Communications.
8. **Production cost.** The cost of producing IAA publications will be managed in an economic manner, subject to the desired level of quality and type of publication. In some cases, particularly for books and relatively lengthy monographs and papers, it may be appropriate to publish them in print in addition to electronically. If in print form, an appropriate charge for these publications may be levied, considering production cost and expected sales.
9. **Archiving.** Documents are kept on the IAA website for an appropriate length of time. The IAA Secretariat maintains an archive of all official IAA documents. However, a review of what is appropriate to stay on the website will be made by each committee and section.
10. **Social Media.** Official IAA social media content is to be published only by the Secretariat.