



Role of IAA Forum* Chairpersons, Vice-Chairpersons, Members, Observers and Liaisons

**All references to Forums include Virtual Forums in this document.*

Chairperson

1. Ensures that the Forum stays on track within its terms of reference (TOR).
3. Plans the knowledge sharing activities of the Forum with effective virtual meetings, discussions, webinars etc., using IT tools as required to meet the TORs. This requires:
 - Planning and scheduling regular virtual meetings, and knowledge sharing activities for the year, in advance.
 - Generating a list of relevant discussion topics for the Forum and maintaining a steady flow of discussions throughout the year.
 - Keeping the content on the website interesting, and encouraging members to share information and engage with others via the IT Community Tools on the website.
 - Conduct effective meetings encouraging a participation style that engages participants by making sure that:
 - each member has equitable time and opportunity at meetings to express his/her association's views,
 - observers are given the opportunity to contribute
 - non-native English speakers and new members views are heard
 - all presentation materials are circulated at least one week in advance of the meeting
 - high level meeting notes and follow up items are shared within a reasonable time after each meeting
 - Ensuring that, where applicable, the IAA Secretariat is utilized properly and is informed on all phases of activity
 - Submitting to the Advance Committee a report on sharing activity when requested
4. Makes effective use of the vice-chairperson(s) in leading discussions, running portions of meetings, taking notes and other tasks as appropriate.
5. Participates in the meetings of the Advance Committee on request to report on the Forum's current and evolving activities, and opportunities of strategic relevance to the global actuarial profession.
6. Be alert to relevant current and evolving actuarial ideas and issues and recommend potential projects to the Advance Committee for consideration.
7. Assists, in conjunction with the IAA Secretariat, with the effective integration of new members

- Welcomes new members
 - Explains the usual functions (terms of reference)
 - Provides background material on any ongoing projects or issues, including reference to recent agendas and minutes and discussions on the website.
8. Considers succession planning issues and discusses them with the Advance Committee.

Vice-Chairperson

1. Assists the Chairperson in the management of the work
2. Is prepared to assume the interim chairmanship in the absence of the Chairperson

Forum Members

Each member of a Forum is designated by an IAA Full Member association as their representative on the Forum. Forum members should be primarily working for what they consider is best for the actuarial profession and the IAA. As such, the expectations, or duties, of each Forum member are as follows.

1. Participate

Each member should personally attend as many meetings of the Forum as possible. They should have read and familiarized themselves with the issues on the agenda prior to the meeting. If they are unable to attend personally, they should provide comments to the Chairperson in advance. If they are presenting at a meeting, they should circulate their presentation material by email at least one week prior to the meeting to facilitate more effective participation by members.

Actively participate in the discussions of the Forum via the Forum's Community Tools.

2. Be active between meetings

Each member is expected to actively engage in knowledge sharing and discussions between meetings. This involves following actively all discussions and announcements on the Forum's Community Tools.

3. Represent their member association

Each member should have discussed with the appropriate parties in their member association the items of discussion within the Forum. Members should communicate the views of their member association, but also actively express their own views on discussion topics and new ideas that arise. If feedback is requested between meetings, each Forum member is expected to transmit the views of their member association in a timely fashion.

4. Report to their member association

Following each Forum meeting or interim discussion, each member should report to their member association on the discussions within the Forum and identify which items remain under discussion and/or require input from their member association.

5. Bring new initiatives to the Forum

Each Forum member is encouraged to discuss issues within their member association and to bring any new initiatives to the attention of the Forum.

6. **Communicate about public statements**

From time to time, drafts of IAA Public Statements on topics relevant to the Forum may be shared with the Forum for review and comment. It is the responsibility of each member to notify their association of such public statements. The member should review the draft statement in consultation with their association, and share any comments and concerns on the draft public statement prior to the deadline.

7. **Brief their successor**

Members should brief their successor on all current and recent issues relevant to the Forum, and other matters relevant to their participation as a member. Successors should be encouraged to use all training and informational material made available by the Secretariat in preparation for the role. Members should be familiar with the IAA website. Members should explain to their successor how best to perform the roles in items 1-6 above.

Observers

Interested individuals may be designated by FMAs to IAA Committees and Forums as observers. A Forum may have multiple observers designated by one FMA. Each Observer must be a member of the designating FMA. Observers do not have voting rights.

Observers are encouraged to:

- Attend Forum meetings and contribute to the discussions via the Forum's Community Tools.
- Actively express their own views on discussion topics and new ideas that arise.
- Volunteer to be on IAA Task Forces for specific projects.

Section Liaison

Each relevant Section may delegate one liaison. Sections may endorse other individuals to join as observers. The Section Liaison will:

- Serve as the main contact for information exchange between the Forum and Sections, and will otherwise have a status similar to that of an observer within the Forum.
- Actively promote and develop links between the Forum and the Sections.

Advance Committee Liaison

The Advance Committee will appoint a liaison to each Forum. The Advance Committee liaison will be responsible for keeping the Forum informed about the relevant activities/decisions in the Advance Committee and vice versa.

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