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# Influencing Public Policy

## Canadian experience

Bob Howard

President, CIA

2010 03 06

# Guiding Principle #1 – CIA

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- In carrying on its activities and programs, the Institute holds the duty of the profession to the public above the needs of the profession and its members.

March 1993

# Public Positions

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- History
- Recently
- Policy
- Why?
- So what?

# Several years ago

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- Achieve consensus first
- Never did
- No public positions
- Two approaches
  - Individual responsibility
  - Collective responsibility

# Currently

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- New Policy in 2005
- Respond to regulators
- Issue public positions
- Write op-ed pieces for newspapers

# Consequences

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- Many public positions
- Actively promote opinions
- Sought by media and government
- See [www.actuaries.ca](http://www.actuaries.ca) > advocacy

# Policy on Public Positions

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- Definition
- Process
- Communication

# Definition – Public Position

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- Establish and document views of CIA
- Statement on an issue
- Submission to an external audience
- Not a press release
- Communications based on public positions



# Process 1 – Initiate

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- Decide to develop a public position
- By President and Executive Director

# Process 2 – Governing entity

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- Identified by President and ED
- Normally Board or a Council
- Has authority for public position

# Process 3 – Drafting entity

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- Appointed by governing entity
- Committee / task force / individual(s)
- Drafts the public position

# Process 4 – Authorizing Cttee

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- Appointed from governing entity by chairperson of governing entity
- May not be on drafting entity
- Responsible for release of public position

# Process 5 – Draft

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- By drafting entity
- Required to take into account all relevant practice areas
- View with support

# Process 6 – Review

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- By all members of governing entity
- Comments to authorizing committee

# Process 7 – Finalize

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- By authorizing committee along with drafting entity
- No further interaction with governing entity

# Process 8 – Distribute

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- By Secretariat



# Process – Overview

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- A few days to a few months
- Emphasis on speed, with checks
- Members not consulted
- Not all members happy with a public position

# Urgent Response Team

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- Response needed in hours
- Team appointed by Pres and ED
- Authorized to develop response and speak for CIA
- May follow-up with formal public position

# Communication – Submission

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- Send letter
- Post on website
- Announce to members

# Communication – Statement

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- Post on website
- Notify members
- Use as needed for external communication

# Spokespeople

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- Individual(s) who speak for CIA on issue
- Appointed by authorizing committee
- Confirmed by Pres or Chair of governing entity
- Spokesperson represents spirit and intent of public position

# Recent Submissions

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- Quebec regulator
- Office of the Superintendent of Financial Institutions
- House of Commons Standing Committee on Finance
- Manitoba Pension Commission
- Accounting Standards Board

# Recent Statements

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- Retooling Canada's Ailing Pension System Now, for the Future
- Pandemics
- Health care

# Why public positions?

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- Unique skills
- Unique understanding
- Good reputation and credibility
- If we are silent, others will speak
- Serve the public interest
- Promote the profession



# Why CIA's Process?

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- Need for speed
- Review by leaders

# Call to action

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- Valuable advice to offer
- Important issues being considered
- Positive impact on our nations

# Public Positions

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- Questions
- Experiences
- Intentions



# Debate

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# Proposition

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Resolved,

that it is in the public interest and essential for the credibility of the actuarial profession for the IAA to establish a robust set of model International Actuarial Standards of Practice to guide actuarial work under IFRS Phase 2 within 3 years.

# Debaters

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## For

- Fred Rowley
- Michael Pomery

## Against

- Godfrey Perrott
- Peter Doyle

# Debating Rules

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- 4 minutes remarks by each debater
- 3 minutes rebuttal by each side
- 1 minute for each question, 2 minutes response for each side
- 3 minutes summary by each side

# Proposition

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Resolved,

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