



Institute
and Faculty
of Actuaries

Guidance for Member-Led Research Working Parties

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1. What is a member-led research working party?

Research working parties link together members who have an interest in, and ability to, contribute to research on an area of interest associated with actuarial science. The research topic may be associated with a particular practice area or may be of cross practice interest.

Member-led research working parties are driven by members for members and will typically report into a Board or Sub-committee. They are an integral part of the IFoA's strategy to deliver thought leadership activities, securing the long term sustainability of the profession. Research furthers actuarial science, promotes the profession and aims to provide members with cutting edge knowledge relevant to their working lives.

Membership is open to all those with an expertise or interest in the subject matter and who have the potential to provide input to the development of the research.



2. Why participate in a working party?

By participating in a working party you can:

- promote the skill set and work of actuaries
- help shape the future of actuarial science and contribute to the public interest;
- further your personal development;
- achieve recognition as an expert in your chosen area or of having made a significant contribution to its development;
- meet new people who have a common interest and share best practice;
- give something back to your profession; and
- support the learning of your IFoA peers as well as gain potential CPD credits.



3. Establishing a member-led research working party

Working parties may originate through:-

- a research topic suggested by a Practice Board
- a research topic suggested by a Sub-committee
- a research topic suggested by an individual member (for example, at one of the IFoA's residential conferences).
- a research topic suggested by the Policy team at the IFoA following their horizon scanning exercises

Whoever suggests the research topic is generally referred to as the initiator and should use the initial scoping meeting template (link to template provided on page 5) to give an outline of their topic including what issues would be examined and the proposed target audience. This will then form the basis of the Terms of Reference (ToR) for the working party and enable a call for members to be advertised on the volunteer vacancies webpage.

All working parties are supported and approved by an appropriate Practice Area Board or Research Sub-committee. The Communities Manager will support the initiator to obtain approval and establish the working party.

4. Initial meeting of volunteers for the working party

The initial meeting of volunteers for the working party will be set up by the Communities Manager in conjunction with the initiator of the research topic. Normally the Communities Manager and Communities Executive will attend the first one or two working party meetings, to provide support in the set up phase, to confirm the support available to the working party and to ensure understanding of the key issues to take into consideration by working party members. The working party should use the [initial scoping meeting template](#) to:

- establish draft ToR (for guidance on ToR see page 6), timescales (including responding to call for speakers at a conference or event) and outputs;
- nominate a chairperson if not already in place (this does not have to be the initiator);
- investigate whether any IFoA or external research exists, or whether there are any other active working parties with relevant scopes or that supports the topic;
- establish membership of the working party, including whether additional members with particular skills and expertise might be needed;
- decide the frequency and type of meetings;
- decide what resources are needed to meet target dates;
- establish what may be available in terms of support from the IFoA;
- consider any possible intellectual property rights issues;
- consider any conflicts of interest issues which might arise by virtue of a member's membership on the working party and which might breach the [Actuaries' Code](#) provisions; and
- consider any competition law and data protection issues which might be relevant to the work being undertaken by the working party and how to address those issues.

5. Setting objectives and potential outputs for working parties

A 'target' output for the working party can keep the work focussed and on track.

There are many ways to disseminate the work which benefits members and promotes the thought leadership goals. Examples include:

- events: conference workshops, roundtables, presentations and through various sessional meeting formats. We are also developing online capability for events so that presentations are captured for those who are not able to physically attend
- publications: IFoA website, *The Actuary Magazine* and the *British Actuarial Journal (BAJ)*
- public affairs: your ideas may be of interest outside our community to policymakers, e.g. policymakers, regulators, industry bodies, consumer group and perhaps even the media.

It is helpful when setting out the objectives to think about the potential audience(s) for the outputs, this is to determine what support is required in the early stages and how best to feed your outputs into events, publications and the media.

6. Establishing Terms of Reference (ToR)

The working party should formulate simple, non-commercially sensitive ToR at the outset and review these as work develops and the understanding of the subject matures.

When developing its draft ToR and scope, the working party should consider:

- the aim of the work and how it can be focussed. For example, will the output/s provide technical or commercial insight for practitioners, academic development of the subject, or support the profession's public interest obligation?
- the questions the research seeks to answer and the gaps the research could fill;
- whether this is of interest to just one practice area or if it is something that could benefit from input on a cross-practice basis. Would it benefit from input or review by experts outside the profession, whether on a regular basis or as part of a final review?
- what outlets or audience will the work have? The way to disseminate any findings should be considered early in the process as it could provide a focus as to how to proceed and provide dates to work to (see page 5 – setting objectives and potential outputs for working parties);
- what resources will be required (e.g. funding or additional volunteers with specific experience) and can the IFoA help provide this/these resources?
- whether other research that has been or is being undertaken either member-led or commissioned across the IFoA to avoid duplication of effort?

It is also worth noting that some quick-win objectives can help to build morale and publicise the working party.

Members of working parties need to be aware of some of the limitations they have to work within, (e.g. they need to be aware of and ensure they comply with relevant EU and UK competition laws - see section 16 in this document and section 5 in the Volunteer Information Pack).

The agreed ToR should be sent to the Communities Manager who will present them to the research Sub-committee or Board for review and sign-off. The relevant Board or research sub-committee will then appoint a Shadow to provide technical expertise as required who will maintain contact with the working party and monitor its progress.

For more information on assistance provided by the IFoA please see page 9.



7. Membership of the working party

The working party should discuss whether attendees of the initial meeting still wish to become members of the working party and/or establish whether additional members are needed.

Once a Board has agreed to the establishment of a working party a Shadow will be appointed from the research Sub-committee to act as mentor/technical support and help develop the TOR and membership makeup (see Section 9). To help with the selection process we have developed a [flow chart](#).

Once membership has been agreed and discussed with the Communities Manager and or Research Shadow, a volunteer vacancy will be created and advertised to allow other members to get involved. Working parties can advertise for volunteers at any point during their existence.

All volunteer opportunities are advertised on the [volunteer vacancies](#) section of our website. Advertising means that the working party can:

- attract a wider audience of volunteers to the opportunity;
- obtain additional expertise and support (if the working party is already established); and
- tailor the advert so members with the skills and experience needed can apply.

It is helpful to have a brief outline of the skills and expertise the working party is seeking to help guide applicants.

For working parties to work effectively they should include a mix of members who are willing to act as 'doers' and 'reviewers'. You may also wish to draw in other volunteers to act in an advisory capacity along the way. For volunteers to take on the role of chairing a working party we have produced a [chairperson's guide](#).

Depending on the range of expertise it is also possible to recruit from outside the IFoA's membership. If you do agree to recruit a non-member to join the working party, please contact your Communities Manager in the first instance.

Those involved should be aware of the potential for conflicts of interests or corporate affiliations which could lead to members biasing the direction taken by the working party. Such issues should be identified as early as possible and should be referred to the Shadow or research Sub-committee where appropriate.

8. Frequency and type of meetings

Working parties should ideally meet once every one to two months and report back to the research contact or Shadow on the Board. This regular contact and monitoring of progress is essential to ensure work is advanced. Some short life working parties choose to meet fortnightly for up to six months, where other working parties might meet monthly for 12-18 months. Most working parties meet via telephone or video conference and your Communities Executive can help to organise your meeting schedule.

If the working party has a large membership, it is recommended that a core management group of approximately six people be established. This means the group is able to organise meetings at regular intervals, with all other members able to join on a periodic basis.

9. Monitoring and tracking activities and progress

The aim of monitoring is to help research remain on track and to ensure the working party is provided with any assistance or guidance it may need.

While oversight of progress is provided by the Board and the Shadow, progress will also be monitored by the Research and Thought Leadership Committee whose remit includes oversight of many IFoA commissioned research programmes. This committee reports directly to Council.

Each practice area operates the detail of support for research slightly differently so as to respond to the different needs of their communities. When the working party is being established the research Sub-committee or Shadow contact should:

- liaise with the chair of the working party and provide support with establishing objectives; and
- assist with finding working party members via the volunteer recruitment process, and answer general queries.

When the working party is established the Communities Manager, other executive staff and/or the research Sub-committee Shadow should:

- act as a link between the working party and the IFoA, to help the working party gain clarity around the objectives of the relevant Board and research Sub-committee;
- maintain regular contact with the working party chair in order to feed back to the research Sub-committee on progress against targets;
- feed in any views of the Board and research Sub-committee to the working party;
- flag the potential for requesting funding and help facilitate any request in liaison with the IFoA's communities and research staff;
- provide assistance to the working party, where feasible, by providing details of sources of literature or other research in the area;
- consider whether the outputs may be suitable for a sessional research event, a conference session or an external facing event;
- be given the opportunity to make comments on near final version of papers, if this is feasible and felt to be helpful;
- help facilitate distribution of findings and outcome of research to the membership e.g. using e-newsletters and *The Actuary* magazine;
- ensure any contact with external bodies is supported by the IFoA via the Public Affairs Directorate; and
- review progress at the end of the sessional year and agree next steps.

Guidance for the role of Shadow can be found [here](#).

10. Support provided by the IFoA

The working party should approach the Communities Executive with any requests for assistance in arranging meetings and teleconferences. The Communities Manager can assist in obtaining approval for the activities of the working party, provide advice on planning various events, online activity such as discussion forums, and general publicity through e-newsletters etc.

Funds may be available to purchase data and other information. Such requests should be channelled through the Communities Manager in the first instance. Where the working party is considering commercially sensitive and/or personal data, the Communities Manager must handle that data, collate it and anonymise it before providing it to the working party in order to avoid breaching relevant competition and/or data protection laws.

The IFoA's Research and Knowledge team are responsible for the library service and the delivery of the British Actuarial Journal and the Annals of Actuarial Science. Help is available for working parties in the following ways:

- advising on how to conduct literature searches and identify sources of published research;
- providing access to the '[actuarial knowledge hub](#)', an integrated portal for the discovery of actuarial research developed by the library service;
- supplying books and papers from any source, even if they are not currently part of the library collections;
- assisting with the process of editorial review and publication for those working party outputs intended to be published in the British Actuarial Journal
- advising on data sources, availability and conditions of access; and
- providing guidance on the correct format for references, copyright matters and good practice for researchers.

The library service also provides a [catalogue](#) of over 50,000 books, papers and journal references with the facility for members to request books and download papers.

The [actuarial knowledge hub](#) provides access to thousands of online journal articles, records from the library catalogue, eBooks and citation databases. For further information email [library services](#).

The IFoA's Policy team is responsible for overseeing our external stakeholder engagement. Help is available for working parties who would like to reach out to external audiences in order to achieve their objectives. This includes organising meetings with external organisations and inviting them to any events you are planning to host, as well as issuing press releases.

Peer Review and quality assurance

Like all professional bodies who publish papers, the IFoA expects working parties to ensure the quality of their output and has developed a quality assurance process to support this. The process requires working parties to have all papers and presentations peer reviewed before publication or presentation at an event. The process is very useful and can assist in the quality of the paper. Your Communities Manager will help you ensure the peer review process is applied to your paper or presentation.

Research Outputs

The IFoA supports and sponsors research through member-led working parties in various practice areas and through commissioned external research such as that undertaken in universities. By supporting new research, we continue to further actuarial science and aim to provide members with cutting edge knowledge attuned to the realities of their working lives. All research outputs are available as open source. All research output is copyright to the IFoA, and not to individual working party members.

11. Sessional research programme events

Formal sessional research meetings are now supplemented by a range of other research programme events that will help you develop your ideas.

Whatever format is used the event should:

- be primarily concerned with presenting evidence based research;
- be published in written form before the event (with the exception of lectures and workshops) even if only in shortened or draft form for work in progress or a round table event;
- raise the profile of the IFoA as a learned society; and
- be able to be recorded for posterity suitable for the format and in such a way that it can be referred to, challenged and built upon as necessary by future researchers and practitioners. Sessional meetings are usually captured in the *BAJ* for this purpose.

The form and stage of the research should inform the format of the event. See the table in Appendix A. (page 14)



12. Presentation of findings at a conference

There are a number of annual residential conferences each year and calls for speakers are advertised on the IFoA's website. The conferences include one hour workshops, which often consist of research working parties presenting their ideas and findings to groups of 30-50 people, followed by a discussion. Your Communities Manager will assist the working party in the application to present at such events.

Conference workshops allow for a less formal presentation of research findings, and need not necessarily involve publishing findings. They can also be a forum for presenting work in progress or draft reports to elicit the views of members and is a good opportunity to get feedback on the research being conducted. In addition they can also attract more members to join the working party

13. Other events and publicity

Other Thought Leadership and Continuing Professional Development (CPD) events allow for a less formal presentation and more interactive debate. Working parties presenting at CPD events may do so in addition to continuing ongoing work for sessional research programme events/papers. Events include one and half day seminars – a series of plenary sessions with questions and answers. There may also be workshop sessions.

The working party may also publicise its work through the profession's e-newsletters and articles, press releases or features for *The Actuary*. Recent research with our members found that *The Actuary* magazine was the preferred way to learn about research. The relevant Communities Manager can advise on these.

The IFoA also has a large number of Regional Communities globally who also welcome working party presentations and engagement.

You may also wish to consider a separate event aimed at external stakeholders.

Recordings

We are uploading the recorded content from some of our events onto our [events webpages](#) to enable members to access a broader range of learning.

NB:- All research papers should be presented using IFoA branding. Please contact the [Professional Communities Team](#) who can give you access to our suite of branded templates.

14. Governance and Legal issues

Purpose of the guide

This guide is issued by the IFoA for the use and benefit of actuaries and their employers. Like the provisions of the Actuaries' Code, this guide is for all members of the IFoA (Students, Affiliates, Associates, Honorary Fellows and Fellows) who work with a member-led research working party, regardless of where they practise. For ease of reference, the terms "actuary" or "you" are used in this guide to refer to members.

Given the variety and number of issues which are covered and that it is designed to be useful for actuaries in all practice areas, this is, of necessity, a broad, high-level guide. You should consider the general principles contained in the guide but you will also need to consider how the general principles should be applied to your specific practice areas since the issues and application will vary between areas.

The guide has been designed to stimulate thought processes, rather than serving as a mandatory rule book.

This guide does not constitute legal advice, nor does it necessarily provide a defence to allegations of misconduct. While care has been taken to ensure that it is accurate, up-to-date and useful, the IFoA will not accept any legal liability in relation to its contents.

Representing the IFoA

As part of our efforts to support our volunteers we have identified some important things for volunteers to observe in order to protect your own reputation and the reputation of the IFoA.

Please see Section 5 of the [Volunteer Information Pack \(VIP\)](#) where you can read more about this and use the “Ask a question” icon, or contact our [Public Affairs team](#).

Data Protection - Compliance with GDPR

The IFoA is registered as a Data Controller in terms of the Data Protection Act 1998 (DPA). It is essential that we comply with all the requirements of the Act. The DPA will be replaced by the General Data Protection Regulation (GDPR) which will come into force on 25 May 2018. The GDPR enhances the rights of data subjects, imposes stricter controls on data processing and imposes higher penalties for breach. Compliance with GDPR is essential and the consequences for breach are significant. It is therefore important to seek guidance in advance from the Communities Manager before any personal data is used for any purpose by the working party.

Competition law issues

The IFoA and our members must comply with competition law. Competition law issues apply both to the IFoA itself and to our members and may impact on the work of a working party. Members who are on such working parties must be aware of this issue and be prepared to take steps to avoid any breach of competition laws.

The IFoA cannot provide advice to members on specific competition law matters or concerns. Individual members may need to consult their own in-house lawyers or external legal advisers about this if they are in any doubt as to their obligations, or if they have any concerns or require advice.

For further information and our Competition Law Decision Tree see Appendix B, page 15.

We also recommend all working party members watch this [Competition Law Webinar](#) recorded in 2018.

15. Intellectual property issues

The IFoA needs to ensure that the work produced by our working parties remains the intellectual property of the IFoA and not of individual members, their employers or of the working party itself. This means work can be used and disseminated by the IFoA to its members, stakeholders and the wider public to advance all matters relevant to actuarial science and promote the work of the wider actuarial profession. Working parties should seek the permission of the IFoA prior to using, circulating and/or publishing the outputs of their research.

The IFoA is very grateful to the members and their employers for the time, effort and work which is devoted by the working parties for the shared benefit of all members and the public. However, we also appreciate that employers may have their own intellectual property rights in certain material used by the working party – or even license it to/from third parties – and we need to make sure that the working party is not using that material without the employer’s, or third party’s consent. Members need to get the consent of their employer or relevant third party to bring that material to the working party for use.

In recognition of the support provided by individuals and their employers, all material which is permitted to be used will, of course, be credited – noting the sources or contributors by name in the final work product generated by our working parties. Employers can also raise their own profile by allowing staff to sit on working parties and to have their firms acknowledged as supporting contributors in the final products.

The IFoA has some short consent forms for our members to use if they do wish to use their employer's or a third party's work which will enable the Executive to compile a list of contributors to be referenced in the final work product. Please approach your relevant Communities Manager for more details.

Again, the IFoA cannot provide members with advice in relation to specific intellectual property law matters or concerns. Individual members may need to consult their own in-house lawyers or external legal advisers about this if they are in any doubt as to their obligations or if they have any concerns or require advice.

Further guidance

- The [UK Intellectual Property Office](#) has some helpful guidance for members on basic intellectual property issues.
- The World Intellectual Property Office's website also provides some [helpful guidance on intellectual property matters](#).

16. Plagiarism

Plagiarism is the act of including in one's work the work of another person without providing adequate acknowledgement of having done so, either deliberately or unintentionally.

The IFoA takes the issue of plagiarism extremely seriously and research outputs may be checked using a plagiarism tool. It is individual members' responsibility to ensure that they take the appropriate steps to ensure any data or information which is shared with a working party or other group is properly referenced and/or attributed to the source and all necessary permissions have been obtained.

Working parties must ensure that any research papers submitted for publication or presentation is their own. Where their work includes quotations, theories, ideas, data or any other materials which are the work of another person or persons, they should ensure that they obtain permission and acknowledge the source. The IFoA's website includes [guidance on how to reference the work of others appropriately](#).

If a member is found to have plagiarised the work of others without adequate referencing, he/she could be subject to the IFoA's disciplinary process.

Appendix A: Sessional event formats

Note: sessional research events are just some of the ways you can present and publicise working party reports and activity.

Sessional research programme	Event format	Publication requirements	Suitable for
Sessional research meeting	Traditional meeting, usually with an opener and closer slot. Paper presented in summary form with main focus being on the discussion.	<ul style="list-style-type: none"> Paper should be completed three months before the event to allow for it to be scrutinised and published ahead of the event. The paper and the discussion are published in the <i>British Actuarial Journal (BAJ)</i> with the discussion sometimes holding as much significance as the main paper. 	<ul style="list-style-type: none"> Completed research which authors and the IFoA wish to disseminate and encourage learned debate.
Sessional research working paper (research development event)	Presentation of research work in progress followed by discussion and debate.	<ul style="list-style-type: none"> Published as short introductory piece (not just a slide show) six weeks before event. Introductory piece plus discussions where appropriate published in the <i>BAJ</i>. 	<ul style="list-style-type: none"> Presenting research that is in an earlier stage of development. Allowing researchers to test their ideas and engage in debate. Focussing on next steps and developing the research piece into a full paper for publication.
Lecture	Lecture for presenting ideas followed by discussion.	<ul style="list-style-type: none"> Published in <i>BAJ</i> as transcribed or in summary form. 	<ul style="list-style-type: none"> When the speaker is eminent. Pulling together themes rather than presenting a specific piece of pre-published research. When the topic is encouraging thought leadership in a specific area or helping the profession engage in public debate.
Round table event	Short presentations by two or more individuals followed by questions and answers.	<ul style="list-style-type: none"> Each speaker to publish short piece summarising their presentation (not slides) six weeks before event. Short pieces to be published in <i>BAJ</i> along with the debate. 	<ul style="list-style-type: none"> When there are a number of different views to be expressed or groups that can add to a debate. Allowing the input of those from other professions and backgrounds without making participation seem onerous. When we want to engage in debate more swiftly than a full paper would allow.

Appendix B: Note on competition law issues

Some working parties will come across competition law issues due to the nature of the work that they undertake. Members who are on such working parties must be aware of the potential issues and be prepared to take steps to avoid any breach of the relevant competition laws.

We have set out below some considerations for working party members. A more comprehensive Competition Law Guidance Note is available on request. The IFoA cannot, however, provide specific advice to members on competition law matters or concerns. Individual members may need to consult their own in-house lawyers or external legal advisers about this.

This guidance is based on the prevailing legal position, however as with all areas of law, competition law may change over time. This is particularly the case given that competition law requirements have been set at European level.

What is competition law?

Competition law aims to ensure that markets function competitively. It therefore prohibits agreements or conduct that damage or restrict competition – either by limiting the competition that would otherwise exist between participants in a market or by excluding participants from the market.

In broad terms, competition law prohibits:

1. agreements, concerted practices and decisions of associations (e.g. membership bodies) which prevent restrict or distort competition. s
2. the abuse of a dominant position.

The first prohibition is most relevant to IFoA working parties. Agreements which have a restrictive effect on competition do not need to be formal or legally binding and could include one-off events/discussions and agreeing on best practice procedures – even if these are undertaken with the best of intentions. Working party members should remember that they may represent competing businesses and so must not enter into agreements or engage in any practice which may (even inadvertently) prevent or restrict competition.

For our working parties, in addition to restrictive agreements, information sharing and price signalling are the other areas of competition law which are likely to be the most concerning for our members. These are explained in more detail below.

We recommend all IFoA volunteers watch this [Competition Law Webinar](#) recorded in 2018.

Relevance to IFoA working parties

Restrictive agreements: could impact upon individual working party members if they are found to reduce or intend to reduce the ability of firms/consultancies to compete individually. However, some agreements that members enter into are unlikely to affect competition between them e.g. an agreement to comply with particular technical requirements when exchanging claims data.

Cartels: likewise, if working party members are found to have acted as a cartel, not only could individual members be found to be in breach of the law, so could the IFoA if we are found to have aided the commission of the offence.

Price signalling: this may arise if working party members use public means to indicate to the market that there is an intention to raise prices. Specifically mentioning a particular percentage increase or number is generally not acceptable e.g. “the IFoA advises the UK public that insurance premiums will have to rise by 10% in 2018.” However, giving the public/the market the right amount of information to make their own mind up about what might happen in the future is likely to be acceptable behaviour.

Information exchange: some acts will affect competition indirectly e.g. the exchange of commercially sensitive information, which is likely to also be deemed to be a breach of competition law. For natural competition to occur, competitors must individually determine how they will operate in the market; the exchange of commercially sensitive information might materially reduce this uncertainty and compromise the market’s objectivity.

The IFoA has a long tradition of information exchange between its members and the law **does not** prohibit information sharing per se; it just imposes limitations on the way information is shared and the type of information that may be exchanged. For example, working party meetings should never be used to exchange confidential information, information about future commercial and pricing strategies or to enter into prohibited agreements. It is fundamental that working parties do not act as a conduit or forum for the exchange of future pricing or strategic information between competitors.

Practical tips to avoid breaches of the law

The IFoA is aware that some working parties may be working with commercially sensitive information because of the projects they are involved with as part of our commitment to further the interests of actuarial science in the public interest. In order to comply with competition law in such a situation, working party members, with the Executive's support, must ensure that:

- they do not share future pricing or strategic information;
- confidential information is only handled by the Executive and not individual working party members;
- individual members do not have access to confidential information;
- information, once collated, is anonymised so that individual contributors cannot be identified;
- analysis and recommendations supplementing the data are brief and leaves the statistics or final graphs etc. to speak for themselves;
- terms of reference and the legitimate aims associated with the work of the working party are clearly defined; and
- non-disclosure or confidentiality agreements are in place where appropriate.

To assist in recognising potential competition law issues, it may be useful for members to keep in mind three questions:

- What kind of information am I working with?
- Does it have the potential to affect competition?
- What conclusions do I draw?

The Competition Law Decision Tree below is also a useful guide.

To be on the safe side: if in doubt seek guidance from your relevant Communities Manager,

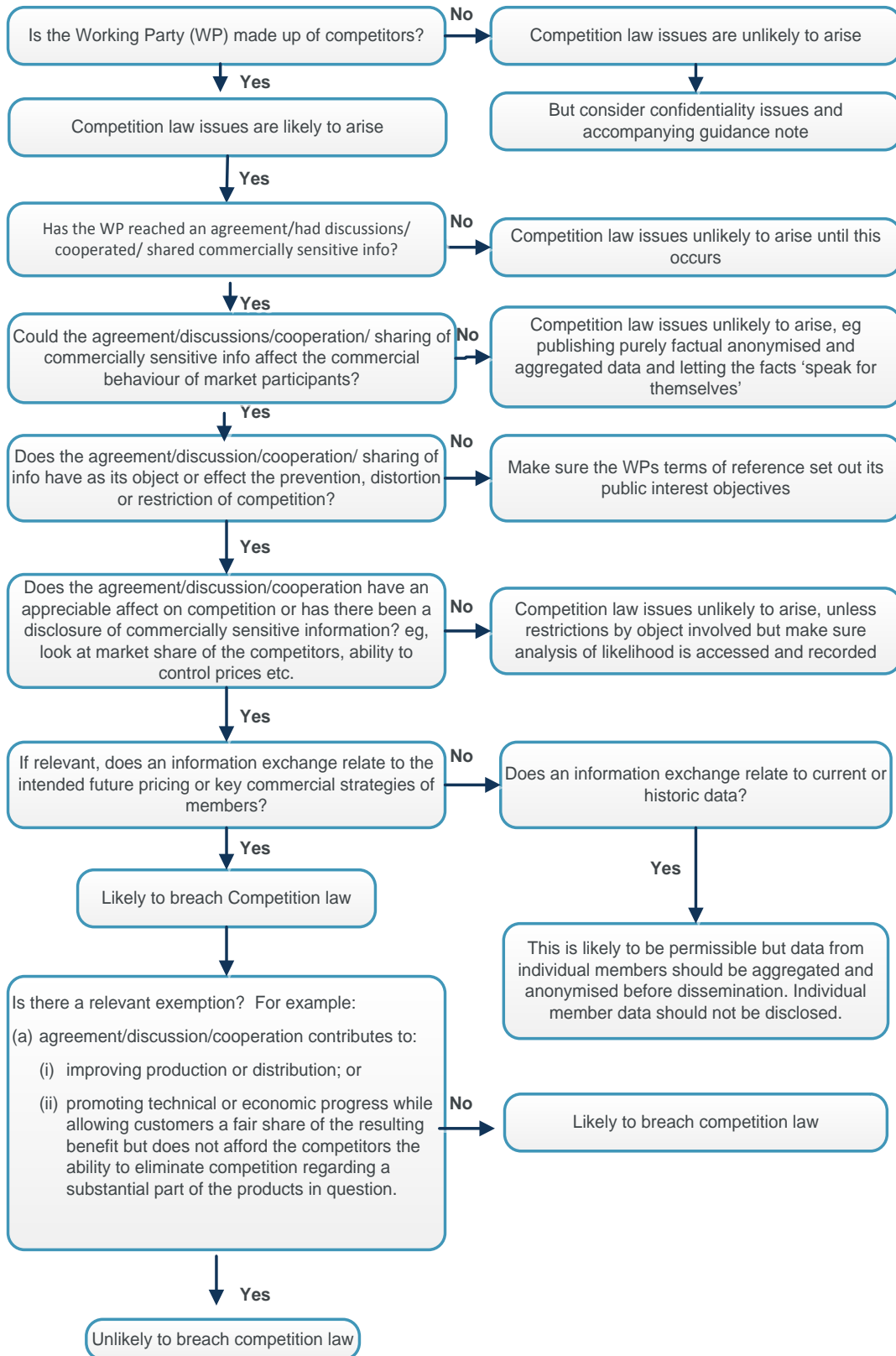
If a breach of competition law occurs or looks likely to occur in a meeting, the chair of the working party should remind members of competition law issues and, if necessary, call the meeting to a close. Members who have concerns about competition law matters during the course of a meeting should speak up and have their objections or concerns minuted. If the discussion continues, that member should excuse themselves from the meeting and have their departure minuted.

Agenda and minutes should also be kept in order to avoid straying into this area and to provide proof that meetings are not being used to conclude unlawful agreements or to facilitate unlawful information exchanges.

Further guidance

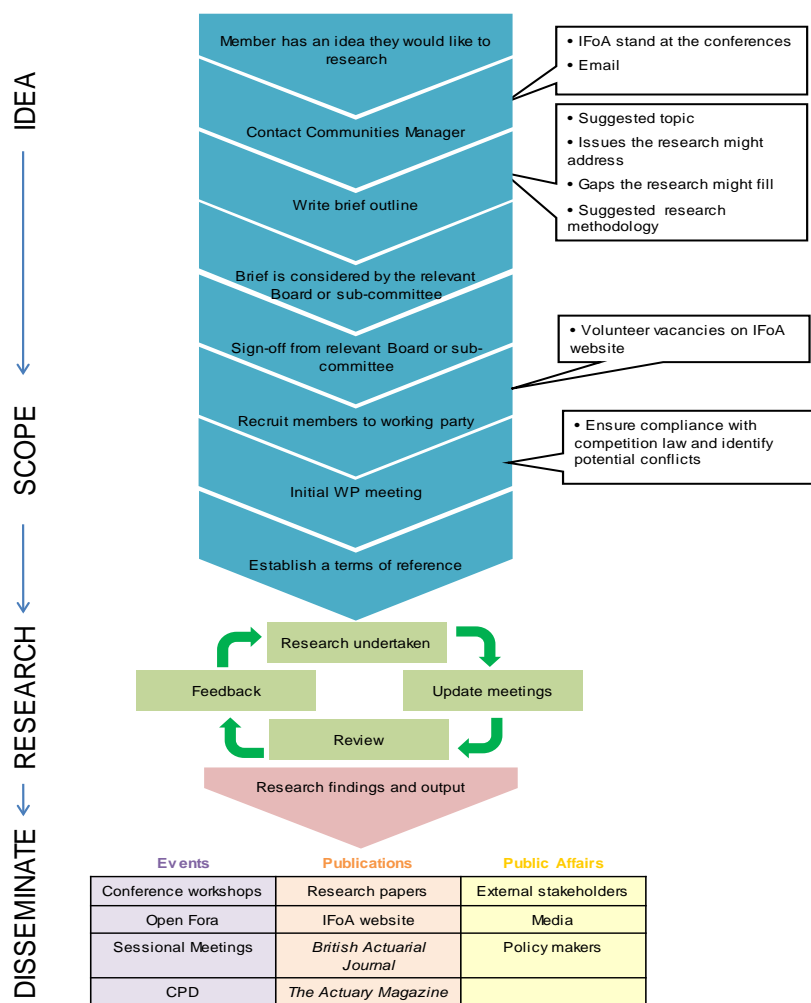
- The Competition and Markets Authority (CMA) investigates competition law issues and has some [handy guides](#) which members might find useful.
- The CMA also mentions the [Competition Pro Bono Scheme](#) which offers some free legal advice to individuals and businesses who believe that their rights under competition law have been infringed or who are concerned that they may be in breach of any relevant laws. Members may also find this useful.
- We recommend all IFoA volunteers watch this [Competition Law Webinar](#) recorded in 2018.

Competition Law Decision Tree



Appendix C: Quick reference process flow chart for working parties

Ideas for research are generated by:-



Guidance for member-led research working parties:- Updated September 2017.