

Guidelines on Managing an IMIA Working Group

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Introduction

About two months before next conference the EC will start setting up a Working Group for each new topic selected by the EC from suggestions made by IMIA Members during the past year.

You will be reading this having volunteered or been appointed a member of a Working Group to tackle a subject on which you are expected to contribute and these guidance notes are intended to help you in the coming months which will lead up to a paper being published and a presentation of the paper being made at the next IMIA conference.

Contributing to a Working Group (WG) not only represents an important value for IMIA and its delegates but it also actively enriches the knowledge of the WG-members, who benefit from

- investigating an innovative technical or insurance related topic,
- looking deeper (than one would normally do) and jointly with other colleagues into underwriting questions,
- investing some of their available working time into research and expanding their knowledge,
- professional opportunities derived from presenting the results of the WG to other colleagues within their own organisation or association,
- forging new relationships with other members of the group with whom they meet and exchange views and experiences related not only to the WG-topic but also to many other professional issues encountered during day-to-day activity in Engineering Insurance.

What does a WG consist of?

A WG has:

- a Chairman
- a Sponsor (normally from IMIA's executive committee who will have been involved in a number of previous WGs)
- A number of WG members from different countries and different types of companies (insurers, reinsurers, brokers, loss adjusters, lawyers, accountants etc.)

WG members may be located in widely different parts of the world so it may not be possible for them all to attend WG meetings. Their English language capabilities may also vary.

Roles of those involved

The Chairman

The role of the chairman is to manage the whole process of producing the working group paper including providing information to members of the group and coordinating

their efforts. The chairman needs to make sure that a suitable timetable is agreed and that working group members stick to it so that the paper is finished on time. The chairman is also likely to be involved in drafting certain key sections of the paper and is the main editor of the paper. The chairman will also usually be the person who presents the paper at the conference although sometimes the chairman may ask another member of the group to make the presentation or may do it jointly with another group member. The chairman is also responsible for liaising with the sponsor and for organising working group meetings. As individual working group members start to produce sections of the paper, the chairman will be in contact with individual members of the group about their allocated sections. As the paper begins to come together the chairman is likely to be looking to the group as a whole to refine and polish the paper.

The Sponsor

The role of the sponsor is to provide advice and guidance the Chairman on how the process of producing a paper should be managed, to help with the deciding on the content of the paper and ensuring that the paper adequately covers subjects that will be of interest to those attending the conference and reading the paper in future. The sponsor can also help the Chairman with any problems that are encountered such as difficulties in getting working group members to deal with their allocated tasks or dealing with inappropriate content. Since the chairman may not have previously run a working group the Sponsor should be able to explain to the Chairman how the process normally runs, what types of difficulties may be encountered and how these can be overcome. The Sponsor will also provide editorial input from time to time and particularly towards the end of the drafting process. Sponsors normally do not attend working group meetings unless invited to do so.

The Working Group members

The role of the working group members is to contribute and support the chairman in the preparation of the paper. If possible they should attend the kick-off meeting and later working group meetings. In the early stages using their experience and sources they provide ideas and suggestions on what the paper should cover and how the subject matter should be tackled and structured. Once a plan has been formed for drafting different sections of the paper, they should undertake the necessary research and draft their allocated section. They should then liaise with the chairman and other working group members to revise their section until it is suitable for incorporation into the overall paper. Once the first draft of the overall paper has been circulated, they should revise their section to fit in with the rest of the paper by eliminating duplications and making the material flow smoothly. They should also review and comment appropriately on the other sections of the paper where they feel they can contribute and help the chairman to produce the final text. If, during the process of producing the working group paper, they run into difficulties they should advise the chairman as soon as possible and should respond promptly to e-mails sent to them.

When does it start to work and when is it finished?

The WG chairman should start to work as soon as he/she is appointed. The WG, steered by the Chairman, will have to complete their work by the end of May the following year. The process of managing a WG starts with the Chairman thinking about the structure of the paper before the conference that is about to happen. This is because a kick-off meeting will take place for each WG at this conference. The kick-off meeting is a chance for those working in the WG to meet for the first time and discuss and plan what they are going to do over the next year. Sometimes WG chairmen are not able to attend the conference and if that is the case then normally the Sponsor should chair the kick off meeting on the Chairman's behalf. It is useful to have an agenda prepared before the kick-off meeting. The agenda should include the following:

- Introductions
- The composition of the WG
- Initial thoughts on the subject matter
- Initial thoughts on the structure of the paper, possible contents and results
- Initial thoughts on the timetable for the preparation of the paper (including when actions need to be taken and when and where WG meetings are going to happen)
- Request for those present to volunteer to take responsibility for particular parts of the paper elaborating contents, requesting and coordinating input supplied from others.

Soon after the kick off meeting, the chairman should send an e-mail to all the WG members (including WG members who were unable to attend the conference) recording main points discussed and decisions made at the kick off meeting.

The timetable for producing a paper is up to the chairman. It may seem at the start in September that there is plenty of time before the paper has to be finished at the end of May the following year. Since everyone is busy it would be wrong to relax too much. It is often useful to divide the 9 months (September to May) into 3 periods as follows:

- First 3 months - researching the subject matter, collecting information (relevant literature, explanations, statistics, case examples, graphics, pictures)
- Second 3 months - writing the sections of the paper
- Third 3 months - putting the sections together and polishing the paper

Appended to these notes is an example of a plan for producing a WG paper. Don't forget that once the overall text of the paper has been finished there is still a need to prepare the presentation to be given at the conference. The presentation file will be needed by the Secretary one month before the conference for checking, making adjustments and to confirm proper functioning.

WG Meetings

A WG normally achieves optimal results when meeting physically during the research period. Members should jointly define the intended details of content, structure and scope of the paper to be produced, distribute among each other the various sub-topics composing the main subject and have the opportunity to review and discuss the intermediate results of the research work performed in between the meetings. Meetings help members focus on what they have to do and will explain how their work fits in with others. It also helps to address problems that may arise which might delay some work.

Meetings can be held at different locations best suited to minimize travelling time and cost of the group members. Usually the hosting company provides a meeting room and lunch/dinner. It is useful to have 2 (and maybe more) meetings if possible with as many WG members as possible to discuss progress and make plans. For example one meeting during the first 3 months and one during the second three months may be helpful.

It is recognised that where WG members reside in different continents it may be difficult or considered too costly to arrange physical meetings. In such circumstances telephone conference meetings can be easily arranged and such meetings can quickly deal with draft proposals sent previously by email and also agreement can be obtained on the scope of the final document. Such arrangements are very cost effective irrespective of the very valuable benefits of physical meetings.

It is the WG chairman's responsibility to ensure progress and an adequate number of meetings of the group, to liaise with the Sponsor and/or IMIA-secretariat, to report on problems and to possibly ask for advice on scope and structure of the paper.

Initial thoughts on the subject matter

The topic of the paper may involve new aspects, considerations or technology to be investigated or require the elaboration of a presentation of technical / insurance risk aspects of existing critical topics. You may be an expert in the subject matter of your paper and you may feel you could write the whole paper yourself. Please resist these feelings since you are probably going to be surprised at the insight that other members of your group are going to contribute especially if they come from different professions and markets. Please also remember that IMIA is looking for a paper that covers the technical subject and also (and very importantly) the insurance aspects that Engineering Underwriters will be interested in.

What happens if one of the WG members is not contributing?

Experience has also shown us that WG members may be very keen to be involved at the start, sometimes for a variety of reasons may not deliver what they should. It's usually difficult to tell who will be the biggest contributors and who will not.

If it happens that someone finds he/she is unable to contribute then he/she will not appear on the author's list on the paper.

If a member of a WG does not respond to requests for action it may help to telephone him/her to find out if he/she has a problem. The Chairman might ask for help from the Sponsor or Secretary. The circumstances of members can change after they agreed to join a WG and this may prevent them from contributing (e.g. a change of job, a move to another country, a sudden increase in workload or even personal circumstances). Being busy however should not stop someone contributing to a paper. We are all busy.

Ultimately, if a member of a WG does not contribute, the Chairman has to either reallocate work or take on that member's work him/herself. It's best not to leave things too late. Chairmen should give WG members deadlines for producing paper sections and remind them if these are not produced. That way it should be possible to identify early if there is a problem.

The form of the paper

A separate publications manual is shown in Appendix 2 below.

Polishing the paper

When all sections of the paper have been written it is necessary to bring them all together to produce one coherent document. This can be quite challenging if sections have been written by different people with different styles. There may be overlapping parts or gaps in the logical flow of the paper, transitions needed and over extensive text that needs shortening. When a first full draft of the paper has been produced, it is worth circulating it to all WG members for comment and also seeking the Sponsor's comments. These may identify critical issues related to anti-trust regulations or other aspects, missing references or material that can be thinned out.

The text of the paper needs also to be checked for the quality of its English. If English is not your first language, it may be worth asking a member of the WG or the sponsor or the IMIA secretary to arrange for the English to be checked.

Presentations to the conference

It is up to the Chairman (in agreement with the WG) to decide who is going to present the findings of the paper at the conference. Sometimes presentations can be made by two people working together but this is unusual since the time available at the conference is relatively short. Typically you will be allocated 50 minutes for the presentation and questions. This means that the presentation part should be around 35 to 40 minutes with 10 to 15 minutes for questions. It is very important that the presentation part should not overrun because feedback from conference delegates consistently stresses the value placed on the question and answer section.

For PowerPoint presentations the Secretary has a template available that should be used. There should be approximately 12 to 15 slides. These should have small quantities of text in large font. Do not insert lengthy paragraphs of text onto slides. The presentation should explain the interesting findings that have come out of the work of the WG. In 35 minutes it is not possible to go through the content of the paper in any detail. If delegates are interested in the subject matter of the paper, then they can read the full paper either before the conference or afterwards. The job of the presentation is to explain what will be found in the written paper and encourage people to read it. Please bear in mind that for most delegates English is not their first language. Please do not speak in a complicated way or use unusual words. (This rule is mostly a problem for native English speakers who may not appreciate the problems they create for non-native English speaking listeners). It is normally worth asking the Sponsor or Secretary to review the presentation before it is finalised.

Please practice your presentation with a stop-watch so you are able to make sure it does not last too long. Pictures/diagrams are always welcome (assuming they are relevant to the subject matter of your paper). Brief video clips are sometimes used, but they need to be short and care is needed to make sure they are compatible with the systems used at the conference.

The presentation file will be needed by the Secretary one month before the conference for checking, making adjustments and prove proper functioning. It is always advisable to bring a spare copy of your presentation on a memory stick or CD with you, especially if you have made any late changes to it.

Conference Equipment

A lap top computer and video projector will be available in the conference room. The IMIA Secretary and the Hosts' organiser will make sure all presentations are with the presentation technical staff and have been tested for proper working.