



# Thought Leadership Publication Policy

## Overview

1. The purpose of this policy is to provide a framework for the publication of items on the Thought Leadership section of the NZSA website. This section is for external-facing publications that show the value of applied actuarial thinking. There will be two sub-sections:
  - Submissions: every submission made by NZSA to government or industry consultations.
  - Publications: reports or articles by members individually or in working groups or committees that have been approved for publication by this policy process.

## Policy

2. As per the Rules of the Society, external statements or comments concerning actuarial and related matters on behalf of the Society can only be made by the President (or Committee Chair in limited ways) unless, with the approval of Council, the President has delegated the powers to another Voting Member of the Society. This Policy describes the way in which powers to approve the publication of external statements in the Thought Leadership section of the website are exercised.
3. The aim of the Policy is to ensure, for the benefit of all members, that the Thought Leadership content published on the NZSA website is objective, in the public interest, free from conflict of interest or bias and demonstrates the added value of applying actuarial skills.
4. Time spent on preparing Thought Leadership content may be counted as CPD according to PS10 Continuing Professional Development.

## Submissions

5. Submissions are usually prompted by a government or industry consultation. Submissions made by the NZSA on behalf of all members.
6. Council will appoint a group of members with relevant expertise to draft the submission. The group may be an existing Committee. Council must approve Submissions in full before submission. Council will also approve the timing of publication on the Submissions section of the NZSA website.
7. Submissions should be in the form of a letter from the President, with appendices as necessary. The submission should contain brief background on the NZSA and how member input was incorporated into the submission.

## Publications

8. A publication is a report or article that is written by a member(s) or group including at least one member on their own behalf. Publication on the NZSA website does not mean that NZSA necessarily agrees with the content, but that NZSA supports the public airing of the content and is satisfied that it meets this policy.
9. Any member(s) can offer to Council a report or article to be published. The Publication Panel will review a draft and approve the item for publication.



10. Council appoints a standing Publication Panel. It will consist of at least two members, at least one of which will be a Council member and at least one with experience in communicating to a non-actuarial public audience. These members may decide to ask other member(s) or non-member experts to review a specific item, for example, to obtain subject matter expertise.
11. The Panel's review will be to check consistency with this policy and help the authors reach the standard as outlined in paragraph 3. The Panel's feedback to members should be helpful to members' professional development.
12. Reports or articles can be of any length, and should:
  - Be original work by the author(s).
  - Be research- or data- and/or fact-based.
  - Include comment on implications or recommendations only when substantiated. Pure opinion is not acceptable.
  - Have already been peer-reviewed for external publication.
13. The report or article must be published with clear statements of authorship, showing which authors are members of NZSA. No employer names should be given. If the item is being re-published, the original attribution must be made.
14. The current Naming Convention for published documents must be followed. The Secretariat can advise.
15. A disclaimer should be made on each Publications item to clarify that the content is a personal or group statement, not made by the NZSA on behalf of members. The wording may vary. An example is:

*Where views are expressed in this paper, they are the collective personal views of the members of XXX Group. This paper does not necessarily reflect the positions of our employers, other members of the New Zealand Society of Actuaries, or any KiwiSaver provider. Any errors are our own.*
16. If the subject matter could be perceived as related to personal money management, a disclaimer such as the following should be used:

*Nothing in this paper should be taken as financial advice or as a recommendation for how any individual should manage their money.*

**This policy was approved by Council on 20 December 2022.**

*Scott Lewis*

President

*Mat Jensen*

Secretary