

Policy on CIA Surveys

Document 222054

Context and purpose

This policy outlines both a strategy and process related to conducting surveys of the membership and stakeholders of the Canadian Institute of Actuaries (CIA).

The Institute is constantly striving to serve its members better. To that end, it must survey its members periodically to identify their needs, opinions, satisfaction levels, expectations, and priorities. Surveys of external stakeholders can reveal information and trends that could be vitally important for the Institute to know as strategic plans are developed.

Scope

This policy is for use by the CIA Board, staff, councils, committees, and task forces, as well as the Actuarial Profession Oversight Board (APOB) and the boards and other groups under its oversight, in conducting a membership survey or a survey of external stakeholders.

Policy statements

1. Development and delivery of a survey

- a. The CIA Communications and Public Affairs Department (COMMS) is responsible for delivering surveys to members and the results of those surveys to the originating group. This will be done in a manner that is
 - i. aligned with the CIA's strategy; and
 - ii. not redundant in content.
- b. A survey may be requested by the Board, a council, a committee, the APOB or one of its boards (i.e., the originating body).
- c. COMMS will review and approve the timing, purpose, and format of all surveys.
- d. If needed, COMMS can request the Governance and Nominations Committee to appoint an advisory group of volunteer members to assist with the development of a survey, in particular those with actuarial or technical content.
- e. A senior member of COMMS staff will be charged with overseeing the development and delivery of each survey.

2. Types of surveys

- a. *Comprehensive membership survey*
 - i. This survey has the objective of finding out more about the overall opinions, preferences, priorities, and expectations of CIA members. The results of this survey allow the CIA to better tailor its programs, services, and other offerings.

- ii. A comprehensive survey is normally conducted every three to five years.
- iii. An appropriate budget will be established to work with an external agency for the purposes of coordinating and conducting the survey, as required.
- iv. The results of the survey will be carefully reviewed by COMMS and communicated to the Board and CIA members.

b. In-house surveys

- i. Every year, up to three in-house surveys of the membership may be conducted.
- ii. Each survey is to be kept short (normally 10 questions or less) to avoid survey fatigue and thus encourage a greater participation rate.
- iii. In-house surveys are conducted to gather information on a specific topic in a timely fashion. They are not expected to result in undue additional workload or financial expenses and should not repeat content from the comprehensive membership survey.
- iv. The surveys are internal (CIA members only) and narrowly focused, using survey tools from the CIA Head Office.

c. External surveys

- i. The CIA may survey external stakeholders such as employers, elected officials, or government decision-makers on a specific topic.
- ii. These surveys are administered by COMMS with the use of an outside resource, as necessary.

d. Online polls

- i. To get a quick response or opinion on a single question or idea, the CIA may open an online poll on the website, social media, email, or other online platform.
- ii. Polls would be open to members, and sometimes to the public, for just a few days and could provide immediate feedback of results to all participants. The goal would be to increase engagement and take the “temperature” of the audience.
- iii. These polls are administered by COMMS using tools from the CIA Head Office.

3. Survey results

- a. Anonymity of the respondents is maintained when releasing the results.
- b. The data from all surveys are made available to the originating body for deeper study.

Exemptions

N/A

Escalation Procedures/Management of Non-compliance with this Policy

Governance and Nominations Committee

Definitions and Abbreviations

N/A

Associated Documents

N/A

References

N/A

Monitoring, Evaluation, and Review

Approval date	March 22, 2022
Effective date	March 22, 2022
Approval authority	Board
Review owner	Head Office
Prior review and revision dates	November 10, 2016; September 19, 2018; January 1, 2020
Review cycle	Every five years
Next review date	2027

Procedures

N/A