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LOMA COMMITTEE HANDBOOK

**LOMA
Suite 600
6190 Powers Ferry Landing
Atlanta, GA 30339-2967
770-951-1770; FAX 770-984-0441**

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LOMA COMMITTEE HANDBOOK

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LOMA COMMITTEES

LOMA committees consist of member company representatives who meet periodically to discuss common problems and responsibilities. They share information on various aspects of the insurance business and explore ways of developing and improving their methods of operation and management.

Committees are major contributors to the management, education and cooperative research efforts conducted by LOMA. Working with division staff, committees initiate and develop many programs and projects, and the documentation generated by their activities constitutes a wealth of invaluable information. The role of a committee member is significant and extremely beneficial in several respects. By providing personal interaction and an active information exchange among colleagues, committee involvement can greatly enhance a member's professional expertise. In addition, committee participation can be personally rewarding, since it promotes many important contacts with individuals throughout the industry.

Not only does an individual benefit from committee participation, but the committee as a whole profits from each member's contribution. Through the continual documentation of its activities and dissemination of information throughout the association, each committee advances the management expertise of the entire industry.

LOMA prepared this information as a working tool and reference for committee members. It will also provide information and guidance for those interested in joining a LOMA committee or learning more about committee structure and function.

Through LOMA's Committees, industry professionals have the opportunity to explore issues, exchange ideas, develop a network of peers, and serve the industry as a whole by contributing to surveys, conference programs, research and articles in *Resource*, LOMA's award-winning magazine for life and health insurance professionals.

All committees operate in a similar manner, though there are some operational differences as needed for each group's own purpose.

A LOMA staff person is assigned to each committee and is your best source for additional information. Please call LOMA's main number at 770/951-1770 and ask for the LOMA representative for the specific committee in which you are interested.

Responsibilities of Committee Members

Every member is responsible for participating in committee activities within the framework of its operating policy. Each member should contribute to the planning of meeting programs, suggest discussion topics or special projects, serve on subcommittees, and cooperate with the chair in the committee's operation.

Attendance. LOMA expects a committee member to give high priority to attending all committee meetings. If absence is unavoidable, the member should designate a substitute before the meeting. A member who repeatedly misses meetings will be asked to resign from the committee.

Advance Preparation. Besides being prepared to participate in all discussions, the committee chair or a program coordinator may ask members to prepare a written report or other materials on certain topics.

Documentation. The true value of a committee lies in its ability to perform useful services for its members and for LOMA. Producing reports frequently that contain significant and interesting information enhances the committee's value and merits LOMA's continued support of its activities. When selecting research and discussion topics, committee members should keep this broad objective in mind. Documentation is extremely important to LOMA. Some of it is edited and published in *Resource* magazine for the benefit of all member companies. Committee documentation also comprises a significant portion of the research collection maintained by LOMA's Information Center and is made available to LOMA's full membership.

IMPORTANT! Antitrust. Some discussion or report topics may be sensitive from a legal standpoint, and committees will avoid addressing or discussing these topics at their meetings or in any of their written work (e.g., prices, commission rates or interest rates or other terms or conditions of products offered for sale). Moreover, committees should not undertake surveys or reports on such sensitive areas. LOMA publishes a separate booklet explaining its antitrust policy. If you do not have a copy, contact your LOMA representative.

The Committee Chair

SELECTION

Each year or two after consultation with the LOMA representative, an incumbent committee chair recommends his or her successor. The LOMA Board of Directors and/or LOMA's President makes the official appointment.

The board appoints committee chairs (normally in June) for one- or two-year terms beginning on September 1. This procedure gives a new chair ample time to prepare for the coming LOMA fiscal year.

DUTIES

The operating policy of each committee sets forth the duties expected of its chair; these will vary according to the committee's particular structure and operating procedures. Some basic responsibilities of a chair (applicable to most committees) are:

- Conduct all committee meetings and appoint people to assume responsibilities such as meeting secretary, program chair, and host;
- Review applications for committee membership;
- Prepare an agenda for each meeting;
- Help with the orientation of new committee members;
- Recommend a successor.

Role of LOMA Staff Liaison

Members of LOMA staff assist committees in their work and channel the results to the rest of the association and to the industry at large. A committee's staff liaison:

- Reports on association activities and other subjects of interest;
- Helps select and develop discussion topics and projects;
- Helps obtain outside speakers to make presentations to the committee;
- Serves as a reference for information concerning other companies' practices;
- Serves as a source of information about the services and research materials LOMA offers; assists the committee chair and secretary in meeting administration; actively supports all other committee activities.

Education Committees

The **Course Review Committee** consists of teams of subject matter experts who work with LOMA authors to develop and/or revise the content, teaching/learning materials, and exams used in LOMA courses. Course Review Committee members lend their expertise and experience in subject areas covered in a scheduled course and/or exam review. In so doing, these industry professionals ensure that LOMA course content and exams are current, accurate, applicable, and relevant to the industry.

Membership Requirements: Members must have expertise in the subject area covered in a currently scheduled LOMA curriculum project and examination.

LOMA Staff Liaison: Janet Kean (860-285-7728 ext. 632), jkean@limra.com

The **Education Administrative Committee** is a committee of individuals who have been involved in marketing and administering the LOMA education programs in their companies, usually as LOMA Education Representatives. Before adopting rules and regulations, LOMA asks the Administration Committee to evaluate the proposals to see if they are practicable. Often the committee evaluates the objective and tells LOMA ways to improve proposals. The committee also provides ideas concerning the marketing and promotion of the FLMI and other LOMA Education and Training programs.

Membership Requirements: Members should be seasoned Educational Representatives for companies that have strong participation in LOMA education.

LOMA Staff Liaison: Darius Webb (770-984-3768), webb@loma.org

The **LOMA Society Officers** are responsible for the management and operations of their local LOMA Society. There are approximately 30 active LOMA Societies worldwide. The purpose of LOMA Societies is to:

- Promote continuing professional education
- Foster recognition of the FFSI and FLMI designation
- Assist others in earning the FFSI and FLMI designation
- Encourage professional, educational, and social relations among FFSIs and FLMIs, students, and other insurance professionals

Membership Requirements: Be elected to office by members of their local LOMA Society. Most Societies require officers to be a LOMA Fellow or hold a LOMA Associate designation.

Staff Liaison: Barbara Francis (770-984-3741) francisb@loma.org

Financial & Strategic Management Committees

The **Enterprise Risk Management (ERM) Committee** focuses on current trends, strategies, and best practices pertinent to the ERM function of insurance companies including, but not limited to, risk assessment, measurement, modeling, management applications, monitoring and oversight.

Membership Requirements: Members should be the Chief Risk Officer at the enterprise level; an officer and direct report to the CRO with significant managerial responsibilities with the company's ERM program will be considered at the discretion of the current members.

LOMA Staff Liaison: Angie Norman (770) 984-6438, norman@loma.org

The **Financial Planning & Analysis Committee** identifies and discusses programs, practices, and current trends related to a broad range of financial planning and analysis issues in the financial services industry. Topics addressed include but are not limited to: financial forecasting, allocations, budgeting and planning (including capital budgeting and cost benefit analysis), expense management, improving management reporting as well as tools and technologies employed in these areas.

Membership Requirements: Members should be officer level and have primary responsibility for one or more of the following functions: financial forecasting, allocations, budgeting and planning, expense management.

LOMA Staff Liaison: Angie Norman (770) 984-6438, norman@loma.org

The **Investment Committee** studies and discusses current trends, strategies and practices pertaining to the diverse responsibilities which comprise the Investment Management function of financial services companies; including, but not limited to: discussion of the current investment market and the impact on existing products, analysis of new and emerging investment instruments, asset/liability management and developing and identifying appropriate methodologies for measuring the financial performances of individual investments and investment portfolios.

Membership Requirements: Members must be either the Chief Investment Officer or have significant responsibilities in the Investment Department.

LOMA Staff Liaison: Jeff Hasty (770) 984-3707, hasty@loma.org

Financial & Strategic Management Committees Continued

The **Investment Operations Committee** studies and discusses current trends, strategies and practices pertaining to the diverse responsibilities, which comprise the Investment Operations of life insurance companies. This includes all aspects of the back-office operations of supporting the Investment activities such as, but not limited to: accounting, regulatory and compliance issues, system support, valuing investments, and insurance company involvement in securities industry initiatives.

Membership Requirements: Members must be either the Head of Investment Operations or have significant managerial responsibilities in the Investment Operations area. Most members are director level or above.

LOMA Staff Liaison: Angie Norman (770) 984-6438, norman@loma.org

The **Treasury Operations Committee** studies and discusses current trends, strategies and practices pertaining to the diverse responsibilities which comprise the Treasury Operations of financial services companies; including, but not limited to: projecting and administering cash flows, conducting bank relations, and effectively employing cash resources within the overall corporate financial management process. The committee also aids in identifying session topics and speakers for the LOMA Financial Inforum (an annual conference). Most committee members also attend this conference.

Membership Requirements: Members should be the Treasurer or Assistant Treasurer; an officer and direct report to the Treasurer with significant managerial responsibilities will be considered at the discretion of the current members.

LOMA Staff Liaison: Angie Norman (770-984-6438), norman@loma.org

Human Resources Committees

The **Compensation Committee** identifies and addresses policies, programs, practices and current trends related to a broad range of employee compensation issues. Issues of concern include: new/increased legislation, variable pay plans, new/enhanced compensation strategies, and the use of these mechanisms to remain competitive.

Membership Requirements: Typically high-level human resources professionals with substantial responsibilities and expertise in compensation.

LOMA Staff Liaison: Denise C. Marvel (860-285-7759), dmarvel@loma.org

The **Employee Relations Committee** identifies and addresses policies, programs, practices and current trends related to a broad range of employee relations issues. Issues of concern include: fostering a corporate culture that facilitates quality; staffing and recruiting; developing employees and managers, managing reductions in force and acquisitions; balancing work and family; and managing diversity.

Membership Requirements: Members are typically human resources professionals with substantial responsibilities and expertise in employee relations and generalist functions.

LOMA Staff Liaison: Emily Spicer (770-951-1770, ext. 416), spicere@loma.org

The **Human Resources Executive Panel** is a group of senior-level Human Resource executives from LOMA member companies. At each meeting panel members will have the opportunity to bring to the table HR issues of concern that relate specifically to their organization in terms of policy setting and strategic direction. When available the group will also have outside speakers present on topics of interest to the group.

Membership Requirements: Members are senior-level executives representing a variety of company types; all possess a depth of industry knowledge and experience. Members represent the Human Resources area of their organization and are responsible for setting HR policies and strategic direction for their organization.

LOMA Staff Liaison: Vicki Beaudry Phone: 770-984-3736 Email: vbeaudry@loma.org

Human Resources Committees Continued

The **Organizational Improvement Committee** shares important information on a variety of topics including: quality, continuous improvement, process improvement, measurement, reengineering, and benchmarking. Committee members share this information through activity reports, roundtable discussions, presentations at meetings and formal research reports.

Membership Requirements: Generally, committee members manage the continuous improvement and/or measurement activities in their companies.

LOMA Staff Liaison: Emily Spicer (770-951-1770, ext. 416), spicere@loma.org

The **Strategic Recruitment and Selection Committee** shares company policies and practices that relate to recruiting qualified job candidates and selecting the best employees for the organization. Trends in the area of recruiting and selection are also discussed.

Membership Requirements: Members have responsibility for the recruitment and selection function in their companies.

LOMA Staff Liaison: Jessica Merten (770-984-6447), mertenj@loma.org

Life Insurers Council Committees

The **Marketing Committee** shall determine subjects proper for survey and study and by study and research collect and report to the President for the attention of the Board of Directors, information of value to the membership and the public. It shall also be the duty of this Committee to make suggestions and recommendations as to programs with a view to mutual self-improvement.

Membership Requirements: Typically, members are Chief Marketing and Agency Officers from companies that use the Home Service distribution system.

LOMA Staff Liaison: Jeff Shaw (860) 285-7827 jshaw@limra.com

The **Operations Committee** shall promote continuing awareness of industry issues pertaining to distribution, administration, service and other areas of insurance company operations including compliance, technology and marketing with regard to insurance products developed and distributed to lower and middle-income consumers.

Membership Requirements: Typically, members are senior officers (some CEOs) responsible for the administration and/or operations of a Life insurance company that develops and distributes insurance products to lower and middle-income consumers.

LOMA Staff Liaison: Jeff Shaw (860) 285-7827 jshaw@limra.com

The **Laws and Legislation Committee** shall examine legislation affecting the business of insurance, and shall promptly report thereon from time to time to the officers and directors of the Conference. Each member of this Committee should at all times be available for consultation by the organization, its officers and the Board of Directors.

Membership Requirements: Typically, members are legal counsels from member companies, both Life and Affiliate. All members are invited to send a representative, however.

LOMA Staff Liaison: Jeff Shaw (860) 285-7827 jshaw@limra.com

Operations Committees

The Broker-Dealer Operations Committee assists subsidiary companies in the improvement of product selection, marketing and distribution, administration and operational systems, as they relate to an affiliation with a member parent life insurance company.

Membership Requirements: Members are usually officers of the Broker-Dealer and/or the parent life company involved in marketing, compliance, operations & administration, or sales.

LOMA Staff Liaison: Jim Huffman (770) 984-6446, huffmanj@loma.org

The Chief Actuary Committee provides a forum for Chief Actuaries to discuss trends, strategies, and best practices in all areas that impact chief actuaries, including product development, risk management, financial reporting, investments, tax, talent management and development, education, professionalism, technology and other issues facing the industry.

Membership Requirements: Members shall have the title of Chief Actuary, preferably at the enterprise level (or have responsibility for the functions typically performed by the Chief Actuary).

LOMA Staff Liaison: Angie Norman (770) 984-6438, norman@loma.org

The Contact Center Committee assists member companies in the improvement of their operations by pooling experience, identifying and suggesting acceptable alternatives and investigating various practices. The committee discusses techniques and strategies in the areas of management, training, effectively using metrics and identifying new tools that can make a call center more productive. The committee explores the use of contact centers in the claims process and in cross-sell/up-sell opportunities.

Membership Requirements: Members of this committee should have direct responsibility for the operation of their organizations contact center as a whole or a unit within the contact center.

LOMA Staff Liaison: Marvin Jones (770-984-6459) jonesm@loma.org

Operations Committees Continued

The **Employee Benefits Administration Committee** investigates studies and discusses current administrative practices, procedures and systems in the fields of group life, long-term disability and medical insurance.

Membership Requirements: Members are at Director or Vice President level with responsibilities for one or more areas of administration of voluntary, group insurance or employee benefit products sold and administered by their company.

LOMA Staff Liaison: Stacey Quance (770) 984-6448, squance@loma.org

The **Equity Products and Annuity Committee** investigates studies and discusses issues relative to administration and marketing procedures and practices in the fields of fixed and variable annuities, variable life insurance, mutual funds, and other registered and non-registered products.

Membership Requirements: Members are officers with expertise and functional responsibility for various aspects of annuity/equity product administration, new business and/or client services.

LOMA Staff Liaison: Stacey Quance (770) 984-6448, squance@loma.org

The **Group Retirement and Institutional Products Committee (GRIPC)** covers topics relative to the product management of group retirement and institutional businesses with guarantees, including spread lending, stable value and record keeping. Discussion topics focus on current product issues, and actuarial, regulatory, and investment issues and practices.

Membership Requirements: Members are officers with substantial responsibilities as well as significant expertise and exposure to various aspects of the group retirement and/or institutional business operations.

LOMA Staff Liaison: Stacey Quance (770) 984-6448, squance@loma.org

The **Individual Insurance Services Committee I** assists member companies in the improvement of all aspects of individual insurance service, concentrating on identifying ways to improve and provide customer service by research on specific topics, exchange of information and distribution of reports as appropriate; investigating organizational structures, administrative practices and procedures and promoting the study of topics that focus on customer service as perceived by the customer.

Membership Requirements: Members must have current, substantial and relevant experience in the POS aspects of the life insurance industry and hold a management level, policy-making position. Companies represented on IISC I generally have more than 1.5 million policies in force.

LOMA Staff Liaison: Marvin Jones (770-984-6459) jonesm@loma.org

Operations Committees Continued

The Individual Insurance Service Committee II analyzes individual customer service functions through review of various company operations dealing with policyowners, agents and regulators and by identifying and suggesting acceptable alternatives, investigating various company operations and practices in policyholder services, keeping in mind the perception by the customer.

Membership Requirements: Members must have current, substantial and relevant experience in the POS aspects of the life insurance industry and hold a management level, policy-making position. Companies represented on IISC II generally have less than 1.5 million policies in force.

LOMA Staff Liaison: Marvin Jones (770-984-6459) jonesm@loma.org

The **New Business Committee** assists member companies in the improvement of their new business operations in areas such as policy issue, underwriting, compliance and technology by way of sharing information as well as discussing various methods of operation and practices.

Membership Requirements: Members must have current, substantial and relevant experience in the new aspects of the life insurance and/or annuity industry and hold a management level, policy making position.

LOMA Staff Liaison: Angie Norman (770) 984-6438, norman@loma.org

The **Operations Leader Roundtable Committee** provides a forum for senior-level operations executives in LOMA member companies to discuss ideas and share concerns that relate to objectives and strategic approaches for operational efficiency in the financial services sector.

Membership Requirements: Members of the Operations Leader Roundtable are Chief Operations Officers or other senior-level executives (EVP, SVP, VP) from Life Insurance Companies that are corporate members of LOMA. Roundtable members have responsibility for enterprise –wide strategic decision making within their respective companies.

LOMA Staff Liaison: Marvin Jones (770-984-6459) jonesm@loma.org

Operations Committees Continued

The **Product Development Management Committee** directs its primary attention to improving the product development/management process within the industry, improving product design in order to better meet consumer/distribution needs, gaining a better understanding of industry related issues.

Membership Requirements: Members are executives with responsibilities and expertise and exposure to various aspects of product development.

LOMA Staff Liaison: Jim Huffman (770) 984-6446, huffmanj@loma.org

The **Retirement Plans Committee** investigates studies and discusses issues relative to administrative systems, regulatory requirements, and marketing relationships and other procedures and practices in group pension plan administration on both the plan and contract level, and with other group or corporate retirement arrangements.

Membership Requirements: Members are executives with substantial responsibilities and expertise and exposure to various aspects of group retirement plan operations such as administration, investment, actuarial, underwriting, systems, legal, product development, benefit payments, financial reporting or marketing.

LOMA Staff Liaison: Stacey Quance (770) 984-6448, squance@loma.org

Technology Committees

The **Applied Technology Committee** facilitates high-level information exchanges on broad issues including current non-competitive technical, management and best practices information related to technology, application infrastructures and architectures.

Membership Requirements: Members should have Information Technology executive management experience with broad technology exposure in larger financial services companies with life insurance operations. Members would have responsibility for Application Development, Enterprise Architecture or serve as Chief Technology Officer for their organization.

LOMA Staff Liaison: Jim Huffman (770) 984-6446, huffmanj@loma.org

The **Business Continuity/Disaster Recovery Council**'s mission is to educate, to assist in compliance with requirements of federal and state business continuity laws and to assist in the development of good BC / DR practices within the insurance services industry. The meetings provide a forum in which information can be shared as it relates to program best practices, new technologies for recovery capabilities, planning for threats, and compliance and regulation.

Membership Requirements: The membership is comprised of those responsible for either Business Continuity or Disaster Recovery within their respective organization.

LOMA Staff Liaison: Marvin Jones (770-984-6459) jonesm@loma.org

The **Canadian Systems Development Committee** (consisting of Canadian insurance companies only) generally undertake cooperative research and gather and disseminate information in the areas of planning, systems, equipment, procedures and other company administrative practices. Committee members provide activity reports, which are fairly detailed one- to two-page write ups on specific developments in their companies, as well as informal notes on various events of interest throughout their companies. Activity reports are available for distribution and/or publication. Members also give presentations on topics of interest to the group.

Membership Requirements: Typically, members are in a management position in a Canadian insurance company and have at least three years of life insurance experience, including some systems or information management responsibilities.

LOMA Staff Liaison: Jim Huffman (770) 984-6446, huffmanj@loma.org

Technology Committees Continued

The **Chief Information Security Officers Council** provides a confidential forum for the top security professional (or their immediate designate) from LOMA member companies to share issues and experiences within the broad domain of information protection. Member research, presentations or sponsored activities deal with common industry issues impacting people, process and technology to maintain an appropriate level of security.

Membership Requirements: Members are Chief Information Security Officers or CIOs responsible for IT Security (awareness, planning, implementation and monitoring) in LOMA member companies.

LOMA Staff Liaison: Marvin Jones (770-984-6459) jonesm@loma.org

The **Individual Products Systems Committee** investigates and shares experiences related to the development of product administration systems and other systems that support individual life and related products.

Membership Requirements: Members are senior-level executives with substantial responsibilities and expertise in individual systems and/or product development and support.

LOMA Staff Liaison: Jim Huffman (770) 984-6446, huffmanj@loma.org

The **Information Technology Leadership and Strategy Committee** typically facilitates an information exchange on broad issues of importance in the information management of a company.

Membership Requirements: Members should be at the CIO/CTO or one level below depending on the organization and company scope or have primary responsible for IT for a significant line business in the organization.

LOMA Staff Liaison: Marvin Jones (770) 984-6459, jonesm@loma.org

Technology Committees Continued

The **Investment Systems Committee** focuses on current activity involving computer-assisted systems for investment support, including portfolio management, investment administration and investment accounting. The committee analyzes how these systems support the business requirements of areas responsible for managing, administering or reporting on company investments.

Membership Requirements: Members are officers with primary responsibility for recommending and/or implementing investment systems applications and ideally should have at least three years experience in investments, investment accounting, or investment systems.

LOMA Staff Liaison: Angie Norman (770) 984-6438, norman@loma.org

The **Retirement Plans Technology Committee** investigates studies and discusses current activity in member companies with group and individual pension systems. Primary emphasis is on group pension systems.

Membership Requirements: Members are responsible for the development and/or maintenance of an individual or group pension system. Depending on the company organization, the member could be from either the user or systems area.

LOMA Staff Liaison: Jim Huffman (770) 984-6446, huffmanj@loma.org

The **Group Systems Committee** investigates studies and discusses current company activity with dedicated systems for administering group life, long-term disability and medical business; the primary emphasis is on group life and medical systems.

Membership Requirements: Members are responsible for the development and/or maintenance of an integrated group system at their company.

LOMA Staff Liaison: Stacey Quance (770) 984-6448, squance@loma.org

The **Project Management Committee** studies and discusses current trends, strategies, and practices pertaining to the diverse responsibilities, which comprise the Project Management Office (PMO) of life insurance companies.

Membership Requirements: The membership is comprised of those responsible for Project Management Activities within their respective organization.

LOMA Staff Liaison: Marvin Jones (770-984-6459) jonesm@loma.org

Technology Committees Continued

The **Social and Digital Business Council** assists member companies in harnessing the power of and advancing the use of social media within the insurance industry. To gain a better understanding of industry related issues, the group will study and discuss current use of social media including strategies, procedures, tools, and best practices within their organization and industry-wide.

Membership Requirements: Members must have current, substantial and relevant experience in the use of social media and hold a management level, policy making position.

LIMRA Staff Liaison: Carolyn Clement (860-298-3939) cclement@limra.com

LOMA Staff Liaison: Jim Huffman (770) 984-6446, huffmanj@loma.org

The **Systems Development Committee** generally undertake cooperative research and gather and disseminate information in the areas of planning, systems, equipment, procedures and other company administrative practices. Committee members provide activity reports, which are fairly detailed one- to two-page write ups on specific developments in their companies, as well as informal notes on various events of interest throughout their companies. Activity reports are available for distribution and/or publication. Members also give presentations on topics of interest to the group.

Membership Requirements: Typically, members are in a management position and have at least three years of life insurance experience, including some systems or information management responsibilities.

LOMA Staff Liaison: Marvin Jones (770-984-6459) jonesm@loma.org

Training & Management Committees

The **Education & Training Council** provides guidance and input on the kind of education and training that is needed by companies that offer life and health insurance, annuities, and a wide array of related financial services worldwide. The Council is involved in the development of policies concerning the administration of programs that LOMA offers to the industry. Through the Chairman, the Council serves as an advisory body to the LOMA Board of Directors and to the LOMA staff on education issues.

Membership Requirements: Senior executives from LOMA member companies with broad range of insurance experience.

LOMA Staff Liaison: Kathy Milligan (770-984-3723), milligan@loma.org

The **Learning and Development Committee** provides a forum for members to exchange ideas and experiences, gather helpful information, and initiate, shape, and evaluate research. Issues discussed at Committee meetings include all topics within the field of training and development, such as technology and e-learning, employee development and leadership programs, assessments of employee development effectiveness, and methods to align employee development with corporate goals and strategies.

Membership Requirements: Members are senior training and management development personnel who are responsible for initiating and overseeing strategic planning and implementation of training and management development.

LOMA Staff Liaison: Miriam Orsina (770) 951-1770 ext.468 orsina@loma.org

Activity Reports

Many committees require each member to write an activity report, as well as informal notes, for every meeting. This one- or two-page report describes any company occurrence of potential interest to other members of that committee. It usually presents information about an innovation, change, new idea, or company practice that might help others. The subject matter may concern a new or improved system, procedure, form, piece of equipment, communication technique, workflow, systems tool or any other subject pertinent to the committee's area of interest.

A typical activity report describes a problem, the alternative solutions available, the method of resolution, and an evaluation of the final results. LOMA has a standard activity report form, which is available from the division staff.

Guidelines for Preparing Committee Papers. LOMA has developed the following guidelines to help committee members prepare activity reports suitable for publication.

SUBJECT MATTER

Papers should address issues of special interest to members on issues related to the assigned discussion topic. If a paper merely repeats common knowledge about a subject, members gain no new information. However, papers on familiar subjects can still present significant information and insight if they emphasize some new factor or unusual dimension.

Of course, new subjects offer the best possibilities of interest to many readers simply because they treat relatively unexplored topics. Also, if a subject is very new, literature on it is probably in great demand, so all points of view would usually be welcome contributions.

PREPARATION

To communicate the paper's message effectively, a writer need only observe a few basic principles of preparation:

Impose a structure on the material. A definite beginning, middle, and end will help clarify the intended meaning; a disregard for structure will weaken or destroy the message.

Interpret data or facts. Because the facts often do not speak for themselves, writers should explain them as though the reader has only superficial knowledge or understanding of the subject. A writer should try to increase the reader's level of knowledge, and can do so by acting as an interpreter. This approach will also make the writing assignment itself more interesting.

Comment on industry experience. The writer's interpretation should take into account the broadest point of view possible, viewing the industry as a whole. The writer could examine his/her company within the spectrum of industry experience.

SAMPLE REPORT FORMAT

One effective format the writer can use to organize a paper is a problem/solution structure. For example, if a paper discusses a company's new system for handling customer inquiries it might follow the structure given below.

- Summary of industry practices or a description of alternatives available to most companies.
- Description of the company's past procedures.
- Description of the factors that made a change necessary or desirable, the strategies proposed by management to deal with those factors, and the specific actions finally taken.
- Discussions of what has occurred since the changes were implemented.
- Discussion of the future outlook.
- Items one and two of this outline would constitute the paper's beginning, and item 5 would form the conclusion.