

MEMO# 1757

March 19, 1990

PLANNING TASK FORCE - 1991 INDUSTRY RESEARCH AGENDA FROM: TOM MACK, RESEARCH COMMITTEE CHAIRMAN [1

March 16, 1990 TO: RESEARCH COMMITTEE NO. 8-90 COMMITTEE CHAIRMEN: GREGORY BARTON (Pension) BOB BLUCKE (Operations) EUGENE DESTAEBLER, Jr. (Closed-End) BILL HOSTLER (Direct Marketing) STEVE NORWITZ (Public Information) ANNE PATENAUDE (Communications) CLAUDE THOMAS (Sales Force Marketing) FROM: TOM MACK, RESEARCH COMMITTEE CHAIRMAN RE: PLANNING TASK FORCE - 1991 INDUSTRY RESEARCH AGENDA @@@@ Each year the ICI's Research Committee develops a number of possible research projects of interest to ICI members. This process is about to begin for the 1991 fiscal year and I wanted to both bring you up-to-date on how the process works and solicit your thoughts on research proposals which might be considered for inclusion. The Committee process to develop research projects includes an important new step this year. Here is the current plan: New this year, we have established a subcommittee to collect and screen project ideas prior to discussion by the full Research Committee. Given the size of the full committee (52 members) and the number of possible projects, we think this will be an important improvement in the efficiency of the collection process. The subcommittee was selected to represent the major types of member organizations, methods of distribution and so forth. This group will meet at ICI on April 24, 1990 with the objective of producing a short list (say 6-10) of the most promising projects. Research Committee members will review this list of projects prior to the June 6th Committee meeting, where discussions will take place. Revised project descriptions will be sent to each Research Committee member for preference ranking of projects. The results will be tabulated and the resulting list will guide the ICI in establishing research priorities in the ICI's budget process for next year. The projects which are funded will be presented at the full Research Committee's October meeting, and small groups of members will be recruited to work with ICI staff on each project. We are anxious to identify your ideas on important topics for research projects prior to the subcommittee's meeting on April 24, 1990. Please contact any of the subcommittee members listed below with your thoughts. Tom Mack, Chairman, (212) 713-2082 Maureen Behning-Doyle, Prudential-Bache, (212) 214-4796 Barbara Contardo, TNE, (617) 578-2303 Mary Ann Gillen, MFS, (617) 954-6201 Russ Haskell, Keystone, (617) 338-3303 Tom Iandola, Lord Abbett, (212) 848-1800 Bridget Macaskill, Oppenheimer, (212) 323-0600 Janis Miller, IDS, (612) 372-3032 Evelyn Montalvo, Fidelity, (617) 570-5905 Charlie Vieth, T. Rowe Price, (301) 547-5763 If you have any questions

about this undertaking, please phone either Sandy West, (202) 955-3509 or me, (212) 713-2082. Please respond before April 24th.

Source URL: <https://icinew-stage.ici.org/memo-1757>

Copyright © by the Investment Company Institute. All rights reserved. Information may be abridged and therefore incomplete. Communications from the Institute do not constitute, and should not be considered a substitute for, legal advice.