

SOA Education Volunteer Job Descriptions

Curriculum Job Descriptions

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Position Title: Common Curriculum Chairperson

Position Summary: Responsible for coordination of common curriculum. Oversees goals, learning outcomes, content and assessment development, delivery and management of the following:

- Fundamentals of Actuarial Practice module and assessments
- Preliminary Education and Exams
- ERM Curriculum, Exam and Module**
- Shared modules.

**Does not include CFE track

Ensures there is a proper curriculum for the shared curriculum. Works with the Education Exec committee to make sure the Education curriculum, exams and modules are in sync.

Committee: Education Executive

Reports to: Education General Chair, Managing Director-Education

Qualifications:

- FSA with minimum of 10 years experience and active member of the SOA. Previous experience as an Education General Officer.

Term:

- 3 years (not renewable) and is expected to become the Education General Chair (2 year commitment).
- Typically a 5-year commitment in total.

Time Commitment:

- Minimum of eight to ten hours per month.

Responsibilities:

- Supports and implements SOA Board of Directors (BOD) and Education Executive policy decisions.
- Identifies and analyzes emerging issues in Education
- Oversees Preliminary education and exam, ERM, FAP and Shared Module general officers.
- Ensures the coordination of Fellowship Education (curriculum and exams) with respect to common and track specific elements.
- Recruits for education system volunteer positions, with emphasis on Common Curriculum General Officer and Module Chairperson positions.
- Works with the Education Executive Committee to develop and implement succession plans for the common curriculum.
- Identifies mentors and develops future Education leaders.
- Prepares for, attends and actively participates in Education Executive and other meetings and conference calls as appropriate.
- Along with the other members of the Education Executive sets annual goals based on input, as appropriate, from others.
- Monitors common curriculum effectiveness (candidate evaluations; stakeholder feedback).
- With help from SOA staff, organizes training for Fellowship volunteers on content of preliminary exams and path to become an ASA.
- Maintains confidentiality in accordance with the SOA Education Confidentiality Agreement and demands the same of other education volunteers.
- Consults and coordinates with:
 - SOA Board of Directors (as needed).
 - Education Executive members.
 - SOA Managing Director, Education.
 - FAP Curriculum and Assessment General Officers
 - Preliminary Education and Exam General Officers
 - Shared Module General Officer
 - SOA Staff: Education,

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- Other Actuarial Organizations (as needed).

Meetings and Travel Requirements:

- Meetings
 - Two, 4-day Education Central Reviews/Executive Group/General Officers meetings per year (January, July).
 - One 2 to 2.5 day Leadership Orientation meeting (November)
 - Periodic planning and working group meetings (as needed basis).
- Conference Calls:
 - Periodic working group conference calls (as needed basis).

Required competencies (knowledge, skills and abilities to perform the volunteer job):

Overall, strong communication (effective presentation and writing, in particular) and interpersonal relationship management (including facilitation and team building) skills are essential. Leadership skills (also including negotiation, influence, and conflict resolution) are very important. A focus on ensuring results-oriented solutions is essential to the continued success of the e-Learning education and assessment systems. Professionalism is critical, especially as it relates to the confidential nature of the work and the discipline aspects of the position.

The Common Curriculum Chairperson demonstrates proficiency in each of the eight core competency areas listed below.

1. *Professional Values:* Maintain current and thorough understanding of the subject matter; act in accordance with volunteer confidentiality agreement.
2. *Communication:* Demonstrate effective listening, writing and speaking skills in informal and formal volunteer settings.
3. *External forces and industry knowledge:* Respond to changes in the environment (cultural/social values, demographics, governmental influences, economic/business environments, other) by identifying and incorporating the implications of the changes into content or assessments.
4. *Leadership:* Meet commitments; initiate and inspire other volunteers; mentor and coach volunteer direct reports.
5. *Relationship management and interpersonal collaboration:* Be an active member of the team; understand varying work styles and preferences; work together towards common goal.
6. *Technical skills and analytic problem solving:* Apply actuarial knowledge, skills and judgment to develop and deliver accurate content/assessments/grades.
7. *Strategic insight and integration:* Proactively contribute to continued evolution of ASA and other common modules. Learning; understand and respond to stakeholder (candidate, member, employer, volunteer) needs; anticipate trends and how to apply to content/assessments/grading.
8. *Results-oriented solutions:* Participate in education decision making; implement recommendations.

SOA Education Curriculum Volunteer Position

Updated 4/8/14

Position Title: Fellowship Curriculum Chairperson

Position Summary: Overall responsibility for the development, revision, and review of the learning objectives and course of reading for SOA Fellowship examinations and ensuring appropriate integration with FSA module content; serves as a member of the Education Executive Group.

Reports To: General Chairperson

Qualifications:

- An FSA member in good-standing with the SOA.
- Compliant with SOA Education Conflict of interest policy and Confidentiality Agreement
- Prior experience on curriculum committees up through GO.
- Position requires leadership, initiative, communication, and organizational skills, plus a good understanding of all aspects of the curriculum development process.

Term of Service: Normally three years, with the expectation that the incumbent will then advance to the General Chairperson position

Time Commitment: Approximately 150 hours, for required duties including PDC participation; can increase if involved in other Education Committee initiatives

Responsibilities & Duties: Specific responsibilities include:

- Establishing priorities related to curriculum issues, in conjunction with input from the Education Executive Group
- Ensuring that Curriculum Committees are appropriately staffed; recommending and recruiting Curriculum GOs
- Ensuring that the course of reading is kept up-to-date
- Ensuring that consistent standards are maintained across fellowship tracks
- Participating as a reviewer at spring and fall exam Central Review sessions
- Conducting Curriculum GO meetings during Central Review and by teleconference as needed between Central Review meetings
- Proactively reviewing curriculum policy and recommending changes as deemed appropriate
- Ex-officio member of Professional Development Committee (PDC)

Meeting & Travel Requirements:

- Education Executive Group monthly teleconferences
- PDC monthly teleconferences
- Central Review / GO in-person meetings of 3-4 days, two times per year, plus travel time
- PDC face-to-face meetings twice per year (1 day each)
- Curriculum GO teleconferences twice per year
- Other ad hoc conference calls and/or meetings dependent on specific initiatives
- Fall SOA Leadership meeting (1-1/2 days)

SOA Education Curriculum Volunteer Position

Updated 4/8/14

Position Title: Curriculum General Officer (GO)-FSA Exams

Position Summary: Responsible for the development, revision, and review of the learning objectives and course of reading for applicable track SOA examinations

Reports To: Fellowship Curriculum Chairperson

Qualifications:

- An FSA member in good standing with the SOA
- Compliant with SOA Education Conflict of Interest policy and Confidentiality Agreement
- Position requires leadership, initiative, communication, and organizational skills, plus a good understanding of all aspects of the curriculum development process.

Term of Service: Three years

Time Commitment: Approximately 125 hours annually, for required duties; approximately 6-7 days out of the office per year; can increase if involved in other Education Committee initiatives

Responsibilities & Duties: Specific responsibilities include:

- Ensuring that the course of reading is kept up-to-date
- Initiating development of curriculum material as needed
- Leading Curriculum Committee efforts to identify and select new course material
- Ensuring that course learning objectives and outcomes are appropriate and complete
- Ensuring that Curriculum Committee is appropriately staffed
- Communicating/coordinating with track examination committees to obtain their input regarding course of reading
- Participating as a reviewer at spring and fall exam Central Review sessions
- Participating in GO meetings at Central Review
- Conducting Curriculum Committee meetings and conference calls during periodic reviews of course of reading
- Signing-off on learning objectives, learning outcomes, course of reading and Introductory Study Notes on a timely basis
- Coordinating with preliminary education curriculum content committees and e-learning committees to ensure coordination in course of reading and learning objectives

Meeting & Travel Requirements:

- Central Review / GO in-person meetings of 3-4 days, two times per year, plus travel time

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- Periodic (generally not more than 2 per year) one-day Curriculum Committee meetings for face-to-face course of reading review
- Curriculum Committee teleconferences (estimated at 8-10 per year)
- Curriculum GO teleconferences (estimated 2 per year)
- Other ad hoc conference calls and/or meetings dependent on specific initiatives

SOA Education Curriculum Volunteer Position

Updated 4/8/14

Position Title: Curriculum General Officer (GO) Preliminary Examinations

Position Summary: Responsible for the development, revision, and review of the learning objectives and course of reading for SOA preliminary examinations

Reports To (if applicable): Common Curriculum Chairperson

Qualifications:

- An ASA or FSA Member in good standing with the SOA
- Compliant with SOA Conflict of Interest policy and Confidentiality Agreement
- Prior experience on curriculum, examination, or e-learning committees
- Position requires leadership, initiative, communication, and organizational skills, plus a good understanding of all aspects of the curriculum development process

Term of Service: Three years

Time Commitment: Approximately 80 hours per year, for required duties
Can increase if involved in other initiatives

Responsibilities & Duties: Specific responsibilities include:

- Signing-off, on behalf of the SOA, learning objectives, learning outcomes, course of reading and Introductory Study Notes on a timely basis
- Ensuring that the course of reading is kept up-to-date
- Leading efforts on behalf of the SOA within the Preliminary Examination Curriculum Committee (a joint SOA/CAS committee) to identify and select new course material
- Initiating, as needed, the development of new course materials
- Ensuring that course learning objectives and outcomes are appropriate and complete
- Communicating and coordinating with preliminary examination committees to obtain their input regarding learning objectives and course of reading
- Coordinating with FSA curriculum content committees and e-learning committees to ensure coordination of learning objectives and course of reading
- Participating as a reviewer at spring and fall exam Central Review sessions
- Participating in Education General Officer meetings
- Representing SOA positions during Preliminary Examination Curriculum Committee meetings and conference calls
- Ensuring that the SOA membership within the Preliminary Examination Curriculum Committee is appropriately staffed

Meeting & Travel Requirements:

- Central Review / GO in-person meetings of 2-3 days, two times per year, plus travel time. 2-4 days are during the work week.

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- Preliminary Examination Curriculum Committee teleconferences (estimated at 10 per year)
- Curriculum GO teleconferences (estimated 2 per year)
- Other ad hoc conference calls and/or meetings dependent on specific initiatives

SOA Education Curriculum Volunteer Position

July 1, 2011

Position Title: Curriculum Committee Member-FSA Exams

Position Summary: Participate in the development, revision, and review of the learning objectives and course of reading for applicable track SOA examinations

Reports To (if applicable): Curriculum GO

Qualifications:

- An FSA member in good standing with the SOA
- Compliant with SOA Conflict of Interest policy and Confidentiality Agreement
- Prior experience on curriculum committees up through GO.
- Familiarity with course of reading, nature of SOA examinations and practice area(s) relevant to Track.
- Position requires ability to work independently and adhere to deadlines, initiative, communication, creativity and organizational skills.

Term of Service: Term of service is three years; committee members can serve up to two terms

Time Commitment: Approximately 60 hours per year

Responsibilities & Duties: Specific responsibilities include:

- Participating in Curriculum Committee efforts to identify, review and select new course material
- Initiating development of curriculum material as needed
- Participating in Curriculum Committee review of course of reading, learning objectives and learning outcomes
- Ensuring that course learning objectives and outcomes are appropriate and complete
- Recruiting study note authors and overseeing study note development and review
- Assisting SOA staff in mapping textbook updates
- Participating in Curriculum Committee meetings and conference calls during periodic reviews of course of reading
- Developing as-needed content for inclusion in Introductory Study Notes

Meeting & Travel Requirements:

- Periodic (generally not more than 2 per year) one-day Curriculum Committee meetings for face-to-face course of reading review
- Curriculum Committee teleconferences (estimated at 8-10 per year)

Additional Information (if applicable):

Participation on curriculum committees is encouraged for persons involved in other areas of the Education committee, particularly those involved in the examination side.

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Such participation facilitates the volunteer's understanding of the complete education "cycle" from learning objective setting, curriculum development, examination and assessment. With such an understanding and participation, all phases of the education process are connected and better coordinated.

SOA Education Curriculum Volunteer Position

July 1, 2011

Position Title: Curriculum Committee Member (Preliminary Examinations)

Position Summary: Participate in the development, revision, and review of the learning objectives and course of reading for SOA preliminary examinations

Reports To (if applicable): Curriculum GO Preliminary Examinations

Qualifications:

- An ASA or FSA member in good standing with the SOA
- Compliant with SOA Education Conflict of Interest policy and Confidentiality Agreement
- Familiarity with course of reading and nature of SOA examinations relevant to the SOA preliminary examinations. Does not require familiarity with the course of reading of every examination.
- Position requires ability to work independently and adhere to deadlines, initiative, communication, creativity and organizational skills.

Term of Service: Term of service is three years; committee members can serve two consecutive terms

Time Commitment: Approximately 40 hours per year

Responsibilities & Duties: Specific responsibilities include:

- Participating in Preliminary Examination Curriculum Committee (a joint SOA/CAS committee) efforts to identify, review and select new course material
- Participating in Preliminary Examination Curriculum Committee review of course of reading, learning objectives and learning outcomes
- Ensuring that course learning objectives and outcomes are appropriate and complete
- Assisting in the recruitment of study note authors and overseeing study note development and review
- Assisting SOA staff in mapping textbook updates
- Participating in conference calls during reviews of course of reading

Meeting & Travel Requirements:

- Preliminary Examination Curriculum Committee teleconferences (estimated at 10 per year)