

Society of Actuaries
Education Professionalism Volunteer Job Descriptions

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SOA Education Professionalism Volunteer Position July 1, 2011

Position Title: Professionalism Education Management Committee (PEMC) Member

Position Summary: PEMC is responsible for the oversight, review, and revision of the Associateship Professionalism Course (APC) and Fellowship Admissions Course (FAC) programs. Committee members work together to accomplish this objective.

Reports To: PEMC Chair

Qualifications: Committee members should have a solid understanding of the content, requirements, and goals of the APC and FAC programs. Volunteering as a Facilitator is common, but not required.

Committee members must also be:

- FSA member in good standing of the SOA
- Compliant with SOA Education Conflict of Interest policy and Confidentiality Agreement

Term of Service: Three years. Term may be renewed once.

Time Commitment: Attend two in-person meetings (possibly by phone) annually. Most other Committee work is task-oriented, with e-mail or phone communication.

Responsibilities & Duties: Specific responsibilities include:

- Ensure that course content continues to be relevant and appropriate.
- Develop, revise, and update course materials, including case studies, as necessary.
- Develop, revise, and update faculty guides as necessary.
- Approve audio, video, and outside speaker content.
- Participate in outside vendor evaluation as necessary
- Review and act upon course evaluations (APC and FAC).
- Each member generally has responsibility for a specific aspect of the course (e.g., case studies, Professionalism Session, APC, presentations, DMAC coordination, CIA liaison)
- Organize course schedules to effectively meet objectives.
- Assure adequate sessions are planned.
- Work with SOA staff on program logistics.
- SOA staff is a key partner in all aspects of the APC, FAC, and PEMC.

Meeting & Travel Requirements:

- Two annual one-day meetings, normally held on Monday or Friday.
- Reasonable travel expenses are reimbursed by the SOA.

**SOA Education Professionalism Volunteer Position
July 1, 2011**

Position Title: Professionalism FAC/APC Facilitator

Position Summary: For FACs: Facilitate case study discussions, review and critique candidate presentations, support Course Director and SOA Staff in managing FAC program. For APCs: Run one-day APC course including lecture, Q&A, case studies.

Reports To: Course Director for FAC; Professionalism GO or SOA staff for APC.

Qualifications: Facilitators are recruited from the ranks of senior actuaries, generally with at least ten years of post-Fellowship experience who agree to undergo training in the case study method. FAC Facilitators must be good listeners, willing to let off-beat ideas be discussed without intervening authoritatively, and willing to let the case study process work. Also, strong facilitators generally have many years of experience, preferably some that is recent, leading to an awareness of subtleties and overtones in the case studies. Facilitators who possess a combination of experience, awareness of current issues and a willingness to let the groups work out their own solutions have proven to be most effective. Once trained, facilitators are expected to participate in one FAC per calendar year. FAC facilitators who have participated in at least two complete FAC sessions are eligible to facilitate the Associateship Professionalism Course (APC).

Facilitators must also be:

- FSA member in good standing of the SOA
- Compliant with SOA Education Conflict of Interest policy and Confidentiality Agreement

Term of Service: Facilitators are not subject to term limits.

Time Commitment: Each new facilitator must be trained by attending an FAC and working with an assigned faculty mentor. An APC requires travel time and a full day (9 am to 3 pm) for the course. An FAC requires three full days plus travel time. Facilitating once per year at either an APC or an FAC is a meaningful contribution.

Responsibilities & Duties: Specific responsibilities include:

- Lead case study discussions. Teaching guides are provided.
- Provide feedback to FAC candidates, all of whom are required to make a presentation.
- APC Facilitators are provided a script, but preparation time is required.
- Assist Course Director and SOA staff as required.

Meeting & Travel Requirements:

- Reasonable travel expenses are reimbursed by the SOA.
- SOA staff handles all logistics (meals, meeting space, candidate instructions, etc.).

SOA Education Professionalism Volunteer Position
July 1, 2011

Position Title: Professionalism General Officer (GO)

Position Summary: Responsible for the development, revision, and review of the APC and FAC programs.

Reports To: Curriculum Chairperson

Qualifications: Position requires leadership, initiative, communication, and organizational skills, plus a complete understanding of all aspects of the APC and FAC programs.

The Professionalism GO must also be:

- FSA member in good standing of the SOA
- Compliant with SOA Education Conflict of Interest policy and Confidentiality Agreement

Term of Service: Three years.

Time Commitment: Attendance at several FACs, two PEMC meetings, two GO/Central Review meetings each year. Frequent contact with SOA staff, discussing APC and FAC arrangements.

Responsibilities & Duties: Specific responsibilities include:

- Chair Professionalism Education Management Committee.
- Recruit APC/FAC Facilitators as needed, generally four new facilitators each year.
- Work with SOA staff to oversee new Facilitator training.
- Serve as FAC Course Director and APC Facilitator, to stay in close touch with courses.
- Resolve course discipline situations with Course Director and SOA staff.
- Work closely with SOA staff to assure that APC/FAC programs are working properly.
- Assure that course content remains relevant and appropriate.
- Responsible for: pre-reading, course materials, course schedules, faculty guides.
- Work with SOA staff on outside speakers and video content.
- Work closely with SOA staff on all details related to the courses.
- Keep General Officers apprised of issues, concerns, problems related to APC/FAC.
- Participate as a reviewer at spring and fall exam Central Review sessions.
- Serve as SOA liaison to the Academy's Council on Professionalism.

Meeting & Travel Requirements:

- Volunteer as Course Director for the FAC (3 full days plus travel) as schedule permits.
- Occasionally volunteer as APC Facilitator.
- Run two annual one-day PEMC face-to-face meetings.
- Attend GO/Central Review in-person meetings (3 days) twice each year.
- Participate in Curriculum GO teleconferences (at least 2 per year)