

Society of Actuaries
Professional Development Volunteer Job Descriptions

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**SOA Professional Development Volunteer Job Description
June 15, 2010**

Position Title: Annual Meeting Program Committee Chairperson

Position Summary:

Reports To (if applicable):

Qualifications: Vice Chair previous year

Term of Service: 1 Year

Time Commitment: 50+ Hours

Responsibilities & Duties:

- Partner with SOA staff in setting and communicating goals and objectives for the Meetings.
- Provide leadership to Program Committee section representatives in planning and designing the educational program, particularly in articulating clear, demonstrable learning outcomes for each session.
- Support committee members in their efforts to recruit presenters.
- Reviewing session descriptions for clearly defined demonstrable learning outcomes.
- Assist with monitoring recruiting efforts and sub recruiting as needed.
- Serve as section representative or committee substitute in program slotting review if the representative is absent.
- Review program for overlapping or conflicting sessions/seminars.
- Provide an overall membership viewpoint during discussions or committee decision making
- Contact section representatives as needed

Meeting & Travel Requirements: None

**SOA Professional Development Volunteer Job Description
June 15, 2010**

Position Title: Annual Meeting Program Committee Member

Position Summary:

Reports To (if applicable):

Qualifications:

Term of Service: Varies

Time Commitment: 50+ Hours

Responsibilities & Duties:

Members-at-Large

- Assist committee chairperson and section representatives as needed. Tasks could include:
- Reviewing session descriptions for clearly defined demonstrable learning outcomes.
- Assist with monitoring recruiting efforts and sub recruiting as needed.
- Serve as section representative or committee substitute in program slotting review if the representative is absent.
- Review program for overlapping or conflicting sessions/seminars.
- Provide an overall membership viewpoint during discussions or committee decision making.
- Contact section representatives as needed.

Section Representatives

- Actively participate in meetings, discussions, and decisions of the Program Committee.
- Communicate key messages (such as meeting goals and objectives) to the section's council and/or CE team.
- Coordinate the identification and development of meeting topics with the section's council and/or CE team input.
- Coordinate the identification and development of section networking opportunities with the section's council and/or CE team input.
- Serve as the section's primary communications point-person for SOA staff and the Program Committee (for example, for meeting information, content and recruiting information).
- Meet the content development and recruiting deadlines.

Meeting & Travel Requirements: None

SOA Professional Development Volunteer Job Description
June 15, 2010

Position Title: Annual Meeting Program Committee Vice Chairperson

Position Summary:

Reports To (if applicable):

Qualifications: Must be SOA Member, Must have previously been on committee

Term of Service: 1 Year

Time Commitment: 50+ Hours

Responsibilities & Duties:

- Provide leadership to Program Committee section representatives in planning and designing the educational program, particularly in articulating clear, demonstrable learning outcomes for each session.
 - Support committee members in their efforts to recruit presenters.
 - Reviewing session descriptions for clearly defined demonstrable learning outcomes.
 - Assist with monitoring recruiting efforts and sub recruiting as needed.
 - Serve as section representative or committee substitute in program slotting review if the representative is absent.
 - Review program for overlapping or conflicting sessions/seminars.
 - Provide an overall membership viewpoint during discussions or committee decision making.
 - Contact section representatives as needed.
- Serve as chair the following year.

Meeting & Travel Requirements: None

**SOA Professional Development Volunteer Job Description
June 15, 2010**

Position Title: Meetings Moderator

Position Summary:

Reports To (if applicable): N/A

Qualifications: Some subject matter knowledge

Term of Service: N/A

Time Commitment: 5-10 hours

Responsibilities & Duties:

- Monitoring of meeting sessions at program
- Provide assistance to presenter(s) as needed

Meeting & Travel Requirements: Travel once per year

**SOA Professional Development Volunteer Job Description
June 15, 2010**

Position Title: Meetings Presenter

Position Summary:

Reports To (if applicable): N/A

Qualifications: Expertise in subject matter

Term of Service: Varies

Time Commitment: 8-12 Hours

Responsibilities & Duties:

- Provide knowledge of late breaking trends on pertinent topics
- Be a reliable source of knowledge and information on specific subject matter
- Be capable of handling questions and feedback from audience members
- Ability to professionally present information in front of a large audience of your peers

Meeting & Travel Requirements: Travel to meeting to present

SOA Professional Development Volunteer Job Description July 2, 2012

Position Title: Professional Development Committee (PDC) Chairperson

Position Summary: The Chair of the PDC facilitates the ability of the committee to carry out the functions necessary to accomplish its goals. To be able to identify strategic connections when they arise, the Chair also has a responsibility to maintain a knowledge base about the PD Redesign Plan approved by the Board of Directors as well as the Competency Framework for Actuaries.

General Responsibilities

The PDC is charged with ensuring that the SOA's Professional Development program meets the diverse development needs of the profession and provides the highest quality learning experiences. The PDC ensures that the program is focused on both current and forward-looking technical and non-technical content, making appropriate use of instructional technologies to assure timeliness of, and broad access to, relevant and engaging programming.

The Chair, along with the Vice Chair and Staff Partner, work with PDC to align the efforts of the PDC with the PD Redesign Plan, the Competency Framework for Actuaries and the overall mission and goals of the SOA.

The Chair will take an active role in most PDC activities. The activities of the PDC include both face-to-face meetings as well as regularly scheduled conference calls.

Specific Responsibilities

Stewardship

1. Participate in developing the annual plan of work for the PDC. The annual plan of work will be based upon the PD Redesign Plan as approved by the Board of Directors at its October 25, 2009 meeting.
 - *What does this mean?*
 - The PDC is will evaluate the proposed annual schedule of PD offerings. It will identify gaps in the schedule in relation to the Competency Framework for Actuaries. It will recommend options for programming to provide a comprehensive, progressive curriculum. Delivery mechanisms will also be evaluated to provide the wide access to the highest quality content.
 - *Chair role*
 - Optimally, the Chair is a facilitator and participant in these planning meetings and can provide insight to Committee of what is deemed important to the SOA.
2. Review all Committee call/meeting agendas and participate in those meetings.
 - *What does this mean?*
 - It is anticipated that there will be four face-to-face meetings and up to eight conference calls held each year. The Chair, working with the Staff Partner, is expected to develop the agenda for each of these gatherings. The Chair is expected to lead these calls/meetings. In addition, ad hoc subcommittees may be created to address specific needs identified by the PDC. The Chair is expected to participate in these subcommittees as appropriate (that is, based on applicable experience or insight, and in consideration of other commitments already made to supporting the PDC). The Chair may have independently scheduled (or informal) calls with the Board Partner, Vice Chair and/or Staff Partner. While staff can arrange calls, the Board Partner and Chair have (the most) discretion on the level of these relationships.
3. Review the PDC report prior to its inclusion in the Board packet.
 - *What does this mean?*

- Prior to the Board meeting, the PDC report will be prepared for the Consent Agenda for the Board packet. It is a consolidated report of accomplishments and upcoming activities of the Committee. The Chair will assist in the development of this report.
4. Ensures liaison roles are filled as appropriate
- *What does this mean?*
 - One way that the PDC ensures a feedback loop with other organizations and teams is through the role of liaisons (see last page for complete listing). The Chair is responsible for ensuring these roles are filled by leading PDC in the selection process (note that where another committee has final approval the PDC's selection is taken as a recommendation).

Communicating with SOA Members

The Chair will be the face of the PDC as regards communications with the SOA membership.

- *What does this mean?*
- As opportunities for communication with SOA members arise, the Chair will respond or delegate responsibility. This includes, but is not limited to, writing articles, replying to recommendations, and participating in meeting sessions or webinars regarding PDC activities.

The Chair is a member of the PDC and is thus expected to fulfill any facets of the PDC Member Job Description not otherwise specified above.

Organization or Team	Member assigned	Selection Responsibility
SOA Board of Directors	Board Partner	n/a, tied to PDC role
Issues Advisory Committee	Board Partner	n/a, tied to PDC role
International Committee	TBD annually	Leadership Team
Education Executive Committee	TBD annually	PDC (with Ed Exec input)
Conference of Consulting Actuaries	Vice Chair	n/a, tied to PDC role
<i>Planning Committees</i>	<i>Section Rep</i>	
Annual Meeting	Special Interest	n/a, tied to PDC role
ERM Symposium	ERM/Finance	n/a, tied to PDC role
Health Meeting	Health	n/a, tied to PDC role
Investment Symposium	ERM/Finance	n/a, tied to PDC role
Life & Annuity Symposium	Life	n/a, tied to PDC role
Valuation Actuary Symposium	Life	n/a, tied to PDC role

With the approval of the PDC, role specific assignments may be placed with others on the committee.

SOA Professional Development Volunteer Job Description July 2, 2012

Position Title: Professional Development Committee (PDC) Vice Chairperson

Position Summary: The Vice Chair of the PDC assists the Chair in facilitating the ability of the committee to carry out the functions necessary to accomplish the goals of the committee. To be able to identify strategic connections when they arise, the Vice Chair also has a responsibility to maintain a knowledge base about the PD Redesign Plan approved by the Board of Directors as well as the Competency Framework for Actuaries.

General Responsibilities

The PDC is charged with ensuring that the SOA's Professional Development program meets the diverse development needs of the profession and provides the highest quality learning experiences. The PDC ensures that the program is focused on both current and forward-looking technical and non-technical content, making appropriate use of instructional technologies to assure timeliness of, and broad access to, relevant and engaging programming.

The Vice Chair, along with the Chair and Staff Partner work with PDC to align the efforts of the PDC with the PD Redesign Plan, the Competency Framework for Actuaries and the overall mission and goals of the SOA.

The Vice Chair will take an active role in most PDC activities. The activities of the PDC include both face-to-face meetings as well as regularly scheduled conference calls.

Specific Responsibilities

Stewardship

Review all Committee call/meeting agendas and participate in those meetings.

- *What does this mean?*
- It is anticipated that there will be four face-to-face meetings and up to eight conference calls held each year. The Vice Chair, working with the Chair and Staff Partner, is expected to support the agenda development for the face-to-face meetings. The Vice Chair is expected to actively participate in these calls/meetings. In addition, ad hoc subcommittees may be created to address specific needs identified by the PDC. The Vice Chair is expected to participate in these subcommittees as appropriate (that is, based on applicable experience or insight, and in consideration of other commitments already made to supporting the PDC). The Vice Chair may have independently scheduled (or informal) calls with the Board Partner, Chair and/or Staff Partner. While staff can arrange calls, the Board Partner and Chair have (the most) discretion on the level of these relationships.

External Relations.

Strategic relationships and partnerships are key to the success of the PD Program.

- *What does this mean?*
- Many Section Councils have semi-autonomous relationships with other professional organizations. The relationship may be with another actuarial organization or another professional organization. Staff Partners should be apprised of any new relationships under consideration.
- *Vice Chair role*
- The Vice Chair is tasked with organizing, with the support of SOA staff, the vetting of proposed partnerships and the presentation of these opportunities to the Committee. In addition, the Vice Chair will serve as the PDC's liaison to the Conference of Consulting Actuaries.

The Vice Chair is a member of the PDC and is thus expected to fulfill any facets of the PDC Member Job Description not otherwise specified above.

Organization or Team	Member assigned	Selection Responsibility
SOA Board of Directors	Board Partner	n/a, tied to PDC role
Issues Advisory Committee	Board Partner	n/a, tied to PDC role
International Committee	TBD annually	Leadership Team
Education Executive Committee	TBD annually	PDC (with Ed Exec input)
Conference of Consulting Actuaries	Vice Chair	n/a, tied to PDC role
<i>Planning Committees</i>	<i>Section Rep</i>	
Annual Meeting	Special Interest	n/a, tied to PDC role
ERM Symposium	ERM/Finance	n/a, tied to PDC role
Health Meeting	Health	n/a, tied to PDC role
Investment Symposium	ERM/Finance	n/a, tied to PDC role
Life & Annuity Symposium	Life	n/a, tied to PDC role
Valuation Actuary Symposium	Life	n/a, tied to PDC role

With the approval of the PDC, role specific assignments may be placed with others on the committee.

SOA Professional Development Volunteer Job Description July 2, 2012

Position Title: Professional Development Committee (PDC) Member

Position Summary: There are 12 members of the PDC, as follows:

Five section representatives (ERM/Finance, Health, Life, Pension, Special Interest)
Two location representatives (Canada, International)
Two SOA staff members (MD of Sections & Practice Advancement, Senior Director of Curriculum and Content Development)
Two SOA Education Executive representatives (Curriculum Chair, e-Learning Chair)
Board Partner

All, with the exception of the Senior Director of Curriculum and Content Development, must be SOA members in good standing. Members of the PDC will carry out the functions necessary to accomplish the goals of the committee.

General Responsibilities

The PDC is charged with ensuring that the SOA's Professional Development program meets the diverse development needs of the profession and provides the highest quality learning experiences. The PDC ensures that the program is focused on both current and forward-looking technical and non-technical content, making appropriate use of instructional technologies to assure timeliness of, and broad access to, relevant and engaging programming.

Committee Members will assess, analyze and propose strategies for developing SOA PD programs aligned with the Competency Framework for Actuaries and the overall mission and goals of the SOA. Members also encourage other volunteers to develop and deliver PD programs.

Members take an active role in most PDC activities, including face-to-face meetings, regularly scheduled conference calls and other assignments.

Specific Responsibilities

1. Attend regularly scheduled face-to-face meetings and conference calls.
 - *What does this mean?*
 - It is anticipated that there will be four face-to-face meetings and up to eight conference calls held each year. Members are expected to actively participate in these calls/meetings. In addition, ad hoc subcommittees may be created to address specific needs identified by the PDC. Members are expected to participate in these subcommittees as appropriate (that is, based on applicable experience or insight, and in consideration of other commitments already made to supporting the PDC).
2. Review the annual PD Plan.
 - *What does this mean?*
 - A complete annual plan of programs will be prepared each year. The annual plan will include both traditional and distance learning programs. The Committee Members will review the plan against the principles of the PD Redesign Plan. This annual plan is subject to revision throughout the year based on ongoing requests.
3. Assess the annual PD Plan for gaps and make recommendations.
 - *What does this mean?*
 - The annual plan should be comprehensive and meet the diverse needs of the membership. The plan will:
 - Reflect the Competency Framework for Actuaries,
 - Provide for the reuse and repurposing of content
 - Provide a variety of delivery methods.

- Align with the pre-credentialing education program
 - Committee members will assess all aspects of the annual PD Plan and provide recommendations for modifications.
- 4. Communicate the annual PD Plan.
 - *What does this mean?*
 - The sections play a vital role the planning, development and delivery of the SOA PD Program. The PDC members will be responsible for ensuring that the sections and other organizations or teams with which the PDC has a liaising role are provided with appropriate communication related to the plan.
- 5. Monitor and make recommendations on emerging learning technologies.
 - *What does this mean?*
 - Learning technologies are rapidly changing. Committee members should evaluate and make recommendations for the adoption of new technologies for application to SOA PD Programs.
- 6. Establish an ongoing review cycle and participate in the review of content.
 - *What does this mean?*
 - Instructional content must be reviewed in a systematic manner to ensure accuracy and timeline of content. The committee will assist in determining the appropriate review cycle for content and participate as appropriate in reviewing content.
- 7. As required, select liaisons to ensure a feedback loop with other organizations and teams (see last page for complete listing).
- 8. Encourage volunteers to participate in the development and delivery of content.
 - *What does this mean?*
 - Committee members shall serve as ambassadors for SOA PD programs. They should encourage volunteerism for all aspects of SOA's PD Program.
- 9. Evaluate proposed strategic partnerships with other organizations
 - *What does this mean?*

The SOA may consider undertaking a strategic partnership for PD purposes with another organization, whether actuarial or professional. The PDC has the responsibility and authority to evaluate the proposals and take a decision as to the appropriateness of the relationship. Members may have knowledge of other experiences with a professional organization being considered and, if so, it is appropriate to share these with the PDC.

Organization or Team	Member assigned	Selection Responsibility
SOA Board of Directors	Board Partner	n/a, tied to PDC role
Issues Advisory Committee	Board Partner	n/a, tied to PDC role
International Committee	TBD annually	Leadership Team
Education Executive Committee	TBD annually	PDC (with Ed Exec input)
Conference of Consulting Actuaries	Vice Chair	n/a, tied to PDC role
<i>Planning Committees</i>	<i>Section Rep</i>	
Annual Meeting	Special Interest	n/a, tied to PDC role
ERM Symposium	ERM/Finance	n/a, tied to PDC role
Health Meeting	Health	n/a, tied to PDC role
Investment Symposium	ERM/Finance	n/a, tied to PDC role
Life & Annuity Symposium	Life	n/a, tied to PDC role
Valuation Actuary Symposium	Life	n/a, tied to PDC role

With the approval of the PDC, role specific assignments may be placed with others on the committee.

**SOA Professional Development Volunteer Job Description
June 15, 2010**

Position Title: Spring Meetings Committee Chairperson

Position Summary:

Reports To (if applicable):

Qualifications: Recruitment/Organizing ability

Term of Service: 1 Year

Time Commitment: 50+ Hours

Responsibilities & Duties:

- Partner with SOA staff in setting and communicating goals and objectives for the Meetings.
- Provide leadership to Program Committee section representatives in planning and designing the educational program, particularly in articulating clear, demonstrable learning outcomes for each session.
- Support committee members in their efforts to recruit presenters.
- Reviewing session descriptions for clearly defined demonstrable learning outcomes.
- Assist with monitoring recruiting efforts and sub recruiting as needed.
- Serve as section representative or committee substitute in program slotting review if the representative is absent.
- Review program for overlapping or conflicting sessions/seminars.
- Provide an overall membership viewpoint during discussions or committee decision making
- Contact section representatives as needed

Meeting & Travel Requirements: None

SOA Professional Development Volunteer Job Description
June 15, 2010

Position Title: Spring Meetings Committee Vice Chairperson

Position Summary:

Reports To: Spring Meetings Committee Chairperson

Qualifications: Must be SOA Member, capable to recruit, organize and assist program chairperson

Term of Service: 1 Year typically

Time Commitment:

Responsibilities & Duties:

- Provide leadership to Program Committee section representatives in planning and designing the educational program, particularly in articulating clear, demonstrable learning outcomes for each session
- Support committee members in their efforts to recruit presenters
- May serve as chair the following year

Meeting & Travel Requirements: None