

## SOA Education Volunteer Job Descriptions

# Education Executive Group Job Descriptions

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## **Society of Actuaries**

### **Volunteer Job Description**

**Department Name:** Education Department

**Position Title:** General Chairperson

**Position Summary:** Operating head of the SOA Education Committee with overall responsibility for all Committee activities.

**Reports To (if applicable):** N/A

**Qualifications:** An FSA member in good standing with the SOA; Compliant with SOA Education Conflict of Interest policy and Confidentiality Agreement; Prior experience on examination, curriculum, and/or e-learning committees up through General Officer (GO) level or equivalent leadership role, followed by service as a member of the Education Executive Group; Position requires leadership, communication, and organizational skills.

**Term of Service:** One year

**Time Commitment:** Minimum of 100 hours, for routine duties (can range to double/triple that amount if proactive in addressing policy initiatives).

**Responsibilities & Duties:** Specific responsibilities include:

- Establishing Education Committee priorities, in conjunction with the SOA Managing Director - Education, with consideration to any direction provided by the SOA Board of Directors
- Conducting Education Executive Group and GO meetings
- Approving pass marks for all non-CBT exams
- Approving disciplinary action arising from cheating incidents and other exam and e-learning irregularities
- Proactively reviewing policy and recommending changes as deemed appropriate

**Meeting & Travel Requirements:**

- Education Executive Group monthly teleconferences
- Central Review / GO in-person meetings of 3-4 days, two times per year, plus travel time
- SOA Leadership in-person meeting of 1 ½ days, plus travel time
- Other ad hoc conference calls and/or meetings dependent on specific initiatives

**Additional Information (if applicable):**

## **Society of Actuaries**

### **Volunteer Job Description**

**Department Name:** Education Department

**Position Title:** Immediate Past General Chairperson

**Position Summary:** Provides advice and support as a member of the Education Executive Group based on expertise gained as prior General Chairperson

**Reports To (if applicable):** General Chairperson

**Qualifications:** An FSA member in good standing with the SOA; Compliant with SOA Education Conflict of Interest policy and Confidentiality Agreement; Service as General Chairperson in prior year

**Term of Service:** One year

**Time Commitment:** Approximately 50 hours  
Can increase if becomes involved in specific initiatives

**Responsibilities & Duties:** Specific responsibilities include:

- Participating in Education Executive Group calls and meetings
- Providing input and expertise on educational initiatives where his/her perspective and past experience are of particular value
- Heading or providing support for projects as requested by the Executive Group
- Coordinating the production of Education Committee communication pieces, for example, articles in The Actuary
- Serving as an Education representative on the Centers of Actuarial Excellence (CAE) Grants Committee. The individual would serve as a voting member of the committee and would seek to ensure that the Committee understands and is aware of any Education initiatives that may be in conflict with grant proposals.

**Meeting & Travel Requirements:**

- Education Executive Group monthly teleconferences
- Central Review / GO in-person meetings of 3-4 days, two times per year, plus travel time
- SOA Leadership in-person meeting of 1 ½ days, plus travel time
- Other ad hoc conference calls and/or meetings dependent on specific initiatives

## SOA Education Volunteer Job Description

4/8/14

**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,

## SOA Education Volunteer Job Description

4/8/14

- 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 Examination Volunteer Position

Updated 4/8/14

**Department Name:** Education Department

**Position Title:** Fellowship Examination Chairperson

**Position Summary:** Overall responsibility for the proper development and administration of SOA examinations; serves as a member of the Education Executive Group.

**Reports To (if applicable):** General Chairperson

**Qualifications:** FSA Member in good standing with the SOA; Compliant with SOA Education Conflict of Interest policy and Confidentiality Agreement; Prior experience on examination committees up through General Officer (GO) level; Position requires leadership, communication, and organizational skills, plus a good understanding of all aspects of the exam 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 100 hours for required duties (can increase if proactive in addressing policy initiatives).

### **Responsibilities & Duties:**

- Establishing priorities related to examination issues, in conjunction with input from the Education Executive Group
- Ensuring that Examination Committees are appropriately staffed; recommending and recruiting Examination GOs
- Coordinating and monitoring the preparation of examinations
- Conducting spring and fall exam Central Review sessions
- Conducting Examination GO meetings during Central Review and by teleconference as needed between Central Review meetings
- Coordinating pass mark setting and recommending pass marks to the General Chairperson
- Proactively reviewing examination policy and recommending changes as deemed appropriate

### **Meeting & Travel Requirements:**

- Education Executive Group monthly teleconferences
- Central Review / GO in-person meetings of 3-4 days, two times per year, plus travel time
- Examination GO teleconferences twice per year
- SOA Leadership in-person meeting of 1 ½ days, plus travel time
- Item writer training sessions of 2-3 days, two times per year, plus travel time
- Other ad hoc conference calls and/or meetings dependent on specific initiatives

## **Society of Actuaries**

### **Volunteer Job Description**

**Department Name:** Education Department

**Position Title:** Education Board Partner

**Position Summary:** Serves as a liaison and communication link between the SOA Board of Directors and the Education Executive Group; participates as a full member of the Education Executive Group.

**Reports To (if applicable):** Board of Directors

**Qualifications:** An FSA member in good standing with the SOA; Compliant with SOA Education Conflict of Interest policy and Confidentiality Agreement; Current Board of Directors member, preferably at the Vice President level; appointed to this position by SOA President; Prior experience with education committees is not required, but a willingness to gain familiarity with the SOA education system is important; Position requires leadership and communication skills.

**Term of Service:** One year, may be re-appointed

**Time Commitment:** Approximately 50 hours, for required duties (can increase if becomes involved in specific initiatives).

**Responsibilities & Duties:** Specific responsibilities include:

- Participating in Education Executive Group calls and meetings
- Communicating and interpreting SOA Board policy decisions to the Education Executive Group
- Bringing policy initiatives from the Education Executive Group to the SOA Board as appropriate
- Ruling on candidate appeals of disciplinary action imposed as a result of cheating incidents and other exam and e-learning irregularities
- Reviewing and approving any pass mark recommendations that are inconsistent with SOA Board guidelines
- Participating as a reviewer at spring and fall exam Central Review sessions
- Proactively reviewing Education Committee policy and recommending changes as deemed appropriate

**Meeting & Travel Requirements:**

- Education Executive Group monthly teleconferences
- Central Review / GO in-person meetings of 3-4 days, two times per year, plus travel time
- SOA Leadership in-person meeting of 1 ½ days, plus travel time
- Other ad hoc conference calls and/or meetings dependent on specific initiatives

## **Society of Actuaries**

### **Volunteer Job Description**

**Department Name:** Education Department

**Position Title:** Academic Partner

**Position Summary:** Serves as a member of the Education Executive Group, with responsibility for providing an academic perspective on issues addressed by the Education Executive.

**Reports To (if applicable):** General Chairperson

**Qualifications:** An FSA member in good standing with the SOA; Compliant with SOA Education Conflict of Interest policy and Confidentiality Agreement; Current or recent prior experience as a practicing academic in actuarial science or a related field; Prior experience with education committees is not required, but a willingness to gain familiarity with the SOA education system is important; Position requires leadership and communication skills.

**Term of Service:** Normally three years

**Time Commitment:** Approximately 50 hours, for required duties  
Can increase if becomes involved in specific initiatives and training

**Responsibilities & Duties:** Specific responsibilities include:

- Participating in Education Executive Group calls and meetings
- Providing input and expertise on educational initiatives where the academic background brings particular value
- Assisting with obtaining pre-testers for multiple choice and fellowship examinations
- Assisting with development of training material for item writers
- Participating in providing item writer training, as available
- Participating as a reviewer at spring and fall exam Central Review sessions
- Proactively reviewing Education Committee policy and recommending changes as deemed appropriate

**Meeting & Travel Requirements:**

- Education Executive Group monthly teleconferences
- Central Review / GO in-person meetings of 3-4 days, two times per year, plus travel time
- SOA Leadership in-person meeting of 1 ½ days, plus travel time
- Item writer training sessions of 2-3 days, two times per year, plus travel time
- Other ad hoc conference calls and/or meetings dependent on specific initiatives

## **Society of Actuaries**

### **Volunteer Job Description**

**Department Name:** Education Department

**Position Title:** Member-at-Large/Training Chairperson\*

**Position Summary:** Responsible for coordinating the development and delivery of training to Education Committee volunteers; serves as a member of the Education Executive Group.

**Reports To (if applicable):** 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 education committees at a leadership level and familiarity with all facets of the SOA education process; Position requires strong communication, presentation, and organizational skills.

**Term of Service:** Normally three years

**Time Commitment:** Approximately 100 hours, for required duties (can increase if becomes involved in other specific initiatives).

**Responsibilities & Duties:** Specific responsibilities include:

- Establishing priorities related to training initiatives, based on requested support from the Examination, Curriculum, and e-Learning chairs, and in conjunction with input from the Education Executive Group
- Participating in Education Executive Group calls and meetings
- Developing and updating training modules to address the needs of education volunteer
- Recognizing where professional expertise is needed and recruiting appropriate support for training development
- Coordinating the delivery of training to education volunteers, including personally presenting modules where appropriate
- Participating as a reviewer at spring and fall exam Central Review sessions

**Meeting & Travel Requirements:**

- Education Executive Group monthly teleconferences
- Central Review / GO in-person meetings of 3-4 days, two times per year, plus travel time
- SOA Leadership in-person meeting of 1 ½ days, plus travel time
- Item writer training sessions of 2-3 days, two times per year, plus travel time
- Other ad hoc conference calls and/or meetings dependent on specific initiatives

\* The Education Executive Group policies call for a "member-at-large" position, with the focus of that position based on the perceived needs of the Group at any given time. The member-at-large position for the past several years has been designated as the Training Chairperson and this description is based on that specific position.