



IABA
INTERNATIONAL ASSOCIATION OF BLACK ACTUARIES

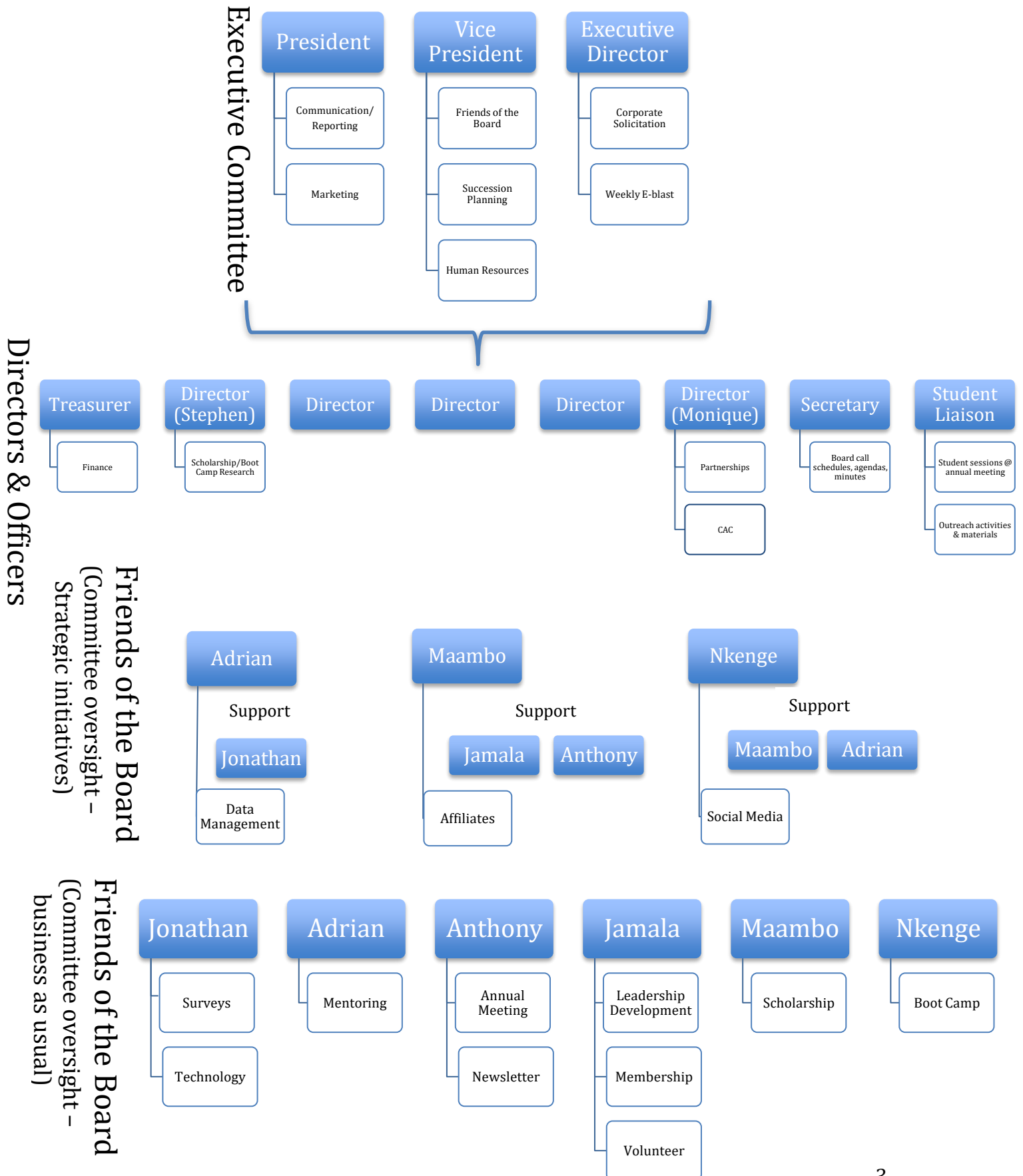
Operations Manual
Organizational Structure
Volunteer Conduct
Leader Roles & Responsibilities
Committee Procedures

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Organizational Structure of The International Association of Black Actuaries



Volunteer Conduct

As a volunteer organization, IABA relies heavily on volunteers for its success.

As a volunteer, you agree to comply with all applicable policies and procedures of IABA. If you do not follow all applicable policies and procedures, IABA's Board of Directors reserve the right to ask you to step down as a volunteer. If you are asked to leave your role, you agree to leave immediately.

Our expectation is that every volunteer will respond to emails, other written and verbal communication within a reasonable time frame. IABA defines a reasonable time frame to be up to 72 hours. We understand that there may be times where this is not possible, however, consistent behavior of unresponsiveness will be subject to corrective actions.

Volunteers who are unreliable, consistently late, miss scheduled meetings, unresponsive to emails, other written or verbal communications, fail to file scheduled reports, or are exhibiting other problems with delivering on their commitments will be evaluated by leaders of the organization, to determine if their continued participation is appropriate based on the needs of the program and the impact of their ability to consistently adhere to the responsibilities required for the role.

If your performance does not improve following any corrective actions, you may be reassigned or released from your role and your responsibilities within the organization. Corrective actions may include verbal or written warnings.

As a volunteer, you have the right to terminate your volunteer service for any reason. IABA reserves the same right.

Duties of the Director

The Directors' responsibilities may include:

- Strategic planning and execution for the organization;
- Preparing for and attending meetings of the IABA Board of Directors (Attendance is required at a minimum of 75% of meetings);
- Representing the IABA at various events;
- Preparing for and attending the Annual Leadership Retreat;
- Participating in CAC meetings as needed, at the request of the Executive Committee;
- Participating on task forces, as determined by the Strategic Focus and external partner needs;
- Completing additional tasks or initiatives, as assigned by and at the discretion of the Board;
- Participating in Board voting, whether they take place via conference calls, in person meetings or email;
- Attending Annual Meeting of the IABA.

Duties of the President

The following are duties of the President:

- Strategic planning for the organization;
- Overseeing diversity initiatives & articles;
- Managing strategic partnerships;
- Presiding over and setting agenda for meetings of the IABA Board of Directors;
- Presiding over the Business Meeting at the Annual Meeting;
- Representing the IABA at various events;
- Participating in the Executive Committee;
- Presiding over and setting agenda for the Annual Leadership Retreat;
- Participating in CAC meetings;
- Overseeing Communication & Reporting for the organization;
- Conducting annual review of Executive Director.

Duties of the Vice President

The Vice President's responsibilities may include:

- Strategic planning for the organization;
- Working with the President on diversity initiatives & articles;
- Overseeing efforts surrounding Succession Planning;
- Overseeing the Friends of the Board, including the organization and distribution of monthly Friends report to Board;
- Serving as Human Resource contact for Executive Director;
- Acting as President in the absence of the President.

Duties of the Secretary

The Secretary's responsibilities may include:

- Sending calendar invites and managing RSVP's for Board meetings;
- Transcribing the minutes for the Annual Meeting business meeting;
- Transcribing the minutes for all Board meetings;
- Distributing minutes to Board members prior to each Board meeting;
- Creating and distributing Board meeting agendas;
- Documenting and helping develop the Communication strategy for IABA.

Duties of the Student Liaison

The Student Liaison's responsibilities may include:

- Representing the interest of collegians and actuarial students;
- Assessing the needs and helping develop strategies to better address the needs of collegians and actuarial students;
- Communicating with collegians and actuarial students;
- Serving on the Annual Meeting Planning Committee;
 - Setting agendas for the high school and college outreach sessions at the Annual Meeting;
 - Recruiting attendees for the high school and college outreach session at the Annual Meeting.
- Assisting with IABA outreach activities and Affiliate outreach:
 - Recommendation of ideas for activities;
 - Development of educational materials;
 - Assessment of activities;

Duties of the Executive Director

The Executive Director (ED) manages the day-to-day affairs of the IABA, under the supervision of the Executive Committee.

In addition to working with IABA Committees and Leaders, the ED assists by:

- Responding to all phone calls and emails received on a given business day within 24 hours. Phone calls and emails received over the weekend or a Holiday will be responded to upon return to the office on the next business day;
- Managing all RFP processes for IABA;
- Performing all other duties as assigned and agreed upon by the President and/or the Board.

The Friends of the Board

The Friends of the Board (“Friends”) act as intermediaries between the Board and the Committees, including Affiliates. The overall goal of the Friends is to help the committees enact the initiatives and direction of the Board, while also allowing a sounding board and helping hand for the committees when issues and new ideas arise. The Friends report to the Vice President, and provide an additional layer of tactical leadership for the organization.

STAFFING

The process for selecting Friends is as follows:

1. Interested volunteers must complete the Volunteer Application (for new volunteers) or the Annual Participation Survey (for existing volunteers);
2. Committee consisting of a minimum of three IABA Leaders (this may include Directors, Officers; Friends; Committee Leaders; Volunteer Committee Members) reviews candidates and vets them for qualifications, interest and availability;
3. Recommendation is made to IABA Board for consideration and approval.

Friends serve for stagger two-year terms. Additional information regarding qualifications and service is below.

1. Friends must be Full, Paid Members of the organization, with actuarial designations (i.e., Fellows, Associates or Enrolled Actuaries.)
2. Friends must have prior recognized volunteer involvement with the organization. The Friend assigned to Affiliates should have experience as an Affiliate leader.
3. In general, a Friend may serve no more than two consecutive terms, with exceptions permitted if justified to the Board.
4. The Friends shall consist of at least five (5) members and may vary from time to time up to ten (10). One member will serve as chairperson and coordinate the meetings, and another member will serve as secretary (taking meeting minutes and aggregating report outs).

REPORTING & COMMUNICATION FRAMEWORK

The Friends will meet at least once per month, before each monthly Board meeting and develop an aggregated report to deliver to the Vice President. Any feedback from the Board will be shared by the Vice President or an ad hoc meeting will be called.

RESPONSIBILITIES

The following are duties of the Friends pertaining to committee operations:

1. Oversee the activities of the committees reporting to him/her:
 - a. Ensure that the goals of the committee are clearly defined and continue to be relevant (especially as they relate to the Strategic Focus);
 - b. Ensure resources are adequate for the goals/objectives of the committee;
 - c. Work with the Volunteer and Succession Planning committees to ensure there exists at all times at least one qualified successor candidate for each committee chairperson;
 - d. Monitor contact/placement by committee chairpersons of all volunteers who express strong interest in joining the committee;
 - e. Take the necessary action to remove and replace ineffective chairperson(s);
 - f. Review requests for extensions of tenure on committees.
2. Work with Succession Planning committee and Volunteer Chairperson to identify committee chairpersons.
3. Recommend committee chairpersons to the Executive Committee, for the committees that report to him/her.
4. Review annual goals from each assigned committee and submit to Executive Committee for approval. Goals should be aligned with the Annual Strategic Focus.
5. Oversee the annual budgeting process for committees.
6. Submit quarterly reports prepared by the committee chair to the Executive Committee, in writing, on progress within his/her area of responsibility, including reporting on actual vs. goal basis.
7. Review (at least annually) and approve the position descriptions of each committee chairperson reporting to him/her.
8. Attend monthly Friends of the Board meetings.
9. Attend Annual IABA Leadership Retreat.
10. Attend Annual Meeting of the IABA.

SPECIALIZED DUTIES OF FRIEND ASSIGNED TO AFFILIATES

1. Collecting Affiliate plans, budgets and quarterly reports;
2. Coordinating calls with and providing information to members who are interested in starting an Affiliate;
3. Holding regular calls with Affiliate leaders to increase collaboration and best practices among Affiliates;
4. Maintaining regular communication with Affiliate leaders to ensure Affiliate leaders have all the resources they need to successfully execute their agenda.

Executive Committee

The Executive Committee's responsibility is to give direction to the day-to-day role of the Executive Director. The Executive Committee consists of the President and Vice President of IABA, and the Executive Director. Other leaders may attend the meetings at the invitation of the Executive Committee.

The Executive Committee meets twice per month for one hour, or more frequently, as needed. The Executive Director will report on all activities on his/her desk and discuss the future direction of these activities with the Committee.

Duties of the Committee/Affiliate Chairperson

STAFFING

Committee Appointment Guidelines

Each committee chairperson is requested to observe the guidelines that appear below. However, chairpersons are requested to replace ineffective committee members prior to the normal term specified in the guidelines.

Guidelines

These guidelines reflect the intention to involve as many members as possible in committee activities without sacrificing continuity.

1. All members are eligible and encouraged to serve on committees.
2. Every effort should be made to staff chairperson positions with Fellows.
3. In general, a person should be chairperson of a standing committee for no more than three years subject to annual reappointment, and should retire from the committee after serving as chairperson, with exceptions permitted if justified to Director by committee chairs.
4. In general, a person should remain on a standing committee for no more than three years unless such person becomes chairperson by the end of that period, with exceptions permitted if justified to Director by committee chairs.
5. The size of the committee will be determined by the chairperson.
6. It is up to the committee chairperson to contact non-participating members and take appropriate action, such as suggesting they should withdraw from the committee.

Staffing Deadlines & Notification of Roster Changes

The process for selecting Committee/Affiliate Chairpersons is as follows:

1. Interested volunteers must complete the Volunteer Application (for new volunteers) or the Annual Participation Survey (for existing volunteers);
2. Committee consisting of a minimum of three IABA Leaders (this may include Directors, Officers; Friends; Committee Leaders; Volunteer Committee Members) reviews candidates and vets them for qualifications, interest and availability;
3. Recommendation is made to IABA Board for consideration and approval.

Each committee chairperson should keep a current committee roster and include the roster in the Q1 and Q3 cycle reports. Affiliate rosters should include a list of active volunteers in the Affiliate.

One of the key challenges faced by Chairpersons is recruiting the appropriate committee members for their committee. Quality staffing ensures high quality results.

- a. **Turnover:** Every committee needs some level of turnover within their membership. Too static a group can lead to stagnation and a lack of new ideas. Too much turnover leads to a lack of institutional memory and inconsistency.
- b. **Committee Size:** The optimal size of a committee varies significantly. Too many members can result in members not being challenged or provided with meaningful opportunities to serve, too few can stretch willing volunteer resources too thin.
- c. **Recruitment:** A number of criteria should influence selection of new members. These may include:
 - a. Experience - The addition of less experienced innovators or more experienced experts may each be appropriate in different situations
 - b. Availability - Sometimes the best committee members also have the least availability. Chairs need to recognize the time constraints that some members have and shift assignments and responsibilities accordingly.
 - c. Skills - Achievement of Committee goals often require volunteers with specialized skills.

Participation Survey

Each year, in the Spring, IABA will distribute a copy of the Participation Survey results to the committee chairpersons for the following year.

Committee Chairpersons are encouraged to use as many of the volunteers listed in the Participation Survey results for their committee as reasonably possible. At a minimum, Committee Chairpersons should personally contact (by phone if possible, by e-mail if unable to contact by phone) those members who indicate they are very interested and intend to serve if asked, and keep a record of the reason for those not placed.

Placement of volunteers is closely monitored by the Volunteer Committee. IABA leadership is committed to making sure that everyone who is interested in serving on an IABA committee gets an opportunity to do so.

Courtesy Letters

Every new committee member should receive a welcoming email from the chairperson of the committee at the beginning of their tenure.

Every retiring committee member should receive an appreciation email from the chairperson of the committee at the close of their service, with a copy to the Volunteer Committee.

COMMITTEE PLANNING PROCESS

Introduction

IABA uses a formal planning and reporting process to assist committee chairpersons in structuring their committee activities and facilitating their interface with the Board. Likewise, the process assists the Board in monitoring committee effectiveness and resolving any issues that may arise.

Initial Plans

Committee chairpersons are to submit a committee plan to their assigned Friend by December 1 of each year. The plan should be limited to no more than two pages and could include the following:

- Committee name and its chairperson;
- Statement of committee goals for the coming year;
- Outline of anticipated committee activity for the coming year;
- Requested budget for the coming year;
- Program for communicating with the membership via the Voice of IABA, IABA Web Site, weekly e-blast or otherwise, as applicable;
- Unresolved staffing issues; and
- Other matters, at the discretion of the chairperson.

Quarterly Cycle Reports

Each committee is to submit a quarterly cycle report to its assigned Friend. The deadline for these reports is April 15, July 15, October 15 and January 15. Committee chairpersons are encouraged to use the established format for cycle reports. Cycle reports may contain the following elements:

- An overview or summary of committee activity during the quarter and expected activity during the coming months.
- A report on goals. This part of the report should contain comments on progress to date and the chairperson's prognosis regarding the likelihood of meeting each goal within pre-established time frames.
- A report on committee staffing changes.
- The Q4 Cycle Report also includes a request for Key Performance Indicator information.

Goals and Deadlines (Project Management)

Setting goals and intermediate milestones, assigning responsibilities, monitoring progress and holding committee members accountable is essential to a committee's success. This process also assists in framing committee meetings, completing cycle reports and ensuring the committee meets and achieves their stated goals.

Ideally the Chair will work with their assigned Friend to develop a detailed project plan or roadmap to assure timely delivery of major deliverables.

Successor Planning

Working cooperatively with assigned Friends, chairpersons are responsible for successor planning. If possible, the succeeding chairperson should be chosen from the current committee members. Ideally, the successor should be identified and appointed vice chairperson one year prior to the chairperson's retirement.

Chairperson Transition

The transition between a chairperson whose term has expired and an incoming chair is a critical moment of knowledge transfer in any committee or task force.

a. Elements Needed by New Chair:

- Previous meetings, agendas, and minutes
- Current and prior goals, statuses and dates accomplished
- All ongoing projects and statuses
- Previous cycle reports and annual goals
- Committee procedures, training documents, relevant log-in information and timelines
- Expected member annual time commitment
- A list of resources available to the chair to perform committee work

b. The Transition Conference: It is strongly recommended that a teleconference or face-to-face conference be held between the exiting and incoming chair. The purpose of this meeting is to ensure an effective transition of committee leadership.

Managing Volunteers

One of the greatest challenges a chair faces, is managing the variety of personalities, motivations and availabilities of their committee members.

- a. **Getting people engaged.** It is imperative to get all committee members engaged in some manner to assist in accomplishing the committee's goals. A one size fits all model simply does not work for the variety of individuals on a typical IABA committee. A chair should strive to understand what motivates their committee members, what their talents and abilities are, what they enjoy doing, and how they would like to support the goals of the committee. The Chair should also consider forming subgroups to deal with projects that support the committee's goals in order to engage all of the committee's members.
- b. **Non-contributing individuals.** Sometimes, a change in work responsibilities or personal commitments may force a formerly valued committee member to curtail their efforts. The chair should discuss these matters professionally and privately with the individual and seek to remedy the behavior, up to and

- including suggesting that the committee member consider rolling off the committee until the other commitments allow their full participation.
- c. **Diversity of Opinions.** Chairs should encourage committee members to express diverging opinions during their deliberative process. The committee's successful completion of their deliverables are significantly enhanced by considering a wide variety of opinions.
 - d. **Potential future leaders.** It is important that chairs identify committee members that demonstrate the skills for future IABA leadership. A chair can be instrumental in a talented committee members progressing to further leadership in IABA volunteer activities.

IABA Leadership Retreat

Every chairperson should plan to attend the annual IABA Leadership Retreat. It is normally a two day meeting that takes place in November. The meeting provides chairpersons and other IABA leaders with a unique opportunity to exchange ideas on committee operations with other committee chairpersons and to establish two-way communication with the IABA leadership with regard to critical issues facing the organization. The primary objective of the meeting is to provide a template for the strategic focus.

Meeting expenses: IABA typically offers a travel reimbursement up to \$300 to help cover the cost of airfare. Hotel expenses are paid directly by IABA and meals are provided throughout the duration of the event.

IABA Annual Meeting

Every chairperson should plan to attend the IABA Annual Meeting. It is normally held during the last weekend of July or the first weekend of August. The meeting provides an opportunity to network with one another and share in the accomplishments of the organization.

Meeting expenses: IABA is unable to cover the cost of travel or hotel for leaders or volunteers attending the Annual Meeting.

Position Description For Leader of an Affiliate

1. Incumbency. The leader of an Affiliate should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society, or have at least 3 years experience as a working actuary.
2. Tenure. The leader of an Affiliate serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. Accountability. The leader of the Affiliate is accountable and reports to their assigned Friend of the IABA Board.
4. Duties. The broad function of the leader of an Affiliate is to manage the activities of the members of the Affiliate for the purpose of achieving the Affiliate's mission of:
 - Executing the vision of IABA at the local level.

The duties of the leader fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Affiliate.

Common Duties:

- Manage the membership of the Affiliate. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Affiliate for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Affiliate's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Affiliate members or subcommittees so as to achieve the agreed upon goals for the year.
- Monitor the work of Affiliate members to ensure that progress towards goals is being achieved as planned.
- Maintain training documents for any Affiliate member whose volunteer position requires a particular set of steps/procedure to complete their

regular volunteer assignment.

- Maintain log-in/password information for any Affiliate member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Affiliate to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Partner with local organizations, such as schools, college and other actuarial organizations to increase the awareness of IABA and the Actuarial profession.
- Provide professional and actuarial career development opportunities for IABA members.
- Participate in local opportunities, such as attending partner events, presentation opportunities, etc.
- Affiliate Leaders are required to attend the quarterly Affiliate Leader Meetings organized by the assigned Friend. If the Affiliate Leader cannot attend, it is their responsibility to either appoint a representative to attend in their absence or provide a written response to the agenda action items. In either case, they must make the Friend aware of their absence.
- Affiliate Leaders are required to meet with the assigned Friend a minimum of two times per year to provide an update on goal progress, receive guidance on Affiliate obstacles, and discuss other Affiliate related topics.

Position Description For Chairperson of an Ambassador Program

1. **Incumbency.** The chairperson of an Ambassador Program should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society, or have at least 3 years experience as a working actuary.
2. **Tenure.** The chairperson of an Ambassador Program serves under the direction of, and at the discretion of their employer – who serves in partnership with the school.
3. **Accountability.** The chairperson of an Ambassador Program is accountable and reports to their assigned Friend of the IABA Board.
4. **Duties.** The broad function of the chairperson of an Ambassador Program is to manage the activities of the members of the program for the purpose of achieving the program's mission of:
 - Developing a Corporate sponsorship program to increase the number of minorities in the Actuarial profession through the mentorship and development of young aspiring actuarial students at select universities.

The Goals and Objectives of the program include:

- Increase the number of black minorities in the Actuarial profession
- Raise awareness of the Actuarial profession
- Develop a program to provide ongoing mentoring to students
- Help students develop the tools and skill set to become future actuaries
- Develop a program to help students create their own personal brand and improve leadership skills

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this program.

Common Duties:

- Prepare (annually) and submit to the assigned Friend the goals of the program for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the program's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.

- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Select a faculty ambassador to oversee the program on-site
 - Select a student ambassador to lead and coordinate program activities. The student ambassador will also act as a liaison with the corporate sponsor and the faculty ambassador
 - Execute planned activities:
 - On-site presentations addressing:
 - Actuarial hot topics
 - Profession overview (P&C, Life , Health, etc.)
 - Sample projects
 - Actuarial and soft skills
 - Executive presence
 - Study tips, etc.
 - Events including career networking, high school outreach, etc.
 - Case Study competitions
 - Have recent college graduates speak about the transition between school and the work world or college students give insight on internships.
 - Software workshops
 - Job shadowing program
 - Q&A sessions
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

Annual Meeting of IABA

1. **Presentations.** All presenters will submit their presentations prior to the meeting. Presentations will be posted on the IABA website prior to the meeting for attendees to download, as copies of presentations will not be made for meeting attendees. Each presenter may bring printed copies of the presentation to the meeting. Presentations will be available on the IABA website after the meeting.
2. **Presenters for Professional Development Sessions.** Presenters are not compensated for participating in our Annual Meeting. Presenters are also expected to register for the meeting.
3. **Time.** The Annual Meeting shall be held during the last weekend of July or the first weekend of August of each year, unless otherwise determined by the Board. The CAC meeting will be held on the Thursday prior to the meeting. The Annual Meeting will begin on Thursday afternoon and conclude on Saturday evening. A Leadership meeting may be held on the Sunday, following the conclusion of the Annual Meeting.
4. **Dress.** The attire for the Annual Meeting is business casual.
5. **Business Meeting.** The President shall preside over the business meeting. The purpose of the business meeting shall be:
 - Presentation of reports;
 - Elections of officers for following year.

The meeting shall follow the general format as outlined in Robert's Rules of Order.

The Secretary shall transcribe minutes for the Business Meeting. The Secretary will prepare a copy of the minutes for permanent record within five (5) business days of the conclusion of the meeting.

**Position Description
For Chairperson of the
Annual Meeting Committee**

1. Incumbency. The chairperson of the Annual Meeting Committee should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society.
2. Tenure. The chairperson of the Annual Meeting Committee serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. Accountability. The chairperson of the Annual Meeting Committee is accountable and reports to their assigned Friend of the IABA Board.
4. Duties. The broad function of the chairperson of the Annual Meeting Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Planning and executing the IABA Annual Meeting to elevate the professional development and networking opportunities of the attendees.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.
- Monitor the work of Committee members to ensure that progress towards

goals is being achieved as planned.

- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Planning all aspects of the Annual Meeting
 - Assisting with site selection – both city and hotel and any off-site venues
 - Selecting a meeting theme and assisting with design
 - Setting the meeting agenda – including community outreach event
 - Overseeing the budget
 - Selecting food and beverage for each event
 - Creating communications for marketing the event and for registered attendees
 - Preparing and reviewing meeting website and online registration
 - Identifying all professional development topics and speakers, including Master of Ceremonies and Keynote speakers
 - Planning the Awards program
 - Overseeing session surveys and overall meeting survey
 - Meeting execution
 - Assisting with registration set up and execution
 - Serving as meeting host
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

Position Description For Chairperson of the Boot Camp Committee

1. Incumbency. The chairperson of the Boot Camp Committee should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society.
2. Tenure. The chairperson of the Boot Camp Committee serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. Accountability. The chairperson of the Boot Camp Committee is accountable and reports to their assigned Friend of the IABA Board.
4. Duties. The broad function of the chairperson of the Boot Camp Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Planning and executing the IABA Actuarial Boot Camp which is designed to provide students with the soft skills needed to successfully interview for and land an internship or entry level position in the actuarial field.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.

- Monitor the work of Committee members to ensure that progress towards goals is being achieved as planned.
- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Planning all aspects of the Boot Camp
 - Assisting with site selection
 - Assisting with application process and selecting all attendees from group of applicants
 - Setting the agenda
 - Overseeing the budget
 - Creating communications for marketing the program
 - Identifying all professional development topics and speakers
 - Assisting with fundraising efforts
 - Overseeing session surveys and overall Boot Camp survey
 - Work with mentoring committee to pair each attendee with a mentor
 - Meeting execution
 - Identifying Boot Camp hosts to serve on site
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

Corporate Advisory Council

1. Accountability. The CAC meets under the direction of a member of the IABA Board of Directors, typically the current President or Immediate Past President. This director is responsible for working with the Executive Director to set the agenda for CAC meetings.
2. The IABA Corporate Advisory Council (CAC) consists of:
 - Actuarial employers who qualify for membership by virtue of making donations at the requisite level; and
 - Actuarial professional associations that support the IABA's mission.
3. Meeting Timing & Location. Meetings are typically held four times per year according to the following schedule:
 - First Friday in February, teleconference, typically 10 – 11:30 AM EST
 - First Friday in May – the location of this meeting is determined by a member company or other company who wishes to sponsor the meeting
 - Last Thursday in July, or first Thursday in August – held in advance of the first general session of the IABA Annual Meeting
 - Second Friday in November – held in conjunction with the IABA Leadership RetreatMeetings are typically held from 9:00 AM – 3:30 PM and include breakfast and lunch.
4. Goals of the CAC may include:
 - Taking an active interest in all aspects of the IABA's activities;
 - Providing input and advice on all matters related to the IABA's strategic direction and mission;
 - Upholding the reputation of the IABA in its affairs.
 - In addition, representatives of member entities may participate in IABA programs, such as Mentoring, Boot Camp, Leadership Development and Corporate Solicitation.

Corporate Solicitation

1. **Accountability.** The Corporate Solicitation activities take place under the direction of the Executive Director and members of the Executive Committee (President, Vice President).
2. **Duties.** The Corporate Solicitation Committee is responsible for developing and cultivating prospective corporate sponsors.

The Corporate Solicitation Committee's responsibilities may also include:

- Identifying prospects and cultivating relationships with potential corporate sponsors;
- Maintaining and expanding existing sponsor relationships;
- Managing and maintaining the corporate solicitation database;
- Overseeing corporate sponsorship fundraising events;
- Managing the documents and information on the Corporate Sponsorship webpage.

**Position Description
For Chairperson of the
Data Management Committee**

1. Incumbency. The chairperson of the Data Management Committee should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society, or have at least 3 years experience as a working actuary.
2. Tenure. The chairperson of the Data Management Committee serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. Accountability. The chairperson of the Data Management Committee is accountable and reports to their assigned Friend of the IABA Board.
4. Duties. The broad function of the chairperson of the Data Management Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Managing and reporting on the pipeline data of IABA as it relates to the achievement of our mission, while also providing data support to IABA Affiliates, Committees and Directors.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.

- Monitor the work of Committee members to ensure that progress towards goals is being achieved as planned.
- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Fulfilling data requests (ex. the Hartford Affiliate asking for a list of people in the region; a company asking for a list of people that work at their company, etc.)
 - Updating and maintaining pipeline information in the IABA database
 - Including researching and updating bounced email addresses
 - Ongoing analysis of duplicate accounts
 - Researching ways to improve the database
 - Developing reports that demonstrate progress toward the achievement of IABA's mission – including projections based on data available.
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

**Position Description
For Chairperson of the
Finance Committee/Treasurer**

1. Incumbency. The chairperson of the Finance Committee is the IABA Treasurer and should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society.
2. Tenure. The chairperson of the Finance Committee serves for the term they are elected.
3. Accountability. The chairperson of the Finance Committee is accountable and reports to the IABA Board.
4. Duties. The broad function of the chairperson of the Finance Committee is to manage the day to day financial activities of the organization and to manage long-term planning of the organization's financial health.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.
- Monitor the work of Committee members to ensure that progress towards goals is being achieved as planned.
- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.

- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

The Treasurer’s responsibilities may include:

- Preparing all financial statements for the IABA;
- Managing the budgeting and forecasting process;
- Serving on the Annual Meeting Planning Committee;
- Acting as the primary and required signatory on check disbursement for the IABA;
- Forwarding appropriate documentation to bookkeepers for production of financial statements;
- Working with bookkeepers on preparation of all IABA tax returns and other IRS requirements;
- Reviewing all IABA contracts and acting as the signatory on contracts;
- Managing payroll and compensation for Executive Director;
- Managing and following the IABA Finance calendar (see below);
- Managing audits for IABA.

Finance Calendar

5th of each Month – IABA financials due to accountant
 January 15 – IABA Annual Meeting budget due
 February 1 – IABA budgets due
 March 15 – Information due to accountant for IABA tax preparation
 May 15 – IABA tax filings due
 June 4 – Renew worker’s compensation insurance with The Hartford
 June 15 – IABA audits to be completed
 November 11 – Renew Flex Plus insurance through Philadelphia Insurance Company
 December 5 – Renew Business Owners insurance through The Hartford

The Finance Committee’s responsibilities may include:

- Creating and managing the IABA budget;
- Managing and following the IABA Finance calendar;
- Managing audits for IABA;
- Pricing of IABA products, such as job postings, Annual Meeting registration fees, Membership fees, etc.;

- Management of contracts entered into by IABA;
- Working directly with and supporting the treasurer;
- Overseeing the transition of the office of treasurer.

All actions above are subject to Board approval where appropriate. The Finance Committee will meet quarterly, prior to each quarterly Board meeting.

5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

Human Resources

1. Accountability. The Human Resources functions are carried out by a member of the IABA Board of Directors. This director is responsible for working with the Treasurer and Finance Committee to carry out the duties outlined below.
2. Duties. The Human Resources Committee shall administer the compensation plan for the Executive Director and ensure that the management of IABA is in compliance with legal responsibilities as an employer. The Committee shall also propose and administer policies as necessary and appropriate to ensure a fair and professional environment for employees and volunteers to work.

Annual Review: The Committee shall provide oversight for the IABA Board's annual review of the Executive Director's performance and compensation package. The Executive Director review and compensation changes are to be in effect as of June 1 of each year.

Employment Related Agreements: The Human Resources Committee shall oversee the following employment related agreements. Any material revisions to these documents should be reviewed in advance by IABA's attorney and copies of the final documents should be provided to IABA's attorney.

- IABA Employment Agreement
- Leased Employee Acknowledgement

State Registration: IABA is required to register as an employer in the state in which we employ workers. Specific requirements and procedures for registration vary by state. Any state account numbers assigned for tax remittance purposes must be provided to the current payroll processor for processing. Currently, IABA is registered in the state of Connecticut with the following state agencies:

- Connecticut Secretary of State
- Connecticut Department of Revenue Services
- Connecticut Department of Labor

Payroll Processing: The payroll processor provides the following services:

- Payroll processing
- Remittance of employment taxes to appropriate taxing authorities on our behalf
- Prepares employee withholding tax statements (W-2)

Vanguard Simple IRA: On each bi-weekly payroll date, an authorized IABA representative must process a deposit of the employee and employer contributions to the Executive Director's Vanguard Simple IRA account. Process this deposit on-line at Vanguard's website, www.vanguard.com.

Leadership Retreat

1. Date and Location. The IABA Annual Leadership Retreat shall be held once per year, on a date and at a location to be set by the IABA Board of Directors.
2. Meeting Purpose. The purpose of the leadership retreat shall be to review IABA's progress towards meeting the current year's objectives and to set objectives for the upcoming year. Matters and issues of interest to the various committees shall be discussed. The leadership retreat shall also be used as a forum to facilitate the transition from out-going officers to in-coming officers, and to hold formal meetings of the IABA Board of Directors.

Membership

1. How to Join. New members will apply for membership on the IABA website. Dues may be paid online or submitted to the IABA mailing address. Renewing members may also renew online by paying membership dues online or by submitting dues to the IABA mailing address. An individual's dues are determined based on the most appropriate membership category for that person as outlined in the membership policy and dues structure. Membership is valid for one year from join date.

All dues received at the mailing address will be forwarded to the Treasurer within ten (10) business days. The Treasurer will deposit all checks within five (5) business days of receipt. Electronic payments are verified in real time and generate an automatic receipt and thank you email.

2. Membership Renewal. Renewal notices will be automatically generated by the website, one year after last payment, and members will be notified electronically. A monthly renewal notice report will be generated for the membership chairperson to verify and follow-up with members.
3. Membership Documents. Membership documents (including membership policy, policies and procedures manual, bylaws of the IABA) are available on the members only portal of the website.
4. Membership Rights. The rights of each class of membership as it pertains to IABA can be found in the IABA Bylaws.

**Position Description
For Chairperson of the
Membership Committee**

1. Incumbency. The chairperson of the Membership Committee should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society, or have at least 3 years experience as a working actuary.
2. Tenure. The chairperson of the Membership Committee serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. Accountability. The chairperson of the Membership Committee is accountable and reports to their assigned Friend of the IABA Board.
4. Duties. The broad function of the chairperson of the Membership Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Enhancing and growing IABA membership through communication, engagement and marketing.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.
- Monitor the work of Committee members to ensure that progress towards goals is being achieved as planned.

- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Growing the membership of IABA through membership thank yous, membership renewal and new member drives and surveys
 - Reviewing IABA membership pricing and levels
 - Managing and enhancing IABA membership benefits
 - Developing Membership prospectus documents, including membership benefits
 - Membership communication including:
 - Thank you emails to new members
 - Thank you emails to renewing members
 - Renewal reminder messaging & frequency - via website
 - New member messaging – via website
 - Renewing member messaging – via website
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

Position Description For Chairperson of the Mentoring Committee

1. Incumbency. The chairperson of the Mentoring Committee should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society.
2. Tenure. The chairperson of the Mentoring Committee serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. Accountability. The chairperson of the Mentoring Committee is accountable and reports to their assigned Friend of the IABA Board.
4. Duties. The broad function of the chairperson of the Mentoring Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Promoting the career development of IABA members, while also helping those with an interest in the actuarial profession by providing valuable information to help them break into the profession.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.

- Monitor the work of Committee members to ensure that progress towards goals is being achieved as planned.
- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Administration of IABA’s Future Leaders Mentoring Program
 - Recruiting mentors to serve
 - Identifying Mentees with Executive Committee
 - Creation of Mentor booklet – to assist with matching mentees to mentors
 - Development of materials for mentors/mentees to use throughout the program
 - Program evaluation
 - Administration of IABA’s Mentor Resource Program
 - Recruiting mentors to serve
 - Monitoring requests and responding within 30 days
 - Development and updating of FAQ’s
 - Program evaluation
 - Administration of IABA’s Traditional Mentoring Program
 - Recruiting mentors to serve
 - Monitoring requests and responding within 30 days
 - Matching mentees with mentors – includes matching all current-year Scholarship and Boot Camp students
 - Development of materials for mentors/mentees to use throughout the program
 - Program evaluation
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

Position Description For Chairperson of the Newsletter Committee

1. **Incumbency.** The chairperson of the Newsletter Committee should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society, or have at least 3 years experience as a working actuary.
2. **Tenure.** The chairperson of the Newsletter Committee serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. **Accountability.** The chairperson of the Newsletter Committee is accountable and reports to their assigned Friend of the IABA Board.
4. **Duties.** The broad function of the chairperson of the Newsletter Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Publishing the IABA newsletter that highlights IABA programs, activities and recognizes the achievements of black actuaries.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.
- Monitor the work of Committee members to ensure that progress towards goals is being achieved as planned.

- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Generating content for IABA newsletter
 - Solicit article ideas from IABA members. Research and prepare articles that highlight IABA programs, activities and the achievement of black actuaries in the industry.
 - Publication of the IABA newsletter
 - Work with the graphic designer to create each issue of the IABA newsletter.
 - A minimum of three newsletters shall be published each year – June (Annual Meeting Preview), September (Annual Meeting recap), January (Strategic focus highlight, volunteer recognition). Special edition newsletters may be requested by the Board of Directors as needed.
 - Marketing the IABA newsletter
 - Market each edition of the newsletter online through the website (technology committee), social media channels (social media committee) and the weekly e-blast.
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

Position Description For Chairperson of the Scholarship Committee

1. **Incumbency.** The chairperson of the Scholarship Committee should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society.
2. **Tenure.** The chairperson of the Scholarship Committee serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. **Accountability.** The chairperson of the Scholarship Committee is accountable and reports to their assigned Friend of the IABA Board.
4. **Duties.** The broad function of the chairperson of the Scholarship Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Successfully administering the IABA scholarship by marketing the program and selecting recipients that will advance the mission of IABA.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.
- Monitor the work of Committee members to ensure that progress towards

goals is being achieved as planned.

- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Online scholarship application process
 - Manage the scholarship application process – determine where updates may be needed on application form or changes to supporting document requirements.
 - Scholarship selection process
 - Determine the process for evaluating applications and selecting winners.
 - Provide a final list of scholarship recipients to Executive Director.
 - Database and contact with past recipients
 - Maintain database of scholarship winners.
 - Communication plan for touching base with past scholarship recipients and encouraging them to update profile regularly (this helps us determine who is still in the profession).
 - Co-sponsor scholarship program
 - Assist in developing timeline and process for co-branded scholarships.
 - Work with mentoring committee to pair each recipient with a mentor
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

**Position Description
For Chairperson of the
Social Media Committee**

1. Incumbency. The chairperson of the Social Media Committee should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society, or have at least 3 years experience as a working actuary.
2. Tenure. The chairperson of the Social Media Committee serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. Accountability. The chairperson of the Social Media Committee is accountable and reports to their assigned Friend of the IABA Board.
4. Duties. The broad function of the chairperson of the Social Media Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Engaging IABA members and stakeholder groups via social media platforms to increase member engagement and interaction with IABA.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.
- Monitor the work of Committee members to ensure that progress towards

goals is being achieved as planned.

- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Generating content for IABA social media posts
 - Examples include industry news, relevant posts by partner organizations.
 - Marketing IABA programs activities
 - Examples include scholarship application and notifications, Boot Camp application and notifications, Affiliate events and efforts, strategic plan updates, etc.
 - Engaging IABA members and volunteers
 - Examples include highlighting new/renewing members, recognizing member accomplishments, recognizing exam passers, marketing volunteer needs and highlighting outstanding volunteer activities.
 - Manage social media presence on LinkedIn, Twitter, Facebook, Instagram and Twitter
 - Including approving new members, inviting people to join relevant groups, monitoring pages and groups for suspicious or spam-related activity.
 - Monitor social media trends and suggest changes and improvements to IABA social media strategy
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

Succession Planning

1. **Accountability.** The Succession Planning activities take place under the direction of the Vice President, in cooperation with the Executive Committee and the Volunteer Committee.
2. **Duties.** The Succession Planning Committee is responsible for developing a pipeline of leaders for critical IABA roles.

The Succession Planning Committee's responsibilities may include:

- Identifying critical roles and developing a plan for creating a pipeline of leaders for each role;
- Developing a profile of each critical role, including:
 - Responsibilities;
 - Skills/attributes;
 - Definition of success.
- Conducting interviews with incumbent and prospective leaders;
- Documenting the pipeline for each role;
- Developing channels for keeping track of talent;
- Preparing the election slate;
- Recommending participants for the Future Leaders mentoring program.

Position Description For Chairperson of the Surveys Committee

1. Incumbency. The chairperson of the Surveys Committee should be a paid member of the IABA.
2. Tenure. The chairperson of the Surveys Committee serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. Accountability. The chairperson of the Surveys Committee is accountable and reports to their assigned Friend of the IABA Board.
4. Duties. The broad function of the chairperson of the Surveys Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Providing survey support to IABA Affiliates, Committees and Directors in order to continuously improve the programs and operations of IABA.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.
- Monitor the work of Committee members to ensure that progress towards goals is being achieved as planned.

- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Monitor and report new volunteer survey submissions weekly to the volunteer committee.
 - Create surveys for IABA Affiliates, Committees and Directors to measure program effectiveness, solicit feedback and seek member input, as needed.
 - Develop survey result summaries and reports for interested parties.
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

Position Description For Chairperson of the Technology Committee

1. **Incumbency.** The chairperson of the Technology Committee should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society, or have at least 3 years experience as a working actuary.
2. **Tenure.** The chairperson of the Technology Committee serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. **Accountability.** The chairperson of the Technology Committee is accountable and reports to their assigned Friend of the IABA Board.
4. **Duties.** The broad function of the chairperson of the Technology Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Managing the IABA website and ensuring it is functioning properly and that it is a resource for up-to-date information regarding IABA program and services.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.
- Monitor the work of Committee members to ensure that progress towards

goals is being achieved as planned.

- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Developing and enhancing the IABA website through:
 - Implementation and introduction of additional features and suggesting ideas for improving readability and usability of website
 - Updated news, event and featured member/volunteer information
 - Managing regular updates to the IABA website - at the request of Affiliate & Committee leaders and Directors of IABA
 - Ensuring proper functionality of online membership payment, event registration, etc.
 - Working with website developer as needed
 - Including reviewing proposals and provider options if a new provider is required
 - Developing and enhancing the IABA mobile presence through:
 - Implementing and maintaining the Annual Meeting mobile app
 - Researching and evaluating mobile app options for IABA website functions
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

Position Description For Chairperson of the Volunteer Committee

1. **Incumbency.** The chairperson of the Volunteer Committee should be a paid member of the IABA and have their Associateship or Fellowship in an Actuarial Society.
2. **Tenure.** The chairperson of the Volunteer Committee serves for one year. An incumbent may be re-appointed annually and serve for up to three years.
3. **Accountability.** The chairperson of the Volunteer Committee is accountable and reports to their assigned Friend of the IABA Board.
4. **Duties.** The broad function of the chairperson of the Volunteer Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Utilizing our volunteers effectively to ensure IABA is successful in achieving our mission, while allowing volunteers to develop both personally and professionally. The main goal of the Committee is to encourage and promote volunteerism. This is accomplished by:
 - Welcoming volunteers to the organization;
 - Matching volunteers to an opportunity that suits their area of interest;
 - Maintaining information regarding our active volunteers and the important roles they fulfill.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the goals of the Committee for the coming year of service.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.

- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.
- Monitor the work of Committee members to ensure that progress towards goals is being achieved as planned.
- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Communication regarding volunteering with IABA
 - Publicize the benefits of volunteering by developing a volunteering “benefits list”.
 - Write at least 2 newsletter article(s) about the benefits of volunteering and/or about volunteer opportunities in general, recognizing volunteers, etc.
 - Regularly submit content for the weekly e-blast – including recognition of volunteer efforts, announcements of new leaders, descriptions of volunteer roles needing fulfillment, etc.
 - Database and Volunteer Information Tracking
 - Maintain the Volunteer database. Database should specify opportunities, log and track volunteer hours, track rewards points, etc.
 - Maintain a Volunteer Opportunities section/page on IABA’s website with information about volunteering, volunteer opportunities, etc.
 - Collect and maintain database of Confidentiality agreements received.
 - Recognition of Volunteers
 - Determine criteria and award a Volunteer of the Month.
 - Determine criteria and award a Volunteer(s) of the Year at the Annual Meeting each year.
 - Create a system of recognizing volunteers throughout the organization for their work and accomplishments whether in IABA, professionally or personally.
5. Miscellaneous. In the event of the unavailability of the assigned Friend to answer questions, consult on problems, etc., the chairperson should refer the question, problem, etc. to the attention of the Executive Director.

Weekly E-blast

1. Accountability. The Weekly E-blast activities take place under the direction of the Executive Director.
2. Duties. The broad function of the chairperson of the Weekly E-blast Committee is to manage the activities of the members of the Committee for the purpose of achieving the Committee's mission of:
 - Engaging our members and constituents through frequent updates regarding IABA programs, activities and member updates.

The duties of the chairperson fall into two categories: those that are common to all committee chairpersons and those that are specifically related to the work of this Committee.

Common Duties:

- Manage the membership of the Committee. Recruit new members utilizing the annual Participation Survey and other sources. Submit welcoming and appreciation emails to new and retiring members, respectively.
- Prepare (annually) and submit to the assigned Friend the Committee's budget requirements for the coming fiscal year of service. These requirements will be reviewed by the Finance Committee and approved by the Board.
- Prepare (quarterly) a brief "actual vs. goals" report and submit to the assigned Friend for incorporation in the organization's overall quarterly cycle report.
- Review (annually) this position description for continued relevance and propose any changes to the assigned Friend.
- Provide support to other IABA committees as requested.
- Assign tasks to Committee members or subcommittees so as to achieve the agreed upon goals for the year.
- Monitor the work of Committee members to ensure that progress towards goals is being achieved as planned.
- Maintain training documents for any committee member whose volunteer position requires a particular set of steps/procedure to complete their regular volunteer assignment.
- Maintain log-in/password information for any committee member who utilizes an IABA email address, online account, etc.
- Monitor the staffing of the Committee to assure that the resources are equal to the task and report any imbalances with the recommendations to the assigned Friend.
- Attend the Annual IABA Leadership Retreat.
- Attend the Annual Meeting of the IABA.
- Perform other duties as may be assigned by the assigned Friend.

Specialized Duties:

- Preparing weekly e-blast content:
 - Annual Meeting updates
 - Affiliate activity
 - Partner highlights
 - Job Board highlights
 - Member highlights
 - Volunteer of the Week
 - Exam passers/exam updates
 - New/Renewing members
- Maintaining and updating mailing list.
- E-blasts typically go out on Wednesday mornings.