



**ASPPA Subject Matter Experts (SMEs)/ad-Hoc SMEs
CONFIDENTIALITY and NON-DISCLOSURE AGREEMENT**

This Confidentiality and Non-Disclosure Agreement (“Agreement”) is made effective as of the _____ day of _____, _____, by and between the American Society of Pension Professionals and Actuaries (“ASPPA”), Education and Examination Committee (“E&E”), and _____ (“SME”). SME is engaged by E&E to perform the duties (“Project”) as outlined in the SME Job Description listed in Exhibit 1.A.

As part of the Project, ASPPA may provide SME with certain oral and written information about ASPPA and/or the examinations/courses, including, but not limited to, information relative to candidates, operations, proprietary concepts and ideas, marketing materials, examination statistical analysis, and/or product information. SME hereby agrees that the information will be used solely for the purpose of this Project and that such information will be kept confidential by SME.

During the two year term a SME will not be responsible for more than two (2) designated topics. SMEs will not be permitted to take ASPPA exams or teach ASPPA courses during their tenure and for one year after their tenure has ended as their work may include coverage of topics and texts directly related to exam development.

SME agrees that ASPPA shall be entitled to equitable relief, including injunction and specific performance in the event of any breach or threatened breach of this Agreement. This Agreement will be construed and interpreted in accordance with the laws of the State of Virginia.

Please review statement and sign below:

*I agree to maintain the full **confidentiality** of all Project parameters, specifically not to reproduce and/or disclose any test question in whole or in part to any unauthorized person or entity, any oral and written information about ASPPA and its courses and understand that if I reproduce any such material in any manner I am subject to a copyright infringement lawsuit and any other action(s) ASPPA may take.*

SME/ad-Hoc SME:

ON BEHALF OF ASPPA:

By: _____
Name

By: _____
Kim L. Szatkowski, CPC, QPA, QKA
Co-Chair, ASPPA Education &
Examination Committee

ASPPA Designation(s): _____

Date: _____

Date: _____

Exhibit 1.A

Subject Matter Expert (SME) or ad-hoc SME Job Description

Directed by: Vice-chair, E&E

Being a SME is a rewarding experience! You will work with other dedicated pension professionals to educate the next generation of administrators, consultants and actuaries. As an expert in a particular area/specialty/topic, you will have the chance to share your knowledge and hone your skills. Furthermore, your role as a SME will encourage you to stay current, which is essential in our swiftly changing industry! Being a SME in a national association with over 6,000 members can give you a strong marketing edge. SMEs and ad-hoc SMEs receive ASPPA CE credit each year for their work on the committee.

Expectation for All Volunteers

Support ASPPA's mission, vision, and values by exhibiting the following behaviors: excellence and competence, collaboration, innovation, respect, accountability and ownership.

Position Summaries:

SME

Acting in an expert advisory role, this position provides input and support to ASPPA's Chairs, Vice-chairs, Senior Technical Education Consultant, Technical Education Consultants (TECs) and other designated ASPPA staff. The SME is responsible for maintaining up-to-date expertise in a specific subject area in order to participate in evaluating curriculum and program material for consistency with defined learning objectives. SMEs recommend changes and participate in discussion of the depth and breadth of topic coverage in particular exams and credential programs. A SME should anticipate dedicating approximately 25 hours per quarter with a minimum two year commitment.

Ad-hoc SMEs

Ad-hoc SMEs help out on an "as needed" basis when a SME is temporarily unable to fulfill his/her responsibilities or when the time required to complete a project is more than a single SME can fulfill. Ad-hoc SMEs may be asked to fill in on a variety of topics, therefore having an expertise in one or more specific subjects may not be required. Ad-hoc SMEs, must have a strong general retirement plan background and the knowledge and experience to identify technical errors or omissions. Ad-hoc SMEs receive monthly E&E e-mails and participate in quarterly training calls. Ad-hoc SMEs will not be required to travel to the E&E Committee meetings.

Essential Functions

With regard to assigned subject matter, the SME:

- Participates in the development of learning objectives, program curriculum and texts.
- Monitors curriculum and learning objectives for consistency with the changing legal and business environments, recommending modifications with regard to the depth and breadth of the subject matter coverage as it affects all ASPPA E&E exams and credential programs.
- Evaluates texts, study guides, compendiums, webcourse materials, and exam questions for consistency with current learning objectives, level of difficulty, and practical application.
- Participates in conference calls with E&E staff and other volunteers quarterly or on an as needed basis.
- Responds to inquiries from E&E staff and other volunteers on an as-needed basis.
- Meets strict turnaround schedules, many of which will be no more than one week.
- Travels to one to two meetings per year.

- Participates in other E&E functions as needed.

Qualifications/Skills and Knowledge Requirements

- Current ASPPA member; up-to-date on all continuing education requirements for any ASPPA designations held by the individual.
- Minimum five (5) years technical retirement plan experience.
- Must demonstrate in-depth technical expertise and a thorough understanding of the practical application of relevant law and formal/informal guidance.
- Excellent verbal and written communication skills.
- Highly developed interpersonal skills to handle sensitive and confidential situations. Position continually requires demonstrated poise, tact, and diplomacy.
- Work requires continual attention to detail, ability to establish priorities and meet deadlines.
- Must be able to work in a shifting environment with ability to juggle and prioritize multiple, competing tasks and demands and to seek supervisory assistance as appropriate.
- Ability to make minimum two year commitment to position.

Performance Measures

On an annual basis, a SME will be evaluated by an E&E vice-chair for:

- Demonstration of expertise and ongoing commitment to enhance current knowledge.
- Quality and timeliness of assigned projects.
- Responsiveness to E&E staff and other volunteers.
- Flexibility and adaptability in responding to transition issues and evolution of E&E.

Supplemental Information

A SME will not be responsible for more than two (2) designated topics. SMEs will not be permitted to take ASPPA exams or teach ASPPA courses during their tenure and for one year after their tenure has ended as their work may include coverage of topics and texts directly related to exam development.

This description is based on E&E management's current assessment of the requirements and functions of the SME as of the date of this description. It is a general guideline and not an exhaustive list of all of the elements of the position. E&E management retains the right to make adjustments to this description as needed to meet ASPPA's mission. These changes may include the expansion, modification, or elimination of assigned subject matter topics.