Public Plan Trustees Institute—LEVEL I

Education for Public Sector Fiduciaries

July 15-16, 2025
Fairmont Chicago, Millennium Park
All sessions held at the Gleacher Center
Chicago, Illinois

www.ifebp.org/public

New Program for 2025!

International Foundation of Employee Benefit Plans

Public Plan Trustees Institute—
LEVEL I

Education for Public Sector Fiduciaries

Formerly known as Certificate of Achievement in Public Plan Policy (CAPPP®)

New Program Announcement: The Public Plan Trustees Institute is a new education offering designed for public sector health and retirement trustees and other fiduciaries. This program will replace the Certificate of Achievement in Public Plan Policy (CAPPP) program. Covered sessions are detailed below.

LEVEL I

July 15-16, 2025

- Fiduciary Responsibility and Plan Governance
- Retirement Plans
- Health Plans
- Legal Environment

LEVEL II

(Coming in 2026)

- Public Plan Governance and Emerging Issues
- Investing Public Plan Assets
- Trustee Board Strategies
- Plan Administration and Communication Concepts

Who Should Attend

This program is designed specifically for trustees and other fiduciaries who work in public retirement and health systems—including protective services, education, transportation and health care systems—in municipalities, states and the federal government.

Register online today! www.ifebp.org/public

Course Learning Objectives/Agenda

Tuesday, July 15, 2025

8:00 a.m.-12:15 p.m.

Fiduciary Responsibility and Plan Governance

- Fiduciary responsibility
  - Identify key fiduciary responsibilities and their implications for governance.
- Plan governance structure and governing documents
  - Describe the essential components of a governance structure and the role of governing documents.
- Role of unions and collective bargaining agreements
  - Evaluate the impact of unions and collective bargaining on organizational policies and worker relations.
- Role of policy makers and elected officials
  - Analyze the influence of policymakers and elected officials on governance and decision-making processes.

1:15-4:30 p.m.

Retirement Plans

- Fiduciary duties in a retirement plan
  - Understand the fiduciary duties in a retirement plan.
- Plan types
  - Identify and differentiate between various retirement plan types, including defined benefit, defined contribution and hybrid plans, and explain their implications.
- ERISA and its role in public retirement plans
  - Understand the role of the Employee Retirement Income Security Act (ERISA) in public retirement plans and its impact on compliance and governance.
- Plan administration
  - Describe key aspects of plan administration.

Wednesday, July 16

8:00 a.m.-12:15 p.m.

Health Plans

- Fiduciary duties in a health plan
  - Understand the fiduciary duties in a health plan.
- Plan considerations
  - Analyze plan considerations, including plan design and funding, and assess their impact on overall health outcomes and financial sustainability.
- ERISA and its role in public health plans
  - Explain the role of the Employee Retirement Income Security Act (ERISA) in public health plans and its implications for compliance and governance.
- Plan administration, data collection and analysis
  - Outline effective plan administration practices, including data collection and analysis, to enhance decision making and support strategic initiatives.
- Cost-control initiatives
  - Evaluate cost-control initiatives that can improve outcomes and reduce expenses.

1:15-4:30 p.m.

Legal Environment

- Laws and regulations governing public sector plans
  - Describe the key laws and regulations governing public sector plans.
- IRS and federal regulations
  - Identify and summarize the roles of the IRS and federal regulations affecting public sector retirement and health plans.
- State and local considerations
  - Analyze considerations that influence public sector plan governance and compliance.
- Legislative and regulatory outlook
  - Assess the current legislative and regulatory outlook and its impact on plans.
- Fiduciary roles and duty in the legal environment
  - Articulate the roles and duties of fiduciaries within the legal framework, ensuring they understand their fiduciary responsibilities and the importance of compliance.

Course Learning Objectives—Level II

COMING IN 2026!

Public Plan Governance and Emerging Issues

- Navigating state, local and federal legislation
  - Understand the structure and scope of state, local and federal legislation as it pertains to governance, compliance and decision making.
- Headline risk for public plans
  - Identify and analyze headline risks associated with public plans, understanding how they can affect stakeholder perceptions and plan sustainability.
- IT and cybersecurity
  - Explain the importance of IT and cybersecurity measures in protecting public plans and ensuring compliance with legal standards.
- Recruitment and retention with public benefits
  - Evaluate strategies for recruitment and retention that leverage public benefits to attract and retain talent.
- Role of policy makers and elected officials
  - Assess the role of policymakers and elected officials in shaping legislation that impacts public plans, and identify ways to engage effectively with these stakeholders.

Investing Public Plan Assets

- Working with your investment consultant
  - Develop the skills to communicate your financial goals and risk preferences clearly, evaluate investment recommendations critically and work collaboratively with your investment consultant.
- Investment process, objectives and policies
  - Articulate the investment process, including key objectives and policies that guide decision making in collaboration with an investment consultant.
- Asset classes and allocation strategy
  - Analyze various asset classes and develop an appropriate allocation strategy that aligns with the organization's financial goals and risk tolerance.
- Selecting managers and monitoring performance
  - Evaluate criteria for selecting investment managers, and establish effective monitoring practices to assess performance and ensure accountability.

Course Learning Objectives—Level II

COMING IN 2026!

Trustee Board Strategies

- Strategic Planning
  - Understand the risk assessment process to identify potential challenges and opportunities in the strategic planning process.
  - Analyze and audit organizational operations to enhance efficiency and effectiveness, using insights to inform strategic initiatives.
- Principles of change management
  - Apply principles of change management to facilitate smooth transitions and ensure stakeholder buy-in during strategic shifts.
- Business improvement strategies
  - Develop and implement business improvement strategies that align with organizational goals and enhance overall performance.
- Managing trustee board meetings
  - Effectively manage trustee board meetings, ensuring productive discussions, clear communication and strategic decision making.

Plan Administration and Communication Concepts

- Trustee role in public plan administrative issues
  - Understand the trustee's responsibilities in overseeing public plan administration, including ensuring compliance with fiduciary duties; evaluating administrative policies and procedures; and effectively addressing issues related to governance, funding and stakeholder communication.
- Communicating with plan members
  - Identify the legally required communications for plan members, and develop strategies for effective engagement to enhance member understanding and participation.
- Navigating public comments, communications and headlines
  - Navigate the complexities of public comments and communications, including managing media headlines that impact public perception of the plan.
- Legal issues for public plans and plan member benefits
  - Understand legal issues affecting public plans and plan member benefits, enabling them to address concerns and ensure compliance with relevant regulations.

Frequently Asked Questions

1. What is the Public Plan Trustees Institute?

The Public Plan Trustees Institute is a new education offering designed for public sector health and retirement trustees and other fiduciaries. This program will replace the Certificate of Achievement in Public Plan Policy (CAPPP) program. Sessions include:

LEVEL I

- Fiduciary Responsibility and Plan Governance
- Retirement Plans
- Health Plans
- Legal Environment

LEVEL II

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- Investing Public Plan Assets
- Trustee Board Strategies
- Plan Administration and Communication Concepts

2. How is the Public Plan Trustees Institute different from CAPPP?

The program was streamlined and redesigned to be more relevant for trustees and other public sector fiduciaries. The CAPPP Health and Pensions tracks were combined into a single track to place a larger emphasis on essential fiduciary duties. In addition, the take-home exam portion of the program was replaced with in-class lectures and exercises.

3. Who is the intended audience for the Public Plan Trustees Institute?

The Public Plan Trustees Institute is designed specifically for trustees and other fiduciaries who work in public retirement and health systems—including protective services, education, transportation and health care systems—in municipalities, states and the federal government.

4. I have already completed the CAPPP program. Should I complete the Public Plan Trustees Institute program?

While the program contains updated material, the Public Plan Trustees Institute will replicate a large portion of the existing CAPPP material, which may be duplicative. However, longer tenured fiduciaries may find value in the redesigned program as a refresher of their essential duties.

(continued)

5. I have taken one part of the two parts necessary to complete the CAPPP program. What do I do now?

We are sensitive to the fact that attendees do not want to be "caught in the middle" of the program transition. Because of this, we are giving attendees a two-year window to complete Level I of the new Public Plan Trustees Institute and retroactively earn the full CAPPP certification. In other words, attendees have until the end of 2026 to earn the CAPPP certification using a combination of the old CAPPP program and newly redesigned program.

6. When will the full program be rolled out?

Level I will be offered as a standalone program July 15-16, 2025 in Chicago, Illinois. Beginning in 2026, Levels I and II will be offered in conjunction with future offerings of the Trustees and Administrators Institutes and before the U.S. Annual Employee Benefits Conference.

7. I work in the public sector but am not a trustee or other fiduciary. What other education does the International Foundation offer?

Public sector staff who may have limited or no fiduciary duties should explore the Employee Benefits Courses and Certificates program offered by the International Foundation. In addition, the U.S. Annual Employee Benefits Conference offers a full education track for public plans. See page 11 for details of these offerings.

8. I have additional questions about the program. Who should I contact?

If you have any further questions about public sector education at the International Foundation, please contact Justin Held at (262) 373-7718 or justinh@ifebp.org.

Register online today! www.ifebp.org/public

Hotel

Fairmont Chicago, Millennium Park

All sessions will be held at the Gleacher Center.

Reservation Deadline:
Friday, June 20, 2025

Rate: US$265 single/double occupancy

Taxes & Fees (subject to change)**:**
17.4% Room Tax

Urban Experience Fee: Waived

Urban Experience Fee Includes (subject to change)**:**

- Standard internet access
- Premium internet access for Accor Live Limitless members
- Access to the Fairmont Fitness Studio

Hotel Cancellation Policy: A fee of one (1) night's room rate plus tax will be charged for reservations cancelled within 24 hours prior to arrival.

Note: Hotel room availability is not guaranteed outside of scheduled program dates.

For hotel questions, contact the Registration Department at (888) 334-3327, option 2, or edreg@ifebp.org.

Hotel Information

The Fairmont Chicago, Millennium Park is surrounded by over 400 acres of protected space in the heart of downtown Chicago. All guest rooms are air-conditioned and include a 50" HDTV and in-room, high-speed internet. You can enjoy the pristine views of Lake Michigan, Millennium and Grant Parks, and the Chicago skyline right from the hotel. The hotel offers a multitude of dining experiences, such as Columbus Tap, the Millennium Room and in-room dining. If you need a break, you can also visit The Bar for a drink in the hotel.

Location Details

Chicago offers over 200 theaters, fine dining at Michelin-star restaurants, and museums such as the Field Museum and the Art Institute of Chicago. There's always something to do, whether it's taking a city tour, watching a sports game or enjoying the great shopping that Chicago has to offer. There are also plenty of bars, live music and comedy clubs for entertainment while you're there!

REGISTRATION

Register today at **www.ifebp.org/public**

CONFERENCE REGISTRATION FEES

Through June 2, 2025	Member: US$1,400 | Nonmember: US$1,620
After June 2, 2025	Member: US$1,700 | Nonmember: US$1,920

Save US$300 if you register by June 2, 2025.

POLICIES

Cancel and transfer fees are based on registration fee paid: 60+ days of meeting is 10%; 31-59 days of meeting is 25%; within 30 days of meeting is 50%. Hotel deposit is forfeited for cancellations/transfers received within 3 days (8 days for Disney properties) of arrival. Registration fee is forfeited once program commences. Visit www.ifebp.org/policies for details.

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live, in-person sessions. You must request continuing education credit on your program registration at least 60 days prior to the beginning of the program so that the Foundation can seek preapproval from the governing agency.

Note: Requests made for continuing education credit do not guarantee administration of credit. For further information on continuing education credit, please call (262) 786-6710, option 2, or email continuinged@ifebp.org.

CEBS COMPLIANCE APPROVED Educational sessions at this program can qualify for self-reported CEBS® Compliance credit. Visit www.cebs.org/compliance for additional information.

Employee Benefits Courses and Certificates

Formerly known as Certificate Series

Chicago, Illinois
July 14-19, 2025

Stay ahead in managing and supporting your benefits and compensation plans with confidence! These in-person courses offer an immersive, hands-on learning experience designed to empower you with knowledge and insights. Dive deep into the history, evolution and latest trends in benefits through engaging, interactive lectures and real-world case studies. Gain the expertise you need to make impactful decisions and elevate your organization's understanding of employee benefits.

Start by taking a single course in a specific area of benefits, or take three courses to earn a topic-specific Certificate of Achievement.

Elevate Your Impact.

Attend the Largest Employee Benefits Conference.

71st ANNUAL

Employee Benefits Conference

November 9-12, 2025
Hawaiʻi Convention Center | Honolulu, Hawaiʻi
In-Person Preconferences: November 7-9
www.ifebp.org/usannual

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Register by June 2 to save US$300 with the early registration discount!

Visit www.ifebp.org/public to register, or call (888) 334-3327, option 2, for more information.

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OF EMPLOYEE BENEFIT PLANS

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