

You Attended the U.S. Annual Conference—Now What?

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Agenda

- Introductions and housekeeping
- Who is in the room?
- Conference overview
- Communicating key takeaways and actions at your next meeting
- Tips for implementing new initiatives
- Making the case for ongoing education
- Key takeaways

Polling Question

I serve as a:

- A. Labor Trustee
- B. Management Trustee
- C. Salaried Administrator
- D. Third Party Administrator
- E. Plan Professional
- F. Service Provider
- G. Other

Polling Question

The benefit plan(s) I serve are classified as:

- A. Multiemployer Plan(s)
- B. Public Plan(s)
- C. Single Employer Plan(s)

Conference Overview

- Keynotes
- Fiduciary
- General
- Pension
- Health
- Investments
- Apprenticeship
- Public Sector

Polling Question

What session/topic did you find most valuable?

Open Discussion

What did you learn this week?

Communicating Key Takeaways and Actions at Your Next Meeting

- Navigate your internal culture
- Make sure you are on the agenda
- Share session handouts
- Summarize and correlate key learning to current issues before your board

Communicating With Your Stakeholders

- Consider when and how to talk to:
 - Your Board
 - Your Members
 - Your Appointing Authority
 - Others?

Tips For Implementing New Initiatives

- Be prepared—Do your homework
- Have a plan
 - Be flexible but avoid scope creep
- Build consensus
- Track progress
- Communicate, communicate, communicate

Open Discussion

What are your tips for bringing education to life, implementing new initiatives, and managing change?

Making the Case for Ongoing Education

- Be deliberate about your education
- Be sure you plan your educational experiences, not only for yourself but for the full board and the staff
- Talk to your plan professionals and service providers about how they educate themselves
- Is education a regular item on your board agendas? **It should be!**

IFEBP Resources

- Update your profile
- Review your transcripts regularly
- Attend the US Annual Conference regularly but not exclusively
- Attend specialty conferences based on the funds you serve
- Be sure someone from your fund attends and represents at most programs

Polling Question

What sessions/topics would you like to see in the future?

Key Takeaways

- Know and tell—
Share what you learned
- Plan how you intend to
implement change
- Execute
- Be deliberate when planning
your future education

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Session Evaluation

