

Certificate of  
**Achievement**  
*in* **Public Plan Policy**

**CAPPP**<sup>®</sup>

**PENSIONS  
AND HEALTH  
PARTS I AND II  
CONSECUTIVELY**

**July 30-August 2, 2024**  
Boston, Massachusetts

**PENSIONS  
AND HEALTH  
PART II ONLY**

**November 9-10, 2024**  
San Diego, California

**Earn a Certificate in  
Pensions or Health**



[www.ifebp.org/cappp](http://www.ifebp.org/cappp)

International Foundation   
OF EMPLOYEE BENEFIT PLANS  
*Education | Research | Leadership*

# Certificate of Achievement *in* Public Plan Policy

CAPPP®

## Benefits of Attending

Build a strong foundation of knowledge in the core areas of public sector benefit plans by earning your Certificate of Achievement in Public Plan Policy (CAPPP®). The CAPPP Pensions and Health tracks are each designed specifically for public sector trustees and support staff of these plans. Regarded as the educational benchmark of excellence within the public sector, the CAPPP program addresses fundamental concepts and current trends in the legal, legislative, plan design and fiduciary aspects of public sector benefit plans.

Providing essential education for new trustees as well as for those who need a refresher, CAPPP is an exam-based program. Sessions are taught by expert practitioners who enrich the content with their own real-life experiences from the field and offer proven solutions you can apply to your own plans. Register today!

## Who Should Attend

- New public sector trustees
- Experienced public sector trustees looking to strengthen their knowledge
- Representatives of public funds of various types, sizes and geographical areas looking for a high-level overview
- Individuals needing a comprehensive understanding of public plan management at the policy-making level



## PROGRAM AT A GLANCE

	PENSIONS PART I	HEALTH PART I
<b>DAY 1</b>		
<b>8:00 a.m.-12:00 noon</b>	Governance (joint session)	
<b>1:00-5:00 p.m.</b>	Fiduciary Responsibility	Fiduciary Responsibility
<b>DAY 2</b>		
<b>8:00-11:30 a.m.</b>	Legal, Legislative and Regulatory Developments	Legislative and Regulatory Developments
<b>12:30-4:00 p.m.</b>	Actuarial Principles	Actuarial Principles

	PENSIONS PART II	HEALTH PART II
<b>DAY 1</b>		
<b>8:00 a.m.-12:00 noon</b>	Plan Design	Change Management and Communication Strategies
<b>1:00-5:00 p.m.</b>	Investments	Concepts of Group Health Plan Administration
<b>DAY 2</b>		
<b>8:00-11:30 a.m.</b>	Business Improvement Strategies	Health Plan Strategies and Options
<b>12:30-4:00 p.m.</b>	Emerging Issues	Emerging Issues

“If you are a trustee, in particular a new or newer trustee, you should definitely attend!”

# CAPPP: PENSIONS PART I

July 30-31, 2024

The Westin Copley Place, Boston | Boston, Massachusetts

## DAY 1

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8:00 a.m.-12:00 noon

### Governance (Joint session with CAPPP Health)

- An overview of the governance of public pension and health plans, including a broad-based orientation addressing issues, duties and responsibilities
- Participate in an interactive environment with small-group discussions to gain a deeper knowledge of governance issues.

1:00-5:00 p.m.

### Fiduciary Responsibility

- An overview of the legal environment in which public plans operate
- Review fiduciary duties and the role of fiduciary decision making.
- Apply legal concepts to hypothesized situations.
- Familiarize policy makers with necessary components of advice.

## DAY 2

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8:00-11:30 a.m.

### Legal, Legislative and Regulatory Developments

- Evolution of public plans and regulations
- Current rules and regulations of significance
- Tax deferral plans and their role in retirement income
- Challenges and benefits of public sector plans
- Possible outlook for future legislative and regulatory activity

12:30-4:00 p.m.

### Actuarial Principles

- The role and function of actuaries
- Applicable pension plan policies
- Cash flow characteristics
- The basic methods and assumptions for evaluating future events
- Asset valuation methods
- Experience investigations
- Actuarial reviews and audits

**Register online today! [www.ifebp.org/cappp](http://www.ifebp.org/cappp)**

# CAPP: PENSIONS PART II

**August 1-2, 2024**

The Westin Copley Place, Boston | Boston, Massachusetts

**November 9-10, 2024**

San Diego Convention Center | San Diego, California

*(Held in conjunction with U.S. Annual Conference)*

## DAY 1

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8:00 a.m.-12:00 noon

### Plan Design

- Adequacy funding and risks of retirement
- An overview of basic retirement plan components
- The features unique to public plans
- The structure of alternative plan designs
- A review of the legislative landscape
- Case studies

1:00-5:00 p.m.

### Investments

- Setting goals and objectives for developing an investment policy
- Asset allocation strategies
- An explanation of asset classes
- Selecting and monitoring investment performance
- Components of an investment report

## DAY 2

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8:00-11:30 a.m.

### Business Improvement Strategies

- How to effectively use strategic planning to focus on the most important aspects of the organization
- How to integrate tools and tips to improve your organization's risk assessment effectiveness
- How to strategically analyze, audit and improve your operations

12:30-4:00 p.m.

### Emerging Issues

- An overview of workforce attitudes and demographics
- An explanation of tools for trustees and administrators
- An overview of emerging and hot topics

# CAPPP: HEALTH PART I

July 30-31, 2024

The Westin Copley Place, Boston | Boston, Massachusetts

## DAY 1

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8:00 a.m.-12:00 noon

### **Governance (Joint session with CAPPP Pensions)**

- An overview of the governance of public pension and health plans, including a broad-based orientation addressing issues, duties and responsibilities
- Participate in an interactive environment with small group discussions to gain a deeper knowledge of governance issues.

1:00-5:00 p.m.

### **Fiduciary Responsibility**

- An overview of a trustee's or administrator's fiduciary duties
- Examine legal concepts as they apply to hypothetical situations.
- A review of hot topics in the public sector legal environment

## DAY 2

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8:00-11:30 a.m.

### **Legislative and Regulatory Developments**

- Overview of federal legislation impacting health care plans for active and Medicare populations
- An overview of key ACA issues for public sector plans
- Potential federal legislative changes

12:30-4:00 p.m.

### **Actuarial Principles**

- Overview of actuarial principles
- Basic methods and assumptions
- The factors involved in rate setting
- Short-/long-term projections

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# CAPPP: HEALTH PART II

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## DAY 1

---

8:00 a.m.-12:00 noon

### **Change Management and Communication Strategies**

- An overview of relationships, change management and communication
- Improving staff competencies
- The use of effective information systems
- Developing successful communication plans

1:00-5:00 p.m.

### **Concepts of Group Health Plan Administration**

- Effective oversight and management of your plans, including procurement and vendor accountability
- Population health concepts and strategy
- Understanding basic health plan designs and options for structuring a plan
- Understanding plan funding and financing

## DAY 2

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8:00-11:30 a.m.

### **Health Plan Strategies and Options**

- Understanding the drivers of health care
- Evaluating the health care equation
- Understanding employer strategies/options
- Class exercise and discussion

12:30-4:00 p.m.

### **Emerging Issues**

- Federal health care policy landscape
- Evaluating the forces shaping health care (AI, telemedicine, pandemics, etc.)
- Mental health
- Specialty drugs

# How Do You Earn Your Certificate?

CAPPP is an exam-based program. The following steps must be completed to earn your certificate.

**1**

## **ATTEND PART I AND PART II**

Part II can be taken before Part I in whichever order fits your schedule (Part II can be taken before Part I).



**2**

## **PASS A TAKE-HOME EXAM**

after each part.



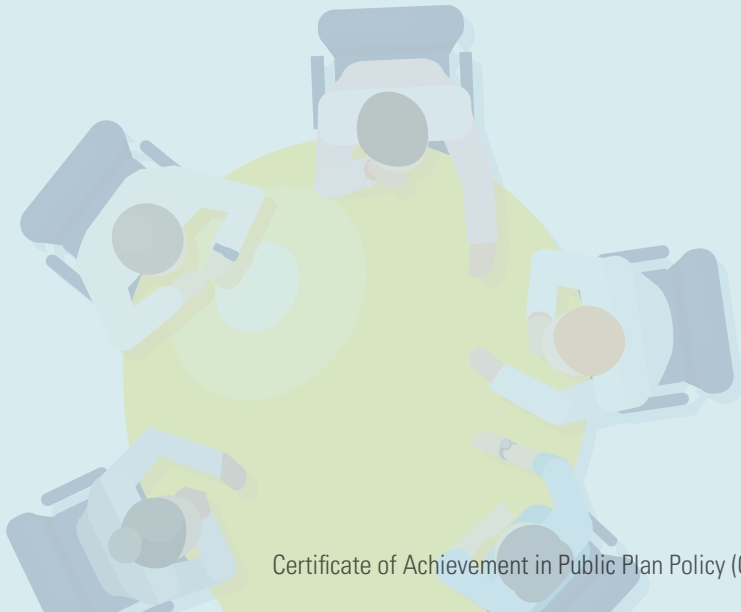
**3**

## **RECEIVE YOUR OFFICIAL CERTIFICATE**

in the mail upon verification that the take-home exams were passed for both Part I and Part II.



Attendees will be given the exam at the conclusion of each part of the course. Candidates will have 30 days to complete the exam (60 days if both parts are completed consecutively) and return it to the International Foundation for scoring.





# Hotels



## **The Westin Copley Place, Boston** **Boston, Massachusetts**

Reservation Deadline: Monday, July 1, 2024

Rate: US\$299 Single/Double Occupancy

Please visit our hotel/travel tab at [www.ifebp.org/cappp](http://www.ifebp.org/cappp) to book your hotel reservations online. For hotel questions, contact the Registration Department at (888) 334-3327, option 2 or [edreg@ifebp.org](mailto:edreg@ifebp.org).



## **San Diego Convention Center** **San Diego, California**

Visit [www.ifebp.org/sandiegohotels](http://www.ifebp.org/sandiegohotels) for hotel information.  
Reserve your hotel room by September 23, 2024.

## REGISTRATION

Register today at [www.ifebp.org/cappp](http://www.ifebp.org/cappp)

### CONFERENCE REGISTRATION FEES

Member early: US\$1,295 | Member late: US\$1,595  
Nonmember early: US\$1,470 | Nonmember late: US\$1,770  
Early registration for Boston offerings ends June 18, 2024.

## CONFERENCE REGISTRATION FEE INCLUDES

Continental breakfasts | Lunches | Beverage breaks

## 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.



Educational sessions at this program can qualify for self-reported CEBS® Compliance credit. Visit [www.cebs.org/compliance](http://www.cebs.org/compliance) for additional information.

## 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 (5 days for Disney properties) of arrival. Registration fee is forfeited once program commences. Visit [www.ifebp.org/policies](http://www.ifebp.org/policies) for details.

## RELATED READING



### Employee Benefits Survey: 2022 Results

International Foundation of Employee Benefit Plans  
2022. Item #8409E \$145 (Members \$95). E-book only.  
Additional information at [www.ifebp.org/ebs2022](http://www.ifebp.org/ebs2022)



# Let Us Bring Education to You!

International Foundation flexible on-site training brings industry-leading education to your workplace. As your partner in education, we work with you to meet your unique training goals.

In-person programs, including CAPPP and the Certificate Series, bring the experts directly to you—providing a one-of-a-kind learning and team-building experience.

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1

### **COST-EFFECTIVE**

Train your entire team without the added expense of travel.

2

### **CONVENIENT**

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3

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Strengthen communication, motivate employees and build problem-solving skills through a shared learning experience.

4

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or call (888) 334-3327, option 2.**

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more information.



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