

Public Plan Trustees Institute

Education for
Public Sector Fiduciaries

Introducing
Level II

LEVEL I

June 15-16, 2026

Hilton San Diego Bayfront
San Diego, California

October 24-25, 2026

New Orleans Ernest N.
Morial Convention Center
New Orleans, Louisiana

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www.ifebp.org/public



Join Us in San Diego!

International Foundation
OF EMPLOYEE BENEFIT PLANS



Public Plan Trustees Institute

Education for Public Sector Fiduciaries

The Public Plan Trustees Institute is a new education offering designed for public sector health and retirement trustees and other fiduciaries. This program has replaced the Certificate of Achievement in Public Plan Policy (CAPPP®) program. Sessions are detailed below.

LEVEL I

June 15-16, 2026
October 24-25, 2026

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

LEVEL II

June 15-16, 2026
October 24-25, 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 Agenda: Public Plan Trustees Institute—Level I

June 15, 2026 | October 24, 2026

7:30-11:30 a.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 policy makers and elected officials on governance and decision-making processes.

12:30-4:30 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.

June 16, 2026 | October 25, 2026

7:30-11:30 a.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.

12:30-4:30 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 Agenda: Public Plan Trustees Institute—Level II

June 15, 2026 | October 24, 2026

7:30-11:30 a.m.

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 policy makers and elected officials in shaping legislation that impacts public plans, and identify ways to engage effectively with these stakeholders.

12:30-4:30 p.m.

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.

June 16, 2026 | October 25, 2026

7:30-11:30 a.m.

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.

12:30-4:30 p.m.

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, and know how to address concerns and ensure compliance with relevant regulations.

Hilton San Diego Bayfront

San Diego, California | June 15-16, 2026

The June Public Plan Trustees Institute will be held at the Hilton San Diego Bayfront in San Diego, California. Rising above San Diego Bay and steps from Gaslamp Quarter, Petco Park and Rady Shell at Jacobs Park, Hilton San Diego Bayfront is the signature SoCal resort. Enjoy a tailored, urban and coastal experience with bright and unparalleled views in every guest room, relaxing amenities and locally inspired dining.

The International Foundation has secured a low room rate for Institute attendees. You must book your room through the Foundation by indicating your needs on the registration form.

Reservation Deadline:

Monday, May 11, 2026

Deposit: \$450

Rate: \$319 single/double occupancy

For additional hotel information, visit our Hotel/Travel tab at www.ifebp.org/trusteesadministrators.

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



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 has replaced the Certificate of Achievement in Public Plan Policy (CAPP) program. Sessions include:

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- Fiduciary Responsibility and Plan Governance
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2. How is the *Public Plan Trustees Institute* different from CAPP?

The program was streamlined and redesigned to be more relevant for trustees and other public sector fiduciaries. The CAPP 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 has been 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 CAPP program. Should I complete the *Public Plan Trustees Institute* program?

While the program contains updated material, the Public Plan Trustees Institute has replaced a large portion of the existing CAPP 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 or II 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. 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.

7. 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

72nd Annual Employee Benefits Conference

New Orleans, Louisiana | October 25-28, 2026

We work diligently to ensure there are a variety of hotel options available that meet your personal needs and budgetary requirements. Only those hotels that meet our strict standards for quality and value are utilized, and the high volume of hotel rooms used allows us to provide the lowest rate available. To ensure you continue to receive the best rates available, please make your hotel reservation through the International Foundation. Hotel reservations are confirmed on a first-come-first-served basis. Best available will be assigned. If you don't receive your preferred hotel, contact edreg@ifebp.org to be waitlisted.

Reservation Deadline:

Monday, September 14, 2026

Deposit: \$500

For additional hotel information, visit our Hotel/Travel tab at www.ifebp.org/neworleanshotels.

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



REGISTRATION

Register today at www.ifebp.org/public.

CONFERENCE REGISTRATION FEES

Save \$300 if you register by May 4 for the June program
or by September 13 for the October program.

Through May 4 or September 13, 2026	Member: \$1,495 Nonmember: \$1,715
After May 4 or September 13, 2026	Member: \$1,795 Nonmember: \$2,015

POLICIES

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

CONTINUING EDUCATION CREDIT

Continuing education (CE) credit for professions and designations MAY be available for attendance at live sessions. You must request CE credit on your program registration at least 60 days prior to the beginning of the program so that the Foundation can seek pre-approval from the governing agency. More information is available at www.ifebp.org/ce.

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



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

INTERNATIONAL FOUNDATION MISSION

The International Foundation of Employee Benefit Plans is the premier educational organization dedicated to providing the diverse employee benefits community with objective, solution-oriented education, research and information to ensure the health and financial security of plan beneficiaries worldwide.



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

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