



# EMPLOYEE BENEFITS EDUCATION

FOR MULTIEMPLOYER  
AND PUBLIC PLANS

**2023-2024**



# THE INTERNATIONAL FOUNDATION DIFFERENCE

As uncertainties in the benefits industry linger, the responsibilities on your plate are increasing in number and significance. Your organization is looking to you for guidance on big decisions that impact the health and financial security of your plan participants. Learn what makes the International Foundation different, with focused education, research and information so you can make informed and sustainable decisions.

## Content From the Source

Our content is developed and delivered by industry leaders and our own members, based on their needs. Learn from those who work in the field and relate to the day-to-day challenges you face.

## Timely Information

We live and breathe employee benefits. We are prepared with the resources you may not have immediate access to, helping you react quickly to changing laws, regulations and industry trends as they happen.

## Vendor-Neutral

We provide multiple perspectives on the issues at hand, allowing you to make decisions based on balanced facts. You won't find sales presentations disguised as education.

## Education From Anywhere

With a variety of education delivery formats, choose the delivery method that works best for you, and we'll meet you wherever you are.



IN-PERSON  
CONFERENCES  
AND  
WORKSHOPS



ONLINE  
LEARNING



CUSTOMIZED  
EDUCATION  
FOR YOUR  
WORKPLACE

# EDUCATIONAL PROGRAMS

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



## **Alternative Investment Strategies**

July 18-20, 2023 | San Francisco, California

This program provides practical education covering the complexities of alternative investments. Learn tools to make effective investment decisions, covering hedge funds and real estate investing for benefit funds.



## **Designing Curriculum to Close the Skills Gap**

July 18-20, 2023 | Brookfield (Milwaukee), Wisconsin

This workshop will help new and seasoned professionals apply a systematic approach to deliver a more impactful apprenticeship program.



## **Fraud Prevention Institute for Employee Benefit Plans\***

July 24-25, 2023 | Lake Tahoe, Nevada

Fraud can happen at any time, and it can cause major damage. Uncover emerging trends in fraud prevention, learn the latest in cybersecurity and data breaches, and receive guidance for internal controls and risk prevention.



## **Certificate in Global Benefits Management**

July 24-28, 2023 | Chicago, Illinois

September 18-22, 2023 | Las Vegas, Nevada

Gain the comprehensive knowledge needed to administer and manage a global benefits program. You'll gain a solid foundation in international benefits and an enhanced understanding of the benefits offered around the world.



## **Introduction to Public Sector Benefits Administration**

August 1-10, 2023 | Online Workshop

This course covers the core needs of public plan comprehension and handling. Take a deep dive into the structure of the public sector, government financing, technology, the legal and regulatory environment, and more.



## **69th Annual Employee Benefits Conference\*\***

October 1-4, 2023 | Boston, Massachusetts

*Available preconference sessions listed on page 11.*

Your source for objective, timely and relevant education, this conference provides proven solutions and thoughtful resources that address the critical and upcoming trends impacting your role today. The conference offers over 120 sessions to choose from, ensuring that you will leave with numerous takeaways.

*\*Sponsorships are available. \*\*Exhibits and sponsorships are available.*



## **Mental Health in the Workplace Virtual Conference**

October 18-19, 2023 | Virtual Conference

This event will provide best practices of when, where and how employers can support the total well-being of their employees and their families, responding to mental health challenges and fostering a healthy work environment.



## **Collection Procedures Institute**

November 6-7, 2023 | Santa Monica, California

Learn best practices, trends, and legal and legislative updates so you can fulfill your fiduciary responsibility to collect benefit payments. Benchmark your policies and procedures and network with those facing similar challenges.



## **Essentials of Multiemployer Trust Fund Administration**

November 6-10, 2023 | Santa Monica, California

Access critical information and updates for all aspects of multiemployer trust fund administration. Stay up to date on legal requirements and develop a supportive peer network through this respected program.



## **Institute for Apprenticeship, Training and Education\***

January 22-24, 2024 | Las Vegas, Nevada

This program is designed specifically to meet the needs and interests of stakeholders involved in training and education funds in both the United States and Canada. Focus on legal and legislative updates, fiduciary responsibility, risk management, HR issues, mental health and substance abuse as well as promoting the trades.



## **Construction Industry Benefits Conference\***

January 25-26, 2024 | Las Vegas, Nevada

This conference provides a forum for examining the latest trends and solutions for delivering benefits to participants in the construction industry.



## **33rd Annual Health Benefits Conference & Expo (HBCE)\*\***

January 30-31, 2024 | Clearwater, Florida

Using employer case studies that offer proven solutions and insights from experts paving the way in their organizations, HBCE will guide you in identifying the right formula for positive health care outcomes at your organization.

*\*Sponsorships are available. \*\*Exhibits and sponsorships are available.*



## **Advanced Trustees and Administrators Institute\*\***

February 12-14, 2024 | Orlando, Florida

June 24-26, 2024 | Las Vegas, Nevada

The Advanced Trustees and Administrators Institute is designed to keep experienced trustees informed of the latest industry trends, legal and regulatory changes, and best practices as well as to bring new ideas to light.



## **New Trustees Institute—Level I: Core Concepts**

September 30-October 2, 2023 | Boston, Massachusetts

February 12-14, 2024 | Orlando, Florida

June 24-26, 2024 | Las Vegas, Nevada

November 9-11, 2024 | San Diego, California

This course will provide the foundation of education for new trustees who serve on multiemployer health, retirement or other ERISA plans. Learn about your role and the obligations of a fiduciary as you become familiar with the technical aspects of managing employee benefit plans.



## **Trustees Institute—Level II: Concepts in Practice**

September 30-October 1, 2023 | Boston, Massachusetts

February 10-11, 2024 | Orlando, Florida

June 22-23, 2024 | Las Vegas, Nevada

November 9-10, 2024 | San Diego, California

This course is for experienced multiemployer trustees who have completed the Level I course. The curriculum will take a deeper dive into the benefits industry and your oversight role with a focus on practical application. This highly interactive learning experience will give you the framework and tools you need to address the many challenges you face as a trustee.



## **Health Care Management Conference\***

March 4-5, 2024 | Rancho Mirage, California

Feel prepared to make tough decisions on health care issues impacting your fund. Take action when changes and advancements occur so you can keep your fund moving in the right direction.



## **Investments Institute\***

March 6-7, 2024 | Rancho Mirage, California

Learn about global market trends, alternative investment options and key questions that will help enhance your fund's investments.



## **34th Annual Art & Science of Health Promotion Conference\*\***

April 8-12, 2024 | Hilton Head Island, South Carolina

Join other health plan sponsors who have a passion for promoting healthy workplaces through wellness and disease management programs. Learn about the science and strategy behind maintaining a healthy workforce.



## Washington Legislative Update

May 6-7, 2024 | Washington, D.C.

Receive the latest need-to-know information on legislative changes impacting plans and plan participants, and gain the tools to prepare for what's ahead.



## Accounting and Auditing Institute for Employee Benefit Plans\*\*

June 24-26, 2024 | Las Vegas, Nevada

Attend this event to stay up to date on the latest in reporting and disclosure requirements as well as best practices in your profession. This is the premier conference for those who audit employee benefit plans.



## Essentials of Multiemployer Trust Fund Administration

June 24-28, 2024 | Las Vegas, Nevada

Access critical information and updates for all aspects of multiemployer trust fund administration. Stay up to date on the legal requirements and develop a supportive peer network through this respected program.



## Benefit Communication and Technology Institute\*

July 15-16, 2024 | Denver, Colorado

This conference will bring attendees up to speed on the latest requirements, current trends and best practices for communicating their plans. Also covered are the tools needed to evaluate an existing communication program, ensuring that plans are meeting their objectives and employees are engaged in their benefit offerings.



## Collection Procedures Institute

October 14-15, 2024 | Washington, D.C.

Learn best practices, trends, and legal and legislative updates so you can fulfill your fiduciary responsibility to collect benefit payments. Benchmark your policies and procedures and network with those facing similar challenges.



## 70th Annual Employee Benefits Conference\*\*

November 10-13, 2024 | San Diego, California

**SAVE  
THE  
DATE!**

*\*Sponsorships are available. \*\*Exhibits and sponsorships are available.*

The Certified Employee Benefit Specialist® (CEBS) designation delivers professional expertise supported by research-based best practices with a curriculum developed by the Wharton School of the University of Pennsylvania. You can rely on CEBS for the knowledge you need to tackle challenges you will face throughout your career in benefits.

Earn your Group Benefits Associate (GBA) or Retirement Plans Associate (RPA) designation by completing three courses indicated below. To earn your CEBS, you will successfully complete all five courses: GBA 1, GBA 2, RPA 1, RPA 2 and GBA/RPA 3.

### CEBS Designation



Enroll in the CEBS program and earn the most respected designation in the benefits industry. Knowing that multiemployer and public employee benefit plans have unique challenges, look to CEBS to provide current and relevant health and retirement curriculums. With an academic partner developing streamlined core courses and laser-focused content, you will gain critical knowledge that you will be able to immediately apply to real-life challenges on the job.

### How CEBS Works

<p><b>Required (per course)</b></p>	<p><b>Exam</b>—Successfully complete a two-hour comprehensive exam containing 100 multiple-choice questions.</p>
<p><b>Essential</b></p>	<p>Exams cover content from the Study Guide and readings assigned to each course.</p> <p><b>Study Guide</b>—Exam material is based on the content presented in the Study Guide. It includes print and digital materials and access to the online practice exam.</p> <p><b>Textbook</b>—A textbook and/or supplementary readings are required for each course. These provide the theory and content of the topics covered in the Study Guide.</p>
<p><b>Additional Study Support</b></p>	<p><b>Online Study Group With Instructor Support</b>—Need a little push to stay on track or the security of expert and peer support? These Study Groups are for you. Online Study Groups provide access to instructors, a structured time frame and peer interaction.</p>

# IN-PERSON TRAINING SEMINARS

[www.ifebp.org/certificate-series](http://www.ifebp.org/certificate-series)

The Certificate Series offers educational opportunities in each of the areas of benefits and compensation. Take a single course for education in a specific area, or take three courses to earn a topic-specific certificate of achievement.



**July—Chicago, Illinois**



**September—Las Vegas, Nevada**



## **Certificate in Health and Welfare Plans**

Stay informed of the health care system's latest legal and regulatory changes with the Certificate in Health and Welfare Plans. Attendees will analyze plan management strategies and plan design options.



## **Certificate in Retirement Plans**

Funding a retirement plan introduces many challenges, but they are not insurmountable. Learn about the critical components of the retirement planning landscape and become a confident steward of your plan.



## **Certificate in Benefit Plan Administration**

Managing and administering employee benefit plans is complex and requires a broad range of expertise. This certificate analyzes the core operational and strategic areas of benefit plan administration.



## **Certificate in Benefits and Compensation**

Learn the three key components of a total compensation strategy: compensation, health plans and retirement plans. The Certificate in Benefits and Compensation analyzes these three components and prepares you to implement foundational technical skills in compensation concepts.



## **Certificate in Strategic Benefits Management**

Broaden your strategic perspective and learn to align benefits strategy with the vision of your organization. This certificate prepares you to define objectives for attracting, motivating, supporting and retaining talent in your organization.



## **Certificate in Public Sector Benefits Administration**

The public sector has unique characteristics that impact how employee benefits are managed. Financing, politics, and the legal and regulatory environment pose challenges and opportunities that require professionals to understand how public plans operate.



# CERTIFICATE SERIES 2023

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

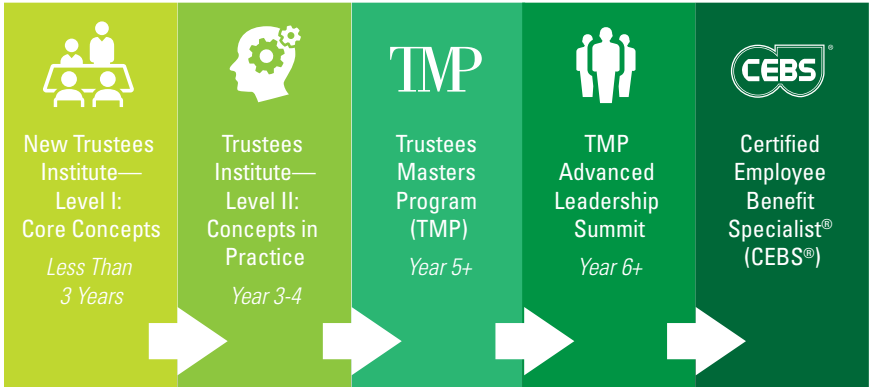
Course Name	July Chicago, Illinois	September Las Vegas, Nevada
<b>Certificate in Health and Welfare Plans   Take Required Courses</b>		
Health Benefit Plan Basics*	July 24-25	September 22-23
Health Care Cost Management*	July 26-27	September 20-21
And Choose One		
Ancillary Benefit Plans	<i>Next offering in 2024</i>	
Funding and Finance of Health Benefits*	July 28-29	
<b>Certificate in Retirement Plans   Take Required Courses</b>		
Retirement Plan Basics*	July 28-29	September 18-19
Investment Basics*		September 20-21
And Choose One		
401(k) Plans	<i>Next offering in 2024</i>	
Public Sector 401, 403 and 457 Plans*		September 22-23
<b>Certificate in Benefit Plan Administration   Take Required Courses</b>		
Basics of Employee Benefits Administration	July 26-27	September 20-21
Communicating Employee Benefits	July 24-25	September 22-23
And Choose One		
Total Rewards and Workforce Strategies*		September 18-19
Funding and Finance of Health Benefits*	July 28-29	
<b>Certificate in Benefits and Compensation</b>		
Retirement Plan Basics*	July 28-29	September 18-19
Health Benefit Plan Basics*	July 24-25	September 22-23
Basic Compensation Concepts		September 20-21
<b>Certificate in Strategic Benefits Management</b>		
Organizational Strategies for Health and Financial Wellness		September 22-23
Total Rewards and Workforce Strategies*		September 18-19
Health Care Cost Management*	July 26-27	September 20-21
<b>Certificate in Public Sector Benefits Administration   Take Required Course</b>		
Introduction to Public Sector Benefits Administration	<i>Available as an online workshop August 1-10, 2023</i>	
And Choose Two		
Public Sector 401, 403 and 457 Plans*		September 22-23
Retirement Plan Basics*	July 28-29	September 18-19
Investment Basics*		September 20-21
Health Benefit Plan Basics*	July 24-25	September 22-23
Health Care Cost Management*	July 26-27	September 20-21

\*These courses apply to more than one certificate.

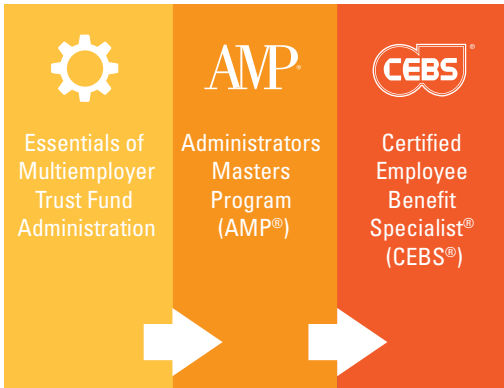
# YOUR EDUCATION PATH

Serving as a multiemployer or public trustee or administrator in today's world requires a greater understanding of wide-ranging issues—complex regulations, legislation, health care systems, investment strategies and more. The educational paths below illustrate the recommended progression of courses for your role.

## U.S. MULTIEMPLOYER TRUSTEE EDUCATION PATH



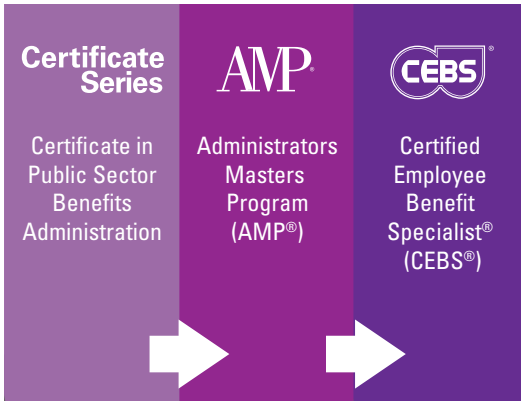
## U.S. MULTIEMPLOYER ADMINISTRATOR EDUCATION PATH



## U.S. PUBLIC EMPLOYER TRUSTEE EDUCATION PATH



## U.S. PUBLIC EMPLOYER ADMINISTRATOR AND STAFF EDUCATION PATH



69TH ANNUAL

## EMPLOYEE BENEFITS CONFERENCE

### Available Preconference Sessions

- New Trustees Institute—Level I: Core Concepts | **September 30-October 2, 2023**
- Trustees Institute—Level II: Concepts in Practice | **September 30-October 1, 2023**
- Certificate of Achievement in Public Plan Policy (CAPP®): Pensions Part I and Health Part I | **September 30-October 1, 2023**
- Administrators Masters Program (AMP) | **September 30-October 1, 2023**
- AMP for Graduates | **September 30-October 1, 2023**
- Trustees Masters Program (TMP) | **September 30-October 1, 2023**
- TMP Advanced Leadership Summit | **October 1, 2023**

**More information at [www.ifebp.org/usannual](http://www.ifebp.org/usannual)**

# ONLINE CERTIFICATES

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

Online certificates provide the necessary training to understand the basics of plan design and administration. These certificates are designed to onboard employee benefits professionals who are new to the industry as well as to educate those serving a new type of plan.



## Fundamentals in Health Benefits

Get up to speed on how and why an employer may sponsor a health plan for its employees and their beneficiaries.



## Fundamentals in Retirement Benefits

Gain a broad understanding of what you need to know about designing and administering a compliant retirement plan.



## Certificate in Health Plan Navigation

If you're on the front line of health care enrollment at your organization, this online certificate provides the training you need to help your plan participants make the best health care choices.



## Certificate in ERISA Compliance

You'll learn the general requirements of ERISA that all plans must follow, plus ERISA's impact on group health plans, retirement plans, plan investing and vendor management.



## Certificate in Absence Management

This certificate covers strategic approaches to managing employee absence, the various reasons employees miss work, and how absenteeism and presenteeism affect organizational productivity.



## Financial Skills for Life

This approachable online course will help new workers build solid personal finances. It highlights the issues they should consider as they are getting started in their jobs and provides helpful tools for the future.

# E-LEARNING COURSES

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

These engaging, self-paced courses provide fundamental information on a variety of employee benefits topics and include ample opportunities to apply, build and check your knowledge as you progress. E-learning courses can be taken individually or as part of an online certificate so you get the exact training you need. Enroll today to receive course access for 180 days via any computer or mobile device.

## COURSES COVER THE FOLLOWING

### Health Care Benefits

- COBRA
- Flexible Spending Accounts (FSAs)
- Health Care Cost and Quality
- Health Care Delivery Models
- Health Insurance Basics
- Health Literacy
- Health Reimbursement Arrangements (HRAs)
- Health Savings Accounts (HSAs)
- HIPAA Privacy
- HIPAA Security
- Introduction to Group Health Plans
- Medicare Basics
- Overview of ACA
- Overview of Disability Plans
- Overview of Exchanges
- Overview of Prescription Drugs
- Self-Funded Health Plan Basics
- Self-Funded Health Plans: Cost-Containment Strategies
- Self-Funded Health Plans: Understanding Stop-Loss Insurance
- Workforce Wellness

### Retirement Benefits

- 401(k) Plans
- Defined Benefit Plans
- Defined Contribution Plans
- Overview of Retirement Plans
- Retirement Plan Investments and Vendor Management
- Understanding Social Security

### General Benefits

- Americans with Disabilities Act (ADA)
- ERISA
- Family and Medical Leave Act (FMLA)
- Fiduciary Responsibility for ERISA Plans
- Leave Program Design and Administration
- Life and Accidental Death and Dismemberment (AD&D) Insurance
- Managing Absence and Productivity Issues
- Multiemployer Plan Accounting and Auditing
- Multiemployer Plan Structure and Administration

# CUSTOMIZED EDUCATION FOR YOUR TEAM

[www.ifebp.org/onsite-education](http://www.ifebp.org/onsite-education)

Our training solutions are as unique as your organization. We can bring education to your organization on your schedule and in your preferred format.



## IN PERSON

Bring the experts to you—your city, your workplace, your staff. Having a subject matter expert at your organization allows for a one-of-a-kind learning and team-building experience.



## E-LEARNING COURSES

Industry-leading online education provides comprehensive and interactive training for your staff. Choose from more than 30 e-learning courses that can be housed on your internal LMS for easy tracking and grading.



## WEBCASTS

A series of webcasts is a cost-effective and convenient way to train staff wherever they are located. Direct interaction with subject matter experts allows for your specific issues to be addressed.

**Choose a single format, or customize your education by blending multiple formats.** The Foundation offers both off-the-shelf and customized training solutions.

# INTERNATIONAL FOUNDATION MEMBERSHIP HELPS YOU LEARN MORE

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

The International Foundation covers trending topics, breaking compliance updates and legislative updates. Our resources will help you:



## STAY COMPLIANT

### **Legislative and Regulatory Updates**

Find vetted, expertly curated updates out of Washington on issues impacting the employee benefits landscape.

[www.ifebp.org/resources/legislative](http://www.ifebp.org/resources/legislative)

### **Today's Headlines**

Stay ahead of benefit regulations with daily compliance alerts, benefits news stories, and industry legislative and regulatory updates.



## MAKE CONNECTIONS

### **Jobs in Benefits/Career Resource Center**

Find your next great hire, develop your career as a benefits professional, learn the latest trends in benefits and get an idea of salaries in your field. Visit [www.JobsInBenefits.com](http://www.JobsInBenefits.com) to explore more.

### **Community**

Chat directly with your peers, and learn from others' conversations. [www.ifebp.org/community](http://www.ifebp.org/community)



## SAVE TIME

### **InfoQuick**

Instantly receive articles amongst over 100 frequently asked questions about industry topics, saving hours of searching time.

### **Sample Documents**

Enough starting from scratch—View sample policies, forms, RFPs, checklists and other documents first.

### **Personalized Research Service**

Save hours of time by letting one of our information specialists handle your complicated benefits questions.



## LEARN FROM THE EXPERTS

### **Webcasts**

Gain just-in-time information on developing benefit issues, delivered by experts, with unlimited live and on-demand webcasts. Visit [www.ifebp.org/webcasts](http://www.ifebp.org/webcasts) for a full listing.

### **Benefits Magazine**

Understand emerging trends affecting benefit plans through best practices, case studies and expert analysis, delivered to your door every other month. Go to [www.ifebp.org/magazines](http://www.ifebp.org/magazines) to view the electronic version.

Plus extra perks like discounts on educational events, benchmarking data on hot topics and resources pages for a deeper topic-specific dive!

**Look to the Foundation for guidance and more information on:**

- 401(k) participant notice requirements
- ACA compliance
- Benefit committee structure
- Cryptocurrency investments
- Cybersecurity for benefit plans
- Dependent audits
- ESG investments
- Flexible work arrangements
- FMLA
- Health care costs
- HIPAA compliance
- Inflation Reduction Act
- Mental health at work
- No Surprises Act
- Paid leave
- Participant-directed retirement accounts
- PBM contracting
- Pension funding
- Phased retirement programs
- Post-*Dobbs* reproductive coverage
- SECURE Act 2.0
- Self-funded health plans
- Wellness programs.



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