

California Public Retirement Systems COURSE GUIDE | 2018-2019

Presented by the California Association of Public Retirement Systems

CALAPRS sponsors educational forums for sharing information and exchanging ideas among trustees and staff of California public retirement systems to enhance their ability to administer public pension plan benefits and manage investments consistent with their fiduciary responsibility.

CALAPRS carries out its mission through an annual conference called the General Assembly, Round Table meetings for discussion of topics of interest, the Principles of Pension Management courses for Trustees, and the Advanced Course, the Overview, Intermediate, and Advanced Staff Training, Disability Staff Training, and the Management/Leadership Academy. Round Table groups are: Trustees, Administrators, Benefits staff, Accountants, Administrative Assistants, Attorneys, Investment Officers, Communications, and Information Technology staff of the member public retirement systems in California.

This guide contains descriptions of educational courses and forums specifically designed for system trustees, managers, and administrators.

CALAPRS

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Education | Communication | Networking

California Association of Public Retirement Systems

CALAPRS GENERAL ASSEMBLY: The CALAPRS General Assembly is an educational conference for retirement system trustees, senior staff, and annual sponsors of CALAPRS. Typically held on a Saturday through Tuesday in March, the program includes educational sessions on relevant and timely topics, as well as networking opportunities for participants. The program agenda is developed by a planning committee commissioned by the CALAPRS Board of Directors.

Courses specifically designed for Trustees: For over twenty years, trustees of CALAPRS member retirement systems have participated in CALAPRS training programs presented exclusively for California public retirement system board members. CALAPRS Principles of Pension Management programs help public pension trustees ask and answer the tough questions. The Principles course, typically held in August, is designed for newer trustees, and the Advanced course, typically held in March, is designed for more experienced trustees who are proven board leaders:



Principles of Pension Management for Trustees at Pepperdine University

This program is designed for new trustees and focuses on the practical aspects of our Trustees' governance duties. Now held at the Pepperdine University Executive Center, CALAPRS continues to offer the same high-caliber coursework and faculty that were previously offered on the Stanford University campus. The three-day intensive program combines team teaching, case studies, and mock board problem-solving. All course materials are based on actual California public pension fund law, policies, practices, and issues.



Advanced Principles of Pension Management for Trustees at UCLA

The Advanced Principles course is about building a trustee's skills and strengthening board governance. Pension trustees are faced with increased challenges, unprecedented scrutiny, and evolving issues. Moreover, areas such as actuarial assumptions, accounting requirements, and risk management are rapidly changing. To help trustees build and enhance their skills in addressing such issues, participants in this program will hear from top-level presenters in the areas of board governance, investments, actuarial science, pension law and economics. Over the course of two days, participants will be immersed in a powerful learning process—acquiring the skills they need to lead their organizations effectively. The program's proven, multifaceted educational approach fosters the professional, intellectual, and personal development required to govern at the board level.



Programs specifically designed for managers and staff:



Management/Leadership Academy

The Academy is for mid-level managers in larger systems and supervisors in smaller systems. The ideal candidate is a retirement system subordinate manager or supervisor with a couple of years of experience leading a team in benefits, accounting, investments or administrative aspects of a public retirement system. The CALAPRS Board of Directors has contracted with The Centre for Organization Effectiveness to present the course. The Centre has the best approach and training resources to give students outstanding training and exposure to enterprise management, problem-solving, leadership and a feedback component in the retirement system context. The Academy is held in three cumulative modules, typically in April, May or June, and July, over a total of 8 days. Participants must attend all three modules in full in order to graduate from the Academy.



Course in Retirement Disability Administration

This course is designed for retirement system staff members who have responsibility for or may be assigned responsibility for, dealing with members' disability retirement administration. The program agenda cycles through several subject areas, which do not necessarily need to be attended in sequence. One session covers an introduction to disabilities and eligibility, communication with the member, the application intake process, and gathering the records file. Another session addresses identifying deception, understanding bias, job analysis, and compiling the medical file. Finally, a third session discusses the disability hearing process, and a panel of presenters conduct a mock trial.



Overview Course in Retirement Plan Administration

The Overview Course is the entry-level training in Retirement Plan Administration and beneficial for all new staff. Attendees will gain an overall knowledge of how a public defined benefit pension system operates and its value to the members of their system as well as an introduction to three main types of California public retirement systems. While this course is considered a primer, it is a perfect program for those staff members wishing to reacquaint themselves with the basics of retirement, and it is a good foundation for those staff members who will take the Intermediate or Advanced Courses (below) at a later date. It is a one-day course generally held in May and, in alternating years, also in December.



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Programs specifically designed for managers and staff:

Intermediate Course in Retirement Plan Administration

This course is intended for the staff of CALAPRS member retirement systems and is the second course in the three-part Retirement Plan Administration series. It is an excellent follow-up for those who attended the Overview Course earlier in the year. The program is generally held on a Wednesday through Friday in October and topics covered typically include: retirement benefits, investment issues, pension funding, actuarial valuation, and fiduciary duty.

Advanced Course in Retirement Plan Administration

This course is intended for the staff of CALAPRS member retirement systems and is the third course in the three-part Retirement Plan Administration series. It is an excellent follow-up for those who have attended the Overview and Intermediate Courses previously. It is generally held on a Wednesday through Friday in late November or December and topics typically covered include: interpretation of the PEPRA, California pension funding assumptions, politics and legislation, the future of IT, measuring quality performance, understanding DC plans, CAFR, actuary 101, and the role of trustees.

Administrators' Institute

The CALAPRS Administrators' Institute is an educational opportunity for member Retirement System Administrators / CEOs / Executive Directors and their Assistant Directors. The program is typically held in late September on a Wednesday evening through Friday mid-day. Each year the agenda is developed by a planning committee commissioned by the CALAPRS Board of Directors.

Round Tables

CALAPRS hosts Round Tables throughout the year to allow staff and trustees from California retirement systems to learn from each other and discuss timely topics of interest to the various roles. The discussion agendas for each meeting are coordinated by volunteer chairs, or co-chairs, from the group and are typically selected at the end of the prior meeting. Round tables are held for the following groups: Accountants • Administrative Assistants • Administrators • Attorneys • Benefits • Communications • Information Technology • Investment Officers • Trustees

FOR MORE INFORMATION, CONTACT: CALAPRS

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