On-Site Education

Your Employees. Your Office. Your Goals.
Our Expertise.

www.ifebp.org/onsite-education
Invest in Your Workforce and Invest in Success

The International Foundation’s 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.

Four Reasons to Choose On-Site Education for Your Organization

1. COST-EFFECTIVE
   Train your entire team without the added expense of travel.

2. CONVENIENT
   Maximize productivity by eliminating travel time and scheduling training when it works best for your workforce.

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

4. CUSTOMIZED
   We can customize content to fit your exact training needs!

Your employees are the most valuable asset you have. Choose on-site education from the International Foundation to ensure their success—and yours.
Our Training Solutions Are as Unique as Your Organization

LEARN MORE at www.ifebp.org/onsite-education.

Face-to-Face:
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.

CEBS:
Certified Employee Benefit Specialist® (CEBS®) is the most respected designation in the industry. CEBS is cosponsored by the International Foundation and the Wharton School of the University of Pennsylvania.

Webcasts:
A series of webcasts is a cost-effective and convenient way to train staff no matter where 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.
Face-to-Face Courses

Face-to-face programs bring the experts directly to you, providing a one-of-a-kind learning and team-building experience. Some of our most popular on-site education courses include the following.

Certificate Series

The Certificate Series offers educational opportunities in each of the areas of benefits and compensation. The courses combine history and terminology with current events for a comprehensive learning experience for your team.

- Certificate in Health and Welfare Plans
- Certificate in Retirement Plans
- Certificate in Benefit Plan Administration
- Certificate in Benefits and Compensation
- Certificate in Public Sector Benefits Administration
- Certificate in Strategic Benefits Management
- Certificate in Canadian Benefit Plans
Public Employer–Focused Education

Certificate of Achievement in Public Plan Policy (CAPPP®)

CAPPP addresses the fundamental areas of public sector benefit plans. Focusing on core concepts and current trends in the legal, legislative, plan design and fiduciary aspects of these plans, the CAPPP programs are ideal for new public sector trustees. The CAPPP program offers certificates in employee health or employee pensions so the education can be tailored to attendees’ specific roles.

Multiemployer-Focused Education

New Trustees Institute—Level I: Core Concepts

Focusing on the role of a new trustee, the New Trustees Institute—Level I: Core Concepts will enhance new trustees’ understanding of basic issues involved in managing health and welfare funds as well as the complex benefits environment. Attendees will secure a high-level understanding of their fiduciary responsibility and the legal environment while discussing best practices and current issues in the benefits industry.

“On-site education from the International Foundation provided a personal touch for our employees. It allowed us to bring the International Foundation to us and to reach everyone in our organization at one time.”

Chris Brecht, GBA, RPA
Chief Executive Officer, Carday Associates
Other Popular Program Topics

At the International Foundation, we want to be your partner in education. Let’s talk about your training goals and develop a strategy together.

With more than 60 years as a leading employee benefits education provider, we can easily help you prioritize your objectives and customize a cost-effective solution to meet your unique needs.

Employee Benefits Training Topics

- 401, 403 and 457 plans
- Administration
- Apprenticeship program management
- Communications
- Compensation
- Conflict resolution
- Customer service
- Deliberate and impactful training
- Diversity training
- ERISA
- Fiduciary responsibility
- Funding methods
- Harassment training
- Health and welfare plans
- Health care costs
- Investments
- Legal/compliance
- Management/leadership
- Retirement plans
- Strategic planning
- Vendor relations

Choose from face-to-face programs, online training or a combination of the two. We can customize the format to fit your educational needs.

Contact us at: onsiteedu@ifebp.org
E-Learning Courses

Individual E-Learning Courses

Whether your organization needs entry-level coursework to onboard new employees or advanced training to keep seasoned employees knowledgeable about industry changes, the International Foundation can help.

We offer more than 30 e-learning courses, which cover a wide range of benefits topics. After students successfully complete each course, an exam will assess their understanding—allowing both the student and your organization to document achievement.

You can tailor the course content to meet your organization’s unique needs and choose to host the course on your learning management system (LMS) to allow you to easily integrate training into your systems and processes.

Online Certificates

Certificate in Health Plan Navigation

If you are on the front line of health care enrollment at your organization, this is the education you need to understand the health care system and support your plan participants. Complete eight courses covering everything from health literacy, to prescription drugs, to disability plans.

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. Take two required courses on group health plans and prescription drugs, and choose one elective on self-funded plans, HSAs or workforce wellness.

Fundamentals in Retirement Plans

Learn everything you need to know about designing and administering a compliant retirement plan. Complete two required courses on retirement plans and investments and vendor management and one elective on DB plans, DC plans or 401(k) plans.
## Individual E-Learning Courses

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Contact us at: onsiteedu@ifebp.org
Webcasts

Webcasts can be a straightforward way to train your team on specific benefit issues. Team members from a single office or multiple locations can easily gather for comprehensive training without travel costs. Subject matter experts will lead the presentation and provide an interactive question-and-answer session to address your organization’s specific issues.

Webcasts can be offered on almost any benefits topic including health and welfare plans, retirement plans, or the latest legislation requirements and compliance regulations.

“The International Foundation worked with us to design education that met our exact needs. We were extremely pleased with the entire experience.”

Jim Hoppe
Vice President, Benefit Plan Administration

Meeting and Event Management Services

Your Full-Service Meeting Logistics Partner | www.ifebp.org/eventmanagement

Let us leverage our relationships with conference centers, hotels and vendors to put together a seamless event for your organization. Our team of certified meeting professionals (CMPs) will assist you with planning and executing a successful event, taking the pressure and tedious tasks off your hands.

Meeting Management
A talented team of CMPs will assist you with planning your meeting.

Audiovisual Services
Let our expert staff incorporate new production elements into your show or meeting.

Registration and Housing
A full-service team approach ensures your attendees have a good experience with registration and securing their hotel reservations.
How Does CEBS Help Strengthen Your Team?

The CEBS (Certified Employee Benefit Specialist) designation provides the university-caliber knowledge you need by partnering with the Wharton School of the University of Pennsylvania. The program is focused and engaging while incorporating real-life applications.

**Benefits Departments**

*(benefits and pension managers, administrators, executives, generalists and specialists)*

Use the CEBS program to build a team of bright professionals ready to hit the ground running. CEBS curriculum provides the application elements that allow you to apply your knowledge from day one. Arm yourself with the knowledge you need to ask advisors questions and confidently answer those you receive each day.

**Sales Teams and Professional Services**

*(agents, brokers, producers, account managers, account execs, consultants, actuaries, attorneys, accountants, third-party administrators)*

CEBS gives your organization a competitive edge with the “best-of-the-best” staff, resulting in increased business revenue and client retention. Ramp up your strategy with critical knowledge to put into action immediately and grow your business.
The Details of the Learning Experience

Your team members will earn their CEBS by successfully completing all five courses: GBA 1, GBA 2, RPA 1, RPA 2 and GBA/RPA 3. Individuals can earn their GBA or RPA designation by completing three courses described below.

It is recommended to start with GBA 1 or RPA 1. Complete all five and have a well-rounded foundation of employee benefits.

**New Curriculum Courses**

*Five Required Courses for CEBS*

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<td>Strategic Benefits Management</td>
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CEBS Designation

- **GBA 1**: Directing Benefits Programs Part 1
- **GBA 2**: Directing Benefits Programs Part 2
- **GBA 3**: Strategic Benefits Management
- **RPA 1**: Directing Retirement Plans Part 1
- **RPA 2**: Directing Retirement Plans Part 2

your path.
On-Site Education

International Foundation
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