



Georgia Association of Public Plan Trustees®

Promoting Education for Public Retirement System Fiduciaries

CRPF™ Leadership Team | Education Committee Guidelines

General Information and Responsibilities

Effective Date: December 19, 2019 | Revision Date: October 15, 2025

Overview:

The Certified Retirement Plan Fiduciary™ (CRPF™) Leadership Team reviews the Georgia Association of Public Plan Trustees® (GAPPT) CRPF™ Course curriculum, evaluates its materials, recommends changes, and assists in selecting and assessing its course presenters. The Education Committee, an ad hoc group operating under the Board of Directors and the CRPF™ Leadership Team, serves as the CRPF™ curriculum subject matter experts (SMEs).

Structure and Appointment:

The CRPF™ Leadership Team Chair, in consultation with the Project Lead-Instructional Designer, serves as the leader of the CRPF™ Leadership Team.

CRPF™ Leadership Team Chair - Appointed by the Board of Directors.

Project Lead-Instructional Designer - GAPPT Executive Director

CRPF™ Leadership Team Members - Recommended by the CRPF™ Leadership Team Chair and appointed by the Board of Directors.

Education Committee Members - Recommended and appointed by the CRPF™ Leadership Team, if needed.

CRPF™ Leadership Team members and Education Committee members report to the CRPF™ Leadership Team Chair. The Project Lead-Instructional Designer and the CRPF™ Leadership Team Chair report to the Board of Directors.

The CRPF™ Leadership Team and Education Committee will have enough members to handle their duties and responsibilities. Generally, a person should not serve on more than one committee at a time, nor should two individuals from the same institution serve on the same committee.

CRPF™ Leadership Team members typically serve two-year terms, starting on May 1st and ending on April 30th. Members may be eligible for reappointment if recommended by the CRPF™ Leadership Team Chair and approved by the Board of Directors. Education Committee members serve as needed.

Member Qualifications, Professional Development, and Evaluation:

To serve on the CRPF™ Leadership Team or Education Committee, an individual must be a GAPPT Affiliate, Plan Sponsor, or Emeritus member in good standing. Plan Sponsor committee members must have experience as a public retirement system trustee or Staff member and be an active CRPF™ designee. Affiliate committee members must have a bachelor's degree or higher, an advanced professional designation, or expertise in a field related to public retirement systems.

The CRPF™ Leadership Team and Education Committee members acknowledge GAPPT educational policies and information, along with their ongoing professional development, on the **Acknowledgment Form for Educational Program Members**.

The CRPF™ Leadership Team Chair, in consultation with the Project Lead-Instructional Designer, evaluates CRPF™ Leadership Team and Education Committee members annually for their participation and compliance with these Guidelines.

Member Resignation or Removal:

A member may resign by providing written notice to the CRPF™ Leadership Team Chair and Project Lead-Instructional Designer. Additionally, a member will lose their committee position if they are no longer associated with the organization that formed the basis of their GAPPT membership. A member may also be removed from their committee position for cause. Reasons for removal include, but are not limited to:

- Engaging in conduct prohibited by the Bylaws or GAPPT policies.
- Abusing the authority of their position.
- Failing to disclose a conflict of interest concerning any matter involving the GAPPT.
- Failing to meet committee responsibilities.

Compensation and Expense Reimbursement:

Committee members serve without compensation. Members may be reimbursed for reasonable expenses incurred while conducting or engaged in duties as allowed by GAPPT policy and with the Board of Directors' approval.

Refer to the GAPPT Reimbursement Policy.

Education Committee Member Responsibilities:

Active Education Committee members should:

- Prepare for and attend Education Committee meetings by asking questions and reviewing any supporting materials in advance.
- Review the accreditation standards for the International Association for Continuing Education and Training (IACET).
- Review O.C.G.A. § 47-1-17 and be familiar with the six areas of continuing education requirements.
- Draft, edit, and submit assigned material promptly and according to the determined target dates.
- Stay updated on GAPPT events by monitoring its website, participating in its educational programs, and learning more about the issues that influence public retirement system trustees.
- Communicate effectively with other committee members.
- Avoid conflicts of interest and adhere to GAPPT policies.
- Refrain from conduct that reflects negatively on the GAPPT.

CRPF™ Leadership Team Responsibilities:

In addition to the responsibilities required of an Education Committee member, the CRPF™ Leadership Team is expected to collaborate with the CRPF™ Leadership Team Chair and Project Lead-Instructional Designer to review and update the CRPF™ curriculum content. Leadership Team members also serve as ad hoc members on the GAPPT Program Committee.

Active CRPF™ Leadership Team members should:

- Conduct an annual review of the entire CRPF™ program curriculum.
- Make recommendations and revise the CRPF™ curriculum content as necessary.
- If SMEs are required, ensure the Education Committee includes representation from all shareholder groups.
- Review and approve the documentation submitted by Education Committee members.
- Attend GAPPT Program Committee meetings.

CRPF™ Leadership Team Chair Responsibilities:

Besides the responsibilities of an Education Committee member and CRPF™ Leadership Team member, the CRPF™ Leadership Team Chair is expected to lead the team and work with the Project Lead-Instructional Designer.

The CRPF™ Leadership Chair should:

- Review these guidelines annually and provide updates to the Project Lead-Instructional Designer.
- Provide the Project Lead-Instructional Designer with the dates for next year's Leadership Team meetings.
- With assistance from the Project Lead-Instructional Designer, maintain regular communication with the Leadership Team members.

- Attend scheduled GAPPT Board of Directors meetings.
- Consult with the Project Lead-Instructional Designer to report on the Leadership Team meetings, including decisions made and follow-up actions required, and provide program recommendations to the Board of Directors.
- Approve Leadership Team meeting agendas before their distribution.
- With assistance from the Project Lead-Instructional Designer, report to the Leadership Team on the Board of Directors' decisions that impact the Leadership Team's work.
- Act as a facilitator by leading and supporting discussions during meetings.

Project Lead-Instructional Designer Responsibilities:

Along with the responsibilities required of an Education Committee and CRPF™ Leadership Team member, the Project Lead-Instructional Designer is expected to develop necessary work plans and meeting agendas and ensure that materials comply with IACET accreditation standards.

The Project Lead-Instructional Designer should:

- In October, send invites for the following year's meetings to all Leadership Team members.
- Be knowledgeable about IACET accreditation standards and procedures, and pursue additional training from IACET if needed.
- Be well-versed in the NASBA CPE standards and procedures and seek additional training from NASBA if necessary.
- Draft essential committee documents, including templates and proposed policies, following IACET and NASBA standards.
- Draft and communicate project target dates to committee members.
- Consult with the CRPF™ Leadership Team Chair to report on the committee meetings, including the decisions made and follow-up actions needed, and provide program recommendations to the Board of Directors.

Additional Information:

The following information is intended to support the roles of the Education Committee and CRPF™ Leadership Team.

Documents: Members should be familiar with the following:

- The GAPPT Bylaws.
- GAPPT policies relating to educational events and the CRPF™ program.
- O.C.G.A. § 47-1-17
- Information regarding learning styles and learning outcomes.
- Accreditation standards for the International Association for Continuing Education and Training (IACET).
- Statement of Standards for Continuing Professional Education (CPE) Programs and the program requirements of NASBA's National Registry of CPE Sponsors.
- Documentation, presentations, and evaluations from previous educational events.
- The GAPPT calendar.

Meetings: The CRPF™ Leadership Team is expected to meet at the Annual Trustee School and, as needed, to fulfill its responsibilities.

Ad Hoc Committees: The CRPF™ Leadership Team may form ad hoc committees as necessary. Each ad hoc committee will have enough members to manage its tasks and responsibilities.

Budget: If necessary, the Treasurer will prepare a committee budget with input from the CRPF™ Leadership Team and Project Lead-Instructional Designer.

GAPPT Calendar and Planning Dates:

The GAPPT calendar will be provided to the CRPF™ Leadership Team before January 1st. Any additions or changes should be submitted to the Project Lead-Instructional Designer for inclusion.

Thank you for serving on the CRPF™ Leadership Team or Education Committee. Questions or concerns may be directed to the CRPF™ Leadership Team Chair or the Project Lead-Instructional Designer, Sue Reynolds, at sue@gappt.org.