



# Georgia Association of Public Plan Trustees®

## Promoting Education for Public Retirement System Fiduciaries

### Membership Committee Guidelines

#### General Information and Responsibilities

Effective Date: August 24, 2017 | Revision Date: October 16, 2026

#### Overview:

The Membership Committee, along with the Board of Directors and Staff, is responsible for recruiting members for the Georgia Association of Public Plan Trustees® (GAPPT), maintaining current membership, and supporting the GAPPT's steady growth. The GAPPT Staff collaborates with the Membership Committee regarding database information and marketing materials.

#### Structure and Appointment:

The Membership Committee Chair is the leader of the Membership Committee.

**Membership Committee Chair** – Appointed by the Board of Directors

- Two-Year Term

**Membership Committee Vice Chair** – Recommended by the Chair and appointed by the Board of Directors

- Two-Year Term (In addition to any Committee Member Term)

**Committee Members** – Recommended by the Chair and appointed by the Board of Directors

- Two-Year Term

Membership Committee members and the Vice Chair report to the Chair. The Chair reports to the Board of Directors.

The Membership Committee will have enough members to manage its activities 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.

Membership Committee 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 Membership Committee Chair and approved by the Board of Directors

#### Member Qualifications and Evaluation:

To serve on the Membership Committee, an individual must be a GAPPT Affiliate, Plan Sponsor, or Emeritus member in good standing.

The Membership Committee Chair evaluates committee members annually for their participation and compliance with these Guidelines.

#### Member Resignation or Removal:

A member may resign by giving written notice to the Membership Committee Chair. Additionally, a member will lose their committee position if they are no longer associated with the organization that formed the basis for 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.
- Failing to attend regularly scheduled Membership Committee meetings.

### **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.*

### **Member Responsibilities:**

Active Membership Committee members should:

- Obtain contact information for eligible GAPPT prospects.
- Implement programs developed by the GAPPT Staff to recruit new members.
- Welcome all new members and help facilitate introductions at GAPPT educational events.
- Conduct outreach to Staff-identified lapsed GAPPT members.
- Develop programs to boost current members' retention.
- Periodically survey the members to assess their needs and satisfaction with the Association's services, programs, and benefits.
- Prepare for and attend committee meetings by asking questions, following up on assigned tasks, and reviewing any supporting materials in advance.
- Communicate effectively with other committee members.
- Encourage GAPPT members to apply for future committee member positions.
- Act as an ambassador for the GAPPT.
- Encourage other public retirement system professionals to attend GAPPT educational events.
- Avoid conflicts of interest and adhere to GAPPT policies.
- Refrain from conduct that reflects negatively on the GAPPT.

### **Chair Responsibilities:**

In addition to the responsibilities required of a committee member, the Membership Committee Chair is expected to guide the committee and collaborate with GAPPT Staff to develop work plans and meeting reports.

The Membership Committee Chair should:

- Review these guidelines annually and provide updates to the Executive Director.
- In October, provide the Executive Director with the dates for next year's committee meetings.
- Inform the GAPPT Staff of any committee roster changes.
- When necessary, recommend a vice chair candidate for the Board of Directors' consideration and approval.
- In consultation with the GAPPT Staff, approve new member letters and brochures.
- Forward obtained GAPPT prospect contact information to the GAPPT Staff.
- With assistance from the GAPPT Staff, oversee the CRPF™ Scholarship program. (See below.)
- Approve agendas of committee meetings before their distribution.
- Attend scheduled GAPPT Board of Directors meetings.
- Report to the Board of Directors on the committee's meetings, including decisions made and follow-up actions with deadlines for implementation.
- Approve any committee meeting agendas before their distribution.
- Act as a facilitator by leading and supporting discussions during meetings.
- Report to the committee on the decisions made by the Board of Directors that impact the committee's work.
- When appropriate, assist the committee in recommending new policies and procedures that support the mission and goals of the GAPPT.

### **Committee Information:**

The following information is intended to support the Membership Committee's role.

**Documents:** The Membership Chair should be familiar with the following:

- The GAPPT Bylaws.
- GAPPT policies relating to membership, events, media publications, and the CRPF™ scholarship program.
- Evaluation results from previous GAPPT educational events or the general membership.

- The GAPPT calendar.

**Meetings:** The Membership Committee is expected to meet as necessary to carry out its responsibilities.

**Ad Hoc Committees:** The Membership Committee may establish ad hoc committees as needed. Each ad hoc committee will have enough members to manage its tasks and responsibilities.

**Budget:** If deemed necessary, the Treasurer will prepare a committee budget with input from the Executive Director and Membership Committee Chair.

### **CRPF™ Scholarship Program:**

In 2017, the GAPPT launched a scholarship program to promote the Certified Retirement Plan Fiduciary™ program to prospective public retirement plans, trustees, and plan staff members. The Membership Committee helps the Board of Directors identify, contact, and select scholarship recipients.

The following information is intended to support the CRPF™ Scholarship Program.

- **Board of Directors Approval:** The Board of Directors must approve the number of available scholarships at least six months prior to the Trustee School.
- **Scholarship Recipient Identification:** Six months prior to the Trustee School, the Membership Committee starts identifying potential plans or individuals who might benefit from participating in the Scholarship Program.
- **Invitation and Application:** The Committee should invite scholarship candidates with enough time to review each application. The GAPPT Staff is responsible for updating the Scholarship Application Form as needed.
- **Executive Director Review:** The Membership Committee Chair will submit a list of acceptable candidates and applicants to the Executive Director for review at least two months before the Trustee School.
- **Scholarship Acceptance and Trustee School Enrollment:** The Membership Committee Chair should notify the Board of Directors about all approved and accepted recipients. The GAPPT Staff is responsible for registering scholarship participants for the Trustee School and handling their hotel arrangements.
- **Follow-Up:** With assistance from the GAPPT Staff, the Membership Committee Chair should follow up with all recipients to assess their future involvement, event experience, and any comments or suggestions. The GAPPT Staff is responsible for updating the Scholarship Post Event Form as needed.

### **GAPPT Calendar and Planning Dates:**

The GAPPT Calendar will be provided to the Membership Committee Chair before January 1st. Any additions or changes should be submitted to the GAPPT Staff for inclusion.

*Thank you for serving on the Membership Committee. Questions or concerns may be directed to the Membership Committee Chairperson or [info@gappt.org](mailto:info@gappt.org).*