



International Society Committee Budget/Action Items

Committee: Professional Development

Date of Meeting: April 12, 2013

Location: Brookfield, Wisconsin

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Minutes

None

Action Items

1. Recommend that the function description for the Professional Development Committee be amended to include supporting and promoting the Continuing Professional Education (CPE) Requirement for the CEBS Credential as well as the inclusion of all membership classifications. 1
 2. Recommend that the Society investigate offering a “National Continuing Education Day” for Society and chapter members as well as other industry professionals. 4
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Advisement Items

1. Recommended topics for special sections in Benefits Quarterly. 2
2. Provided input on how the Continuing Professional Education (CPE) Requirement can enhance the value of the CEBS designation and the Society. 3
3. Recommended links be added to Society documents so members can easily share these resources with colleagues and clients. 4
4. Consider developing an app to serve as a portal to the Members Only section on the ISCEBS website. 4
5. Designate a table for new graduates at the Symposium Monday Luncheon Roundtables so they can meet fellow graduates and learn more about the benefits of Society and chapter membership. 4

Minutes of the Professional Development Committee
International Society of Certified Employee Benefit Specialists

April 12, 2013

Brookfield, Wisconsin

1. **Call to Order.** The meeting was called to order at 8:30 a.m. by Chair Rick Owens. Committee members in attendance were Yvonne Frame, Patrick Haraden, Sam Henson, Monica Infosino and Mary Morrison as well as Governing Council liaisons Debora Green, Michelle Kelly and Alice McAbee and Benefits Quarterly Editor, Jack VanDerhei. Staff members in attendance were Sandy Becker, Linda Bielski, Terry Davidson, Jennifer Mathe, Chris Vogel and Michael Wilson.

2. **Review of Function Description.** An updated function description that covers support and promotion of the CEBS Continuing Professional Education (CPE) Requirement as well as inclusion of all membership classifications was presented and reviewed by the Committee. After discussion,

MOTION was made and seconded to recommend to the Governing Council that the function description for the Professional Development Committee be amended to include supporting and promoting the Continuing Professional Education (CPE) requirement as well as the inclusion of all membership classifications. (See Attachment A). **Motion carried unanimously.**

3. **Minutes of the Last Meeting.** The minutes from the May 18, 2012 meeting were reviewed.

MOTION was made and seconded to accept the minutes from the May 18, 2012 meeting of the Professional Development Committee as presented. **Motion carried unanimously.**

4. **State of the International Society.**

A. **Membership Statistics.** The membership statistics were reviewed and it was noted that the largest growth area continues to be with CEBS students including those holding a GBA, RPA or CMS designation. CEBS graduate members have remained fairly steady. An aggressive mid-year campaign will be starting next month and it is expected that the Society will reach its member goal of 3,600 for 2013. Ongoing strategies to build membership are in place. With the CPE requirement, it is expected that CEBS graduate non-members will look to the Society for their professional development activities.

- B. Chapter Activities.** Staff reported on the 2013 Membership Challenge – Keeping It Simple. Several chapters have reached their challenge goals and earned a monetary award. The Chapter Leader Conference, held in early March at Society headquarters, received excellent ratings. This was the largest attendance and many top-notch ideas were shared. Plans are underway to build the agenda for the next chapter workshop to be held in conjunction with the Symposium in Boston.

5. Benefits Quarterly.

- A. Editorial and Administrative Report.** Editor Jack VanDerhei shared the editorial process, the history of the publication, special section focus, and the time frames for securing submissions for each issue. It was noted that the publication is not suited to covering the “breaking” news type features.
- B. Special Sections – Topic Recommendations.** The Committee discussed a variety of topics that could be featured as special sections in *Benefits Quarterly*. After discussion, the following special section topics were recommended:

2nd Quarter 2014	Generational Issues
3rd Quarter 2014	Pharmacy & Health Savings Accounts
4th Quarter 2014	Retirement
1st Quarter 2015	Health Care Reform “Look Back”

There were also a number of topics that were deemed of interest but may not qualify for a special section. These potential topics could be covered when space permits. Staff will type up the flip-chart notes and send them on to Jack VanDerhei.

6. State of the International Foundation – Education Initiatives.

Michael Wilson provided an overview of the International Foundation. He noted that in its annual membership satisfaction survey the Foundation’s overall rating for its education programs surpassed 2012, scoring 93% satisfaction rate from U.S. members and even higher 97% rating from its Canadian counterparts. The top initiatives for 2013 include rollout of the Affordable Care Act (ACA) University utilizing a virtual environment to disseminate timely and critical information on this most significant piece of legislation since ERISA. Other priorities center on implementing strategies to expand education services to grow and retain members in Canada which likely will include establishing a satellite office within the country, further exploration into the world of mobile applications for both employers and employees, as well as a study of the Foundation’s site and facility to ascertain its capabilities to deliver education.

7. Continuing Professional Education Requirement for CEBS Credential.

- A. Status Report of IFEBP/CEBS CPE Program.** Staff updated the Committee on the CEBS program including participation trends and marketing efforts. Recently, there has been increased use of search engine marketing, which generates a good portion of the program leads. Also, at the forefront is the move to computer-based testing in Canada in April 2014 which affords CEBS test takers opportunities to accelerate their program participation.

The Continuing Professional Education (CPE) Requirement for the CEBS Credential was officially launched in February 2013. Overall, the feedback was positive with most questions covering flexibility of earning credits, types of programs that would qualify for CPE credit as well as concerns about the \$75 filing fee. Staff also fielded questions concerning the loss of the CEBS designation. It was reiterated that graduates would not lose the designation if they choose not to comply with the CPE requirement.

The Society is able to waive the filing fee for the first reporting cycle for ISCEBS members. The waived fee will be leveraged throughout member promotions as a way to attract more members to the Society and the local chapters.

In building a value statement for CEBS graduates who are CPE compliant, the Committee suggested some questions that could be addressed when developing branding, marketing and promotional materials.

- What is the value of earning the CEBS designation?
- What is the value of being CPE Compliant?
- What is the value of attending local chapter programs?
- How will others know what being CPE Compliant means?
- How will a compliant graduate set themselves apart from a non-compliant graduate?

Staff said the process to determine what CPE Compliant means, not only for those who are compliant, but also to the industry is an ongoing process. Conversations with staff and other stakeholders will continue and information will be communicated with the Committee, other leaders and CEBS graduates.

- B. ISCEBS Offerings.** Staff reported that 330 applications have been received for the annual continuing education courses. It is anticipated that participation in the continuing education exams/fellowship program will increase and surpass prior years as members opt to take the continuing education exam to earn/maintain fellowship as well as earn CPE credits.

Local chapters are aggressively championing the CPE program and many are using the CPE approved icon on their educational program announcements. A listing of the chapter programs was presented and, over the past nine months, there have been over 121 local offerings. The Society will continue to assist chapters with their educational programs and communications around the CPE requirement.

C. Professional Development Activities – Brainstorming. The Committee entertained several ideas that surfaced from its brainstorming session with regard to professional development and other services the Society should consider:

- Make it easier to share articles/documents through various social media outlets. The committee recommended adding links to “shareable” documents.
- Develop an app to serve as a portal to the Members Only section on ISCEBS. Rather than requiring a login on the website, the app would keep the member logged in. The Committee recognized that there would be development costs, but felt it would be a valuable member service.
- Designate a table for new graduates at the Symposium Monday Luncheon Roundtables so they can meet fellow graduates as well as learn more about the benefits of Society and chapter membership.
- Offer a National Continuing Education Day via a virtual environment that would be accessible to Society and chapter members and others in the benefits industry. It may be possible to offer continuing education credit for professional licensing in addition to CPE credit. Local chapters could consider dovetailing this with additional onsite sessions, in-house discussions or social events.

MOTION was made and seconded to recommend to the Governing Council that the Society investigate offering a National Continuing Education Day via a virtual environment.

Motion carried unanimously.

8. Fellowship Demographics. The Committee reiterated the need to reach the younger generation, getting them involved and staying engaged with CEBS and the Society. It was noted that it would be beneficial to conduct a survey to learn more about the demographics, delivery preferences in receiving education and information, technology usage, etc. of CEBS students and graduates, Society

members and those holding the fellowship status. This information can be used to effectively market and promote Society products and services as well as evaluate the professional development needs of current and future CEBS students and graduates and Society members.

9. **Adjournment.** The meeting adjourned at 1:35 p.m.

Attachment A
Proposed Changes

ISCEBS PROFESSIONAL DEVELOPMENT COMMITTEE
FUNCTION DESCRIPTION

Preamble

The Committee shall serve the best interests of the International Society of Certified Employee Benefit Specialists (ISCEBS) and its members. Its basic charge is to make recommendations to the Governing Council regarding professional development programs and activities for Society members. Minutes from each committee meeting shall be submitted to the Governing Council.

1. Composition

The Committee shall consist of an appropriate number of Society members from representative industries in the employee benefits sector with consideration also given to geographical region. Industry representations may include but not be limited to: accounting, actuarial services, consulting, corporate and multiemployer plan management, financial services, government, insurance, investments and law.

2. Scope of Duties

- A. The Committee shall make recommendations to the Governing Council regarding continuing education programs, including format, content and delivery methods. Committee members shall identify may suggest topics on an annual basis ~~topics~~ for the continuing education courses.
- B. The Committee shall make recommendations to the Governing Council regarding the administrative and editorial affairs of *Benefits Quarterly*. Committee members shall identify and recommend potential topics and authors to the editor of *Benefits Quarterly*. The Committee also shall review and make recommendations for other Society publications.
- C. The Committee shall make recommendations regarding technology and online applications for all educational and membership services.
- D. Committee members shall stay abreast of current legislative and other developments in the employee benefits field.
- E. Committee members shall actively promote Society membership and chapter membership to those holding the CEBS, CMS, GBA or RPA designations and to CEBS students who have completed at least one CEBS course.
- F. Committee members shall support and actively promote the CEBS Continuing Professional Education (CPE) requirement.
- G. Committee members shall carry out other projects and directives that may be assigned by the Governing Council or the Board of Directors.

3. **Responsibility of Committee Members**

- A. Members shall be aware of the relevant budget allocations and keep them in mind when formulating recommendations.
- B. Members shall become familiar with the minutes of the previous meeting.
- C. Members shall make every effort to attend the committee meeting and review information sent to them. ~~on a periodic basis.~~

(April 12, 2013)