

Schedule A to the NCPERS Code of Conduct for Public Pension Service Providers

The National Conference of Public Employee Retirement Systems (NCPERS) has developed an objective process to determine whether foundations, think tanks, and other nonprofit entities engage in ideologically, politically, or donor driven activities to undermine public pensions. The objective process includes evaluating these entities on the following criteria:

- Advocates or advances the claim that public defined benefit plans are unsustainable.
- Advocates for a defined contribution plan to replace the public defined benefit plan.
- Advocates for a poorly designed cash balance plan to replace the public defined benefit plan.
- Advocates for a poorly designed combination plan to replace the public defined benefit plan.
- Links school performance evaluation to whether it sponsors a defined benefit plan to its teachers/employees.

Based on the criteria above, NCPERS has determined the following foundations, think tanks, and other nonprofit entities engage in ideologically, politically, or donor driven activities to undermine public pensions:

- American Enterprise Institute
- American Legislative Exchange Council
- Brookings Institution
- California Common Sense
- California Policy Center
- Heritage Foundation
- Howard Jarvis Taxpayers Association
- Jessie Ball DuPont Fund
- Laura and John Arnold Foundation
- Manhattan Institute for Policy Research
- Massachusetts Taxpayers Foundation
- National Council on Teacher Quality
- Pioneer Institute
- R Street Institute
- Reason Foundation
- Show Me Institute
- StudentsFirst
- Taxpayers for Sustainable Pensions
- Teacherspensions.org
- Texas Public Policy Foundation
- The Pew Charitable Trust
- UnionWatch
- Urban Institute
- Wyoming Liberty Group

Approved by NCPERS Executive Board on July 11, 2015