

CalPERS Board Member Education Program  
Educational Activity Report

**Board Member/Designee Name:** Malia Cohen  
**Two-year Period to Acquire 24 Hours:** 01/17/2023 - 01/16/2025  
**Position:** Ex Officio Member, California State Controller  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

[Government Code Section 20100 \(PDF\)](#), effective January 1, 2015, requires that CalPERS Board members receive a minimum of 24 hours of education within the first two years of assuming office, and for every subsequent two-year period in which they serve.

The [CalPERS Board Member Education Policy \(PDF\)](#) was amended in December 2014, to conform to the Government Code. The Policy applies to Board members and their designees.

The CalPERS Board Member Education Program Schedule outlines sessions offered each calendar year to meet the requirements of the Government Code and Board Member Education Policy. Program Schedules can be found on the [Transparency and Accountability](#) page.

The table below lists hours of education completed by the Board member or designee named above for the period noted. Each Board member and designee has two years from their effective date to meet the requirement.

<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	4.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	6.50
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.00	7.50
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	8.50
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	9.00

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	11.00
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	12.00
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	13.00

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**Board Member/Designee Name:** Regina Evans  
**Two-year Period to Acquire 24 Hours:** 09/13/2023 - 09/12/2025  
**Position:** Board Designee  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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**Board Member/Designee Name:** Deborah Gallegos  
**Two-year Period to Acquire 24 Hours:** 11/15/2023-11/14/2025  
**Position:** Board Designee  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours

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**Board Member/Designee Name:** Fiona Ma  
**Two-year Period to Acquire 24 Hours:** 1/7/2021 - 1/6/2023  
**Position:** Ex Officio Member, State Treasurer  
**Current Report As Of:** 10/27/2023  
**Date Board Member/Designee Left Office:**

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<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Strategic Alignment Across California's Three Large State Purchasers: What are the Opportunities	1/18/22	12/21/22	1.50	1.50
Case Study on Leverage and Liquidity	1/18/22	12/21/22	1.00	2.50
Annual Board Fiduciary Training	1/18/22	12/21/22	2.50	5.00
Sustainable Investment and the Path to Net Zero	1/18/22	12/22/22	2.00	7.00
Compensation Trends	4/19/22	12/22/22	3.00	10.00

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Geopolitical Risk and Financial Markets	7/17/22	12/23/22	1.00	11.00
Spotlight on Private Debt Opportunities	7/17/22	12/23/22	1.50	12.50
Shaping Our Strategy on Human Capital Management	7/17/22	12/23/22	1.00	13.50
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/17/22	12/23/22	1.00	14.50
Behavioral Health Update	7/17/22	12/24/22	1.00	15.50
Racial Impacts of Financial Markets Operations Diversity, Equity & Inclusion Trends in 2022	7/17/22	12/24/22	2.00	17.50
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/18/23	1/24/2023	4.50	22.00
Board Educational Day - Annual Board Fiduciary Training	1/18/23	1/24/2023	2.00	24.00

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**Board Member/Designee Name:** Patrick Henning  
**Two-year Period to Acquire 24 Hours:** 01/02/2023-01/01/2025  
**Position:** Board Designee  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours

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**Board Member/Designee Name:** Frank Ruffino  
**Two-year Period to Acquire 24 Hours:** 1/7/2023 - 1/6/2025  
**Position:** Board Designee  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF) - (Start of next training period 1/7/2023 - 1/6/2025)	1/17/2023	1/17/2023	4.50	4.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	6.50
Council of Institutional Investors - 2023 Spring Conference - Sessions outlined in Board Travel Report	3/5-10/2023	3/5-10/2023	16.00	22.50
IFEBP - Washington Legislative Update - Sessions outlined in Board Travel Report	5/21-24/2023	3/21-24/2023	18.00	40.50
Trustee Leadership Forum (TLF) for Retirement Security Annual Conference - Sessions outlined in Board Travel Report	6/11-15/2023	023	28.00	68.50



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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.50	70.00
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	71.00
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	72.50
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	74.50
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/17/2023	1.00	75.50
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	76.50
NACD: Master Class on Untangling ESG - Sessions outlined in Board Travel Report	8/24-25/2023	8/24-25/2023	32.00	108.50
IFEBP Conference - Sessions outlined in Board Travel Report	9/29/2023-10/5/2023	9/29/2023-10/5/2023	40.00	148.50
Trustee Leadership Forum for Retirement Security Peer Mentoring Project	10/25-28/2023	10/25-28/2023	11.00	159.50

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**Board Member/Designee Name:** Lisa Middleton  
**Two-year Period to Acquire 24 Hours:** 4/30/2021 - 4/29/2023  
**Position:** Member, Local Government Elected Official  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	1.50
Capital Market Assumptions: Survey & Methodology	7/12/2021	7/12/2021	1.00	2.50
Creating & Assessing Candidate Portfolios	7/12/2021	7/12/2021	1.00	3.50
The New Agenda for Sustainable Investment: Disclosure on Financial, Human and Physical Capital	7/12/2021	7/12/2021	2.00	5.50
Behavioral Health Update	7/13/2021	7/13/2021	1.00	6.50

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Working After Retirement Administration	7/13/2021	7/13/2021	1.00	7.50
Board Self Evaluation 2021	7/14/2021	7/14/2021	1.25	8.75
Strategic Alignment Across California's Three Large State Purchasers: What are the Opportunities	1/18/2022	1/18/2022	1.50	10.25
Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	11.25
Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	13.75
Sustainable Investment and the Path to Net Zero	1/18/2022	1/18/2022	2.00	15.75
Compensation Trends	4/19/2022	4/19/2022	3.00	18.75
Geopolitical Risk and Financial Markets	7/11/2022	7/11/2022	1.00	19.75
Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.50	21.25
Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	22.25
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	23.25
Behavioral Health Update	7/12/2022	7/12/2022	1.00	24.25

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Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	26.25
National Association of Corporate Directors Conference - Various Educational Topics outlined in Board Travel Report	10/8/2022	10/11/2022	12.00	38.25
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	42.75
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	44.75
July Board Offsite Sustainability and Implications for Asset Owners  (Start of next training period 4/29/2023 - 4/28/2025)	7/17/2023	7/17/2023	1.00	1.00
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	2.00
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	3.50
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	5.50
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	6.50
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	7.50
CII Fall Conference	9/11-13/2023	9/11-13/2023	9.25	16.75

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**Board Member/Designee Name:** David Miller  
**Two-year Period to Acquire 24 Hours:** 01/16/2022 - 01/15/2024  
**Position:** Board Member (Elected)  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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Board Educational Day: Strategic Alignment Across California's Three Large State Purchasers: What are the Opportunities	1/18/2022	1/18/2022	1.50	1.50
Board Educational Day: Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	2.50
Board Educational Day: Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	5.00
Board Educational Day: Sustainable Investment and the Path to Net Zero	1/18/2022	1/18/2022	2.00	7.00
Board Educational Day: Compensation Trends	4/19/2022	4/19/2022	3.00	10.00

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Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	14.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	16.50
July Board Offsite: Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.50	18.00
July Board Offsite: CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	19.00
July Board Offsite: Diversity, Equity & Inclusion Innovations in the Investment Industry (Board Education)	7/17/2023	7/17/2023	1.50	20.50
July Board Offsite: Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review (Board Education)	7/17/2023	7/17/2023	2.00	22.50
July Board Offsite: Improving Health Outcomes and Equity: A Population Health Approach (Board Education)	7/18/2023	7/18/2023	1.00	23.50
July Board Offsite: Spotlight on CalPERS Health Data Strategy & Research (Board Education)	7/18/2023	7/18/2023	1.00	24.50

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**Board Member/Designee Name:** Eraina Ortega  
**Two-year Period to Acquire 24 Hours:** 3/7/2021 - 3/6/2023  
**Position:** Ex Officio Member - CalHR  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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Compensation Governance Best Practices	4/19/2021	4/19/2021	2.50	2.50
Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	4.00
Capital Market Assumptions: Survey & Methodology	7/12/2021	7/12/2021	1.00	5.00
Creating & Assessing Candidate Portfolios	7/12/2021	7/12/2021	1.00	6.00
The New Agenda for Sustainable Investment: Disclosure on Financial, Human and Physical Capital	7/12/2021	7/12/2021	2.00	8.00

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<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Behavioral Health Update	7/13/2021	7/13/2021	1.00	9.00
Working After Retirement Administration	7/13/2021	7/13/2021	1.00	10.00
Board Self Evaluation 2021	7/14/2021	7/14/2021	1.25	11.25
Board Educational Day – Strategic Alignment Across California’s Three Large State Purchasers: What are the Opportunities	1/18/2022	1/18/2022	1.50	12.75
Board Educational Day – Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	13.75
Board Educational Day – Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	16.25
Board Educational Day – Sustainable Investment and the Path to Net Zero	1/18/2022	1/18/2022	2.00	18.25
Compensation Trends	4/19/2022	4/19/2022	3.00	21.25
Geopolitical Risk and Financial Markets	7/18/2022	7/18/2022	1.00	22.25
Spotlight on Private Debt Opportunities	7/18/2022	7/18/2022	1.50	23.75
Shaping Our Strategy on Human Capital Management	7/18/2022	7/18/2022	1.00	24.75
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/18/2022	7/18/2022	1.00	25.75



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Behavioral Health Update	7/18/2022	7/18/2022	1.00	26.75
Racial Impacts of Financial Markets Operations Diversity, Equity & Inclusion Trends in 2022	7/18/2022	7/18/2022	2.00	28.75
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	33.25
Board Educational Day - Annual Board Fiduciary Training (Start of next training period 3/7/2023 - 3/6/2025)	1/17/2023	1/17/2023	2.00	2.00
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.00	3.00
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	4.00
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	5.50
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	7.50
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	8.50
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	9.50

CalPERS Board Member Education Program  
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**Board Member/Designee Name:** Thomas Gjerde  
**Two-year Period to Acquire 24 Hours:** 06/30/2021 - 06/30/2023  
**Position:** Board Designee  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	1.50
Capital Market Assumptions: Survey & Methodology	7/12/2021	7/12/2021	1.00	2.50
Creating & Assessing Candidate Portfolios	7/12/2021	7/12/2021	1.00	3.50
The New Agenda for Sustainable Investment: Disclosure on Financial, Human and Physical Capital	7/12/2021	7/12/2021	2.00	5.50
Behavioral Health Update	7/13/2021	7/13/2021	1.00	6.50

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<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Working After Retirement Administration	7/13/2021	7/13/2021	1.00	7.50
Board Educational Day – Case Study on Leverage and Liquidity	01/18/2022	01/18/2022	1.00	8.50
Board Educational Day – Annual Board Fiduciary Training	01/18/2022	01/18/2022	2.50	11.00
Board Educational Day – Sustainable Investment and the Path to Net Zero	01/18/2022	01/18/2022	2.00	13.00
Compensation Trends	01/19/2022	01/19/2022	3.00	16.00
Geopolitical Risk and Financial Markets	07/11/2022	07/11/2022	1.00	17.00
Spotlight on Private Debt Opportunities	07/11/2022	07/11/2022	1.50	18.50
Sustainable Investing: Developing an Impact Toolkit for Private Markets	07/11/2022	07/11/2022	1.00	19.50
Board Educational Day - Annual Board Fiduciary Training	01/17/2023	01/17/2023	2.00	21.50
July Board Offsite Sustainability and Implications for Asset Owners (Board Education)	01/17/2023	01/17/2023	1.5	23.00
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy (Board Education)	01/17/2023	01/17/2023	1.00	24.00
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review (Board Education)	01/17/2023	01/17/2023	2.00	26.00



CalPERS Board Member Education Program  
Educational Activity Report

**Board Member/Designee Name:** Nicole Griffith  
**Two-year Period to Acquire 24 Hours:** 10/19/2022-10/18/2024  
**Position:** Board Designee  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

[Government Code Section 20100 \(PDF\)](#), effective January 1, 2015, requires that CalPERS Board members receive a minimum of 24 hours of education within the first two years of assuming office, and for every subsequent two-year period in which they serve.

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The CalPERS Board Member Education Program Schedule outlines sessions offered each calendar year to meet the requirements of the Government Code and Board Member Education Policy. Program Schedules can be found on the [Transparency and Accountability](#) page.

The table below lists hours of education completed by the Board member or designee named above for the period noted. Each Board member and designee has two years from their effective date to meet the requirement.

Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	4.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.0	6.50

CalPERS Board Member Education Program  
Educational Activity Report

**Board Member/Designee Name:** Jose Luis Pacheco  
**Two-year Period to Acquire 24 Hours:** 1/16/22 - 1/15/24  
**Position:** Member, Elected  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Strategic Alignment Across California's Three Large State Purchasers: What are the Opportunities	1/18/2022	1/18/2022	1.50	1.50
Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	2.50
Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	5.00
Sustainable Investment and the Path to Net Zero	1/18/2022	1/18/2022	2.00	7.00
Compensation Trends	4/19/2022	4/19/2022	3.00	10.00

CalPERS Board Member Education Program  
Educational Activity Report

<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Geopolitical Risk and Financial Markets	7/11/2022	7/11/2022	1.00	11.00
Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.50	12.50
Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	13.50
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	14.50
Behavioral Health Update	7/12/2022	7/12/2022	1.00	15.50
Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	17.50
TLF for Retirement Security - Annual Convening 2022 - Sessions outlined in Board Travel Report	7/18-20/2022	7/18-20/2022	17.00	34.50
NCPERS 2022 Public Pension Forum - Sessions outlined in Board Travel Report	8/20-23/2022	8/20-23/2022	9.00	43.50
2022 Public Funds Forum - Sessions outlined in Board Travel Report	9/5-8/2022	9/5-8/2022	19.25	62.75
ILPA Institute Private Equity for the Trustee - Sessions outlined in the Board Travel Report	9/28-29/2022	9/28-29/2022	12.00	74.75
IFEBP: New Trustees Institute – Level 1: Core Concepts - Sessions outlined in the Board Travel Report	10/21-26/2022	10/21-26/2022	32.00	106.75
CORPaTH's Crystal Globe Summit - Sessions outlined in Board Travel Report	12/13-14/2022	12/13-14/2022	7.00	113.75

CalPERS Board Member Education Program  
Educational Activity Report

<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/23	1/17/23	4.50	118.25
Board Educational Day - Annual Board Fiduciary Training	1/17/23	1/17/23	2.00	120.25
National Conference on Public Employees Retirement Systems 2023 Legislative Conference - Sessions outlined in Board Travel Report	1/21-23/2023	1/21-23/2023	11.25	131.50
NASP - So CA 2023 Annual Day of Education in Private Equity for Trustees and Staff Conference - Sessions outlined in Board Travel Report	3/22-23/23	3/22-23/2023	8.50	140.00
IFEBP's Public Sector Mid-Year Update Virtual Conference - Sessions outlined in Board Travel Report	4/25-26/23	4/25-26/23	8.00	148.00
IFEBP Washington Legislative Update 2023 - Sessions outlined in Board Travel Report	5/21-24/23	5/21-24/23	13.50	161.50
TLF Annual Convening 2023 - Sessions outlined in Board Travel Report	6/11-15/23	6/11-15/23	18.25	179.75
July Board Offsite Sustainability and Implications for Asset Owners	7/17/23	7/17/23	1.50	181.25
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/23	7/17/23	1.00	182.25
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/23	7/17/23	1.50	183.75
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/23	7/17/23	2.00	185.75
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach (	7/18/23	7/18/23	1.00	186.75



CalPERS Board Member Education Program  
Educational Activity Report

Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/23	7/18/23	1.00	187.75
DE&I Deep Dive: Leading Minds of Governance & NACD Master Class - Untangling ESG - Sessions outlined in Board Travel Report	8/21-25/23	8/21-25/23	19.25	207.00
Council of Institutional Investors 2023 Fall Conference - Sessions outlined in Board Travel Report	9/10-13/2023	9/10-13/23	13.00	220.00
ICPM - Rotman Pension Governance Education Program 2023	9/25-28/2023	9/25-28/2023	27.75	247.75
Trustee Leadership Forum Peer Mentoring Project Convening	10/26-27/2023	10/26-27/2023	5.50	253.25
Capital Markets and The Common Good State Policy Convening	11/7-8/2023	11/7-8/2023	4.25	257.50
CORPATH Summit 2023	12/12-13/2023	12/12-13/2023	6.00	263.50

CalPERS Board Member Education Program  
Educational Activity Report

**Board Member/Designee Name:** Kevin Palkki  
**Two-year Period to Acquire 24 Hours:** 1/16/2023 - 1/15/2025  
**Position:** Member, Elected  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	4.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	6.50
2023 Milken Institute Global Conference - Sessions outlined in Board Travel Report	5/1-3/2023	5/1-3/2023	5.00	11.50
IFEBP Washing Legislative Update - Session outlined in Board Travel Report	5/21-23/2023	5/21-23/2023	13.50	25.00
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.50	26.50

CalPERS Board Member Education Program  
Educational Activity Report

<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	27.50
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	29.00
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	31.00
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	32.00
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	33.00
Council of Institutional Investors Fall Conference - Sessions outlined in Board Travel Report	9/10-13/2023	9/10-13/2023	11.00	44.00
NACD CERT Certificate in Cyber-Risk Oversight Program	9/15-10/15/2023	9/15-10/15/2023	20.00	64.00
ICPM - Rotman Pension Governance Education Program - Sessions outline in Board Travel Report	9/24-28/2023	9/24-28/2023	18.75	82.75
NCPERS Fall Conference	10/22-25/2023	10/22-25/2023	12.00	94.75
CII: Corporate Governance Bootcamp	11/6-9/2023	11/6-9/2023	14.00	108.75
Diligent Institute AI Ethics and Board Oversight	11/20-30/2023	11/20-30/2023	18.00	126.75

CalPERS Board Member Education Program  
Educational Activity Report

**Board Member/Designee Name:** Ramon Rubalcava  
**Two-year Period to Acquire 24 Hours:** 1/21/2021 - 1/20/2023  
**Position:** Member (Appointed)  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
CA Health Care: Landscape and Levers for Change	1/21/2021	1/21/2021	2.75	2.75
Behavioral Health Update	1/21/2021	1/21/2021	1.50	4.25
Annual Board Fiduciary Training	1/21/2021	1/21/2021	2.00	6.25
Compensation Governance Best Practices	4/19/2021	4/19/2021	2.00	8.75
Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	10.25

CalPERS Board Member Education Program  
Educational Activity Report

<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Capital Market Assumptions: Survey & Methodology	7/12/2021	7/12/2021	1.00	11.25
Creating & Assessing Candidate Portfolios	7/12/2021	7/12/2021	1.00	12.25
The New Agenda for Sustainable Investment: Disclosure on Financial, Human and Physical Capital	7/12/2021	7/12/2021	2.00	14.25
Behavioral Health Update	7/13/2021	7/13/2021	1.00	15.25
Working After Retirement Administration	7/13/2021	7/13/2021	1.00	16.25
Strategic Alignment Across California's Three Large State Purchasers: What are the Opportunities	1/18/2022	1/18/2022	1.50	17.75
Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	18.75
Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	21.25
Sustainable Investment and the Path to Net Zero	1/18/2022	1/18/2022	2.00	23.25
Compensation Trends	4/19/2022	4/19/2022	3.00	26.25
Geopolitical Risk and Financial Markets	7/11/2022	7/11/2022	1.00	27.25
Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.50	28.75

CalPERS Board Member Education Program  
Educational Activity Report

<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	29.75
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	30.75
Behavioral Health Update	7/12/2022	7/12/2022	1.00	31.75
Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	33.75
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	38.25
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	40.25
July Board Offsite Sustainability and Implications for Asset Owners  (Start of next training period 1/20/2023 - 2/19/2025)	7/17/2023	7/17/2023	1.00	1.00
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	2.00
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	3.50
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	5.50
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	6.50
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	7.50

CalPERS Board Member Education Program  
Educational Activity Report

**Board Member/Designee Name:** Theresa Taylor  
**Two-year Period to Acquire 24 Hours:** 12/30/2022 - 12/29/2024  
**Position:** Member, Elected  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	4.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	6.50
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.50	8.00
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	9.00
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	10.50





CalPERS Board Member Education Program  
Educational Activity Report

**Board Member/Designee Name:** Yvonne Walker  
**Two-year Period to Acquire 24 Hours:** 12/28/2022 - 12/27/2024  
**Position:** Member, Retiree, Elected  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	4.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	6.50
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.00	7.50
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	8.50
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	10.00

CalPERS Board Member Education Program  
Educational Activity Report

Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	12.00
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	13.00
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	14.00

CalPERS Board Member Education Program  
Educational Activity Report

**Board Member/Designee Name:** Mullissa Willette  
**Two-year Period to Acquire 24 Hours:** 5/27/22 - 5/26/24  
**Position:** Member, Elected  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

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<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Geopolitical Risk and Financial Markets	7/11/2022	7/11/2022	1.00	1.00
Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.50	2.50
Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	3.50
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	4.50
Behavioral Health Update	7/12/2022	7/12/2022	1.00	5.50

CalPERS Board Member Education Program  
Educational Activity Report

<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	7.50
TLF for Retirement Security - Annual Convening 2022: Public Markets and Disclosure	7/18/2022	7/18/2022	1.00	8.50
TLF for Retirement Security - Annual Convening 2022: Private Markets and Responsible Contracting	7/18/2022	7/18/2022	1.00	9.50
TLF for Retirement Security - Annual Convening 2022: Trustee Development	7/18/2022	7/18/2022	1.50	11.00
TLF for Retirement Security - Annual Convening 2022: Elevating Racial Justice as an Investment Issue	7/19/2022	7/19/2022	1.50	12.50
TLF for Retirement Security - Annual Convening 2022: Current Labor Issues Round Robin	7/19/2022	7/19/2022	1.00	13.50
TLF for Retirement Security - Annual Convening 2022: Asset Manager Accountability	7/19/2022	7/19/2022	1.50	15.00
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	19.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	21.50
NCPERS Legislative Conference - Sessions Outlined in Board Travel Report	1/23/2023	1/25/2023	8.00	29.50
IEFBP Portfolio Concepts and Management Course - Courses Outlined in Board Travel Report	4/30/2023	5/4/2023	23.75	53.25
International Corporate Governance Network, Governance Sustainability and Stewardship (Virtual Training) - Training Outlined in Board Travel Report	6/1/2023	6/8/2023	7.50	60.75

CalPERS Board Member Education Program  
Educational Activity Report

<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
The Trustee Leadership Forum for Retirement Security Annual Convening - Sessions outlined in Board Travel Report	6/11/2023	6/14/2023	10.00	70.75
ICPM Board Education on Sustainable Investing - Courses outlined in Board Travel Report	7/13/2023	7/14/2023	12.50	83.25
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.50	84.75
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	85.75
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	87.25
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	89.25
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	90.25
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	91.25
International Centre for Pension Management-Rotman Pension Governance Ed Program	9/25-28/2023	9/25-28/2023	17.50	108.75
NCPERS Accredited Fiduciary (NAF) Program	10/20-22/2023	10/20-22/2023	11.25	120.00
Trustee Leadership Forum for Retirement Security Peer Mentoring Project	10/25-27/2023	10/25-27/2023	4.00	124.00
Council of Institutional Investments NYU Corporate Governance Bootcamp	11/6-8/2023	11/6-8/2023	11.25	135.25

CalPERS Board Member Education Program  
Educational Activity Report

**Board Member/Designee Name:** Dr. Gail Willis  
**Two-year Period to Acquire 24 Hours:** 06/09/2022-06/08/2024  
**Position:** Ex Officio Member - State Personnel Board  
**Current Report As Of:** 12/31/2023  
**Date Board Member/Designee Left Office:**

[Government Code Section 20100 \(PDF\)](#), effective January 1, 2015, requires that CalPERS Board members receive a minimum of 24 hours of education within the first two years of assuming office, and for every subsequent two-year period in which they serve.

The [CalPERS Board Member Education Policy \(PDF\)](#) was amended in December 2014, to conform to the Government Code. The Policy applies to Board members and their designees.

The CalPERS Board Member Education Program Schedule outlines sessions offered each calendar year to meet the requirements of the Government Code and Board Member Education Policy. Program Schedules can be found on the [Transparency and Accountability](#) page.

The table below lists hours of education completed by the Board member or designee named above for the period noted. Each Board member and designee has two years from their effective date to meet the requirement.

<b>Educational Activity/Session</b>	<b>Date Offered</b>	<b>Date Attended or Viewed</b>	<b>Hours</b>	<b>Cumulative Hours</b>
July Board Offsite: Geopolitical Risk and Financial Markets	7/11/2022	7/11/2022	1.00	1.00
July Board Offsite: Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.50	2.50
July Board Offsite: Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	3.50
July Board Offsite: Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	4.50
July Board Offsite: Behavioral Health Update	7/12/2022	7/12/2022	1.00	5.50

CalPERS Board Member Education Program  
Educational Activity Report

Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
July Board Offsite: Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	7.50
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.00	8.50
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	9.50
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	11.00
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	13.00
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	14.00
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	15.00