



Agenda Item 5b

September 18, 2013

ITEM NAME: Board Travel Approvals

PROGRAM: Board of Administration

ITEM TYPE: Action Consent

RECOMMENDATION

Approve the attached travel requests as required under the Board of Administration's travel policy.

ATTACHMENTS

As required under the Board of Administration Travel Policy, attached are:

- A. Over \$500/Out of State/Country Travel Requests Approved by Board President
Henry Jones – San Diego, CA

Rob Feckner, President
Board of Administration

Board Member Travel Requests
Approved by the Board President

Board Member	Date	Destination	Purpose of Travel
Henry Jones	9/11/13-9/13/13	San Diego, VA	Attend Credit Suisse Small & Emerging Manager Conference



**Board of Administration
Board Member Travel Request**

In State (\$500 or more Registration Fee) Out of Country Out of State
Registration Fee: _____

Name: HENRY JONES Date(s) of Travel: SEPT. 11-13, 2013
Destination: SAN DIEGO
Sponsoring Organization: CREDIT SUISSE

Purpose of Trip (Please attach meeting itineraries, conference agendas, invitation letters, etc.)
SEE ATTACHED

If CalPERS is not paying for the trip, explain circumstances: _____

Approved Denied

Board Member

Board President (or Vice President if President is traveling)

Date

Date

Henry Jones
Bob Teich

9/5/13

9/9/13

CREDIT SUISSE



CONFERENCES

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Agenda

Wednesday, September 11

- 5:00pm **Welcome Reception**
The Prado
1549 El Prado
San Diego, CA 92101
- Shuttle service will be provided to/from the reception and The US Grant Hotel & Westin Gaslamp

Thursday, September 12

- 7:00am **Registration & Continental Breakfast**
The US Grant Hotel
326 Broadway
San Diego, CA 92101
- 8:00am **CFIG Welcome**
Kelly Williams, Global Head and Managing Director, **Customized Fund Investment Group**
Michael Sacks, Chief Executive Officer, **Grosvenor Capital Management, L.P.**
- 8:30am **Private Equity Panel I: CFG's Approach to Evaluating and Investing in Emerging Managers**
Back by popular demand! An overview of CFG's fund diligence process for investments in emerging managers, including benchmarking of emerging managers, evaluation of track records and a determination of strategic fit for investment programs. CFG Investment Committee members will also highlight best practices observed from CFG's extensive emerging manager investments.
- Moderator:
Derek Jones, Managing Director, **Customized Fund Investment Group**
- Speakers:
Mina Pacheco Nazemi, Partner, **Customized Fund Investment Group**
David Russell, Managing Director and Senior Partner, **Customized Fund Investment Group**
- Real Estate Panel I: The State of the Real Estate Emerging Manager Market**
A data-filled, deep dive presentation and discussion on trends and activity in the real estate emerging manager market, including which strategies, manager types and asset classes are raising capital (and which aren't™), the level of institutional appetite (as well as other forms of capital) and the latest in fund terms.
- Moderator:
Peter Braffman, Partner, **Customized Fund Investment Group**
- Speakers:
Christy Fields, Managing Director of Real Estate Consulting Services, **Pension Consulting Alliance, Inc.**
Larissa Herczeg, Managing Partner and Chief Investment Officer of the Fund of Funds, **Oak Street Real Estate Capital**
Suzanne West, Founder and Managing Partner, **Park Madison Partners**
- 9:30am **Private Equity Panel II: Which Manager Should Receive the Commitment?**
An interactive session with LPs and conference attendees collaborating to evaluate potential fund investments for an investment commitment. Which fund will rise to the top? Will LPs and GPs agree on the top manager? What are the key takeaways for LPs and GPs from the evaluation process?
- Moderator:
Jason Howard, Principal, **Customized Fund Investment Group**
- Speakers:
Dan Chilton, Senior Portfolio Manager, **Colorado Public Employees' Retirement Association**
Francis Idehen, Managing Director of Private Markets, **Exelon Corporation**
Tim Rafalovich, Senior Vice President - Alternative Equity Group Manager, **Wells Fargo Community Lending and Investment**
Karen Rode, Partner and Head of Global Private Equity and Infrastructure Research Group, **Hewitt EnnisKnupp, Inc.**

Real Estate Panel II: Identifying Opportunities in an Increasingly Competitive and Liquid Real Estate Market

The past few years have been an outstanding time to invest in U.S. real estate. With increasing capital flowing into value-add and opportunistic strategies from many traditional national and regional players, where can small cap managers find opportunities? Similarly, as debt becomes increasingly expensive, and with increasing volatility in the core sector, what are the expected returns and what may be successful strategies in an increasingly uncertain environment?

Moderator:

William Thompson, Chairman, Real Estate Capital Advisory Group, **Greenhill & Co.**

Speakers:

Jackie Brady, Co-Founder and Managing Principal, **Canopy Investment Advisors**
Melinda Ellis Evers, Founding Partner and Co-Managing Principal, **Ellis Partners**
Alex Gilbert, President, **Artemis Property Partners**
Meredith Marshall, Managing Partner, **BRP Capital**
Todd Minnis, Managing Partner and Chief Investment Officer, **Cypress Equities Investment Management**

10:30am BREAK

Private Equity Panel III: Outliers: Limited Partner Perspectives on Bucking the Trends

Discussion amongst innovative institutional investors active in the emerging manager space on areas that they find exciting which go against current trends. Topics will include the current environment for emerging manager investments, rationale for investments in emerging managers and performance expectations.

Moderator:

Kelly Williams, Global Head and Managing Director, **Customized Fund Investment Group**

Speakers:

Stuart Bernstein, Investment Manager, **Teacher Retirement System of Texas**
Liza Crisafi, Chief Investment Officer, **San Diego City Employees Retirement System**
Christine Gogan, Senior Portfolio Manager, **California Public Employees' Retirement System**
Mary Pat McKeown, Portfolio Manager, **Allstate Investments**
Pravina Raghavan, Acting Associate Administrator, Office of Investment and Innovation, **U.S. Small Business Administration**

Real Estate Panel III: Getting Started: The Challenges and Rewards for a First-Time Fund

A discussion among seasoned investors who created new, small or emerging investment platforms. Some left large institutional platforms while others sold their businesses to enter the commingled fund world. What paths did they take to raising capital? What were the costs involved in starting their businesses? How did they structure and staff their teams and organizations? An open conversation about what went right and lessons learned.

Moderator:

David Boyle, Chief Investment Officer & Co-Head, **Morgan Stanley Alternative Investment Partners**

Speakers:

Timothy Berry, Founder and Managing Partners, **Pennybacker Capital**
Jeffrey Kaplan, Founder, Managing Partner and Chairman, **Meadow Partners**
Rick Kleeman, Founder and Managing Partner, **Wheelock Street Capital**
Christopher Peatross, Founder and President, **Swift Real Estate Partners**
Neville Rhone, Founder and Managing Partner, **Arc Capital Partners LLC**

11:45am LUNCHEON & KEYNOTE SPEECH

Interviewer: Michael Sacks, Chief Executive Officer, **Grosvenor Capital Management L.P.**

Private Equity Keynote:

Steve Case
Chairman and Chief Executive Officer, **Revolution**
Co-Founder, **America Online**
Chairman, **The Case Foundation**

Real Estate Keynote:

Michael J. Acton
Managing Director
AEW Research

Private Equity Panel IV: Practical Advice from Successful Emerging and Established Managers

Hear from the managers that have successfully navigated the emerging manager path. Topics of discussion will include spinning out from an existing private equity fund, leveraging a co-investment to drive fundraising, successful investing in venture opportunities, raising capital as a fundless sponsor and raising a fund after corporate success.

Moderator:

Tracy Harris, Vice President, **Customized Fund Investment Group**

Speakers:

Frank Baker, **Founding Partner and Managing Director, Siris Capital Group LLC**
Rick Heitzmann, **Founder and Managing Director, FirstMark Capital**
Mac LaFollette, **Co-Founder, TriPointe Capital Partners**
David McGovern, **Founder and Managing Partner, Marlin Equity Partners**
Michael Mendez, **Founding Partner, Estancia Capital Partners L.P.**

Real Estate Panel IV: LP Roundup: Perspectives on Investing in Small and Emerging Real Estate Managers

This panel will explore the institutional investor appetite for real estate in general and how small and emerging funds fit within their broader portfolios. What are LPs looking to achieve? How large of a fund stake are they willing to own? How do they allocate the time and expense necessary to underwrite and oversee small or new funds as opposed to large and existing relationships?

Moderator:

Laurie Weir, **Senior Portfolio Manager, California Public Employees' Retirement System**

Speakers:

Stuart Bernstein, **Investment Manager, Teacher Retirement System of Texas**
Brad Briner, **Director of Real Assets, Willett Advisors LLC**
Ramon Manning, **Founder and Chief Executive Officer, Partners Energy Group / Trustee, Houston Municipal Employees Pension System**
Ione S.V. Permisson, **Partner & Co-Head of Real Estate Fund of Funds, Quilvest Private Equity**
Christina Scariato, **Senior Portfolio Manager, World Bank Pension Fund**

2:30pm Concluding Remarks
3:00pm Networking Reception

Shuttle buses will be available at the conclusion of the conference to San Diego International Airport

*Agenda subject to change

Please [click here](#) to see the 2012 Conference Agenda

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