Educational Activity Report

DRAFT

Board Member/Designee Name:	Henry Jones
Two-year Period to Acquire 24 Hours:	1/1/2019 - 12/31/2020
Position:	Member (Elected)
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

<u>Government Code Section 20100 (PDF)</u>, 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 <u>Transparency and Accountability</u> page.

Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Global Economy & Market Valuations	1/22/2019	1/22/2019	1.50	1.50
Regulatory Landscape	1/22/2019	1/22/2019	1.00	2.50
Return Dynamic-Financial Markets	1/22/2019	1/22/2019	0.75	3.25
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	4.75
The Affordable Care Act, The California Exchange and				
the 116th Congress	1/23/2019	1/23/2019	1.00	5.75
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	7.25
Re-stimulating Health Care Competition	1/23/2019	1/23/2019	1.50	8.75
Fiduciary Training	1/24/2019	1/24/2019	1.50	10.25
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	13.25
Asset Class Overview: The Role of Fixed Income and Benchmarks	6/17/2019	6/17/2019	1.50	14.75
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	15.75
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	17.25
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	18.25
California's Changing Marketplace From the Perspective of Purchaser	7/16/2019	7/16/2019	1.50	19.75
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	22.75

Educational Activity Report

DRAFT

Board Member/Designee Name:	Theresa Taylor
Two-year Period to Acquire 24 Hours:	1/1/2019 to 12/31/2020
Position:	Member (Elected)
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	1.50
Regulatory Landscape	1/22/2019	1/22/2019	1.00	2.50
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	4.25
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	5.75
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	6.75
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	8.25
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	9.75
Fiduciary Training	1/24/2019	1/24/2019	1.50	11.25
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	14.25
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	15.75
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	16.75
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	18.25
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	19.25
California's Changing Marketplace From the Perspective	7/16/2010	7/46/2040	4 50	20.75
of Purchaser	7/16/2019	7/16/2019	1.50	20.75
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	23.75

Educational Activity Report

DRAFT

Board Member/Designee Name:	Margaret Brown
Two-year Period to Acquire 24 Hours:	1/16/2018-1/15/2020
Position:	Member (Elected)
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Sustainable Development Goals: What Do They				
Mean for Investors	1/16/2018	1/16/2018	1.25	1.25
Investing in an Age of Technology Disruption	1/16/2018	1/16/2018	1.75	3.00
Principles for Responsible Investment (PRI) Blueprint				
for Next Ten Years	1/16/2018	1/16/2018	1.00	4.00
Federal Legislation and National Pension Trends				
Update	1/17/2018	1/17/2018	1.00	5.00
Pharmacy Programs: Achieving Value and				
Affordability	1/17/2018	1/17/2018	1.50	6.50
Fiduciary Training	1/18/2018	1/18/2018	1.50	8.00
Invesment in an Age of Technology Disruption	7/16/2018	7/16/2018	1.50	9.50
Sustainable Development Goals	7/16/2018	7/16/2018	2.00	11.50
Rethinking the Core Economy	7/16/2018	7/16/2018	1.00	12.50
High Deductible Health Plans and the Changing				
Landscape	7/17/2018	7/17/2018	1.50	14.00
The Challenges of Managing Opioids	7/17/2018	7/17/2018	0.75	14.75
CalPERS Board Self-Evaluation	7/18/2018	7/18/2018	1.50	16.25
Innovations in the Quest for Board Diversity	7/18/2018	7/18/2018	1.50	17.75
Fiduciary Training	1/24/2019	1/24/2019	1.50	19.25
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	20.75
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	22.25
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	23.25
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	24.75
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	26.50
Regulatory Landscape	1/22/2019	1/22/2019	1.00	27.50

Educational Activity Report

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Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	29.00
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	32.00
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	33.50
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	34.50
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	36.00
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	37.00
California's Changing Marketplace From the				
Perspective of Purchaser	7/16/2019	7/16/2019	1.50	38.50
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	41.50

Educational Activity Report

DRAFT

Board Member/Designee Name:	Rob Feckner
Two-year Period to Acquire 24 Hours:	1/1/2019 to 12/31/2020
Position:	Member (Elected)
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	1.50
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	2.50
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	4.00
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	5.75
Regulatory Landscape	1/22/2019	1/22/2019	1.00	6.75
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	8.25
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	11.25
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	12.75
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	13.75
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	15.25
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	16.25
California's Changing Marketplace From the				
Perspective of Purchaser	7/16/2019	7/16/2019	1.50	17.75
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	20.75

Educational Activity Report

DRAFT

Board Member/Designee Name:	Dana Hollinger
Two-year Period to Acquire 24 Hours:	1/1/2019 to 12/31/2020
Position:	Member (Appointed, Insurance Industry Representative)
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	6/30/2019

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	1.50
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	3.00
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	4.00
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	5.50
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	7.25
Regulatory Landscape	1/22/2019	1/22/2019	1.00	8.25
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	9.75
Left office on June 30, 2019				

Educational Activity Report

DRAFT

Board Member/Designee Name:	Adria Jenkins-Jones
Two-year Period to Acquire 24 Hours:	8/31/2018 to 8/30/2020
Position:	Designee
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Fiduciary Training 2018	1/18/2018	9/19/2018	1.50	1.50
Governing Leadership Conference	12/6/2018	12/6/2018	8.00	9.50
Fiduciary Training	1/24/2019	1/24/2019	1.50	11.00
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	12.50
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	14.00
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	15.00
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	16.50
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	18.25
Regulatory Landscape	1/22/2019	1/22/2019	1.00	19.25
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	20.75

Educational Activity Report

DRAFT

Board Member/Designee Name:	Bill Slaton
Two-year Period to Acquire 24 Hours:	1/1/2019 to 12/31/2020
Position:	Member (Appointed)
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Fiduciary Training	1/24/2019	1/24/2019	1.50	1.50
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	3.00
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	4.50
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	5.50
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	7.00
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	8.75
Regulatory Landscape	1/22/2019	1/22/2019	1.00	9.75
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	11.25

Educational Activity Report

DRAFT

Board Member/Designee Name:	Fiona Ma
Two-year Period to Acquire 24 Hours:	1/7/2019 to 1/6/2021
Position:	Ex Officio Member, State Treasurer
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	1.50
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	3.00
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	4.50
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	6.25
Regulatory Landscape	1/22/2019	1/22/2019	1.00	7.25
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	8.75
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	11.75
Asset Class Overview: The Role of Fixed Income and Benchmarks	6/17/2019	6/17/2019	1.50	13.25

Educational Activity Report

DRAFT

Board Member/Designee Name:	David Miller
Two-year Period to Acquire 24 Hours:	1/16/2018-1/15/2020
Position:	Member (Elected)
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Sustainable Development Goals: What Do They				1.25
Mean for Investors	1/16/2018	1/16/2018	1.25	1.25
Investing in an Age of Technology Disruption	1/16/2018	1/16/2018	1.75	3.00
Federal Legislation and National Pension Trends				
Update	1/17/2018	1/17/2018	1.00	4.00
Pharmacy Programs: Achieving Value and				
Affordability	1/17/2018	1/17/2018	1.50	5.50
Fiduciary Training 2018	1/18/2018	1/18/2018	1.50	7.00
Investment in an Age of Technology Disruption	7/16/2018	7/16/2018	1.50	8.50
Sustainable Development Goals	7/16/2018	7/16/2018	2.00	10.50
Rethinking the Core Economy	7/16/2018	7/16/2018	1.00	11.50
High Deductible Health Plans and the Changing				
Landscape	7/17/2018	7/17/2018	1.50	13.00
The Challenges of Managing Opioids	7/17/2018	7/17/2018	0.75	13.75
Improving Behavioral Health Services	7/17/2018	7/17/2018	1.00	14.75
CalPERS Board Self-Evaluation	7/18/2018	7/18/2018	1.50	16.25
Innovations in the Quest for Board Diversity	7/18/2018	7/18/2018	1.50	17.75
Fiduciary Training	1/24/2019	1/24/2019	1.50	19.25
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	20.75
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	22.25
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	23.25
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	24.75
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	26.50
Regulatory Landscape	1/22/2019	1/22/2019	1.00	27.50

Educational Activity Report

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Clabel Francesser and Market Malvetians	1/22/2010	1/22/2010	1 50	20.00
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	29.00
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	32.00
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	33.50
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	34.50
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	36.00
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	37.00
California's Changing Marketplace From the				
Perspective of Purchaser	7/16/2019	7/16/2019	1.50	38.50
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	41.50

Educational Activity Report

DRAFT

Board Member/Designee Name:	Mona Pasquil Rogers
Two-year Period to Acquire 24 Hours:	1/15/2019 to 1/14/2021
Position:	Ex Officio Member, State Personnel Board
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	1.50
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	3.00
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	4.75
Regulatory Landscape	1/22/2019	1/22/2019	1.00	5.75
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	7.25
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	10.25
Asset Class Overview: The Role of Fixed Income and Benchmarks	6/17/2019	6/17/2019	1.50	11.75
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	12.75
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	14.25
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	15.25
California's Changing Marketplace From the Perspective				
of Purchaser	7/16/2019	7/16/2019	1.50	16.75
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	19.75

Educational Activity Report

DRAFT

Board Member/Designee Name:	Jason Perez
Two-year Period to Acquire 24 Hours:	1/16/2019 to 1/15/2021
Position:	Public Agency Member
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Fiduciary Training	1/24/2019	1/24/2019	1.50	1.50
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	3.00
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	4.50
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	5.50
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	7.00
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	8.75
Regulatory Landscape	1/22/2019	1/22/2019	1.00	9.75
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	11.25
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	14.25
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	15.75
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	16.75
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	18.25
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	19.25
California's Changing Marketplace From the Perspective				
of Purchaser	7/16/2019	7/16/2019	1.50	20.75
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	23.75

Educational Activity Report

DRAFT

Board Member/Designee Name:	Ramon Rubalcava
Two-year Period to Acquire 24 Hours:	1/31/2018-1/30/2020
Position:	Member (appointed)
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Fiduciary Training 2018	1/18/2018	4/30/2018	1.50	1.50
Investment in an Age of Technology Disruption	7/16/2018	7/16/2018	1.50	3.00
Sustainable Development Goals	7/16/2018	7/16/2018	2.00	5.00
Rethinking the Core Economy	7/16/2018	7/16/2018	1.00	6.00
High Deductible Health Plans and the Changing Landscape	7/17/2018	7/17/2018	1.50	7.50
The Challenges of Managing Opioids	7/17/2018	7/17/2018	0.75	8.25
Improving Behavioral Health Services	7/17/2018	7/17/2018	1.00	9.25
CalPERS Board Self-Evaluation	7/18/2018	7/18/2018	1.50	10.75
Innovations in the Quest for Board Diversity	7/18/2018	7/18/2018	1.50	12.25
Fiduciary Training	1/24/2019	1/24/2019	1.50	13.75
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	15.25
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	16.75
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	17.75
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	19.25
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	21.00
Regulatory Landscape	1/22/2019	1/22/2019	1.00	22.00
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	23.50
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	26.50
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	28.00
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	29.00
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	30.50

Educational Activity Report

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Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	31.50
California's Changing Marketplace From the				
Perspective of Purchaser	7/16/2019	7/16/2019	1.50	33.00
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	36.00

Educational Activity Report

DRAFT

Board Member/Designee Name:	Betty Yee
Two-year Period to Acquire 24 Hours:	1/1/2019 to 12/31/2020
Position:	Member (Ex Officio, State Controller's Office)
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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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 <u>Transparency and Accountability</u> page.

Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Fiduciary Training	1/24/2019	1/24/2019	1.50	1.50
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	3.00
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	4.00
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	5.50
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	7.25
Regulatory Landscape	1/22/2019	1/22/2019	1.00	8.25
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	9.75
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	12.75
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	13.75
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	15.25
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	16.25
California's Changing Marketplace From the Perspective of Purchaser	7/16/2019	7/16/2019	1.50	17.75
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	20.75

Educational Activity Report

DRAFT

Board Member/Designee Name:	Ralph Cobb
Two-year Period to Acquire 24 Hours:	9/13/2018 to 9/12/2020
Position:	Designee
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	6/26/2019

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Fiduciary Training	1/24/2019	1/24/2019	1.50	1.50
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	3.00
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	4.50
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	5.50
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	7.00
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	8.75
Regulatory Landscape	1/22/2019	1/22/2019	1.00	9.75
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	11.25
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	14.25
Left office on June 26, 2019				

Educational Activity Report

DRAFT

Board Member/Designee Name:	Genevieve Jopanda
Two-year Period to Acquire 24 Hours:	1/7/2019 to 1/6/2021
Position:	Designee
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	1.75
Fiduciary Training	1/24/2019	9/17/2019	1.50	3.25
Re-Stimulating Health Care Competition	1/23/2019	9/17/2019	1.50	4.75
Delivering Health in Rural California	1/23/2019	9/17/2019	1.50	6.25
Regulatory Landscape	1/22/2019	9/22/2019	1.00	7.25
Global Economy & Maket Valuations	1/22/2019	9/22/2019	1.50	8.75
Evolution of Private Markets	1/22/2019	9/22/2019	1.50	10.25
The Affordable Care Act, The California Exchange and the 116th Congress		9/22/2019	1.00	11.25

Educational Activity Report

DRAFT

Board Member/Designee Name:	Kasey O'Connor
Two-year Period to Acquire 24 Hours:	1/7/2019 to 1/6/2021
Position:	Designee
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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

Educational Activity Report

DRAFT

Board Member/Designee Name:	Frank Ruffino
Two-year Period to Acquire 24 Hours:	1/7/2019 to 1/6/2021
Position:	Designee
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Fiduciary Training	1/24/2019	1/24/2019	1.50	1.50
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	3.00
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	4.50
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	5.50
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	7.00
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	8.75
Regulatory Landscape	1/22/2019	1/22/2019	1.00	9.75
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	11.25
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	14.25
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	15.75
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	16.75
California's Changing Marketplace From the				
Perspective of Purchaser	7/16/2019	7/16/2019	1.50	18.25
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	21.25

Educational Activity Report

DRAFT

Board Member/Designee Name:	Matthew Saha
Two-year Period to Acquire 24 Hours:	7/31/2017 to 7/30/2019
Position:	Designee
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
2018 ALM: Long Term Outlook for Returns	1/17/2017	12/7/2017	2.00	2.00
Value-Based Insurance Design	1/18/2017	12/7/2017	1.75	3.75
Fiduciary Training 2017	1/19/2017	12/6/2017	2.00	5.75
Sustainable Development Goals: What Do They Mean				
for Investors	1/16/2018	1/16/2018	1.25	7.00
Investing in an Age of Technology Disruption	1/16/2018	1/16/2018	1.75	8.75
Principles for Responsible Investment (PRI) Blueprint				
for Next Ten Years	1/16/2018	1/16/2018	1.00	9.75
Federal Legislation and National Pension Trends Update	1/17/2018	1/17/2018	1.00	10.75
Pharmacy Programs: Achieving Value and Affordability Fiduciary Training 2018	1/17/2018	1/17/2018	1.50 1.50	12.25 13.75
Investment in an Age of Technology Disruption	1/18/2018 7/16/2018	1/18/2018 7/16/2018	1.50	15.25
Sustainable Development Goals	7/16/2018	7/16/2018	2.00	17.25
Rethinking the Core Economy	7/16/2018	7/16/2018	1.00	18.25
High Deductible Health Plans and the Changing				
Landscape	7/17/2018	7/17/2018	1.50	19.75
The Challenges of Managing Opioids	7/17/2018	7/17/2018	0.75	20.50
Improving Behavioral Health Services	7/17/2018	7/17/2018	1.00	21.50
CalPERS Board Self-Evaluation	7/18/2018	7/18/2018	1.50	23.00
Innovations in the Quest for Board Diversity	7/18/2018	7/18/2018	1.50	24.50
Fiduciary Training	1/24/2019	1/24/2019	1.50	26.00
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	27.50

Educational Activity Report

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Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	29.00
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	30.00
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	31.50
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	33.25
Regulatory Landscape	1/22/2019	1/22/2019	1.00	34.25
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	35.75
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	38.75
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	40.25
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	41.25
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	42.75
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	43.75
California's Changing Marketplace From the Perspective				
of Purchaser	7/16/2019	7/16/2019	1.50	45.25
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Educational Activity Report

DRAFT

Board Member/Designee Name:	Karen Greene-Ross
Two-year Period to Acquire 24 Hours:	1/1/2019 to 12/31/2020
Position:	Designee (State Controller's Office)
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Fiduciary Training	1/24/2019	1/24/2019	1.50	1.50
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	3.00
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	4.50
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	5.50
Evolution of Private Markets	1/22/2019	1/22/2019	1.50	7.00
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	8.75
Regulatory Landscape	1/22/2019	1/22/2019	1.00	9.75
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	11.25
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	14.25
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	15.75
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	16.75
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	18.25
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	19.25
California's Changing Marketplace From the				
Perspective of Purchaser	7/16/2019	7/16/2019	1.50	20.75
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	23.75

Educational Activity Report

Board Member/Designee Name:	Alan Lofaso
Two-year Period to Acquire 24 Hours:	1/1/2019 to 12/31/2020
Position:	Designee (State Controller's Office)
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	1.50
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	3.00
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	4.00

Educational Activity Report

DRAFT

Board Member/Designee Name:	Lynn Paquin
Two-year Period to Acquire 24 Hours:	9/1/2017 to 8/31/2019
Position:	Designee
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Council of Institutional Investors - Fall 2017	n/a	9/14/2017	9.00	9.00
Sustainable Development Goals: What Do They				
Mean for Investors	1/16/2018	1/16/2018	1.25	10.25
Investing in an Age of Technology Disruption	1/16/2018	1/16/2018	1.75	12.00
Principles for Responsible Investment (PRI) Blueprint				
for Next Ten Years	1/16/2018	1/16/2018	1.00	13.00
Federal Legislation and National Pension Trends				
Update	1/17/2018	1/17/2018	1.00	14.00
Pharmacy Programs: Achieving Value and				
Affordability	1/17/2018	1/17/2018	1.50	15.50
Fiduciary Training 2018	1/18/2018	1/18/2018	1.50	17.00
Investment in an Age of Technology Disruption	7/16/2018	7/16/2018	1.50	18.50
Sustainable Development Goals	7/16/2018	7/16/2018	2.00	20.50
Rethinking the Core Economy	7/16/2018	7/16/2018	1.00	21.50
High Deductible Health Plans and the Changing				
Landscape	7/17/2018	7/17/2018	1.50	23.00
The Challenges of Managing Opioids	7/17/2018	7/17/2018	0.75	23.75
CalPERS Board Self-Evaluation	7/18/2018	7/18/2018	1.50	25.25
Innovations in the Quest for Board Diversity	7/18/2018	7/18/2018	1.50	26.75
	9/12/2018-	9/12/2018-		
PRI in Person Conference, San Francisco	9/14/2018	9/14/2018	19.00	45.75
Restimulating Health Care Competition	1/23/2019	1/23/2019	1.50	47.25
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	48.75
The ACA, The Ca Exchange and 116th Congress	1/23/2019	1/23/2019	1.00	49.75

Educational Activity Report

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Evolution of Private Markets	1/22/2019	1/22/2019	1.50	51.25
Return Dynamic - Financial Markets	1/22/2019	1/22/2019	1.75	53.00
Regulatory Landscape	1/22/2019	1/22/2019	1.00	54.00
Global Economy and Market Valuations	1/22/2019	1/22/2019	1.50	55.50
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	58.50
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	60.00
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	61.00
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	62.50
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	63.50
California's Changing Marketplace From the				
Perspective of Purchaser	7/16/2019	7/16/2019	1.50	65.00
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	68.00

Educational Activity Report

DRAFT

Board Member/Designee Name:	Lisa Middleton
Two-year Period to Acquire 24 Hours:	4/30/2019 to 4/29/2021
Position:	Member, Local Government Elected Official
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	3.00
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	4.50
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	5.50
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	7.00
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	8.00
California's Changing Marketplace From the	7/16/2010	7/16/2010	4 50	0.50
Perspective of Purchaser Investment Committee Workshop #3	7/16/2019 8/20/2019	7/16/2019 8/20/2019	1.50 3.00	9.50 12.50
	0/20/2015	0/20/2015	5.00	12.50
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Educational Activity Report

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Board Member/Designee Name:	Eraina Ortega
Two-year Period to Acquire 24 Hours:	3/7/2019 to 3/6/2021
Position:	Ex Officio Member
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Investment Risk and Return Basics	5/13/2019	5/13/2019	3.00	3.00
Asset Class Overview: The Role of Fixed Income				
and Benchmarks	6/17/2019	6/17/2019	1.50	4.50
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	5.50
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	7.00
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	8.00
California's Changing Marketplace From the	7/16/2010	7/16/2010	4 50	0.50
Perspective of Purchaser Investment Committee Workshop #3	7/16/2019 8/20/2019	7/16/2019 8/20/2019	1.50 3.00	9.50 12.50
	0/20/2015	0/20/2013	5.00	12.50
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Educational Activity Report

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Board Member/Designee Name:	Michelle Mitchell
Two-year Period to Acquire 24 Hours:	6/12/2019 to 6/11/2021
Position:	Designee
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Perspectives on Infrastructure Investing	7/15/2019	7/15/2019	1.00	1.00
Essentials of Successful Emerging Manager Program	7/15/2019	7/15/2019	1.50	2.50
Disruption and the Future of Health Care Technology	7/15/2019	7/15/2019	1.00	3.50
California's Changing Marketplace From the Perspective of Purchaser	7/16/2019	7/16/2019	1.50	5.00

Educational Activity Report

DRAFT

Board Member/Designee Name:	Stacie Olivares
Two-year Period to Acquire 24 Hours:	8/1/2019 to 7/31/2021
Position:	Member, Insurance Industry Representative
Current Report As Of:	12/31/2019
Date Board Member/Designee Left Office:	

<u>Government Code Section 20100 (PDF)</u>, 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 <u>CalPERS Board Member Education Policy (PDF)</u> was amended in December 2014, to conform to the Government Code. The Policy applies to Board members and their designees.

The Transparency and Accountability on the CalPERS website includes the annual CalPERS Board Member Education Program Schedule, which links to sessions offered each calendar year to meet the requirements of the Government Code and Board Member Education Policy.

Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	3.00
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