**Educational Activity Report** 

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:	12/31/2020
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
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
Investment Education Workshop #4	12/16/2019	12/16/2019	1.08	23.83
Fiduciary Training	1/21/2020	1/21/2020	1.25	25.08
Actuarial Essentials	1/21/2020	1/21/2020	1.25	26.33
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	28.83

Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	30.08
Human Capital Management Update	7/13/2020	7/13/2020	1.50	31.58
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	32.58
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	33.58
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	35.08
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	36.08
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	37.08
The Board's Role in Culture in the New Era: Unleashing				
Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	39.08

**Educational Activity Report** 

Board Member/Designee Name:	Theresa Taylor
Two-year Period to Acquire 24 Hours:	1/1/2019 - 12/31/2020
Position:	Member (Elected)
Current Report As Of:	12/31/2020
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				
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
Investment Education Workshop #4	12/16/2019	12/16/2019	1.08	24.83
Fiduciary Training	1/21/2020	1/21/2020	1.25	26.08
Actuarial Essentials	1/21/2020	1/21/2020	1.25	27.33
Cybersecurity: Governance and Best Practices in a Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	29.83

Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	31.08
Human Capital Management Update	7/13/2020	7/13/2020	1.50	32.58
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	33.58
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	34.58
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	36.08
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	37.08
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	38.08
The Board's Role in Culture in the New Era: Unleashing				
Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	40.08

**Educational Activity Report** 

Board Member/Designee Name:	Margaret Brown
Two-year Period to Acquire 24 Hours:	1/16/2020 - 1/15/2022
Position:	Member (Elected)
Current Report As Of:	12/31/2020
Date Board Member/Designee Left Office:	

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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
Fiduciary Training	1/21/2020	1/21/2020	1.25	1.25
Actuarial Essentials	1/21/2020	1/21/2020	1.25	2.50
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	5.00
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	6.25
Human Capital Management Update	7/13/2020	7/13/2020	1.50	7.75
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	8.75
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	9.75
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	11.25
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	12.25
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	13.25
The Board's Role in Culture in the New Era:				
Unleashing Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	15.25

**Educational Activity Report** 

Board Member/Designee Name:	Rob Feckner
Two-year Period to Acquire 24 Hours:	1/1/2019 - 12/31/2020
Position:	Member (Elected)
Current Report As Of:	12/31/2020
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
Delivering Health in Rural California	1/23/2019	1/23/2019	1.50	Hours 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
Investment Education Workshop #4	12/16/2019	12/16/2019	1.08	21.83
Fiduciary Training	1/21/2020	1/21/2020	1.25	23.08
Actuarial Essentials	1/21/2020	1/21/2020	1.25	24.33
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	26.83
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	28.08
Human Capital Management Update	7/13/2020	7/13/2020	1.50	29.58

Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	30.58
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	31.58
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	33.08
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	34.08
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	35.08
The Board's Role in Culture in the New Era: Unleashing				
Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	37.08

**Educational Activity Report** 

Board Member/Designee Name:	Adria Jenkins-Jones
Two-year Period to Acquire 24 Hours:	8/31/2018 - 8/30/2020
Position:	Designee
Current Report As Of:	8/30/2020
Date Board Member/Designee Left Office:	10/21/2020

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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
Left office on October 21, 2020				

**Educational Activity Report** 

Board Member/Designee Name:	Fiona Ma
Two-year Period to Acquire 24 Hours:	1/7/2019 - 1/6/2021
Position:	Ex Officio Member, State Treasurer
Current Report As Of:	12/31/2020
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** 

Board Member/Designee Name:	David Miller
Two-year Period to Acquire 24 Hours:	1/16/2020 - 1/15/2022
Position:	Member (Elected)
Current Report As Of:	12/31/2020
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Fiduciary Training	1/21/2020	1/21/2020	1.25	1.25
Actuarial Essentials	1/21/2020	1/21/2020	1.25	2.50
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	5.00
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	6.25
Human Capital Management Update	7/13/2020	7/13/2020	1.50	7.75
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	8.75
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	9.75
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	11.25
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	12.25
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	13.25
The Board's Role in Culture in the New Era:				
Unleashing Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	15.25

**Educational Activity Report** 

Board Member/Designee Name:	Jason Perez
Two-year Period to Acquire 24 Hours:	1/16/2019 - 1/15/2021
Position:	Public Agency Member
Current Report As Of:	12/31/2020
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
Investment Education Workshop #4	12/16/2019	12/16/2019	1.08	24.83
Fiduciary Training	1/21/2020	1/21/2020	1.25	26.08
Actuarial Essentials	1/21/2020	1/21/2020	1.25	27.33
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	29.83

Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	31.08
Human Capital Management Update	7/13/2020	7/13/2020	1.50	32.58
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	33.58
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	34.58
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	36.08
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	37.08
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	38.08
The Board's Role in Culture in the New Era: Unleashing				
Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	40.08

#### Agenda Item 5a, Attachment 1 Page 13 of 29

## **CalPERS Board Member Education Program**

**Educational Activity Report** 

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:	1/30/2020
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 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

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
Investment Education Workshop #4	12/16/2019	12/16/2019	1.08	37.08
Fiduciary Training	1/21/2020	1/21/2020	1.25	38.33
Actuarial Essentials	1/21/2020	1/21/2020	1.25	39.58
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	42.08
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	43.33

**Educational Activity Report** 

Board Member/Designee Name:	Betty Yee
Two-year Period to Acquire 24 Hours:	1/1/2019 - 12/31/2020
Position:	Member (Ex Officio, State Controller's Office)
Current Report As Of:	12/31/2020
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
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
Investment Education Workshop #4	12/16/2019	12/16/2019	1.08	21.83
Fiduciary Training	1/21/2020	1/21/2020	1.25	23.08
Actuarial Essentials	1/21/2020	1/21/2020	1.25	24.33
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	26.83
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	28.08
Human Capital Management Update	7/13/2020	7/13/2020	1.50	29.58
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	30.58

Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	31.58
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	33.08
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	34.08
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	35.08

#### Agenda Item 5a, Attachment 1 Ogram Page 17 of 29

### **CalPERS Board Member Education Program**

**Educational Activity Report** 

Board Member/Designee Name:	Genevieve Jopanda
Two-year Period to Acquire 24 Hours:	1/7/2019 - 1/6/2021
Position:	Designee
Current Report As Of:	12/31/2020
Date Board Member/Designee Left Office:	

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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 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
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 & Market 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	1/23/2019	9/22/2019	1.00	11.25

**Educational Activity Report** 

Board Member/Designee Name:	Kasey O'Connor
Two-year Period to Acquire 24 Hours:	1/7/2019 - 1/6/2021
Position:	Designee
Current Report As Of:	12/31/2020
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** 

Board Member/Designee Name:	Frank Ruffino
Two-year Period to Acquire 24 Hours:	1/7/2019 - 1/6/2021
Position:	Designee
Current Report As Of:	12/31/2020
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
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
Fiduciary Training	1/21/2020	1/21/2020	1.25	22.50
Actuarial Essentials	1/21/2020	1/21/2020	1.25	23.75
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	26.25
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	27.50
Human Capital Management Update	7/13/2020	7/13/2020	1.50	29.00
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	30.00

Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	31.00
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	32.50
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	33.50
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	34.50
The Board's Role in Culture in the New Era: Unleashing				
Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	36.50

#### Agenda Item 5a, Attachment 1 Page 21 of 29

### **CalPERS Board Member Education Program**

**Educational Activity Report** 

Board Member/Designee Name:	Matthew Saha
Two-year Period to Acquire 24 Hours:	7/31/2019 - 7/30/2021
Position:	Designee
Current Report As Of:	7/30/2021
Date Board Member/Designee Left Office:	

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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
Investment Education Workshop #4	12/16/2019	12/16/2019	1.08	4.08
Human Capital Management Update	7/13/2020	7/13/2020	1.50	5.58
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	6.58
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	7.58
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	9.08
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	10.08
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	11.08
				1

**Educational Activity Report** 

Board Member/Designee Name:	Karen Greene-Ross
Two-year Period to Acquire 24 Hours:	1/1/2019 - 12/31/2020
Position:	Designee (State Controller's Office)
Current Report As Of:	12/31/2020
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
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
Fiduciary Training	1/21/2020	1/21/2020	1.25	25.00
Actuarial Essentials	1/21/2020	1/21/2020	1.25	26.25
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	28.75
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	30.00

Human Capital Management Update	7/13/2020	7/13/2020	1.50	31.50
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	32.50
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	33.50
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	35.00
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	36.00
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	37.00
The Board's Role in Culture in the New Era: Unleashing				
Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	39.00

**Educational Activity Report** 

Board Member/Designee Name:	Lynn Paquin
Two-year Period to Acquire 24 Hours:	9/1/2019 to 8/31/2021
Position:	Designee
Current Report As Of:	12/31/2020
Date Board Member/Designee Left Office:	

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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 Education Workshop #4	12/16/2019	12/16/2019	1.08	1.08
Fiduciary Training	1/21/2020	1/21/2020	1.25	2.33
Actuarial Essentials	1/21/2020	1/21/2020	1.25	3.58
Cybersecurity: Governande and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	6.08
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	7.33
Human Capital Management Update	7/13/2020	7/13/2020	1.50	8.83
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	9.83
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	10.83
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	12.33
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	13.33
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	14.33

**Educational Activity Report** 

Board Member/Designee Name:	Lisa Middleton
Two-year Period to Acquire 24 Hours:	4/30/2019 - 4/29/2021
Position:	Member, Local Government Elected Official
Current Report As Of:	12/31/2020
Date Board Member/Designee Left Office:	

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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 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				
Perspective of Purchaser	7/16/2019	7/16/2019	1.50	9.50
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	12.50
Investment Education Workshop #4	12/16/2019	12/16/2019	1.08	13.58
Fiduciary Training	1/21/2020	1/21/2020	1.25	14.83
Actuarial Essentials	1/21/2020	1/21/2020	1.25	16.08
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	18.58
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	19.83
Human Capital Management Update	7/13/2020	7/13/2020	1.50	21.33
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	22.33
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	23.33
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	24.83
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	25.83
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	26.83
The Board's Role in Culture in the New Era:				
Unleashing Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	28.83

**Educational Activity Report** 

Board Member/Designee Name:	Eraina Ortega
Two-year Period to Acquire 24 Hours:	3/7/2019 - 3/6/2021
Position:	Ex Officio Member
Current Report As Of:	12/31/2020
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				
Perspective of Purchaser	7/16/2019	7/16/2019	1.50	9.50
Investment Committee Workshop #3	8/20/2019	8/20/2019	3.00	12.50
Investment Education Workshop #4	12/16/2019	12/16/2019	1.08	13.58
Fiduciary Training	1/21/2020	1/21/2020	1.25	14.83
Actuarial Essentials	1/21/2020	1/21/2020	1.25	16.08
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	18.58
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	19.83
Human Capital Management Update	7/13/2020	7/13/2020	1.50	21.33
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	22.33
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	23.33
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	24.83
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	25.83
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	26.83
The Board's Role in Culture in the New Era:				
Unleashing Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	2.00

**Educational Activity Report** 

Board Member/Designee Name:	Michelle Mitchell
Two-year Period to Acquire 24 Hours:	6/12/2019 - 6/11/2021
Position:	Designee
Current Report As Of:	12/31/2020
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or	Hours	Cumulative
Perspectives on Infrastructure Investing	7/15/2019	Viewed 7/15/2019	1.00	<b>Hours</b> 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
Fiduciary Training	1/24/2019	12/6/2019	1.50	6.50
Fiduciary Training	1/21/2020	1/21/2020	1.25	7.75
Actuarial Essentials	1/21/2020	1/21/2020	1.25	9.00
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	11.50
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	12.75
Human Capital Management Update	7/13/2020	7/13/2020	1.50	14.25
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	15.25
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	16.25
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	17.75
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	18.75
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	19.75
The Board's Role in Culture in the New Era:				
Unleashing Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	21.75

**Educational Activity Report** 

Board Member/Designee Name:	Stacie Olivares
Two-year Period to Acquire 24 Hours:	8/8/2019 - 8/7/2021
Position:	Member, Insurance Industry Representative
Current Report As Of:	12/31/2020
Date Board Member/Designee Left Office:	

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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
Investment Education Workshop #4	12/16/2019	12/16/2019	1.08	4.08
Fiduciary Training	1/21/2020	1/21/2020	1.25	5.33
Actuarial Essentials	1/21/2020	1/21/2020	1.25	6.58
Cybersecurity: Governance and Best Practices in a				
Shifting Threat Landscape	1/21/2020	1/21/2020	2.50	9.08
Health Care Cost Drivers Nationally and in California:				
What Are They and How Are They Changing?	1/21/2020	1/21/2020	1.25	10.33
Human Capital Management Update	7/13/2020	7/13/2020	1.50	11.83
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	12.83
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	13.83
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	15.33
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	16.33
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	17.33
The Board's Role in Culture in the New Era: Unleashing Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	19.33
	771372020	171372020	2.00	

**Educational Activity Report** 

Board Member/Designee Name:	Shawnda Westly		
Two-year Period to Acquire 24 Hours:	2/7/2020 to 2/6/2022		
Position:	Member, State Personnel Board		
Current Report As Of:	12/31/2020		
Date Board Member/Designee Left Office:			

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Fiduciary Training	1/21/2020	2/11/2020	1.25	1.25
Human Capital Management Update	7/13/2020	7/13/2020	1.50	2.75
Asset Class Education: Public Equity	7/13/2020	7/13/2020	1.00	3.75
Asset Class Education: Private Equity	7/13/2020	7/13/2020	1.00	4.75
Asset Allocation Educational Discussion	7/13/2020	7/13/2020	1.50	6.25
Asset Liability Management Process and Timeline	7/13/2020	7/13/2020	1.00	7.25
Capitol Market Assumptions Methodology	7/13/2020	7/13/2020	1.00	8.25
The Board's Role in Culture in the New Era: Unleashing Value Via Cultural Intelligence	7/15/2020	7/15/2020	2.00	10.25