

CalPERS Board Member Education Program
Educational Activity Report

Board Member/Designee Name:	Rob Feckner
Two-year Period to Acquire 24 Hours:	1/1/2021 - 12/31/2022
Position:	Member (Elected)
Current Report As Of:	12/31/2022
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
California 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	2.50	8.75
Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	10.25
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

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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
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

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Board Member/Designee Name:	Frank Ruffino
Two-year Period to Acquire 24 Hours:	1/7/2021 - 1/6/2023
Position:	Designee
Current Report As Of:	12/31/2022
Date Board Member/Designee Left Office:	

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California 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	2.50	8.75
Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	10.25
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
IFEBP Legal & Legislative Update for Retirement Plans	10/16/2021	10/16/2021	2.00	18.25
IFEBP Hot Topics in Pensions	10/16/2021	10/16/2021	2.00	20.25
IFEBP Health Care Legislative Update	10/16/2021	10/16/2021	2.00	22.25

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IFEBP The Future of Pension Benefits	10/17/2021	10/17/2021	2.00	24.25
IFEBP The Future of Health Benefits	10/17/2021	10/17/2021	2.00	26.25
IFEBP American Resuce Plan Act of 2021	10/17/2021	10/17/2021	2.00	28.25
IFEBP Overview of Retirement Plans	10/18/2021	10/18/2021	4.00	32.25
IFEBP Investing Health & Welfare and Pension	10/19/2021	10/19/2021	4.00	36.25
IFEBP Governance	10/20/2021	10/20/2021	4.00	40.25
Strategic Alignment Across California's Three Large State Purchasers: What are the Opportunities	1/18/2022	1/18/2022	1.50	41.75
Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	42.75
Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	45.25
Sustainable Investment and the Path to Net Zero	1/18/2022	1/18/2022	2.00	47.25
Compensation Trends	4/19/2022	4/19/2022	3.00	50.25
Geopolitical Risk and Financial Markets	7/11/2022	7/11/2022	1.00	51.25
Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.50	52.75
Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	53.75
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	54.75
Behavioral Health Update	7/12/2022	7/12/2022	1.00	55.75
Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	57.75
2022 Public Funds Forum - The Next American Economy; Women in Finance, Stakeholder Litigation; ESG-Exploring in the Emerging Tensions in Investing; Sustainability of Climate Risk	9/7/2022	9/7/2022	8.00	65.75
2022 Public Funds Forum - Best Practices in Fund Governance; First Responders as Fiduciaries; Trends to Watch in Governance and Investing.	9/8/2022	9/8/2022	8.00	73.75
CII – 2022 Fall Conference – Governance GAP Companies, What Next for the PCAOB; Strategies to Incorporate ESG; Washington Out Look; The SEC and Congress	9/21/2022	9/23/2022	8.00	81.75
CII – 2022 Fall Conference – The Materiality of Labor Rights; Engagement to Mitigate Climate Risk; Proxy Season Plans for 2023	9/21/2022	9/23/2022	6.00	87.75
IFEBP – Governance; Retirement Plans; Administration; Fiduciary Responsibility; General Audits; Health & Welfare; New Legislation	10/21/2022	10/25/2022	16.00	103.75
IFEBP – Public Pension Plans; Fund Professionals; Trustees Responsibility & Legal Environment; Networking with Industry Experts	10/21/2022	10/25/2022	16.00	119.75

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Board Member/Designee Name:	Sertan Usanmaz
Two-year Period to Acquire 24 Hours:	11/2/2021 - 11/2/2023
Position:	Designee
Current Report As Of:	12/31/2022
Date Board Member/Designee Left Office:	10/24/2022

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

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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:	12/31/2022
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
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

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Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.5	
Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	20.75
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	21.75
Behavioral Health Update	7/12/2022	7/12/2022	1.00	22.75
Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	24.75

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Board Member/Designee Name:	David Miller
Two-year Period to Acquire 24 Hours:	1/16/2022-1/15/2024
Position:	Member (Elected)
Current Report As Of:	12/31/2022
Date Board Member/Designee Left Office:	

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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

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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
Current Report As Of:	12/31/2022
Date Board Member/Designee Left Office:	

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California 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	2.50	8.75
Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	8.75
Capital Market Assumptions: Survey & Methodology	7/12/2021	7/12/2021	1.00	9.75
Creating & Assessing Candidate Portfolios	7/12/2021	7/12/2021	1.00	10.75
The New Agenda for Sustainable Investment: Disclosure on Financial, Human and Physical Capital	7/12/2021	7/12/2021	2.00	12.75
Behavioral Health Update	7/13/2021	7/13/2021	1.00	13.75
Working After Retirement Administration	7/13/2021	7/13/2021	1.00	14.75
Board Self Evaluation 2021	7/14/2021	7/14/2021	1.25	16.00
Strategic Alignment Across California's Three Large State Purchasers: What are the Opportunities	1/18/2022	1/18/2022	1.50	17.50

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Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	18.50
Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	21.00
Sustainable Investment and the Path to Net Zero	1/18/2022	1/18/2022	2.00	23.00
Compensation Trends	4/19/2022	4/19/2022	3.00	26.00

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Board Member/Designee Name:	Nicole Griffith
Two-year Period to Acquire 24 Hours:	10/20/2020 - 10/19/2022
Position:	Designee
Current Report As Of:	12/31/2022
Date Board Member/Designee Left Office:	

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California Health Care: Landscape and Levers for Change	1/21/2021	1/21/2021	1.75	1.75
Behavioral Health Update	1/21/2021	1/21/2021	1.50	3.25
Annual Board Fiduciary Training	1/21/2021	1/21/2021	2.00	5.25
Compensation Governance Best Practices	4/19/2021	4/19/2021	2.50	7.75
Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	9.25
Capital Market Assumptions: Survey & Methodology	7/12/2021	7/12/2021	1.00	10.25
Creating & Assessing Candidate Portfolios	7/12/2021	7/12/2021	1.00	11.25
The New Agenda for Sustainable Investment: Disclosure on Financial, Human and Physical Capital	7/12/2021	7/12/2021	2.00	13.25
Behavioral Health Update	7/13/2021	7/13/2021	1.00	14.25
Working After Retirement Administration	7/13/2021	7/13/2021	1.00	15.25
Strategic Alignment Across California's Three Large State Purchasers: What are the Opportunities	1/18/2022	1/18/2022	1.50	16.75
Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	17.75

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Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	20.25
Compensation Trends	4/19/2022	4/19/2022	3.00	23.25
Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	24.25
Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	26.75
Sustainable Investment and the Path to Net Zero	1/18/2022	1/18/2022	2.00	28.75
Compensation Trends	4/19/2022	4/19/2022	3.00	31.75
Geopolitical Risk and Financial Markets	7/11/2022	7/11/2022	1.00	32.75
Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.50	34.25
Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	35.25
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	36.25
Behavioral Health Update	7/12/2022	7/12/2022	1.00	37.25
Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	39.25

CalPERS Board Member Education Program
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Board Member/Designee Name:	Jose Luis Pacheco
Two-year Period to Acquire 24 Hours:	1/16/22 - 1/15/24
Position:	Board Member
Current Report As Of:	12/31/2022
Date Board Member/Designee Left Office:	

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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
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

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TLF for Retirement Security - Annual Convening 2022: Welcome and Framing	7/18/2022	7/18/2022	1.00	18.50
TLF for Retirement Security - Annual Convening 2022: Public Markets and Disclosure	7/18/2022	7/18/2022	1.00	
TLF for Retirement Security - Annual Convening 2022: Private Markets and Responsible Contracting	7/18/2022	7/18/2022	1.00	19.50
TLF for Retirement Security - Annual Convening 2022: Trustee Development	7/18/2022	7/18/2022	2.00	21.50
TLF for Retirement Security - Annual Convening 2022: Principal Investment	7/18/2022	7/18/2022	3.00	24.50
TLF for Retirement Security - Annual Convening 2022: Opening Discussion Day 2	7/19/2022	7/19/2022	0.50	25.00
TLF for Retirement Security - Annual Convening 2022: Elevating Racial Justice as an Investment Issue	7/19/2022	7/19/2022	1.50	26.50
TLF for Retirement Security - Annual Convening 2022: Current Labor Issues Round Robin	7/19/2022	7/19/2022	1.00	27.50
TLF for Retirement Security - Annual Convening 2022: Asset Manager Accountability	7/19/2022	7/19/2022	1.50	29.00
TLF for Retirement Security - Annual Convening 2022: Final Discussion	7/19/2022	7/19/2022	0.50	29.50
TLF for Retirement Security - Annual Convening 2022 Workshop on Draft Framework for Elevating Racial Equity in Bond Markets and Fixed Income	7/20/2022	7/20/2022	4.00	33.50
NCPERS 2022 Public Pension Forum - Pros and Cons of ESG Investing	8/21/2022	8/21/2022	0.75	34.25
NCPERS - Understanding Fiscal Sustainability	8/22/2022	8/22/2022	0.75	35.00
NCPERS - Issues in Measuring the Condition of Public Defined Benefit Pension Plans	8/22/2022	8/22/2022	0.75	35.75
NCPERS - Defining and Measuring Public Pension Fiscal Sustainability	8/22/2022	8/22/2022	0.75	36.50
NCPERS - Stabilizing and Managing Unfunded Liabilities	8/22/2022	8/22/2022	0.75	37.25
NCPERS - Strategies to Making CalPERS Sustainable	8/22/2022	8/22/2022	0.75	37.25
NCPERS - Key Factors for Building a Strong Funding Plan – The CalSTRS Experience	8/22/2022	8/22/2022	1.15	38.40
NCPERS - Investment Strategies to Enhance Sustainability	8/22/2022	8/22/2022	0.75	39.15
NCPERS - Macroeconomic Trends and Investment Strategies	8/22/2022	8/22/2022	0.75	39.90
NCPERS - Investing in Turbulent Times	8/22/2022	8/22/2022	1.00	40.90
NCPERS - Two Key Fiscal Policy Options to Make Pensions Sustainable	8/22/2022	8/22/2022	0.75	41.65

CalPERS Board Member Education Program
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NCPERS - Discussion on UCLA Investment Company and Public Pensions	8/23/2022	8/23/2022	0.75	42.40
NCPERS - Actuarial Strategies to Make Public Pensions Stable and Sustainable	8/23/2022	8/23/2022	1.00	43.40
NCPERS - Improving Public Pension Sustainability through Liability-Aware Investing	8/23/2022	8/23/2022	1.00	44.40
NCPERS - Economic Outlook	8/23/2022	8/23/2022	0.50	44.90
2022 Public Funds Forum - Rebuild The Dream: The Next American Economy	9/6/2022	9/6/2022	1.25	46.15
2022 Public Funds Forum - Building Resilience Before the Downturn	9/7/2022	9/7/2022	1.00	47.15
2022 Public Funds Forum - General Counsel's Roundtable: Women in Finance	9/7/2022	9/7/2022	1.00	48.15
2022 Public Funds Forum - Shareable Litigation: An Underused Tool for Investing for Impact	9/7/2022	9/7/2022	1.00	49.15
2022 Public Funds Forum - Is ESG Peaking: Exploring The Emerging Tensions in Investing, Sustainability, and Climate Risk	9/7/2022	9/7/2022	0.75	49.90
2022 Public Funds Forum - Winning Gold: Lessons from Michael Phelps	9/7/2022	9/7/2022	1.00	50.90
2022 Public Funds Forum - Best Practices in Fund Governance	9/7/2022	9/7/2022	1.00	51.90
2022 Public Funds Forum - No, You Shut Up	9/7/2022	9/7/2022	1.00	52.90
2022 Public Funds Forum - First Responders as Fiduciaries	9/8/2022	9/8/2022	1.00	53.90
2022 Public Funds Forum - Hot Topics: Canada	9/8/2022	9/8/2022	1.00	54.90
2022 Public Funds Forum - Trends to Watch in Governance and Investing	9/8/2022	9/8/2022	0.75	55.65
2022 Public Funds Forum - The World According to Garth	9/8/2022	9/8/2022	1.10	56.75
ILPA Institute Private Equity for the Trustee Introduction to Private Equity	9/28/2022	9/28/2022	2.0	58.75
ILPA Institute Private Equity for the Trustee Why Private Equity and Private Equity Critiques and Challenges	9/28/2022	9/28/2022	1.5	60.25
ILPA Institute Private Equity for the Trustee Private Equity Economics and Fee – Fund Life Cycles and Fees	9/28/2022	9/28/2022	1.0	61.25
ILPA Institute Private Equity for the Trustee Regulatory, Governance & Legal	9/28/2022	9/28/2022	1.75	63
ILPA Institute Private Equity for the Trustee Two Truths and a Lie Q&A	9/28/2022	9/28/2022	1.0	64
ILPA Institute Private Equity for the Trustee Fund Selection & Portfolio Construction	9/28/2022	9/28/2022	1.5	65.5

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ILPA Institute Private Equity for the Trustee Fund Selection & Portfolio Construction – Other Investment Considerations	9/29/2022	9/29/2022	1.25	66.75
ILPA Institute Private Equity for the Trustee Measuring Performance – Monitoring Life Cycle	9/29/2022	9/29/2022	0.5	67.25
ILPA Institute Private Equity for the Trustee Private Equity Resourcing and Trends	9/29/2022	9/29/2022	1.0	68.25
ILPA Institute Private Equity for the Trustee Case Study Preparation	9/29/2022	9/29/2022	0.25	68.50
ILPA Institute Private Equity for the Trustee Case Study Breakouts	9/29/2022	9/29/2022	0.5	69
ILPA Institute Private Equity for the Trustee Case Study Debrief	9/29/2022	9/29/2022	0.5	69.5
ILPA Institute Private Equity for the Trustee Key Takeaways/Q&A	9/29/2022	9/29/2022	0.25	69.75
IFEBP: New Trustees Institute – Level 1: Core Concepts Trustee Responsibility & Legal Environment & Overview of Health and Welfare Plans	10/21/2022	10/26/2022	8.0	77.75
IFEBP: New Trustees Institute – Level: Core Concepts Overview of Retirement Plans & Investing Health and Welfare Pension Assets – 22NB	10/21/2022	10/26/2022	7.0	84.75
IFEBP: New Trustees Institute – From the Basketball Court to the Boardroom Opening Session	10/21/2022	10/26/2022	1.5	86.25
IFEBP: New Trustee Institute- Innovation by Design: Becoming the Disrupter vs. the Disrupted Keynote Session	10/21/2022	10/26/2022	1.25	87.50
IFEBP: New Trustee Institute – Level 1 Core Concepts Governance – NT105	10/21/2022	10/26/2022	3.0	90.50
IFEBP: New Trustee Institute Passively and Actively Managed Funds – 104-1	10/21/2022	10/26/2022	1.25	91.75

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:	12/31/2022
Date Board Member/Designee Left Office:	

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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
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	2.50	8.75
Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	10.25
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

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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
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

CalPERS Board Member Education Program
Educational Activity Report

Board Member/Designee Name:	Theresa Taylor
Two-year Period to Acquire 24 Hours:	1/1/2021 - 12/31/2022
Position:	Member (Elected)
Current Report As Of:	12/31/2022
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 [Transparency and Accountability](#) page.

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
California 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
Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	7.75
Capital Market Assumptions: Survey & Methodology	7/12/2021	7/12/2021	1.00	8.75
Creating & Assessing Candidate Portfolios	7/12/2021	7/12/2021	1.00	9.75
The New Agenda for Sustainable Investment: Disclosure on Financial, Human and Physical Capital	7/12/2021	7/12/2021	2.00	11.75
Behavioral Health Update	7/13/2021	7/13/2021	1.00	12.75
Working After Retirement Administration	7/13/2021	7/13/2021	1.00	13.75

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Strategic Alignment Across California's Three Large State Purchasers: What are the Opportunities	1/18/2022	1/18/2022	1.50	15.25
Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	16.25
Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	18.75
Sustainable Investment and the Path to Net Zero	1/18/2022	1/18/2022	2.00	20.75
Compensation Trends	4/19/2022	4/19/2022	3.00	23.75
Geopolitical Risk and Financial Markets	7/11/2022	7/11/2022	1.00	24.75
Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.50	26.25
Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	27.25
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	28.25
Behavioral Health Update	7/12/2022	7/12/2022	1.00	29.25
Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	31.25
Harvard Trustee Leadership Forum Public Markets and Disclosure – Reporting Requirements – Disclosure of Climate, DE&I, Workforce Issues Private Markets and RCP	7/17/2022	7/20/2022	2.00	33.25
Harvard Trustee Leadership Forum – Trustee and Member Voices: Across the lifecycle of a Trustee	7/17/2022	7/20/2022	1.50	34.75
Harvard Trustee Leadership Forum – Elevating Racial Justice as an Investment Issue Information on the Lost Revenue Because of Racial Discrimination of Investment Firms, and Lack of DE&I	7/17/2022	7/20/2022	1.50	36.25
Harvard Trustee Leadership Forum Asset Manager Accountability How to Hold Asset Managers, Specifically in PE but also in Public Equity to Account for Bad Practices in ESG	7/17/2022	7/20/2022	1.50	37.75
Workshop on Draft Framework for Elevating Racial Equity in Bond Markets and Fixed Income – Really Interesting Take on Places Where This is Working in Bond Markets	7/17/2022	7/20/2022	4.00	41.75

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:	Board Member
Current Report As Of:	12/31/2022
Date Board Member/Designee Left Office:	

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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
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
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

CalPERS Board Member Education Program
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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

CalPERS Board Member Education Program
Educational Activity Report

Board Member/Designee Name:	Gail Willis
Two-year Period to Acquire 24 Hours:	6/9/22 - 6/8/24
Position:	Board Member
Current Report As Of:	12/31/2022
Date Board Member/Designee Left Office:	

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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
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
Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	7.50

CalPERS Board Member Education Program
Educational Activity Report

Board Member/Designee Name:	Betty Yee
Two-year Period to Acquire 24 Hours:	1/1/2021 - 12/31/2022
Position:	Member (Ex Officio, State Controller's Office)
Current Report As Of:	12/31/2022
Date Board Member/Designee Left Office:	1/1/2023

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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
California 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
Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	7.75
Capital Market Assumptions: Survey & Methodology	7/12/2021	7/12/2021	1.00	8.75
Creating & Assessing Candidate Portfolios	7/12/2021	7/12/2021	1.00	9.75
The New Agenda for Sustainable Investment: Disclosure on Financial, Human and Physical Capital	7/12/2021	7/12/2021	2.00	11.75
Behavioral Health Update	7/13/2021	7/13/2021	1.00	12.75
Working After Retirement Administration	7/13/2021	7/13/2021	1.00	13.75
Strategic Alignment Across California's Three Large State Purchasers: What are the Opportunities	1/18/2022	1/18/2022	1.50	15.25
Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	16.25

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Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	18.75
Sustainable Investment and the Path to Net Zero	1/18/2022	1/18/2022	2.00	20.75
Compensation Trends	4/19/2022	4/19/2022	3.00	23.75
Geopolitical Risk and Financial Markets	7/11/2022	7/11/2022	1.00	24.75
Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.50	26.25
Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	27.25
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	28.25
Behavioral Health Update	7/12/2022	7/12/2022	1.00	29.25
Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	31.25

CalPERS Board Member Education Program
Educational Activity Report

Board Member/Designee Name:	Karen Greene-Ross
Two-year Period to Acquire 24 Hours:	1/1/2021 - 12/31/2022
Position:	Designee (State Controller's Office)
Current Report As Of:	12/31/2022
Date Board Member/Designee Left Office:	11/22/2022

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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.

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
California 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
Capital Market Assumption Education	7/12/2021	7/12/2021	1.50	7.75
Capital Market Assumptions: Survey & Methodology	7/12/2021	7/12/2021	1.00	8.75
Creating & Assessing Candidate Portfolios	7/12/2021	7/12/2021	1.00	9.75
The New Agenda for Sustainable Investment: Disclosure on Financial, Human and Physical Capital	7/12/2021	7/12/2021	2.00	11.75
Behavioral Health Update	7/13/2021	7/13/2021	1.00	12.75
Strategic Alignment Across California's Three Large State Purchasers: What are the Opportunities	1/18/2022	1/18/2022	1.50	14.25
Case Study on Leverage and Liquidity	1/18/2022	1/18/2022	1.00	15.25
Annual Board Fiduciary Training	1/18/2022	1/18/2022	2.50	17.75
Sustainable Investment and the Path to Net Zero	1/18/2022	1/18/2022	2.00	19.75

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Compensation Trends	4/19/2022	4/19/2022	3.00	22.75
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CalPERS Board Member Education Program
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Board Member/Designee Name:	Lynn Paquin
Two-year Period to Acquire 24 Hours:	7/1/2021 to 7/31/2023
Position:	Designee
Current Report As Of:	12/31/2022
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.

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

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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
Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	26.25