Instructions : Please fill out the below template and return to BSU team. This report wil travel agenda item:	be entered into the monthly Board
Jose Luis Pacheco	
Board Member Name	
June 23, 2024 - June 26, 2024	
Date(s) of Travel	
The Trustee Leadership Forum for Retirement Security (TLF) An	nual Covening 2024
Name of Conference (if applicable)	
Cambridge, MA	
Location(s) Traveled To	
Purpose of Travel:	
The purpose of the travel was to educate public pension trustee and trends as they grapple with the challenges of overseeing th funds on responsible investment in the best interests of their be	eir public sector pension
Instructions: If travel includes attendance at an educational program, complete the new of the program's agenda to this travel report.	et section and attach a copy
Name of Educational Event:	
The Trustee Leadership Forum for Retirement Security (TLF) An	nual Covening 2024
Sessions Attended (include brief synopsis of information provided at each session and a Use page 2 if needed.	amount of time spent at each session)
Day 1 - Welcome & Framing	1.0
Day 1 - Welcome & Flammy	Hours
	-
Day 1:	1.5
Session 1: Private Equity Labor Principles	Hours



Day 1:	1.5	
Session 2: Private Credit, Alternatives, & Asset Allocation	Hours	
Day 1:	1.75	
Session 3: TLF Peer Mentoring Project - First Cohort Review & Recognition & Discussion & Takeways	Hours	
Dinner - Harvard Faculty Club	3.0	
Speaker - John Coates, John F. Cogan, Jr. Professor of Law &	Hours	
Economics, Deputy Dean, Harvard Law School		
Day 2	0.5	
Opening Discussion	Hours	



Day 2:	1.5	
Session 4: Work, Investment, and Climate Change	Hours	
Day 2:	1.5	
Session 5: The Trustee Experience: From New Trustee to Experienced Leader	Hours	
Lunch:	0.83	
Book Talk with Hamilton Nolan, Author of The Hammer: Power, Inequality, and the Struggle for the Soul of Labor	Hours	
Day 2	0.17	
Alida Castillo, Center for Labor & Just Economy (CLJE): Harvard Trade Union Program	ilouis	



Day 2: Current Labor Issues for Investors - Round Robin Day 2:	0.5	
	Hours	
	0.75	
Session 6: Highlights from Shareholder Season	Hours	
Day 2:	0.75	
Session 7:	Hours	
Bargaining for the Common Good		
Day 2:	0.75	
Session 8: Asset Manager Accountability - Preparing for a	Hours	
Meeting with an Asset Manager		



Day 2:	0.5	
Discussion and Takeaways	Hours	
Day 3:	0.5	
Debrief: Asset Manager Meeting	Hours	
Day 3: Workshop: What Trustees Need to Know About Al	2.25	
	Hours	
Day 3: Workshop Continues	1.25	
	Hours	







TLF Annual Convening Agenda Harvard Law School

Wasserstein Hall 1585 Massachusetts Ave Cambridge, MA 02138

Dinner

Harvard Faculty Club

20 Quincy Street Cambridge, MA 02138

Day 1 - Monday, June 24, 2024 Room WCC 2009, Wasserstein Hall

9:30 am

Light Breakfast, Coffee, and Tea Available

10:00 am - 11:00 am Welcome & Framing

Erin Shackelford, Director, Workers' Capital Project, CLJE, HLS Welcome to the TLF Annual Convening, Expectations and Norms

Sharon Block, Executive Director, Center for Labor and a Just Economy

and Professor of Practice, Harvard Law School - State of the Labor

Movement/Building Power for Workers

David Wood, Fellow, Center for Labor and a Just Economy, HLS Adjunct Lecturer in Public Policy, Center for Public Leadership, HKS

Opening Discussion - urgent issues/what's on your mind

11:00 am - 12:30 pm Session 1: Private Equity Labor Principles

Jennifer O'Dell, LIUNA; Mullissa Willette, CalPERS/SEIU; Mike

Musaraca, PE Consortium Project Moderator: David Wood, CLJE

12:30 pm - 1:00 pm Lunch

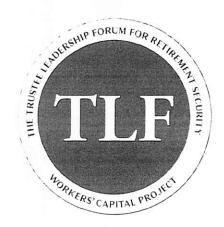
1:00 pm - 2:30 pm Session 2: Private Credit, Alternatives, & Asset Allocation Trends

Lenore Palladino, Assistant Professor Economics & Public Policy

University of Massachusetts Amherst Sharon Hendricks, CalSTRS/AFT Moderator: David Wood, CLJE

2:30 pm - 2:45 pm Break





2:45 pm - 4:15 pm Session 3: TLF Peer Mentoring Project

First Cohort Review and Recognition

Andrew Hirshman, IL TRS/NEA; Michael Hairston, NEA; Paula Barajas,

CTPF, AFT; Denise Bradford, CalSTRS, NEA

Moderator: Eric Horvath, CLJE

4:15 pm - 4:30 pm Discussion and Takeaways

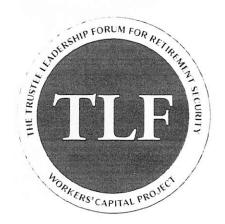
4:30 pm - 6:00 pm Break

6:00 pm - 9:00 pm Dinner - Harvard Faculty Club

Speaker: John Coates, John F. Cogan, Jr. Professor of Law and

Economics, Deputy Dean, Harvard Law School Introduction: Sharon Block, Executive Director, CLJE





TLF Annual Convening Agenda Harvard Law School

Day 2 - Tuesday, June 25, 2024 Room WCC 2009, Wasserstein Hall

8:30 am

Breakfast Available

9:00 am - 9:30 am

Opening Discussion

David Wood, Fellow, Center for Labor and a Just Economy, HLS Adjunct Lecturer in Public Policy, Center for Public Leadership, HKS

9:30 am - 11:00 am

Session 4: Work, Investment, and Climate Change

Carin Zelenko, AFL-CIO; Jennifer O'Dell, LIUNA Kathleen Brophy and Jay O'Neal, Sunrise Project

Danielle Fox. Climate Finance Action

11:00 am - 12:00 pm Session 5: The Trustee Experience: From New Trustee to

Experienced Leader

Sandi Ryan, Alaska RMB/NEA; Vivian Gray, LACERA/SEIU; Mullissa

Willette, CalPERS/SEIU; David Kazansky AFT Moderator: Jay Rehak, retired, CTPF/AFT

12:00 pm - 12:50 pm Lunch: Book Talk with Hamilton Nolan, Author of The Hammer:

Power, Inequality, and the Struggle for the Soul of Labor

book provided for registered attendees Introduction: Dan Pedrotty, NABTU Q&A Moderator: David Wood, CLJE

12:50 pm - 1:00 pm Alida Castillo, CLJE: Harvard Trade Union Program

1:00 pm - 1:30 pm

Current Labor Issues for Investors - Round Robin

Louis Malizia, SOC: Wells-Fargo Campaign; John Keenan, AFSCME: Tax Transparency; Erin Markiewitz, AFL-CIO: Investor Network for Labor

Rights





1:30 pm - 2:15 pm Session 6: Highlights from Shareholder Season

Louis Malizia, SOC Investment Group; Renaye Manlye, CLJE

Moderator: David Wood, CLJE

2:15 pm - 2:30 pm Break

2:30 pm - 3:15 pm Session 7: Bargaining for the Common Good

Vonda Brunsting, CLJE with Lisa Lindsley, Bargaining for the Common Good; Lenore Palladino, UMass Amherst; Natalia Renta, Americans for

Financial Reform; and David Wood, CLJE

3:15 pm - 4:00 pm Session 8: Asset Manager Accountability - Preparing for a Meeting

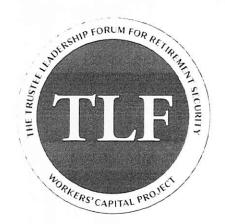
with an Asset Manager

Shalini Ramgoolam, Manager of Investor Leadership, Shareholder

Association for Research and Education

4:00 pm - 4:30 pm Discussion and Takeaways





TLF Annual Convening Agenda Harvard Law School

Day 3 - Wednesday, June 26, 2024

Room Milstein East B, 2nd Floor, Wasserstein Hall

8:30 am

Breakfast Available

9:00 am - 9:30 am

Debrief: Asset Manager Meeting

Shalini Ramgoolam, Manager of Investor Leadership, Shareholder

Association for Research and Education

9:30 am - 11:45 pm

Workshop: What Trustees Need to Know About Al

Michelle Miller, Director of Innovation, Center for Labor and a Just

Economy, HLS

Vasudha Desikan; Katie Montalbano, CWA; Carin Zelenko, AFL-CIO

11:45 am - 12:15 pm Lunch

12:15 pm - 2:00 pm Workshop continues

2:00 pm

Adjourn