CalPERS Board Member Education Program
Educational Activity Report

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: 10/27/2023
Date Board Member/Designee Left Office:

Government Code Section 20100 (PDF), 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 CalPERS Board Member Education Policy (PDF) 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 Transparency and Accountability page.

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
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

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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
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

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Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	26.25
National Association of Corporate Directors Conference - Various Educational Topics outlined in Board Travel Report	10/8/2022	10/11/2022	12.00	38.25
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	42.75
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	44.75
July Board Offsite Sustainability and Implications for Asset Owners (Start of next training period 4/29/2023 - 4/28/2025)	7/17/2023	7/17/2023	1.00	1.00
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	2.00
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	3.50
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	5.50
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	6.50
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	7.50