

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Malia Cohen
Two-year Period to Acquire 24 Hours:	01/17/2023 - 01/16/2025
Position:	Ex Officio Member, California State Controller
Current Report As Of:	10/30/2024
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.

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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.

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
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model	1/17/2023	1/17/2023	4.50	4.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	6.50
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.00	7.50
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	8.50
July Board Offsite Diversity, Equity & Inclusion Innovation	7/17/2023	7/17/2023	1.50	10.00
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	12.00
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	13.00
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	14.00
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risk World	1/16/2024	1/16/2024	1.00	15.00
GreenFin Conference	6/16-20/2024	6/16-20/2024	9.50	24.50
July Board Offsite - Overview of the Sustainable Investments 2030 Strategy	7/15/2024	7/15/2024	0.25	24.75
July Board Offsite - Climate-Aware Investing in Global Public Equities	7/15/2024	7/15/2024	2.00	26.75

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Deborah Gallegos
Two-year Period to Acquire 24 Hours:	11/15/2023 - 11/14/2025
Position:	Board Designee
Current Report As Of:	10/30/2024
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risk World	1/16/2024	1/16/2024	1	1.00
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1	2.00
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.5	3.50
Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1	4.50
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1	5.50
Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1	6.50
Milkin Institute Global Conference	5/5-8/2024	5/5-8/2024	12	18.50
GreenFin Conference	6/16-20/2024	6/16-20/2024	11	29.50
July Board Offsite - Overview of the Sustainable Investments 2030 Strategy	7/15/2024	7/15/2024	0.25	29.75
July Board Offsite - Climate-Aware Investing in Global Public Equities	7/15/2024	7/15/2024	2	31.75
July Board Offsite - Emerging and Diverse Managers in the CalPERS Investment Portfolio	7/15/2024	7/15/2024	2.5	34.25
July Board Offsite - Geopolitics and the Impact of Geopolitical Risks on Economies and Markets	7/15/2024	7/15/2024	2	36.25
July Board Offsite - Proxy Voting Overview	7/15/2024	7/15/2024	1.5	37.75
July Board Offsite - Behavioral Health Update	7/15/2024	7/15/2024	1.25	39.00

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July Board Offsite - Health Care Workforce	7/15/2024	7/15/2024	1.75	40.75
July Board Offsite - Evolution of the Private Equity Industry	7/15/2024	7/15/2024	1.25	42.00
July Board Offsite - CalPERS CEM Pension Administration Benchmark Report - 2023	7/15/2024	7/15/2024	1.00	43.00
July Board Offsite - Fiduciary Duties & Sustainability Considerations	7/15/2024	7/15/2024	2.00	45.00

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Frank Ruffino
Two-year Period to Acquire 24 Hours:	01/07/2023 - 01/06/2025
Position:	Board Designee
Current Report As Of:	10/30/2024
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF) - (Start of next training period 1/7/2023 - 1/6/2025)	1/17/2023	1/17/2023	4.50	4.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	6.50
Council of Institutional Investors - 2023 Spring Conference	3/5-10/2023	3/5-10/2023	16.00	22.50
IFEBP - Washington Legislative Update - Sessions outlined in Board Travel Report	5/21-24/2023	3/21-24/2023	18.00	40.50
Trustee Leadership Forum (TLF) for Retirement Security Annual Conference - Sessions outlined in Board Travel Report	6/11-15/2023	6/11-15/2023	28.00	68.50
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.50	70.00
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	71.00
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	72.50
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	74.50
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/17/2023	1.00	75.50
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	76.50

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NACD: Master Class on Untangling ESG - Sessions outlined in Board Travel Report	8/24-25/2023	8/24-25/2023	32.00	108.50
IFEBP Conference	9/29- 10/5/23	9/29- 10/5/23	40.00	148.50
Trustee Leadership Forum for Retirement Security Peer Mentoring Project	10/25-28/2023	10/25-28/2023	11.00	159.50
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risk World	1/16/2024	1/16/2024	1.00	160.50
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1.00	161.50
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.50	163.00
Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1.00	164.00
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1.00	165.00
Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1.00	166.00
Council of Institutional Investors - 2024 Spring Conference	3/3-8/2024	3/3-8/2024	32.00	198.00
IFEBP (Internation Foundation for Employee Benefit Plan)Washington Legislative Update	5/4-7/24	5/4-7/24	18.00	216.00
TLF (Trustee Leadership Forum) 2024 Annual Convening	6/23-26/24	6/23-26/24	22.00	238.00
Tide Spark 2024	7/10-11/24	7/10-11/24	16.00	254.00
July Board Offsite - Overview of the Sustainable Investments 2030 Strategy	7/15/2024	7/15/2024	0.25	254.25
July Board Offsite - Climate-Aware Investing in Global Public Equities	7/15/2024	7/15/2024	2.00	256.25
July Board Offsite - Emerging and Diverse Managers in the CalPERS Investment Portfolio	7/15/2024	7/15/2024	2.50	258.75
July Board Offsite - Geopolitics and the Impact of Geopolitical Risks on Economies and Markets	7/15/2024	7/15/2024	2.00	260.75
July Board Offsite - Proxy Voting Overview	7/15/2024	7/15/2024	1.50	262.25
July Board Offsite - Behavioral Health Update	7/16/2024	7/16/2024	1.25	263.50
July Board Offsite - Health Care Workforce	7/16/2024	7/16/2024	1.75	265.25
July Board Offsite - Evolution of the Private Equity Industry	7/16/2024	7/16/2024	1.25	266.50
July Board Offsite - CalPERS CEM Pension Administration Benchmark Report - 2023	7/16/2024	7/16/2024	1.00	267.50
July Board Offsite - Fiduciary Duties & Sustainability Considerations	7/17/2024	7/17/2024	2.00	269.50
2024 Public Funds Forum	9/3-5/24	9/3-5/24	16.00	285.50
Council of Institutional Investors - 2024 Fall Conference	9/8-12/24	9/8-12/24	22.00	307.50

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Lisa Middleton
Two-year Period to Acquire 24 Hours:	04/30/2023 - 04/29/2025
Position:	Member, Local Government Elected Official
Current Report As Of:	10/30/2024
Date Board Member/Designee Left Office:	

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July Board Offsite - Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.5	1.50
July Board Offsite - CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1	2.50
July Board Offsite - Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.5	4.00
July Board Offsite - Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2	6.00
July Board Offsite - Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1	7.00
July Board Offsite- Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1	8.00
Council of Institutional Investors - Fall Conference	9/11-13/2023	9/11-13/2023	9.25	17.25
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risked World	1/16/2024	1/16/2024	1	18.25
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1	19.25
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.5	20.75
Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1	21.75
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1	22.75

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Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1	23.75
July Board Offsite - Overview of the Sustainable Investments 2030 Strategy	7/15/2024	7/15/2024	0.25	24.00
July Board Offsite - Climate-Aware Investing in Global Public Equities	7/15/2024	7/15/2024	2	26.00
July Board Offsite - Emerging and Diverse Managers in the CalPERS Investment Portfolio	7/15/2024	7/15/2024	2.5	28.50
July Board Offsite - Geopolitics and the Impact of Geopolitical Risks on Economies and Markets	7/15/2024	7/15/2024	2	30.50
July Board Offsite - Proxy Voting Overview	7/15/2024	7/15/2024	1.5	32.00
July Board Offsite - Behavioral Health Update	7/15/2024	7/15/2024	1.25	33.25
July Board Offsite - Health Care Workforce	7/16/2024	7/16/2024	1.75	35.00
July Board Offsite - Evolution of the Private Equity Industry	7/16/2024	7/16/2024	1.25	36.25
July Board Offsite - CalPERS CEM Pension Administration Benchmark Report - 2023	7/16/2024	7/16/2024	1	37.25
July Board Offsite - Fiduciary Duties & Sustainability Considerations	7/17/2024	7/1/2024	2	39.25

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	David Miller
Two-year Period to Acquire 24 Hours:	01/16/2024 - 01/15/2026
Position:	Member, Elected
Current Report As Of:	10/30/2024
Date Board Member/Designee Left Office:	

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Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risked World	1/16/2024	1/16/2024	1.00	0.00
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1.00	1.00
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.50	2.50
Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1.00	3.50
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1.00	4.50
Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1.00	5.50
July Board Offsite - Overview of the Sustainable Investments 2030 Strategy	7/15/2024	7/15/2024	0.25	5.75
July Board Offsite - Climate-Aware Investing in Global Public Equities	7/15/2024	7/15/2024	2.00	7.75
July Board Offsite - Emerging and Diverse Managers in the CalPERS Investment Portfolio	7/15/2024	7/15/2024	2.50	10.25
July Board Offsite - Geopolitics and the Impact of Geopolitical Risks on Economies and Markets	7/15/2024	7/15/2024	2.00	12.25
July Board Offsite - Proxy Voting Overview	7/15/2024	7/15/2024	1.50	13.75
July Board Offsite - Behavioral Health Update	7/16/2024	7/16/2024	1.25	15.00
July Board Offsite - Health Care Workforce	7/16/2024	7/16/2024	1.75	16.75

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July Board Offsite - Evolution of the Private Equity Industry	7/16/2024	7/16/2024	1.25	18.00
July Board Offsite - CalPERS CEM Pension Administration Benchmark Report - 2023	7/16/2024	7/16/2024	1.00	19.00
July Board Offsite - Fiduciary Duties & Sustainability Considerations	7/17/2024	7/17/2024	2.00	21.00

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Eraina Ortega
Two-year Period to Acquire 24 Hours:	3/7/2023 -3/6/2025
Position:	Ex Officio Member - CalHR
Current Report As Of:	10/30/2024
Date Board Member/Designee Left Office:	

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July Board Offsite Sustainability and Implications for Asset Owners	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
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risked World	1/16/2024	1/16/2024	1.00	8.50
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1.00	9.50
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.50	11.00
Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1.00	12.00
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1.00	13.00
Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1.00	14.00

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DEIA in the Workplace	3/6/2024	3/6/2024	2.00	16.00
Responsible AI For Public Professionals	5/30/2024	5/30/2024	2.50	18.50
July Board Offsite - Overview of the Sustainable Investments 2030 Strategy	7/15/2024	7/15/2024	0.25	18.75
July Board Offsite - Climate-Aware Investing in Global Public Equities	7/15/2024	7/15/2024	2.00	20.75
July Board Offsite - Emerging and Diverse Managers in the CalPERS Investment Portfolio	7/15/2024	7/15/2024	2.50	23.25
July Board Offsite - Geopolitics and the Impact of Geopolitical Risks on Economies and Markets	7/15/2024	7/15/2024	2.00	25.25
July Board Offsite - Proxy Voting Overview	7/15/2024	7/15/2024	1.50	26.75
July Board Offsite - Behavioral Health Update	7/16/2024	7/16/2024	1.25	28.00
July Board Offsite - Health Care Workforce	7/16/2024	7/16/2024	1.75	29.75
July Board Offsite - Evolution of the Private Equity Industry	7/16/2024	7/16/2024	1.25	31.00
July Board Offsite - CalPERS CEM Pension Administration Benchmark Report - 2023	7/16/2024	7/16/2024	1.00	32.00
July Board Offsite - Fiduciary Duties & Sustainability Considerations	7/17/2024	7/17/2024	2.00	34.00

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Nicole Griffith
Two-year Period to Acquire 24 Hours:	10/19/2022 - 10/18/2024
Position:	Board Designee
Current Report As Of:	10/30/2024
Date Board Member/Designee Left Office:	

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July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.50	8.00
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	9.00
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	10.50
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	12.50
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	13.50
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	14.50
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risk World	1/16/2024	1/16/2024	1.00	15.50
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1.00	16.50
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.50	18.00

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Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1.00	19.00
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1.00	20.00
Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1.00	21.00
July Board Offsite - Overview of the Sustainable Investments 2030 Strategy	7/15/2024	7/15/2024	0.25	21.25
July Board Offsite - Climate-Aware Investing in Global Public Equities	7/15/2024	7/15/2024	2.00	23.25
July Board Offsite - Emerging and Diverse Managers in the CalPERS Investment Portfolio	7/15/2024	7/15/2024	2.50	25.75
July Board Offsite - Geopolitics and the Impact of Geopolitical Risks on Economies and Markets	7/15/2024	7/15/2024	2.00	27.75
July Board Offsite - Proxy Voting Overview	7/15/2024	7/15/2024	1.50	29.25
July Board Offsite - Behavioral Health Update	7/15/2024	7/15/2024	1.25	30.50
July Board Offsite - Health Care Workforce	7/16/2024	7/16/2024	1.75	32.25
July Board Offsite - Evolution of the Private Equity Industry	7/16/2024	7/16/2024	1.25	33.50
July Board Offsite - CalPERS CEM Pension Administration Benchmark Report - 2023	7/16/2024	7/16/2024	1.00	34.50
July Board Offsite - Fiduciary Duties & Sustainability Considerations	7/17/2024	7/1/2024	2.00	36.50

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Jose Luis Pacheco
Two-year Period to Acquire 24 Hours:	01/16/2024 - 01/15/2026
Position:	Member, Elected
Current Report As Of:	10/30/2024
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
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risk World	1/16/2024	1/16/2024	1.00	1.00
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1.00	2.00
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.50	3.50
Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1.00	4.50
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1.00	5.50
Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1.00	6.50
National Conference on Public Employee Retirement Systems 2024 Legislative Conference	1/21-25/2024	1/21-25/2024	6.00	12.50
Governance as a Guidepost: The Council of Institutional Investors 2024 Spring Conferenc	3/4-6/24	3/4-6/24	11.50	24.00
Self-Funded Health Plans E-Course: International Foundation of Employee Benefit Plans - Virtual Course	3/16/2024	3/16/2024	9.50	33.50
NCPERS Accredited Fiduciary (NAF) Program - Module 1 and Module 2	5/17-19/24	5/17-19/24	7.25	40.75
The Trustee Leadership Forum for Retirement Security (TLF) Annual Covering 2024	6/23-26/24	6/23-26/24	20.50	61.25
July Board Offsite - Overview of the Sustainable Investments 2030 Strategy	7/15/2024	7/15/2024	0.25	61.50

CalPERS Board Member Education Program
Educational Activity Report

July Board Offsite - Climate-Aware Investing in Global Public Equities	7/15/2024	7/15/2024	2.00	63.50
July Board Offsite - Emerging and Diverse Managers in the CalPERS Investment Portfolio	7/15/2024	7/15/2024	2.50	66.00
July Board Offsite - Geopolitics and the Impact of Geopolitical Risks on Economies and Markets	7/15/2024	7/15/2024	2.00	68.00
July Board Offsite - Proxy Voting Overview	7/15/2024	7/15/2024	1.50	69.50
July Board Offsite - Behavioral Health Update	7/15/2024	7/15/2024	1.25	70.75
July Board Offsite - Health Care Workforce	7/16/2024	7/16/2024	1.75	72.50
July Board Offsite - Evolution of the Private Equity Industry	7/16/2024	7/16/2024	1.25	73.75
July Board Offsite - CalPERS CEM Pension Administration Benchmark Report - 2023	7/16/2024	7/16/2024	1.00	74.75
July Board Offsite - Fiduciary Duties & Sustainability Considerations	7/17/2024	7/1/2024	2.00	76.75
IFEBP - Certificate of Achievement in Public Plan Policy (CAPP) Pensions Part One	7/29-8/1/24	7/29-8/1/24	15.00	91.75

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Kevin Palkki
Two-year Period to Acquire 24 Hours:	01/16/2023 - 01/15/2025
Position:	Member, Elected
Current Report As Of:	10/30/2024
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	4.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	6.50
2023 Milken Institute Global Conference - Sessions outlined in Board Travel Report	5/1-3/2023	5/1-3/2023	5.00	11.50
IFEBP Washing Legislative Update - Session outlined in Board Travel Report	5/21-23/2023	5/21-23/2023	13.50	25.00
July Board Offsite Sustainability and Implications for As	7/17/2023	7/17/2023	1.50	26.50
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	27.50
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	29.00
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	31.00
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	32.00
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	33.00
Council of Institutional Investors Fall Conference - Sessions outlined in Board Travel Report	9/10-13/2023	9/10-13/2023	11.00	44.00
NACD CERT Certificate in Cyber-Risk Oversight Program	9/15-10/15/2024	9/15-10/15/2024	20.00	64.00

CalPERS Board Member Education Program Educational Activity Report

ICPM - Rotman Pension Governance Education Program - Sessions outline in Board Travel Report	9/24-28/2023	9/24-28/2023	18.75	82.75
NCPERS Fall Conference	10/22-25/2023	10/22-25/2023	12.00	94.75
CII: Corporate Governance Bootcamp	11/6-9/2023	11/6-9/2023	14.00	108.75
Diligent Institute AI Ethics and Board Oversight	11/20-30/2023	11/20-30/2023	18.00	126.75
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risk World	1/16/2024	1/16/2024	1.00	127.75
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1.00	128.75
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.50	130.25
Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1.00	131.25
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1.00	132.25
Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1.00	133.25
IFEBP Intro to Public Sector Benefits Administration Certificate Program	3/3-5/2024	3/3-5/2024	13.00	146.25
PPI Winter Round Table	3/5-8/2024	3/5-8/2024	7.00	153.25
NCPERS NAF modules 1&2	5/17-19/24	5/17-19/24	13.50	166.75
PPI summer roundtable	7/8-13/24	7/8-13/24	9.00	175.75
July Board Offsite - Overview of the Sustainable Investments 2030 Strategy	7/15/2024	7/15/2024	0.25	176.00
July Board Offsite - Climate-Aware Investing in Global Public Equities	7/15/2024	7/15/2024	2.00	178.00
July Board Offsite - Emerging and Diverse Managers in the CalPERS Investment Portfolio	7/15/2024	7/15/2024	2.50	180.50
July Board Offsite - Geopolitics and the Impact of Geopolitical Risks on Economies and Markets	7/15/2024	7/15/2024	2.00	182.50
July Board Offsite - Proxy Voting Overview	7/15/2024	7/15/2024	1.50	184.00
July Board Offsite - Behavioral Health Update	7/16/2024	7/16/2024	1.25	185.25
July Board Offsite - Health Care Workforce	7/16/2024	7/16/2024	1.75	187.00
July Board Offsite - Evolution of the Private Equity Industry	7/16/2024	7/16/2024	1.25	188.25
July Board Offsite - CalPERS CEM Pension Administration Benchmark Report - 2023	7/16/2024	7/16/2024	1.00	189.25
July Board Offsite - Fiduciary Duties & Sustainability Considerations	7/17/2024	7/17/2024	2.00	191.25
NCPERS Public Pension Forum	8/17-20/24	8/17-20/24	6.00	197.25
PRI in Person	10/07-11/24	10/07-11/24	6.00	203.25

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Ramon Rubalcava
Two-year Period to Acquire 24 Hours:	01/21/2023 - 01/20/2025
Position:	Member, Appointed
Current Report As Of:	10/30/2024
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
July Board Offsite Sustainability and Implications for Asset Owners	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 Innovation	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
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risk World	1/16/2024	1/16/2024	1.00	8.50
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1.00	9.50
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.50	11.00
Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1.00	12.00
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1.00	13.00
Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1.00	14.00

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Theresa Taylor
Two-year Period to Acquire 24 Hours:	12/30/2022-12/29/2024
Position:	Member (Elected)
Current Report As Of:	10/30/2024
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
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	4.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	6.50
Harvard TLF Annual Convening	6/12-14/2023	6/12-14/2023	7.50	14.00
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.50	15.50
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	16.50
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	18.00
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	20.00
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	21.00
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	22.00
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risk World	1/16/2024	1/16/2024	1.00	23.00
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1.00	24.00
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.50	25.50

CalPERS Board Member Education Program
Educational Activity Report

Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1.00	26.50
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1.00	27.50
Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1.00	28.50
ICGN 2024 Washington, DC Conference Hosted by IFC	3/5-8/2024	3/5-8/2024	4.00	32.50
July Board Offsite - Overview of the Sustainable Investments 2030 Strategy	7/15/2024	7/15/2024	0.25	32.75
July Board Offsite - Climate-Aware Investing in Global Public Equities	7/15/2024	7/15/2024	2.00	34.75
July Board Offsite - Emerging and Diverse Managers in the CalPERS Investment Portfolio	7/15/2024	7/15/2024	2.50	37.25
July Board Offsite - Geopolitics and the Impact of Geopolitical Risks on Economies and Markets	7/15/2024	7/15/2024	2.00	39.25
July Board Offsite - Proxy Voting Overview	7/15/2024	7/15/2024	1.50	40.75
July Board Offsite - Behavioral Health Update	7/15/2024	7/15/2024	1.25	42.00
				42.00
				42.00

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Yvonne Walker
Two-year Period to Acquire 24 Hours:	12/28/2022 - 12/27/2024
Position:	Member, Retiree, Elected
Current Report As Of:	10/30/2024
Date Board Member/Designee Left Office:	

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Educational Activity/Session	Date Offered	Date Attended or Viewed	Hours	Cumulative Hours
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	4.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	6.50
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.00	7.50
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	8.50
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	10.00
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	12.00
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	13.00
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	14.00
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risk World	1/16/2024	1/16/2024	1.00	15.00
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1.00	16.00
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.50	17.50

CalPERS Board Member Education Program
Educational Activity Report

Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1.00	18.50
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1.00	19.50
Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1.00	20.50
July Board Offsite - Overview of the Sustainable Investments 2030 Strategy	7/15/2024	7/15/2024	0.25	20.75
July Board Offsite - Climate-Aware Investing in Global Public Equities	7/15/2024	7/15/2024	2.00	22.75
July Board Offsite - Emerging and Diverse Managers in the CalPERS Investment Portfolio	7/15/2024	7/15/2024	2.50	25.25
July Board Offsite - Geopolitics and the Impact of Geopolitical Risks on Economies and Markets	7/15/2024	7/15/2024	2.00	27.25
July Board Offsite - Proxy Voting Overview	7/15/2024	7/15/2024	1.50	28.75
July Board Offsite - Behavioral Health Update	7/16/2024	7/16/2024	1.25	30.00
July Board Offsite - Health Care Workforce	7/16/2024	7/16/2024	1.75	31.75
July Board Offsite - Evolution of the Private Equity Industry	7/16/2024	7/16/2024	1.25	33.00
July Board Offsite - CalPERS CEM Pension Administration Benchmark Report - 2023	7/16/2024	7/16/2024	1.00	34.00
July Board Offsite - Fiduciary Duties & Sustainability Considerations	7/17/2024	7/17/2024	2.00	36.00

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Mullissa Willette
Two-year Period to Acquire 24 Hours:	05/27/2022 - 05/26/2024
Position:	Member, Elected
Current Report As Of:	10/30/2024
Date Board Member/Designee Left Office:	

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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	0.00
Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.50	1.50
Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	2.50
Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	3.50
Behavioral Health Update	7/12/2022	7/12/2022	1.00	4.50
Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	6.50
TLF for Retirement Security - Annual Convening 2022: Public Markets and Disclosure	7/18/2022	7/18/2022	1.00	7.50
TLF for Retirement Security - Annual Convening 2022: Private Markets and Responsible Contracting	7/18/2022	7/18/2022	1.00	8.50
TLF for Retirement Security - Annual Convening 2022: Trustee Development	7/18/2022	7/18/2022	1.50	10.00
TLF for Retirement Security - Annual Convening 2022: Elevating Racial Justice as an Investment Issue	7/19/2022	7/19/2022	1.50	11.50
TLF for Retirement Security - Annual Convening 2022: Current Labor Issues Round Robin	7/19/2022	7/19/2022	1.00	12.50
TLF for Retirement Security - Annual Convening 2022: Asset Manager Accountability	7/19/2022	7/19/2022	1.50	14.00
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model (PDF)	1/17/2023	1/17/2023	4.50	18.50
Board Educational Day - Annual Board Fiduciary Training	1/17/2023	1/17/2023	2.00	20.50

CalPERS Board Member Education Program
Educational Activity Report

NCPERS Legislative Conference - Sessions Outlined in Board Travel Report	1/21/2023	1/25/2023	8.00	28.50
IEFBP Portfolio Concepts and Management Course - Courses Outlined in Board Travel Report	4/30/2023	5/4/2023	23.75	52.25
International Corporate Governance Network, Governance Sustainability and Stewardship (Virtual Training) -	6/1/2023	6/8/2023	7.50	59.75
The Trustee Leadership Forum for Retirement Security Annual Convening - Sessions outlined in Board Travel Report	6/11/2023	6/14/2023	10.00	69.75
ICPM Board Education on Sustainable Investing - Courses outlined in Board Travel Report	7/13/2023	7/14/2023	12.50	82.25
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.50	83.75
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	1.00	84.75
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.50	86.25
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	2.00	88.25
July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	89.25
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	90.25
International Centre for Pension Management-Rotman Pension Governance Ed Program	9/25-28/2023	9/25-28/2023	17.50	107.75
NCPERS Accredited Fiduciary (NAF) Program	10/20-22/2023	10/20-22/2023	11.25	119.00
Trustee Leadership Forum for Retirement Security Peer Mentoring Project	10/25-27/2023	10/25-27/2023	4.00	123.00
Council of Institutional Investments NYU Corporate Governance Bootcamp	11/6-8/2023	11/6-8/2023	11.25	134.25
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risked World	1/16/2024	1/16/2024	1	135.25
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/16/2024	1/16/2024	1	136.25
Board Educational Day - Diversity, Equity, and Inclusion Activities and Accomplishments Review	1/16/2024	1/16/2024	1.5	137.75
Board Educational Day - A Conversation About the Office of Health Care Affordability	1/16/2024	1/16/2024	1	138.75
Board Educational Day -Annual Board Fiduciary Training	1/16/2024	1/16/2024	1	139.75
Board Educational Day - Cybersecurity Threat Landscape and Considerations for Board Members	1/16/2024	1/16/2024	1	140.75
28th Annual Diversity, Equity & Inclusion	3/4-7/2024	3/4-7/2024	8.00	148.75

CalPERS Board Member Education Program Educational Activity Report

Board Member/Designee Name:	Dr. Gail Willis
Two-year Period to Acquire 24 Hours:	06/06/2022 - 06/08/2024
Position:	Ex Officio Member - State Personnel
Current Report As Of:	10/30/2024
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
July Board Offsite: Geopolitical Risk and Financial Markets	7/11/2022	7/11/2022	1.00	1.00
July Board Offsite: Spotlight on Private Debt Opportunities	7/11/2022	7/11/2022	1.50	2.50
July Board Offsite: Shaping Our Strategy on Human Capital	7/11/2022	7/11/2022	1.00	3.50
July Board Offsite: Sustainable Investing: Developing an Impact Toolkit for Private Markets	7/11/2022	7/11/2022	1.00	4.50
July Board Offsite: Behavioral Health Update	7/12/2022	7/12/2022	1.00	5.50
July Board Offsite: Racial Impacts of Financial Markets Operations	7/13/2022	7/13/2022	2.00	7.50
Board Educational Day – Medicare Accountable Care Policy & Addressing Perspectives about the ACO REACH Model	1/16/2023	10/26/2024	4.50	12.00
Board Educational Day - Annual Board Fiduciary Training	1/16/2023	10/27/2024	2.00	14.00
July Board Offsite Sustainability and Implications for Asset Owners	7/17/2023	7/17/2023	1.50	15.50
July Board Offsite CalPERS' Sustainable Investments 2030 Strategy	7/17/2023	7/17/2023	2.00	17.50
July Board Offsite Diversity, Equity & Inclusion Innovations in the Investment Industry	7/17/2023	7/17/2023	1.00	18.50
July Board Offsite Overview of the Asset Liability Management Mid-Cycle and Strategic Asset Allocation Review	7/17/2023	7/17/2023	1.00	19.50

CalPERS Board Member Education Program
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July Board Offsite Improving Health Outcomes and Equity: A Population Health Approach	7/18/2023	7/18/2023	1.00	20.50
July Board Offsite Spotlight on CalPERS Health Data Strategy & Research	7/18/2023	7/18/2023	1.00	21.50
Board Educational Day - Navigating the Climate Transition: Finding Investment Success in a Climate-Risked World	1/15/2024	10/27/2024	1.00	22.50
Board Educational Day - Washington D.C. Insight-Policy and Politics	1/15/2024	10/27/2024	1.00	23.50
Board Educational Day - A Conversation About the Office of Health Care Affordability	1/15/2024	10/27/2024	1.00	24.50