

CalPERS Board of Administration Travel Report

Instructions: Please fill out the below template and return to BSU team. This report will be entered into the monthly Board travel agenda item:

Jose Luis Pacheco

Board Member Name

July 17, 2022 through July 21, 2022

Date(s) of Travel

Trustee Leadership Forum for Retirement Security (TLF) Annual Convening 2022

Name of Conference (if applicable)

Cambridge, MA

Location(s) Traveled To

Purpose of Travel:

The Trustee Leadership Forum for Retirement Security (TLF) is an applied research collaboration with labor-affiliated trustees of public and Taft-Hartley pension funds, with implications for stakeholders across investment markets. The TLF draws on the experiences of these trustees to identify core issues they face in developing strategies for long-term sustainable wealth creation.

Instructions: If travel includes attendance at an educational program, complete the next section and attach a copy of the program's agenda to this travel report.

Name of Educational Event:

Trustee Leadership Forum for Retirement Security (TLF) Annual Convening 2022 at the Harvard Kennedy School

Sessions Attended (include brief synopsis of information provided at each session and amount of time spent at each session). Use page 2 if needed.

Welcome & Framing, by David Wood, Director IRI, & Panel A: Public Markets and Disclosure by Natalia Renta, Americans for Financial Reform & Cambria Allen-Ratzlaff, Just Capital

2.0

Hours

Panel B: Private Markets and Responsible Contracting by Dan Pedrotty, North American Building Trades Unions (NABTU) & Jennifer O'Dell, LIUNA

1.0

Hours

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Sessions Attended (include brief synopsis of information provided at each session and amount of time spent at each session).

Session 2: Trustee and Member Voices & Discussion	2.0
Case Studies: Trustee development and recruitment	Hours
Case Study: Responding to stakeholders	
Dinner - Speaker - by Christine Shaw, Principal Investment Officer for Corporate Governance & Sustainable Investment for the Connecticut State Treasurer's Office	3.0
	Hours
Opening Discussion Day 2	0.5
By David Wood, Director, Initiative for Responsible Investent	Hours
Session 3: Elevating Racial Justice as an Investment Issue	1.5
Renaye Manley, Deputy Director, Strategic Initiative Department, SEIU	Hours

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Sessions Attended (include brief synopsis of information provided at each session and amount of time spent at each session).

Current Labor Issues Round Robin _____ **1.0** _____
by Sharon Block, Executive Director, Labor and Worklife _____
Program, HLS _____
Hours

Session 4: Asset Manager Accountability: Jim Kane, Sr. _____ **1.5** _____
Pension Specialist, NEA; Tamara Herman, Mgr/Capital _____
Strategies; CWC & SHARE; & Shalini Ramgoolam, CWC _____
Hours

Final Discussion _____ **0.5** _____

Hours

Workshop on Draft Framework for Elevating Racial Equity in _____ **4.0** _____
Bond Markets and Fixed Income by David Woods, Director, IRI _____
& Lourdes German, Executive Director, Public Finance Initiative _____
Hours