

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

June 23, 2024 - June 26, 2024

Date(s) of Travel

The Trustee Leadership Forum for Retirement Security (TLF) Annual Covering 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 trustees with latest best practices and trends as they grapple with the challenges of overseeing their public sector pension funds on responsible investment in the best interests of their beneficiaries.

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:

The Trustee Leadership Forum for Retirement Security (TLF) Annual Covering 2024

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

Day 1 - Welcome & Framing

1.0

Hours

Day 1:

Session 1: Private Equity Labor Principles

1.5

Hours

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

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 & Economics, Deputy Dean, Harvard Law School _____
Hours

Day 2 _____ **0.5**
Opening Discussion _____
Hours

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

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 _____
Hours

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

Day 2: _____ **0.5**
Current Labor Issues for Investors - Round Robin _____
Hours

Day 2: _____ **0.75**
Session 6: Highlights from Shareholder Season _____
Hours

Day 2: _____ **0.75**
Session 7: _____
Bargaining for the Common Good _____
Hours

Day 2: _____ **0.75**
Session 8: Asset Manager Accountability - Preparing for a _____
Meeting with an Asset Manager _____
Hours

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

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 AI _____ **2.25**
Hours _____

Day 3: Workshop Continues _____ **1.25**
Hours _____





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AT HARVARD LAW SCHOOL



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



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- 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



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**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



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- 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**



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AT HARVARD LAW SCHOOL



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 AI**
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