

**BOARD MEMBER EDUCATION
COMPLIANCE PURSUANT TO
GOVERNMENT CODE SECTION 31522.8**

Reporting Period – January 1, 2023 – December 31, 2023

Government Code Section 31522.8, effective January 1, 2013, requires Trustees to receive at least 24 hours of Board member education during the first two years after becoming a trustee, and during each subsequent two-year period. SBCERA Board Education and Training Policy No. 001 – Trustees Education and Training Policy identifies the appropriate topics for Board member education.

Overall compliance to date:

Name	Joined the Board	2-year deadline	Compliance
BOARD MEMBERS			
Jean-Rene Basle	March 24, 2020	March 24, 2024	Compliant
Marc Bracco	January 4, 2019	January 4, 2023	Compliant
Louis Fiorino	January 6, 2011	January 6, 2023	Compliant
Harry Hatch	January 9, 2020	January 9, 2024	Compliant
John Johnson	May 3, 2018	May 3, 2024	Compliant
Michael Kennedy	January 4, 2019	January 4, 2023	Compliant
Ensen Mason	January 7, 2019	January 7, 2025	Compliant
Jared Newcomer	January 7, 2016	January 7, 2024	Compliant
Janice Rutherford	March 1, 2011	March 1, 2023	Compliant
Dawn Stafford	January 6, 2011	January 6, 2023	Compliant
Neal Waner	January 6, 2011	January 6, 2023	Compliant

The tables below reflect training during the period from January 1, 2023 to December 31, 2023 only. Education detail for prior years can be found at [Transparency & Reporting - SBCERA](#).

JEAN-RENE BASLE	HOURS
NEPC – Public Funds Workshop (January 31-February 1, 2023)	11 hours 15 minutes
Mid-Year – Board Offsite (April 14, 2023)	5 hours
SBCERA – Investment Forum (September 13-15, 2023)	9 hours 15 minutes
<i>TOTAL HOURS COMPLETED</i>	25 hrs. 30 mins.

MARC BRACCO	HOURS
Mid-Year – Board Offsite (April 14, 2023)	5 hours
NEPC & Manulife – Due Diligence (May 16, 2023)	3 hours
SACRS – Fall Conference (November 7-10, 2023)	11 hours 30 minutes

SBCERA – Disability Retirement Administration (November 14, 2023)	1 hour 30 minutes
TOTAL HOURS COMPLETED	21 hrs.

LOUIS FIORINO	HOURS
CALAPRS – General Assembly (March 4-7, 2023)	10 hours
Ares – Due Diligence (March 23, 2023)	2 hours
Kayne Anderson – Due Diligence (March 23, 2023)	2 hours
Mid-Year – Board Offsite (April 14, 2023)	5 hours
Pension Bridge – Annual Conference (April 17-19, 2023)	14 hours 45 minutes
Institutional Investors – Public Funds Roundtable (April 24-26, 2023)	15 hours
SACRS – Spring Conference (May 9-12, 2023)	13 hours 15 minutes
NEPC & Manulife – Due Diligence (May 16, 2023)	3 hours
NCPERS – Accredited Fiduciary Program (NAF) (May 20-21, 2023)	14 hours 45 minutes
NCPERS – Annual Conference & Exhibition (May 21-24, 2023)	13 hours 45 minutes
IFEBP – Alternative Investment Strategies (July 18-20, 2023)	19 hours 30 minutes
Pension Bridge – Private Equity Exclusive (July 24-26, 2023)	13 hours 40 minutes
SBCERA – Investment Forum (September 13-15, 2023)	9 hours 15 minutes
CNBC – Delivering Alpha (September 28, 2023)	4 hours 50 minutes
IFEBP – Trustees Masters Program (September 30- October 1, 2023)	14 hours
IFEBP – 69 th Annual Conference (October 1-4, 2023)	11 hours
NCPERS – Accredited Fiduciary Program NAFS (October 21-22, 2023)	12 hours
NCPERS – Fall Conference (October 22-25, 2023)	14 hours
SACRS – Fall Conference (November 7-10, 2023)	12 hours 30 minutes
State Street Global Advisors – Due Diligence (November 20, 2023)	1 hour 30 minutes
TOTAL HOURS COMPLETED	205 hrs. 45 mins.

HARRY HATCH	HOURS
Mid-Year – Board Offsite (April 14, 2023)	5 hours
SACRS – Spring Conference (May 9-12, 2023)	13 hours 15 minutes
Sexual Harassment Prevention Training for Local Agency Officials (AB1661) (May 9, 2023)	2 hours
SBCERA – Disability Retirement Administration (November 14, 2023)	1 hour 30 minutes
<i>TOTAL HOURS COMPLETED</i>	21 hrs. 45 mins.

JOHN JOHNSON	HOURS
SBCERA – Investment Forum (September 13-15, 2023)	9 hours 15 minutes
SACRS – Fall Conference (November 7-10, 2023)	12 hours 30 minutes
<i>TOTAL HOURS COMPLETED</i>	21 hrs. 45 mins.

MICHAEL KENNEDY	HOURS
Mid-Year – Board Offsite (April 14, 2023)	5 hours
SBCERA – Investment Forum (September 13-15, 2023)	9 hours 15 minutes
Cal Chambers – Harassment Prevention (December 24, 2023)	2 hours
<i>TOTAL HOURS COMPLETED</i>	16 hrs. 15 mins.

ENSEN MASON	HOURS
Mid-Year – Board Offsite (April 14, 2023)	5 hours
SACRS – Spring Conference (May 9-12, 2023)	13 hours 15 minutes
Harassment Prevention Training for Local Agency Officials (AB1661) (June 20, 2023)	2 hours
SBCERA – Investment Forum (September 13-15, 2023)	9 hours 15 minutes
SACRS – Fall Conference (November 7-10, 2023)	12 hours 30 minutes

<i>TOTAL HOURS COMPLETED</i>	42 hrs.
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JARED NEWCOMER	HOURS
Mid-Year – Board Offsite (April 14, 2023)	5 hours
Institutional Investors – Public Funds Roundtable (April 24-26, 2023)	15 hours
SACRS – Spring Conference (May 9-12, 2023)	11 hours 30 minutes
NCPERS – Trustee Educational Seminar (TEDS) (May 20-21, 2023)	3 hours
Institutional Investors – Redefining Fixed Income (May 23-24, 2023)	8 hours 50 minutes
Institutional Investors – Private Credit Forum (May 24, 2023)	4 hours 30 minutes
SBCERA – Investment Forum (September 13-15, 2023)	9 hours 15 minutes
IFEBP – Certificate Series: Investment Basics (September 20-21, 2023)	14 hours
SACRS – Fall Conference (November 7-10, 2023)	11 hours 30 minutes
SBCERA – Disability Retirement Administration (November 14, 2023)	1 hour 30 minutes
<i>TOTAL HOURS COMPLETED</i>	84 hrs. 5 mins

ERIC RALEY	HOURS
SBCERA New Trustee Orientation (July 11, 2023)	2 hours
Public Service Ethics Education (July 18, 2023)	2 hours 10 minutes
CALAPRS – Principles for Trustees at Pepperdine (August 28-31, 2023)	19 hours 45 minutes
SBCERA – Investment Forum (September 13-15, 2023)	9 hours 15 minutes
Pensions & Investments – Public Funds Navigating a New World (September 19 -20, 2023)	10 hours 10 minutes
San Bernardino County – State of the County Event (September 27, 2023)	2 hours 30 minutes
CALAPRS – Trustees’ Roundtable (October 27, 2023)	4 hours
SACRS – Fall Conference (November 7-10, 2023)	12 hours 30 minutes

<i>TOTAL HOURS COMPLETED</i>	62 hrs. 20 mins.
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DAWN ROWE	HOURS
SBCERA New Trustee Orientation (January 31, 2023)	2 hours
Ethics Training (March 16, 2023)	2 hours
Mid-Year – Board Offsite (April 14, 2023)	5 hours
SACRS – Spring Conference (May 9-12, 2023)	13 hours 15 minutes
SACRS – UC Berkeley Modern Investment Theory & Practice (July 16-19, 2023)	27 hours
SBCERA – Investment Forum (September 13-15, 2023)	9 hours 15 minutes
SACRS – Fall Conference (November 7-10, 2023)	11 hours 30 minutes
<i>TOTAL HOURS COMPLETED</i>	70 hrs.

DAWN STAFFORD	HOURS
CALAPRS – General Assembly (March 4-7, 2023)	10 hours
Mid-Year – Board Offsite (April 14, 2023)	5 hours
SBCERA – Investment Forum (September 13-15, 2023)	9 hours 15 minutes
SACRS – Fall Conference (November 7-10, 2023)	12 hours 30 minutes
<i>TOTAL HOURS COMPLETED</i>	36 hrs. 45 mins.

NEAL WANER	HOURS
Mid-Year – Board Offsite (April 14, 2023)	5 hours
SACRS – Spring Conference (May 9-12, 2023)	13 hours 15 minutes
SBCERA – Investment Forum (September 13-15, 2023)	7 hours
SACRS – Fall Conference (November 7-10, 2023)	12 hours 30 minutes

<i>TOTAL HOURS COMPLETED</i>	37 hrs. 45 mins
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