



San Bernardino County Employees'  
Retirement Association

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

**Reporting Period – January 1, 2021 – December 31, 2021**

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
<b>BOARD MEMBERS</b>			
Jean-Rene Basle	March 24, 2020	March 24, 2022	Compliant
Marc Bracco	January 4, 2019	January 4, 2021	Compliant
Louis Fiorino	January 6, 2011	January 6, 2021	Compliant
Harry Hatch	January 9, 2020	January 9, 2022	Compliant
John Johnson	May 3, 2018	May 3, 2022	Compliant
Michael Kennedy	January 4, 2019	January 4, 2021	Compliant
Ensen Mason	January 7, 2019	January 7, 2021	Compliant
Jared Newcomer	January 7, 2016	January 7, 2022	Compliant
Janice Rutherford	March 1, 2011	March 1, 2021	Compliant
Dawn Stafford	January 6, 2011	January 6, 2021	Compliant
Neal Waner	January 6, 2011	January 6, 2021	Compliant
Vere Williams	January 8, 2015	January 8, 2021	Compliant
<b>PRIOR BOARD MEMBERS NO LONGER ACTIVE ON BOARD</b>			

The tables below reflect training during the period from January 1, 2021 to December 31, 2021 only. Education detail for prior years can be found at [Transparency & Reporting - SBCERA](#).

<b>JEAN-RENE BASLE</b>	<b>HOURS</b>
Pension Bridge – Alternatives Conference (January 26-28, 2021)	13 hours 15 minutes
Pension Bridge – Private Equity Exclusive (July 27-29, 2021)	15 hours 55 minutes
2021 Due Diligence – Pinnacle (September 30, 2021)	2 hours

Nossaman – Fiduciaries’ Forum (December 6-7, 2021)	6 hours
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>37 hours 10 mins</b>

<b>MARC BRACCO</b>	<b>HOURS</b>
NEPC – Public Funds Workshop (February 3, 2021)	3 hours 30 minutes
CALAPRS – Virtual Trustees’ Roundtable (May 10, 2021)	5 hours
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>8 hours 30 mins</b>

<b>LOUIS FIORINO</b>	<b>HOURS</b>
Pension Bridge – Alternatives Conference (January 26-28, 2021)	13 hours 15 minutes
Institutional Investors – Public Funds Roundtable (February 11 &18, 2021)	4 hours 30 minutes
2021 Virtual Due Diligence – Birch Grove (February 17, 2021)	2 hours
Pension Bridge – ESG Conference (February 23-25, 2021)	11 hours 50 minutes
2021 Virtual Due Diligence – Apollo (March 2, 2021)	2 hours
CALAPRS – Virtual General Assembly (March 8-9, 2021)	8 hours 35 minutes
2021 Virtual Due Diligence – MacKay Shields (March 10, 2021)	2 hours
RERCSC – Fourth Quarter Virtual Meeting (March 10, 2021)	1 hour 15 minutes
2021 Virtual Due Diligence – Crestline (April 7, 2021)	2 hours
IFEBP – Rethinking Pension Obligation Bonds (April 13, 2021)	1 hour 30 minutes
IFEBP – The Short and Long Term Impacts on Health Care Costs (April 14, 2021)	1 hour
IFEBP – COVID-19 Vaccines and Your Workforce – Follow Up (April 15, 2021)	1 hour 30 minutes
NEPC – 2021 Investment Conference (May 4-5, 2021)	6 hours 25 minutes
SACRS – Spring Conference (May 11-14, 2021)	12 hours
2021 Virtual Due Diligence – Bardin Hill (May 17, 2021)	2 hours

2021 Virtual Due Diligence – Kayne Anderson (May 19, 2021)	2 hours
2021 Virtual Due Diligence – Marathon (June 30, 2021)	2 hours
2021 Virtual Due Diligence – ZAIS (July 14, 2021)	2 hours
Private Equity Exclusive – Pension Bridge (July 27-29, 2021)	15 hours 55 minutes
2021 Virtual Due Diligence – Gramercy (September 22, 2021)	2 hours
CNBC Delivering Alpha Virtual Conference (September 29, 2021)	6 hours
2021 Virtual Due Diligence – Pinnacle (September 30, 2021)	2 hours
Value Edge – Public Funds Forum (October 26-28, 2021)	12 hours
CALAPRS – Trustees’ Roundtable (October 29, 2021)	5 hours
Invesco – Real Estate Global Client Conference (November 2-4, 2021)	17 hours
SACRS – Fall Conference (November 9-12, 2021)	14 hours
SACRS – Sexual Harassment Prevention Training for Local Agency Officials (AB1661) (November 9, 2021)	2 hours
Pension & Investments – Fixed Income and Credit (November 16, 2021)	10 hours 15 minutes
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>164 hours 5 mins</b>

<b>HARRY HATCH</b>	<b>HOURS</b>
SACRS – Spring Conference (May 11-14, 2021)	11 hours
SACRS – Ethics Training for Trustees and Staff (May 11, 2021)	2 hours
SACRS – Sexual Harassment Prevention Training for Local Agency Officials (AB1661) (May 11, 2021)	2 hours
SACRS – Fall Conference (November 9-12, 2021)	14 hours
SACRS – Business Meeting (November 12, 2021)	1 hour
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>30 hours</b>

<b>JOHN JOHNSON</b>	<b>HOURS</b>
CALAPRS – Advanced Principles of Pension Governance for Trustees (June 7, 9, & 11, 2021)	7 hours 30 minutes
SACRS – Fall Conference (November 9-12, 2021)	14 hours
SACRS – Sexual Harassment Prevention Training for Local Agency Officials (AB1661) (November 9, 2021)	2 hours
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>23 hours 30 min</b>

<b>MICHAEL KENNEDY</b>	<b>HOURS</b>
SACRS – Fall Conference (November 9-12, 2021)	14 hours
SACRS – Sexual Harassment Prevention Training for Local Agency Officials (AB1661)	2 hours
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>16 hours</b>

<b>ENSEN MASON</b>	<b>HOURS</b>
FPPC AB1234 Ethics Training (January 12, 2021)	2 hours
2021 Virtual Due Diligence – PGIM EM (January 25, 2021)	2 hours
2021 Virtual Due Diligence – Apollo (March 2, 2021)	2 hours
Institutional Investors – West Coast Private Equity Summit (April 27-28, 2021)	4 hours
SACRS – Spring Conference (May 11-14, 2021)	12 hours
SACRS – Sexual Harassment Prevention Training for Local Agency Officials (AB1661) (May 11, 2021)	2 hours
Pension Bridge – Private Equity Exclusive (July 27-29, 2021)	15 hours 55 minutes
Institutional Investors – CNBC Delivering Alpha Virtual Conference (September 29, 2021)	6 hours
SACRS – Fall Conference (November 9-12, 2021)	14 hours
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>59 hours 55 mins</b>

<b>JARED NEWCOMER</b>	<b>HOURS</b>
SACRS – Spring Conference (May 11-14, 2021)	12 hours
SACRS – Ethics Training for Trustees and Staff (May 11, 2021)	2 hours
SACRS – Sexual Harassment Prevention Training for Local Agency Officials (AB1661) (May 11, 2021)	2 hours
Pension Bridge – Public Funds Forum (October 26-28, 2021)	12 hours
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>28 hours</b>

<b>JANICE RUTHERFORD</b>	<b>HOURS</b>
Kayne Anderson - 2021 Annual Investor Conference (October 27-28, 2021)	8 hours
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>8 hours</b>

<b>DAWN STAFFORD</b>	<b>HOURS</b>
Pension Bridge – Alternatives Conference (January 26-28, 2021)	13 hours 15 minutes
CALAPRS – Virtual General Assembly (March 8-9, 2021)	8 hours 35 minutes
SACRS – Spring Conference (May 11-14, 2021)	12 hours
SACRS – Sexual Harassment Prevention Training for Local Agency Officials (AB1661) (May 11, 2021)	2 hours
SACRS – Ethics Training for Trustees and Staff (November 9, 2021)	2 hours
SACRS – Fall Conference (November 9-12, 2021)	14 hours
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>51 hours 50 mins</b>

<b>NEAL WANER</b>	<b>HOURS</b>
NEPC – Public Funds Workshop (February 3, 2021)	3 hours 30 minutes
2021 Virtual Due Diligence – Partners Group (November 15, 2021)	2 hours
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>5 hours 30 mins</b>

<b>VERE WILLIAMS</b>	<b>HOURS</b>
Pension Bridge – Alternatives Conference (January 26-28, 2021)	13 hours and 15 minutes
CALAPRS – Virtual General Assembly (March 8-9, 2021)	8 hours and 35 minutes
SACRS – Spring Conference (May 11-14, 2021)	12 hours
SACRS – Ethics Training for Trustees and Staff (May 11, 2021)	2 hours
SACRS – Sexual Harassment Prevention Training for Local Agency Official (AB1661)	2 hours
CALAPRS – Advanced Principles of Pension Governance for Trustees (June 7, 9, & 11, 2021)	7 hours 30 minutes
Pension Bridge – Private Equity Exclusive (July 27-29, 2021)	15 hours 55 minutes
SACRS – Board of Directors Meeting (August 30, 2021)	6 hours
2021 Virtual Due Diligence – Gramercy (September 22, 2021)	2 hours
2021 Virtual Due Diligence – Pinnacle (September 30, 2021)	2 hours
Pension Bridge - Public Funds Forum (October 26-28, 2021)	12 hours
SACRS – Fall Conference (November 9-12, 2021)	14 hours
Nossaman – Fiduciaries’ Forum (December 6-7, 2021)	6 hours
RERCSC – Third Quarter Meeting (December 8, 2021)	1 hour 15 minutes
<i>TOTAL EDUCATION HOURS COMPLETED IN 2021</i>	<b>105 hours 30 mins</b>