
Date: July 15, 2026
To: Board of Retirement
From: Judy Zeller, Retirement Analyst
Subject: Quarterly Trustee Education and Training Report

Government Code Section 31522.8 requires trustees to receive education in general pension related topic areas. MCERA's [Trustee Education and Travel Policy](#) ensures that board members receive education, and the reporting of that education is compliant with the statute. Some highlights of the policy include:

- ◇ Trustees must complete a minimum of 24 hours of education within the first two years of office and for every subsequent two-year period in which the trustee continues to hold office. Ethics and Harassment Prevention training are required every two years.
- ◇ Trustees must agree to develop and maintain an adequate level of knowledge and understanding of relevant issues involved in the administration of MCERA throughout their terms.
- ◇ The policy provides guidance with respect to preferred conference attendance.
- ◇ The policy and annual report of trustee compliance shall be placed on MCERA's internet website.
- ◇ The Board must allocate sufficient funds annually in MCERA's budget to enable trustees to attend specified conferences.

Education and training attendance is not reported to MCERA. To receive credit trustees must report their own education hours to MCERA. This can be accomplished by using the online [Trustee Education Reporting Tool](#) or by submitting the attached Report of Trustee Education and Training form.

Credit can be received for participating in any of the educational opportunities listed in this report. Events sponsored by MCERA consultants and investment managers will be forwarded by email to trustees when they are received by MCERA. Please check your MCERA email in box frequently for these announcements.

If you would like to receive credit for any other education received but are unsure whether it qualifies as being related to retirement system issues, please refer to the [Trustee Education and Travel Policy](#) or contact the Executive Director for assistance.

2026-2027 Educational Opportunities:

[Callan On-Demand Webinars](#)

[Callan Research Library](#)

[Segal Company On-Demand Webinars](#)

[NCPERS Center for Online Learning](#)

2026-2027 Educational Opportunities Continued:

July 19-22, 2026	SACRS UC Berkeley Haas School of Business, Modern Investment Theory & Practice for Retirement Systems, Berkeley CA
August 24-27, 2026	CALAPRS Principles of Pension Governance for Trustees, Santa Barbara CA
September 22, 2026	Callan College, Introduction to Investments, Virtual
October 2, 2026	CALAPRS Trustees Round Table, Virtual
October 22, 2026	Callan 2026 October Workshop, San Francisco
November 10-13, 2026	SACRS Fall Conference, Rancho Mirage CA
March 8-10, 2027	CALAPRS General Assembly, Coronado CA
April 4, 2027	Callan 2027 National Conference, Scottsdale AZ
May 11-14, 2027	SACRS Spring Conference, Monterey CA
November 9-12, 2027	SACRS Fall Conference, Santa Barbara CA

Trustee Education Reporting								
Trustee Name		Chamise Cubbison	Alex Land	Kathryn Cavness	Vince Lechowick	John Haschak	Jerilyn Harris	Lenord Swope
Joined Board		Mar 2025	Jun 2023	Dec 2014	May 2026	Jan 2025	Jan 2015	Dec 2023
2-Year Reporting Period		3/2025-3/2027	6/2025-6/2027	12/2025-12/2027	5/2026-5/2028	1/2025-1/2027	1/2025-1/2027	12/2025-12/2027
2-Year Period Total		21.75	31.5	5.25	10	68.75	31.25	11.25
2026 Training Log								
2026 Ethics Training		Due		Due		2		
2026 Harassment Prevention Training		Due						Due
1/21/2026 Capital Mkt Projections		1	1	1		1	1	1
2/18/2026 Off Site		6	6			6		6
3/18/26 Performance Review			.5	.5		.5	.5	.5
4/15/2026 PGIM Small Cap & Fixed Income Review		1.75	1.75	1.75		1.75	1.75	1.75
New Trustee Training 5/26					8			
2026 SACRS Spring Conf. 5/12-15/26						12		
6/17/26 Asset Allocation & Actuarial Assumptions		2	2	2	2	2	2	2
2026 Hours	10.75	11.25	5.25	10	25.25	5.25	11.25	
2025 Training Log								
2025 Ethics Training			2			2	2	
2025 Harassment Prevention Training						2		
MCERA New Trustee Training						8		
1/15/25 Capital Markets							.5	
2/19/25 Emerging Markets Equity Manager Selection						2.75	2.75	
3/2-5/25 CALAPRS General Assembly						9	10	
3/19/2025 Small Cap Manager Selection		3				3	1	
Investment Webinar						1		

4/16/2025 Basel III Global Banking Reforms Intro		.5				.5	.5	
5/21/25 Real Assets & IFM Presentation		2				2		
5/30/25 CALAPRS Trustee Roundtable						4		
6/25/25 JP Morgan Alt Inv Webinar								
8/20/25 Core & Core Plus Real Estate		2	2			2	2	
9/17/25 Core Real Estate Manager Selection			3			3	3	
10/15/2025 Core Plus Real Estate Manager Selection		3	3			3	3	
11/5/25 Performance Review		.5	.5			.5	.5	
2025 SACRS Fall Conference			9			X		
12/17/25 ACFR Review			.75			.75	.75	
2025 Hours		11	20.25			43.5	26	

REPORT OF TRUSTEE EDUCATION AND TRAINING

Trustee Name: _____

Name of Conference/Webinar: _____

Dates of Conference/Webinar: _____

List Each Presentation Topic and Materials Reviewed:

Brief Summary of Information and Knowledge Gained:

Evaluation of the Conference/Seminar and its Presentations:

I Would Recommend This Conference/Webinar to other Trustees: Yes: _____ No: _____

Total Number of Educational Hours Completed*: _____

*Excludes breaks and meals periods

Date

Signature

Report your attendance and number of educational hours completed using our online [Trustee Education Reporting Tool](#) or complete and submit this Report of Trustee Education and Training Form to judy.zeller@mendocinocounty.gov.
