

Trustee AB1519 Education Compliance -- 2017

	Neil Baker	Greg Jahn	Michael Gossman	John Pels	Christel Querijero	David Rabbitt	Erick Roeser	Joe Tambe	Brian Williams	Bob Williamson
Period Measured Under AB 1519 (unless the period begins prior to 1/16, education received prior to that date was credited to the prior two year period).	1/17 – 12/19	1/17 – 12/19	1/16 – 12/17	10/15– 9/17*	1/17 – 12/19	1/17 – 12/19	6/17- 06/19***	1/17 – 12/19	1/17 – 12/19	2/16 – 1/18**
Forum – Presenter – Date										
AB1825 Harassment Prevention Training, TargetSolutions, January 20, 2016				2						
CALAPRS Trustees’ Roundtable, February 5, 2016			4							
CALAPRS General Assembly, March 6-8, 2016										10.25
Reinsurance Investing, Consultant Overview, Aon, March 17, 2016			1							1
The Pension Bridge Annual Conference, April 5 - 6, 2016										
Equity Tail Risk Hedging Strategies, Aon, April 21, 2016			.5							.5
CALAPRS Trustee Roundtable, June 10, 2016			5.5	5.5						
AB1234 Ethics Training, FPPC (on line), July 1, 2016			2							
AB1234 Ethics Training, FPPC (on line), July 26, 2016										2
AB1825 Harassment Prevention Training, TargetSolutions, August 7, 2016										2

Forum – Presenter – Date	Neil Baker	Greg Jahn	Michael Gossman	John Pels	Christel Querijero	David Rabbitt	Erick Roeser	Joe Tambe	Brian Williams	Bob Williamson
AB1825 Harassment Prevention Training, TargetSolutions, August 9, 2016						2				
Introduction to Futures and Options, Steve Marsh, September 15, 2016			.35	.35						.35
CALAPRS Trustees' Roundtable, September 30, 2016			5.25							
SCERA Planning Session, October 5-6, 2016			10.5	10.5						10.5
Sonoma County Economic Development Board, October 7, 2016			1.5							
CyberSecurity Online Awareness January-March, 2017	1			1				1		1
CALAPRS Trustees' Roundtable, February 3, 2017			4							
CALAPRS General Assembly March 5-7, 2017				9.75					9.75	
SCERA Investment Committee Meeting- Review of Active vs. Passive Management- Shane Shurter, AON Hewitt, March 16, 2017	.78	.78			.78			.78	.61	.78
SCERA Board Meeting- Legal Update, David Lanzter, March 23, 2017		.3	.3		.3	.3		.3	.3	.3
AB1825 Harassment Training, TargetSolutions (online), April 21, 2017			2							

Forum – Presenter – Date	Neil Baker	Greg Jahn	Michael Gossman	John Pels	Christel Querijero	David Rabbitt	Erick Roeser	Joe Tambe	Brian Williams	Bob Williamson
UBS Annual Investor Meeting, April 1, 2017- April 4, 2017				6.42					6.42	
The 2017 Pension Bridge Annual, April 18, 2017- April 19, 2017									11.42	
AB1825 Sexual Harassment Prevention Training, TargetSolutions (online) April 21, 2017			2							
UBS Agrivest Farmland Fund Annual Shareholders' Meeting May 3-4, 2017								1		1
AB1825 Sexual Harassment Prevention Training County of Sonoma County May 10, 2017					2					
AB 1234 Ethics Certification for Trustees and Staff, Ashley Dunning, SACRS Conference May 16, 2017	2	2		2	2			2		
AB1825 Sexual Harassment Prevention Training, Nossamans LLP's, SACRS Conference May 18, 2017	2									
GFAO Annual Conference, May 21, 2017- May 23, 2017			7.92							
SCERA Board Meeting FPPC Gift Rules, David Lantzer July 27, 2017	1.17	1.17		1.17	1.17		1.17	1.17	1.17	1.17
AB1825 Sexual Harassment Prevention Training, TargetSolutions (online) August 15, 2017									2	
AB 1234 Ethics Certification for Trustees and Staff, FPPC (online) August 15, 2017									2	

Forum – Presenter – Date	Neil Baker	Greg Jahn	Michael Gossman	John Pels	Christel Querijero	David Rabbitt	Erick Roeser	Joe Tambe	Brian Williams	Bob Williamson
CALAPRS Principles of Pension Management August 28- August 31, 2017							19.08			
The Bond Buy's California Public Finance Conference September 25- 27, 2017			3.75							
SCERA Planning Session October 4-5, 2017	10	10	7.6	10	10	9.68	10	7.75	10	10
SACRS Fall Conference November 14-17, 2017				4.68						
AB1825 Sexual Harassment Prevention Training, TargetSolutions (online) December 13, 2017								2		
TOTAL – 2017	16.95	14.25	27.57	35.02	14.25	13.98	31.42	16.0	46.37	14.25
TOTAL – 2016	N/A	N/A	32.60	18.35	N/A	N/A	N/A	N/A	N/A	26.6
TOTAL – 2015	N/A	N/A	N/A	12.7	N/A	N/A	N/A	N/A	N/A	N/A
Two Year Total	16.95	14.25	60.17	66.07	14.25	13.98	31.42	16.00	46.37	40.85

Donna Dunk was appointed to the position of Auditor-Controller-Treasurer-Tax Collector in March, 2016 and, as Treasurer, serves as the *ex officio* member of the Board.

*John Pels was appointed by the Board to fulfill the remainder of the alternate retiree term in October 2013.

** Bob Williamson was appointed by the Board of Supervisors in February 2014.

*** Erick Roeser was appointed by the Board of Supervisors in June 2017.

N/A in the TOTAL 2015 row means that the applicable two year period begins in 2016 or 2017; either the individual was not serving as Trustee in 2015 or that the Trustee's 2015 total was combined with 2014 for the prior two year period.

The enactment of AB 1519, effective January 1, 2013, requires Trustees to obtain at least 24 hours of education in the first two years of their term. The requirement also applies to every subsequent two-year period of service on the Board.