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Date: January 21, 2026  
To: Board of Retirement  
From: Judy Zeller, Retirement Analyst  
Subject: Annual 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 Educational Opportunities:**

[Callan On-Demand Webinars](#)

[Callan Research Library](#)

[Segal Company On-Demand Webinars](#)

[NCPERS Center for Online Learning](#)

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**2026 Educational Opportunities Continued:**

March 8-11, 2026	CALAPRS General Assembly, Carlsbad CA
April 20, 2026	Callan 2026 National Conference, Scottsdale AZ
May 12-15, 2026	SACRS Spring Conference, Olympic Valley CA
May 16-17, 2026	NCPERS Accredited Fiduciary (NAF) Program, Las Vegas NV
May 16-17, 2026	NCPERS Trustee Educational Seminar (TEDS), Las Vegas NV
May 29, 2026	CALAPRS Trustees Round Table, Virtual
August 24-27, 2026	CALAPRS Principles of Pension Governance for Trustees, Santa Barbara CA
October 2, 2026	CALAPRS Trustees Round Table, Virtual
November 10-13, 2026	SACRS Fall Conference, Rancho Mirage 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

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Trustee Education Reporting								
Trustee Name	Chamise Cubbison	Alex Land	Kathryn Cavness	Charles Kelly	John Haschak	Richard Shoemaker	Jerilyn Harris	Lenord Swope
Joined Board	Mar 2025	Jun 2023	Dec 2014	Aug 2023	Jan 2025	Dec 2011	Jan 2015	Dec 2023
2-Year Period	3/2025-3/2027	6/2025-6/2027	12/2024-12/2026	8/2025-8/2027	1/2025-1/2027	12/2023-12/2025	1/2025-1/2027	12/2023-12/2025
2-Year Period Total	10	19.75	22	8.75	42.5	17	25	77.25
2025 Training Log								
2025 Ethics Training	Due	2		Due	2	Due	2	
2025 Harassment Prevention Training	Due	Due	Due		2			
MCERA New Trustee Training					8			8
1/15/25 Capital Markets			.5			.5	.5	.5
2/19/25 Emerging Markets Equity Manager Selection			2.75		2.75	2.75	2.75	2.75
3/2-5/25 CALAPRS General Assembly			10		9		10	
3/19/2025 Small Cap Manager Selection	3		3		3	3	1	3
Investment Webinar					1			
5/21/25 Real Assets & IFM Presentation	2		2		2	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	2	2	2
9/17/25 Core Real Estate Manager Selection		3		3	3	3	3	3
10/15/2025 Core Plus Real Estate Manager Selection	3	3	3	3	3	3	3	3
2025 SACRS Fall Conference		9			X			
12/17/25 ACFR Review		.75	.75	.75	.75	.75	.75	.75
2025 Hours	10	19.75	22	8.75	42.5	17	25	25
2024 Hours						7.75		50.75
2023 Hours						4.75		1.5

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**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](mailto:judy.zeller@mendocinocounty.gov).

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