



NATIONAL COUNCIL *on*
TEACHER RETIREMENT
*Supporting Retirement Security
for America's Teachers*

NATIONAL COUNCIL ON TEACHER RETIREMENT

◆ **2019 ANNUAL TRUSTEE WORKSHOP** ◆

PRESENTED IN AFFILIATION WITH THE UC BERKELEY CENTER FOR EXECUTIVE EDUCATION AT
THE HAAS SCHOOL OF BUSINESS, UNIVERSITY OF CALIFORNIA, BERKELEY

AGENDA

Sunday, July 21, 2019

- 4:15 – 5:30 pm **New Trustee Forum (3 years or less of experience)**
- **NCTR – Get to know the Team**
Maureen H. Westgard, Executive Director
Robyn Wheeler, Assistant Executive Director
Leigh Snell, Director of Federal Relations
 - **Overview of Roberts Rules**
Dana Dillon, Former Board Chair, CalSTRS
 - **Question & Answers and Feedback Session**
- 6:15 – 7:00 pm Registration Opens
- 6:30 – 9:00 pm **Welcome Reception and Dinner for attendees & registered guests**

Monday, July 22, 2019

TRUSTEE WORKSHOP, DAY ONE

- 7:00 am Breakfast for all attendees at hotel
- 8:00 – 8:30 Depart for UC Berkeley Campus
- 8:30 – 9:00 **TRUSTEE WORKSHOP BEGINS**
- WELCOME FROM NCTR PRESIDENT**
Roger Rea, President, NCTR, and Board Member, Omaha SERS
- WELCOME**
Maureen H. Westgard, Executive Director, NCTR
Greg La Blanc, Lecturer, HAAS Business School
- 9:00 – 10:00 **KEYNOTE: INVESTING IN THE NEW ECONOMY**
Rich Lyons, PhD, Former Dean, Haas School of Business
- 10:00 – 10:30 Break



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Monday, July 22, 2019 (continued)

10:30 – 12:00	HOW AI AND ROBOTS CAN DIVERSIFY, RATHER THAN REPLACE HUMAN THINKING <i>Ken Goldberg, William S. Floyd Distinguished Chair of Engineering, UC Berkeley</i>
Noon	Lunch at UC Berkeley
1:00 – 2:00 pm	FEDERAL RELATIONS UPDATE <i>Leigh Snell, Federal Relations Director, NCTR</i>
2:00 – 2:30	Break
2:30 – 4:00	DC PLANS – WHAT YOU NEED TO KNOW <i>Nari Rhee, Associate Academic Specialist, UC Berkeley Leon F. "Rocky" Joyner, Jr., Vice President and Actuary, Segal Consulting</i>
4:00	Depart for hotel
6:00	Depart for dinner
6:30	Offsite Dinner
8:30	Return to hotel

Tuesday, July 23, 2019

TRUSTEE WORKSHOP, DAY TWO

7:00 am	Breakfast for all attendees at hotel
8:00 – 8:30	Depart for UC Berkeley Campus
8:30	TRUSTEE WORKSHOP BEGINS
8:45 – 10:00	HEDGE FUNDS - CURRENT STATE AND CONSIDERATIONS/PITFALLS <i>Dave Francl, Managing Director, San Francisco Employees' Retirement System</i>
10:00 – 10:30	Break



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AGENDA

Tuesday, July 23, 2019 (continued)

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| 10:30 – Noon | THE POWER OF PERSONALIZED MEDICINE
<i>Gary Harbin, Executive Director, Kentucky TRS</i>
<i>Jeffrey Shaman, PhD, Coriell Life Sciences</i> |
| Noon – 1:00 pm | Lunch at UC Berkeley |
| 1:00 – 2:30 | COMPETING PRIORITIES IN PENSION FUND MANAGEMENT
<i>Thomas Gilbert, Associate Professor of Finance, University of Washington</i> |
| 2:30 – 3:00 | Break |
| 3:00 – 4:00 | ESG INVESTING
<i>Greg La Blanc, Lecturer, HAAS Business School</i> |
| 4:00 | NCTR STRATEGIC PLAN UPDATE
<i>Maureen Westgard, Executive Director, NCTR</i> |
| 4:30 | Depart to hotel |
| 6:00 | Depart for dinner |
| 6:30 | Offsite Dinner |
| 8:30 | Return to hotel |

Wednesday, July 24, 2019

TRUSTEE WORKSHOP, DAY THREE

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| 7:00 am | Breakfast for all attendees at hotel |
| 8:00 – 8:30 | Depart for UC Berkeley Campus |
| 8:30 | TRUSTEE WORKSHOP BEGINS |



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Wednesday, July 24, 2019 (continued)

8:45	COMMUNICATIONS – Negotiating and Influence <i>John Danner, PhD, Lecturer, HAAS Business School</i>
10:00 – 10:30	Break
10:30 – Noon	COMMUNICATIONS – Negotiating and Influence (continued)
Noon	SYNTHESIS AND REVIEW <i>Greg La Blanc, Lecturer, HAAS Business School</i>
12:30 – 1:15 pm	Lunch at UC Berkeley
1:15 pm	Tour of Berkeley
3:30	Return to hotel
6:00	Dinner at hotel for all attendees

Thursday, July 25, 2019

Trustee Workshop, Departures