2020 Annual Trustee Workshop
Presented in Affiliation with the UC Berkeley Center for Executive Education
Haas School of Business, University of California, Berkeley

AGENDA

**Thursday, July 16, 2020**
9:00 a.m. (PST)*

**ORIENTATION (30 MINUTES)**

Welcome
- Robyn Wheeler, Assistant Executive Director, NCTR
- Mike Rielly, CEO, Berkeley Executive Education
- Greg LaBlanc, Lecturer in Finance, Strategy, and Law; Haas School of Business, University of California, Berkeley
- Andrea Salvemini, VP Client Success UC Berkeley Executive Education

**Monday, July 20, 2020**
9:00 a.m. – 9:05 a.m

Welcome- NCTR President Brian Guthrie, Executive Director, Texas TRS

9:05 a.m-10:00 a.m

**UCB SESSION 1 – GUIDING PENSIONS FUNDS THROUGH TURBULENT WATERS**

Introduction:
- Greg LaBlanc, Lecturer in Finance, Strategy, and Law; Haas School of Business, University of California, Berkeley

Speaker:
- Jagdeep Singh Bachher; Chief Investment Officer, Vice President of Investments, University of California

The goal of the pension fund is to provide stability and security to its beneficiaries; a task that becomes increasingly difficult in a world that is as unpredictable and insecure as we have experienced during COVID-19. This session will offer a robust discussion with relevant practitioners of the tools they leverage to deal with crisis and uncertainty.
AGENDA

10:15 a.m. – 11:15 a.m.  
**UCB SESSION 2 – THE FUTURE OF EDUCATION – WHAT’S CHANGED?**  
**Introduction:** Greg LaBlanc, Lecturer in Finance, Strategy, and Law; Haas School of Business, University of California, Berkeley  

**Speakers:**  
- Esther Wojcicki, CEO, Global Moonshots in Education  
- Ben Nelson, CEO and Founder Minerva Project  
- Kwame Yamgnane, CEO Qwasar Silicon Valley  

**Trustee Panel:**  
- Guillermo Barriga, Board Member, Colorado PERA  
- Marion Fedrick, Board Member, Georgia TRS  

The current landscape has forced every level of education to rapidly shift its engagement towards alternative delivery methods; an important question remains about how permanent these changes will be. During this panel discussion with industry experts, participants will better understand what is changing in education, what lessons can be derived from the uncertainty we currently face, and what lies ahead!

11:45 a.m. – 12:45 p.m.  
**UCB SESSION 3 – HOW TO EXPERTLY NAVIGATE THE CHANGING WORKPLACE**  
Greg LaBlanc, Lecturer in Finance, Strategy, and Law; Haas School of Business, University of California, Berkeley  

**Speakers:**  
- Nicole Baer, CEO, Logitech  
- Spencer Levy, Head of Research, CBRE Research  

**Panel:**  
- Meredith Despins, Sr. Vice President, Investment Affairs & Investor Education, Nareit  
- Julian Regan, Public Sector Market Leader and a Senior Vice President in Segal Marco Advisors  

The way we work is changing now faster than it ever has before; old ways of managing meetings and engaging people are no longer viable in this new environment. By engaging with industry leaders in a panel discussion format, participants will understand best practices to being more effective leaders and change agents in the post-COVID workplace.
AGENDA

Tuesday, July 21, 2020

9:00 a.m. – 10:00 a.m.
CALIFORNIA STATE CONTROLLER BETTY YEE
45 minute presentation/15 min questions

10:15 a.m. – 11:15 a.m.
UCB SESSION 4 – EXPECTING THE UNEXPECTED: RISK MANAGEMENT & GOVERNANCE
Moderator- Greg LaBlanc, Lecturer in Finance, Strategy, and Law; Haas School of Business, University of California, Berkeley

Panel:
- Janet Becker Wold, Sr. Vice President, Callan
- Erin H. Woods, Partner, Bleichmar Fonti & Auld LLP
- Lowell Yura, CFA, ASA, Head of Multi-Asset Solutions-North America, T. Rowe Price

These uncertain times create further risks. Pension fund managers must monitor these increasing risks through effective governance and management to effectively lead their organizations. Led by Greg Leblanc, this session details the human and organizational factors that get in the way of preparing for disruption and managing the unexpected. Participants will exit this session with the mindset and toolset necessary for managing expectations & the unexpected.

11:45 a.m. – 12:45 p.m.
FEDERAL RELATIONS UPDATE
Leigh Snell, Federal Relations Director, NCTR

In recent years, state and local governments’ retirement systems have become a focus of growing attention and concern for many in Washington, D.C. Now, the COVID-19 pandemic has provided new opportunities for Federal actions that could force specific public pension “reforms” that would weaken the defined benefit model; others would restrict public pensions’ investments in the name of “national security,” or direct them in support of new infrastructure projects. This session will give trustees an update on these and other Federal activities of concern, as well as inform them of NCTR’s actions on their behalf to protect public pensions.
AGENDA

Wednesday, July 22, 2020
9:00 a.m. – 10:00 a.m.

UCB SESSION 5 – SCENARIO THINKING: DEVELOPING NEW BUSINESS IDEAS AND MODELS FOR RAPIDLY CHANGING ENVIRONMENTS

Introduction: Greg LaBlanc, Lecturer in Finance, Strategy, and Law; Haas School of Business, University of California, Berkeley

Speakers:
- Steve Weber, Professor, UC Berkeley-Political Science & I-School

Panel:
- John Biku, President, PBI Research Services

Scenario thinking is a set of tools for ordering perceptions about alternative future environments in which today’s strategic decisions might be played out. Led by one of the world’s experts in scenario thinking, Dr Steve Weber, this interactive session will set the scene for scenario thinking and creation of each participant’s scenario plan, incorporating the previous sessions in the series.

10:15 a.m. – 11:15 a.m.

UCB SESSION 6 - SCENARIO THINKING IN ACTION: APPLICATION WORKSHOP

*All sessions are listed in Pacific Standard Time.*