

SACRS SPRING CONFERENCE

MAY 7-10, 2024 • HILTON SANTA BARBARA BEACHFRONT RESORT • SANTA BARBARA, CA



SACRS Annual Spring Conference 2024

Hilton Santa Barbara Beachfront Resort, Santa Barbara, CA

May 7-10, 2024

Preliminary Agenda as of 3-10-2024

TUESDAY, May 7

Time	Session Title
2:00 pm – 6:30 pm	SACRS REGISTRATION
3:00 pm – 5:00 pm	PRE-CONFERENCE TRAINING SESSIONS
	DISABILITY TRAINING <i>The Disability Retirement Breakout is an educational breakout session designed to provide attendees with valuable insights and information on various Disability Retirement subjects. This session aims to empower individuals, whether they are employees, trustees, or members, with the knowledge and resources needed to navigate the complexities of disability retirement. This includes understanding eligibility criteria, application processes, legal rights, and financial considerations. Moreover, the program creates a platform for attendees to connect, share experiences, and network within the disability retirement community. Who should attend: Employees considering disability retirement options, employers seeking to support employees in the retirement process, disability advocates and support professionals, human resources and benefits managers, and anyone interested in gaining a better understanding of disability retirement.</i>
3:00 pm – 5:00 pm	ETHICS TRAINING FOR TRUSTEES AND STAFF: MORE THAN A CONCEPT <i>This ethics training provides the information required for bi-annual training of public officials in California by AB 1234, and it also addresses key considerations for those public officials whose responsibilities arise from their role as trustees or executives of public retirement systems. *This class is pending approval for MCLE credit.</i> SPEAKERS: Ashley Dunning, Partner, Nossaman, LLP and Amber Maltbie, Partner, Nossaman, LLP

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3:00 pm – 5:00 pm

SEXUAL HARASSMENT PREVENTION TRAINING FOR LOCAL AGENCY OFFICIALS

*Nossaman LLP attorneys John Kennedy and Allison Callaghan will present “Sexual Harassment Prevention Training for Local Agency Officials (AB1661).” AB 1661 requires that if a local agency provides any type of compensation, salary, or stipend to its officials, then all local agency officials of the agency shall receive at least two hours of sexual harassment prevention and education training within the first six months of taking office or commencing employment and every two years thereafter. This interactive training session will meet the requirements under AB 1661 and AB 1825 (sexual harassment prevention training to employees who perform supervisory functions) and assist attendees in preventing inappropriate conduct in the workplace. *This class is pending approval for MCLE credit.*

SPEAKERS: [John Kennedy, Partner, Nossaman, LLP](#) and [Julia Botezatu, Associate, Nossaman LLP](#)

5:30 pm – 6:30 pm

SACRS NETWORKING RECEPTION

Build interactive collaborations, uncover new opportunities, and enjoy a great networking experience. All registered attendees welcome. The reception will be held onsite at the host hotel. *Thank You to our 70th Anniversary Celebration Welcome Reception Sponsor [Acadian Asset Management!](#)*

WEDNESDAY, May 8

Time	Session Title
7:00 am – 8:00 am	SACRS WELLNESS SESSION – YOGA <i>Fitting in fitness when away from home is often difficult, but not during SACRS 2024 Spring Conference! We bring a yoga class onsite to start your day the right way. This class, led by a certified yoga instructor, is intended for everyone, beginner to expert. Water and towels provided. Pre-registration is required to participate for conference attendees & guests and a \$15 participation fee.</i>
7:30 am – 6:30 pm	SACRS REGISTRATION
7:30 am – 8:30 am	SACRS BREAKFAST

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8:45 am – 9:00 am	SACRS WELCOME – David MacDonald, Trustee, Contra Costa CERA and SACRS President
9:00 am – 10:00 am	KEYNOTE GENERAL SESSION SPEAKER: <u>Frank Kelly, Founder & Managing Partner, Fulcrum Macro Advisors LLC, and Senior Political Strategist for DWS</u>
10:00 am – 10:30 am	SACRS NETWORKING BREAK
10:30 am – 11:30 am	GENERAL SESSION SPEAKER: <u>JEFFREY GUNDLACH, FOUNDER & CHIEF EXECUTIVE OFFICER, DOUBLELINE</u>
11:40 am – 12:40 pm	GENERAL SESSION – OUTSIDE THE BOX/CIO PANEL INVESTMENT SESSION
12:45 pm – 1:45 pm	SACRS LUNCH
2:00 pm – 4:30 pm	SACRS BREAKOUTS
2:00 pm – 4:30 pm	ADMINISTRATORS BREAKOUT – <i>Closed Session</i> MODERATOR: Thomas Stadelmaier, Stanislaus CERA
2:00 pm – 4:30 pm	AFFILIATE BREAKOUT - “SHARK TANK” STRATEGY PITCH COMPETITION MODERATOR: JoAnne Svendsgaard, Affiliate Committee Chair
2:00 pm – 4:30 pm	ATTORNEY’S BREAKOUT MODERATOR: Barbara Hannah, Chief Counsel, San Bernardino CERA and David Lantzer, Senior Staff Counsel, San Bernardino CERA
2:00 pm – 4:30 pm	INTERNAL AUDITORS’ BREAKOUT MODERATOR: Harsh Jadhav, Chief of Internal Audit, Alameda CERA
2:00 pm – 4:30 pm	INVESTMENT BREAKOUT MODERATOR: TBD

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2:00 pm – 4:30 pm	OPERATIONS/BENEFITS BREAKOUT MODERATOR: Louis Gittens, Process Management Group, Los Angeles CERA
2:00 pm – 4:30 pm	SAFETY BREAKOUT MODERATOR: Brian Williams, Trustee, Deputy Sheriff, Sonoma CERA and SACRS Board Member
2:00 pm – 4:30 pm	TRUSTEE BREAKOUT MODERATOR: Adele Tagaloa, Trustee, Orange CERS and SACRS Vice President
6:30 pm – 9:30 pm	SACRS ANNUAL WEDNESDAY NIGHT EVENT

Thursday, May 9

Time	Session Title
7:00 am – 8:00 am	SACRS FUN RUN <i>Your morning starts off with an additional opportunity for teambuilding and networking, while enjoying the early morning air. A SACRS tradition, the 3-mile Fun Run and Walk course is the perfect way to get energized for the conference day ahead. Designed for the walker, jogger, or runner, the course is flat and paved. Pocket maps, Fun Run Swag, water, and a snack at the end of the course will be provided. Volunteers will be located along the route to assist with directions and encouragement. Pre-registration is required to participate for conference attendees & guests and a \$15 participation fee.</i>
7:30 am – 6:30 pm	SACRS REGISTRATION
7:30 am – 8:30 am	SACRS BREAKFAST
8:45 am – 9:00 am	SACRS VOLUNTEER AWARDS – David MacDonald, Trustee, Contra Costa CERA and SACRS President
9:00 am – 10:00 am	GENERAL SESSION SPEAKER: California State Controller Malia M. Cohen (Invited)

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10:00 am – 10:30 am

SACRS NETWORKING BREAK

10:30 am – 11:30 am

GENERAL SESSION – ENERGY FOCUS

Thank you to our 70th Anniversary Celebration Session
Sponsor [Bernstein Litowitz Berger & Grossmann LLP](#)

11:40 am – 12:40 pm

GENERAL SESSION

SPEAKER: [Brigadier General Steven J. Butow, Commander, California Air National Guard](#)

12:45 pm – 1:45 pm

SACRS LUNCH

2:00 pm – 3:00 pm

SACRS CONCURRENT SESSIONS

2:00 pm – 3:00 pm

CONCURRENT SESSION A – THE 80% FUNDED MYTH

The 80% Funded Myth - a discussion on funding levels of retirement plans, the public perception, and what is important regarding funding goals.

SPEAKER: [Todd Tauzer, Segal](#)

2:00 pm – 3:00 pm

CONCURRENT SESSION B – INVESTMENT SESSION

2:00 pm – 3:00 pm

CONCURRENT SESSION C - OPERATIONS/BENEFITS

3:00 pm – 3:30 pm

SACRS NETWORKING BREAK

3:30 pm – 4:30 pm

CONCURRENT SESSION A – LEGISLATIVE UPDATE 2024

3:30 pm – 4:30 pm

CONCURRENT SESSION B – INVESTMENT SESSION

3:30 pm – 4:30 pm

CONCURRENT SESSION C – OPERATIONS/BENEFITS

3:30 pm – 4:30 pm

CONCURRENT SESSION D - IN SOLIDARITY

4:30 pm – 5:30 pm

SACRS COMMITTEE MEETINGS

4:30 pm – 5:30 pm

SACRS EDUCATION COMMITTEE MEETING

4:30 pm – 5:30 pm

SACRS NOMINATING COMMITTEE MEETING

4:30 pm – 5:30 pm

SACRS AFFILIATE COMMITTEE MEETING

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5:30 pm – 6:30 pm

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FRIDAY, May 10

Time	Session Title
7:30 am – 8:30 am	SACRS BREAKFAST
9:00 am – 10:00am	GENERAL SESSION
10:00 am – 10:15 am	SACRS NETWORKING BREAK
10:15 am – 11:30 am	SACRS ANNUAL BUSINESS MEETING