



**ORANGE COUNTY EMPLOYEES RETIREMENT SYSTEM
BOARD OF RETIREMENT**

**2024 STRATEGIC PLANNING WORKSHOP
Tuesday, September 10, 2024
8:30 A.M.**

**Westin South Coast Plaza
686 Anton Blvd.
Costa Mesa, CA 92626**

Members of the public who wish to observe and/or participate in the meeting may do so (1) from the Westin South Coast Plaza or (2) via the Zoom app or telephone (information below) from any location.

OCERS Zoom Video/Teleconference information	
<p>Join Zoom Meeting https://ocers.zoom.us/j/85280733838</p> <p>Meeting ID: 852 8073 3838 Passcode: 056378</p> <p>Go to https://www.zoom.us/download to download Zoom app before meeting Go to https://zoom.us to connect online using any browser.</p>	<p>Join by Telephone (Audio Only) Dial by your location</p> <ul style="list-style-type: none"> +1 669 900 6833 US (San Jose) +1 346 248 7799 US (Houston) +1 253 215 8782 US (Tacoma) +1 312 626 6799 US (Chicago) +1 929 436 2866 US (New York) +1 301 715 8592 US (Washington DC) <p>Meeting ID: 852 8073 3838 Passcode: 056378</p>
<p>A Zoom Meeting Participant Guide is available on OCERS website Board & Committee meetings page</p>	



Agenda

Breakfast	7:30 - 8:30
1. WELCOME & INTRODUCTORY COMMENTS	8:30 – 8:45
Steve Delaney, CEO, OCERS	
2. STATE OF OCERS – AN OVERVIEW	8:45 – 9:15
Steve Delaney, CEO, OCERS	
3. FIRESIDE CHAT WITH CHRISTOPHER AILMAN	9:15-10:15
Molly Murphy, CFA, CIO, OCERS, and Christopher Ailman, Founder and CEO, Ailman Advisers	
BREAK	10:15 – 10:30
4. TOTAL PORTFOLIO APPROACH TO PENSION INVESTMENT MANAGEMENT	10:30- 11:30
Molly Murphy, CFA, CIO, OCERS, and Steve Novakovic, CFA, Managing Director, CAIA	
5. INVESTMENT BEST PRACTICES	11:30-12:00
Steve McCourt, CFA, Meketa, and Allan Emkin, Meketa	
LUNCH	12:00 - 1:00
6. VISION 2030 – OCERS AND THE LEVERAGING OF TECHNOLOGY	1:00 – 1:30
Steve Delaney, CEO, OCERS	
7. KEYNOTE: VISION 2030 AND THE FUTURE OF TECHNOLOGY	1:30 – 2:30
Bill Zielinski, Executive Partner, Gartner	
8. OCERS FUTURE – AN ACTUARIAL VIEWPOINT	2:30 - 3:00
Steve Delaney, CEO, OCERS, and Todd Tauzer, Segal	
BREAK	3:00 – 3:15
9. OCERS HEADQUARTER STATUS – THE HEADQUARTERS OF OUR FUTURE	3:15 – 4:00
Brenda Shott, Assistant CEO, OCERS, and Representatives from Griffin Structures, Gensler, and Snyder Langston	
10. WRAP UP	4:00 – 4:15
ADJOURNMENT	
NETWORKING HAPPY HOUR	





**ORANGE COUNTY EMPLOYEES RETIREMENT SYSTEM
 BOARD OF RETIREMENT**

**2024 STRATEGIC PLANNING WORKSHOP
 Wednesday, September 11, 2024
 8:30 A.M.**

AMENDED

**Westin South Coast Plaza
 686 Anton Blvd.
 Costa Mesa, CA 92626**

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OCERS Zoom Video/Teleconference information	
<p>Join Zoom Meeting https://ocers.zoom.us/j/81459322403</p> <p>Meeting ID: 814 5932 2403 Passcode: 991884</p> <p>Go to https://www.zoom.us/download to download Zoom app before meeting Go to https://zoom.us to connect online using any browser.</p>	<p>Join by Telephone (Audio Only) Dial by your location</p> <ul style="list-style-type: none"> +1 669 900 6833 US (San Jose) +1 346 248 7799 US (Houston) +1 253 215 8782 US (Tacoma) +1 929 436 2866 US (New York) +1 301 715 8592 US (Washington DC) +1 312 626 6799 US (Chicago) <p>Meeting ID: 814 5932 2403 Passcode: 991884</p>
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Agenda

BREAKFAST	7:30 - 8:30
1. WELCOME AND INTRODUCTIONS	8:30 – 8:45
Steve Delaney, CEO, OCERS	
2. HEARING FROM OUR STAKEHOLDERS	8:45 – 9:30
For more than a decade we have had the honor of hearing from our stakeholders.	
3. FROM INTELLIGENT TO TECHNOLOGIZED: A LONG-TERM INVESTOR PLAYBOOK	9:30 - 10:30
Molly Murphy, CFA, CIO, OCERS, and Ashby Monk, PhD, Executive Director, Stanford Research Initiative on Long Term Investing, Stanford University	
4. FIRESIDE CHAT WITH FORMER VICE PRESIDENT DAN QUAYLE	10:30 – 11:30
Molly Murphy, CFA, CIO, OCERS, and Dan Quayle, Former Vice President of the United States of America	
LUNCH	11:30 - 12:45
5. MACRO OUTLOOK AND INVESTMENT IMPLICATIONS	12:45 - 1:45
Laura Wirick, CFA, CAIA, Meketa; Mike Krems, CFA, Aksia; Rob Kochis, Townsend; and Shanta Chary, Director of Investments, OCERS	
6. INVESTMENT DATA INITIATIVES	1:45 - 2:45
David Beeson, Director of Investments, OCERS; Josephine He, CFA, FRM, Investment Officer, OCERS; Duc Nguyen, CFA, Sr Investment Analyst, OCERS	
BREAK	2:45 – 3:00
7. PROPOSED 2025-2027 STRATEGIC PLAN/BUSINESS PLAN	3:00 - 4:00
Steve Delaney, CEO, OCERS, and Will Tsao, Director of EPMO, OCERS	
8. WRAP UP	4:00 - 4:15
ADJOURNMENT	

