



# San Bernardino County Employees' Retirement Assoc.

## Staff Report Details (With Text)

**File #:** 19-828 **Name:**

**Type:** Information Item

**File created:** 3/3/2020 **In control:** BOARD OF RETIREMENT

**On agenda:** 3/13/2020 **Final action:**

**Title:** SBCERA Framework for Environment, Social and Governance (ESG) Investment Integration.

**Sponsors:**

**Indexes:**

**Code sections:**

**Attachments:** 1. Exhibit A: SBCERA Framework for ESG Implementation Presentation

Date	Ver.	Action By	Action	Result
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**FROM:** Don Pierce, Chief Investment Officer

**SUBJECT:** Informational Item: SBCERA Framework for ESG Integration

**RECOMMENDATION:**  
SBCERA Framework for Environment, Social and Governance (ESG) Investment Integration.

**BACKGROUND:**  
At the request of the Board, staff, along with Sam Austin of NEPC, will present on ESG principles and integration within SBCERA's investment portfolio, as well as provide examples of some of SBCERA's investments. While made under SBCERA's investment principles of value, contractual income and opportunistic focus, these investments may otherwise be seen through an ESG lens.

**BUDGET IMPACT:**  
None.

**STRATEGIC PLANNING GOAL/OBJECTIVE:**  
Prudent Fiscal Management

**STAFF CONTACT:**  
Don Pierce

**ATTACHMENTS:**  
Exhibit A: SBCERA Framework for ESG Implementation Presentation