
DECEMBER 18, 2017

AGENDA ITEM 2
INFORMATION ITEM

CALIFORNIA SECURE CHOICE RETIREMENT SAVINGS INVESTMENT BOARD

Executive Director's Report

Board Member Appointments

On December 5, 2017 Governor Edmund G. Brown appointed Robert Purcell of Sacramento and Dora Westerlund of Fresno to the California Secure Choice Retirement Savings Investment Board (“Board”). Short biographies for each are included below:

Robert Purcell, 69, of Sacramento, has been appointed to the California Secure Choice Retirement Savings Investment Board. Purcell was a director in the Public Employee Department at the Laborers’ International Union of North America from 1997 to 2012, a political organizer for the California Democratic Party from 1988 to 1989 and a political director at Neighbor-to-Neighbor from 1986 to 1988. He was in-house counsel at Unite Here Local 2 from 1984 to 1986 and a legal advisor at the California Public Employment Relations Board from 1982 to 1984. Purcell was a staff analyst at Cal/OSHA from 1977 to 1979 and an organizer at the United Farm Workers of America from 1971 to 1976. He earned a Juris Doctor degree from the University of California, Davis School of Law. This position does not require Senate confirmation and there is no compensation. Purcell is a Democrat.

Dora Westerlund, 46, of Fresno, has been appointed to the California Secure Choice Retirement Savings Investment Board. Westerlund has been chief executive officer and founder at the Fresno Area Hispanic Foundation since 2004. She was an executive assistant to the consul of Mexico at the Consulate of Mexico in Fresno from 1997 to 2001. She is a member of the 21st District Agricultural Association, Big Fresno Fair Board of Directors, California State University, Fresno Foundation Board of Governors and the Saint Agnes Medical Center Board. This position does not require Senate confirmation and there is no compensation. Westerlund is a Republican.

Additionally, Director of Finance Michael Cohen named Jacqueline Wong-Hernandez his new primary designee for the Board, replacing Eraina Ortega who is leaving the Department of Finance in December.

Staffing

Staff are recruiting for two analyst positions, one focused on outreach and communications and another focused on administration.

Contracts Executed Under Delegated Authority

None to report.

Stakeholders

Staff participated in two stakeholder outreach working group meetings facilitated by the United Ways of California on November 29 and December 12. More information about the stakeholder outreach effort will be reported agenda item six.

Media Mentions

(Specific mentions of or quotes from the Program, Board members, or staff)

1. **Column: New U.S. state retirement plans are welcome, but why so expensive?** (Mark Miller | Reuters | December 14, 2017)
<https://www.reuters.com/article/us-column-miller-retirement/column-new-u-s-state-retirement-plans-are-welcome-but-why-so-expensive-idUSKBN1E81JM>
2. **How women entrepreneurs and their employees can save for retirement** (Forbes | November 30, 2017)
<https://www.forbes.com/sites/nextavenue/2017/11/30/how-women-entrepreneurs-and-their-employees-can-save-for-retirement/#61c1c9fe21ed>
3. **CalChamber urges businesses to participate in workshops for state-run retirement plan** (CalChamber | November 30, 2017)
<http://advocacy.calchamber.com/2017/11/30/calchamber-urges-businesses-to-participate-in-workshops-for-state-run-retirement-program>

External Presentations in Prior Month

1. December 11, 2017: National Council of State Legislatures – *Capitol Forum*, panel presentation, Coronado, CA