



## TLF Peer Mentoring Project at the Center for Labor and a Just Economy

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HARVARD LAW SCHOOL

The Trustee Leadership Forum's (TLF) Peer Mentoring Project (PMP) at the Center for Labor and a Just Economy (CLJE) organizes and supports labor pension fund trustees to foster more responsible investment and stewardship of their Funds, in service of their beneficiaries. Rooted in authentic relationships, the PMP arranges participants into pods (made up of several participants plus an experienced advisor) so that trustees can develop authentic relationships with peers and take action at their Funds. This year we will also ask trustees to choose one of four educational tracks to participate in: climate risk, responsible housing investment, labor principles, or responsible tech and AI)

In its inaugural year, 16 trustees and 4 advisors participated in the PMP and had 100 years of experience as trustees. This past year, the PMP grew to support 20 trustees, who came from 10 states and Puerto Rico, and represented a mix of city, state and multi-employer industry funds. In total, our second cohort collectively represented 150 years of trustee experience.

### PROGRAM REQUIREMENTS

#### Participants will attend:

- 2 required in-person gatherings (both events are in Cambridge, MA at Harvard Law School)
  - Kickoff Convening (October 2025 - dates TBA)
  - TLF Annual Gathering (June 2025 -dates TBA)
- Monthly meeting with your pod, led by your advisor (virtual)
- 2-3 educational track sessions(see "Content" below) (virtual)
- 1 conversation with your track expert, to discuss your specific interest/Fund (virtual)
- 2 full cohort session to reconnect with the entire cohort (virtual)

### CONTENT

The PMP helps participants better understand and effectuate change related to responsible stewardship. New to the PMP curriculum this year are issue-specific educational tracks. Participants will be expected to join one track and attend 2-3 learning sessions on it, led by an expert.

- Responsible Housing Investment: pensions are long time investors in real estate assets. Trustees in this track will explore various investment options, with a specific focus on new opportunities/or models to invest in alignment with beneficiaries' needs and return expectations.
- Climate Risk: pension funds are under pressure to address climate from a risk mitigation perspective while managing the current economic and political environment. Trustees will look at whole-portfolio climate plans as a possible model for guidance.
- Labor Principles: trustees will examine the California Public Employees' Retirement System labor principles as a model to require private equity managers to adhere to a set of labor principles to address labor risk in their investment portfolio.
- Responsible Tech and AI: how might trustees integrate responsible investment practices into their investments in technology, while adhering to their fiduciary duty to ensure long-term returns and plan sponsor solvency? We will examine anti-privatization policies as a potential way to address portfolio and plan risk.

*Updated on July 23, 2025*

## **COST**

For the 2025-2026 cohort, the program fee is covered for all participants by a grant from the Sunrise Project. ***Participants are expected to cover their own travel and lodging to/from Cambridge for both the October and June convenings. Most trustees are able to fund their travel through their pension fund as an educational opportunity. Please find out what the requirements of your fund are for requesting and receiving travel support to educational opportunities so that you can get your travel approved and join us at Harvard Law School in October, 2025 for a program orientation and June, 2026 for a program closing and recognition ceremony.*** Travel support is available but limited and awarded on a case-by-case basis. Please contact Eric Horvath if your pension fund is unable to support your travel costs.

If you're interested in participating, please submit your [application](#) no later than Friday, September 5, 2025 or contact Eric Horvath at [ehorvath@law.harvard.edu](mailto:ehorvath@law.harvard.edu) as soon as possible. We will begin to review and accept applications starting August 13, so we encourage folks to apply early.