

# California HOPE / RVK Work Plan

As of September 12, 2024

	2024					2025					
	August	September	October	November	December	January	February	March	April	May	June
<b>Determine Investment Strategy (Target Approval at November 2024 Meeting)</b>											
Intro Meetings with Staff & Investment Team	✓										
Asset Allocation & Investment Strategies											
Intergenerational Equity Analysis (\$ per child scenarios)											
<b>Investment Program Implementation (Ongoing)</b>											
Program Administrator RFI	✓										
Program Administrator RFP											
Program Administrator Onboarding											
Investment Strategy Onboarding (as needed)											
Any Final "Go Live" Investment Operations-Related Items											
<b>Develop Investment Policy Statement (Target Approval at February 2025 Meeting)</b>											
Draft Investment Policy Statement (IPS)											
Include Success Benchmarks & Ongoing Monitoring Plan in IPS											
Include Investment Strategy Approved at Nov. 2024 Meeting											
<b>Investment Program Success Benchmarks &amp; Monitoring Plan (Target Approval at February 2025 Meeting)</b>											
Investment Program Success Benchmarks											
Ongoing Investment Monitoring & Review Plan											

\*Red lines indicate decision points for California HOPE Governing Board.  
Time periods are tentative and subject to change.