
AUGUST 21, 2024

AGENDA ITEM 8
ACTION ITEM

CALSAVERS RETIREMENT SAVINGS BOARD

Resolution 2024-02: Approval of Draft Strategic Plan 2024-29

Summary

The CalSavers Retirement Savings Board (“Board”) will consider approving the strategic plan for the five-year period beginning July 1, 2024.

Background

On June 22, 2021, the CalSavers Retirement Savings Board (“Board”) adopted a strategic plan for the three-year period beginning July 1, 2021, and ending June 30, 2024.

In May of 2024, the Board reviewed a draft version of the next Strategic Plan, which was expanded to a five-year timeframe, covering 2024-2029. The Board requested revisions to the Strategic Plan and requested that the item be brought back in the next Board meeting.

During this agenda item, the Board will consider approving the proposed strategic plan for 2024-2029 (Attachment 8A) and associated Resolution 2024-02 (Attachment 8B).

Attachments

- Attachment 8A: Proposed CalSavers Retirement Savings Board Strategic Plan 2024-2029
- Attachment 8B: Resolution 2024-02: Approval of Strategic Plan 2024-2029