



Nottingham
BEHIND EVERY INVESTMENT



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High tech. High touch. Holistic infrastructure.

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Program monitoring recommendations

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- Enrollment data and net changes
- Contributions, investment program metrics
- Program withdrawals, beneficiary usage metrics
- Website access metrics
- Call center / customer service metrics

Updated Timeline

TASK	COMPLETION
Final investment options	11/2/2017
Issue FDIC RFP	11/15/2017
Social media kickoff call	1/10/2018
Call center program outline	11/22/2017
CalABLE Board Meeting	12/5/2017
Call center staffing plan	12/8/2017
Solix/Nottingham training	12/12/2017
Web-based enrollment dynamic form	12/15/2017
Select bank for DDA & FDIC	12/30/2017
Disclosure documentation finalized	1/15/2018
Website review by CalABLE	12/22/2017
Gift card production begins	TDB
Configure portfolios in Nottingham recordkeeping system	12/29/2017

Updated Timeline

TASK	COMPLETION
Program Management agreement executed	TBD
Execute SSA agreement	TBD
Programming & configuration of participant website with recordkeeping and reporting requirements	TBD
Social media campaign #1 launch	2/15/2018
Call center recruiting	2/26/2018
Initiate press release series about website	TBD
Launch website	2/15/2018
Open omnibus accounts at DFA and Vanguard	2/7/2018
Test trades with mutual funds	2/14/2018
Define call center quality assurance initiatives	2/16/2018
Initiate press release series about program launch	2/20/2018
End-to-end testing	2/28/2018
GO LIVE	3/1/2018