
MARCH 17, 2021

AGENDA ITEM 5
INFORMATION ITEM

CALSAVERS RETIREMENT SAVINGS BOARD

Report on the Status of the Implementation of the Strategic Plan 2018-21 and a Discussion of the Development of the Next Strategic Plan

On June 25, 2018, the CalSavers Retirement Savings Board (“Board”) adopted a strategic plan for the three year period beginning July 1, 2018 and ending June 30, 2021 (Attachment 5A).

The Executive Director will report on the status of each of the 28 measures contained in the strategic plan (Attachment 5B) and present a draft framework for the new strategic plan for the three year period beginning July 1, 2021 (Attachment 5C).

Based on discussion during the meeting, the Executive Director and senior staff will develop a full draft of the new strategic plan and present to the Board for consideration and potential adoption at the next meeting.

Attachments

- Attachment 5A: CalSavers Retirement Savings Board Strategic Plan 2018-2021
- Attachment 5B: Status of Implementation of Strategic Plan 2018-2021
- Attachment 5C: Draft Framework for Strategic Plan 2021-2024