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MAY 19, 2021

AGENDA ITEM 4  
INFORMATION ITEM

CALSAVERS RETIREMENT SAVINGS BOARD

*Discussion of Draft Strategic Plan 2021-2024*

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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 4A).

On March 17, 2021, the Executive Director reported on the status of each of the 28 measures contained in the strategic plan (Attachment 4B) and presented a draft framework for the new strategic plan for the three-year period beginning July 1, 2021.

During this agenda item, the Board will consider and discuss the draft strategic plan prepared by staff (Attachment 4C).

A final draft will be presented to the Board for potential adoption during its meeting on June 22, 2021.

***Attachments***

- Attachment 4A: CalSavers Retirement Savings Board Strategic Plan 2018-2021
- Attachment 4B: Status of Implementation of Strategic Plan 2018-2021
- Attachment 4C: Draft Strategic Plan 2021-2024