



AGENDA

**SEPTEMBER 2023 MEETING OF THE CALIFORNIA HOPE, OPPORTUNITY,
PERSERVERANCE AND EMPOWERMENT (HOPE) ADVISORY WORKGROUP**

Funds Per Youth Investment Sub-Workgroup

Friday, September 22, 2023, at 1:00 pm

State Treasurer's Office
901 P Street
1st Floor Conference Room 102
Sacramento, CA 95814

Alternate Location for In-Person Participation:
California State Treasurer's Office Reagan State Building
(Off of 4th and Spring Streets)
300 S. Spring Street, Suite 8500-South Tower Los Angeles,
California 90013

*Public Participation Call-In Number
1-866-434-5269 Participant Code: 3563229

1. Call to Order and Roll Call—Chair
2. Executive Director's Report - Kasey O'Connor
3. Review of Draft Implementation Plan, Board Discussion, and Information Still Needed, including Updates from Eligibility & Outreach Subgroup Meeting – Andrea Luquetta, Pa'lante Collaborative Services
4. Discussion: What amount should be invested per youth? – Kasey O'Connor
 - a. Presentation by California Budget and Policy Center
 - b. Discussion and Recommendations to the Advisory Workgroup
5. Discussion: What goals and values should guide the selection of the investment and plan managers? – Kasey O'Connor
 - a. Review of draft RFP for Investment Consultant
 - b. Discussion and Recommendations to the Advisory Workgroup
6. Discussion: Timelines for contracting investment consultant, investment manager and plan manager – Kasey O'Connor



California HOPE OPPORTUNITY, PERSEVERANCE, AND EMPOWERMENT (HOPE) for Children Trust Account Program

7. General public comment for items not on the agenda - Chair
8. Adjournment— Chair

There will be an opportunity for public comment before the end of each item.

Note: Items designated for information are appropriate for Advisory Workgroup action if the Advisory Workgroup chooses to take action. Items may be taken out of order.

FOR ADDITIONAL INFORMATION

Kasey O'Connor, Executive Director

California Hope, Opportunity, Perseverance and Empowerment (HOPE) for Children Trust
Account Program

901 P Street, Suite 411-B Sacramento, CA 95814

(916) 926-2074

The agenda is also available on the California Hope, Opportunity, Perseverance and
Empowerment (HOPE) for Children Trust Account Program website at:

www.treasurer.ca.gov/hope

* Interested members of the public may use this number to call in to listen to and/or comment on items before the Advisory Workgroup. Additional instructions will be provided to callers once they call the indicated number. This call-in number is provided as an option for public participation, but the Advisory Workgroup is not responsible for unforeseen technical difficulties that may occur. The Advisory Workgroup is under no obligation to postpone or delay its meeting in the event such technical difficulties occur during or before the meeting.

The California Hope, Opportunity, Perseverance and Empowerment (HOPE) Advisory Workgroup complies with the Americans with Disabilities Act (ADA) by ensuring that the facilities are accessible to persons with disabilities, and providing this notice and information given to the members of the HOPE Advisory Workgroup in appropriate alternative formats when requested. If you need further assistance, including disability-related modifications or accommodations, you may contact the Executive Director, Kasey O'Connor, no later than five calendar days before the meeting at (916) 651-0549. From a California Relay (telephone) Service for the Deaf or Hearing Impaired TDD Device, please call (800) 735-2929 or from a voice phone, (800) 735-2922.