

California HOPE / RVK Work Plan

As of September 12, 2024

	2024					2025					
	August	September	October	November	December	January	February	March	April	May	June
Determine Investment Strategy (Target Approval at November 2024 Meeting)											
Intro Meetings with Staff & Investment Team	✓										
Asset Allocation & Investment Strategies											
Intergenerational Equity Analysis (\$ per child scenarios)											
Investment Program Implementation (Ongoing)											
Program Administrator RFI	✓										
Program Administrator RFP											
Program Administrator Onboarding											
Investment Strategy Onboarding (as needed)											
Any Final "Go Live" Investment Operations-Related Items											
Develop Investment Policy Statement (Target Approval at February 2025 Meeting)											
Draft Investment Policy Statement (IPS)											
Include Success Benchmarks & Ongoing Monitoring Plan in IPS											
Include Investment Strategy Approved at Nov. 2024 Meeting											
Investment Program Success Benchmarks & Monitoring Plan (Target Approval at February 2025 Meeting)											
Investment Program Success Benchmarks											
Ongoing Investment Monitoring & Review Plan											

*Red lines indicate decision points for California HOPE Governing Board.
Time periods are tentative and subject to change.