

MCERA Work Plan: 2020

Below is a proposed work plan for Callan and the MCERA Board meetings for the 2020 year. In addition to regular performance reviews, we plan to conduct structure reviews for each broad asset class in the MCERA portfolio.

February 19: 4Q 2019 Performance Review, Investment Policy Statement Review, Callan's 2020 Capital Market Assumptions, Infrastructure Funding Update

May 20: 1Q 2020 Performance Review, Domestic Equity Structure Review

August 19: 2Q 2020 Performance Review, International Equity Structure Review, Next Steps for Domestic Equity (as applicable)

November 4: 3Q 2020 Performance Review, Fixed Income Structure Review, Real Assets Structure Review, Next Steps for International Equity (as applicable)

	1Q20	2Q20	3Q20	4Q20	1Q21
Strategic Planning & Implementation					
Review Investment Policy Statement					
Capital Market Projections Discussion					
Infrastructure Implementation Update					
Domestic Equity Structure					
International Equity Structure					
Fixed Income Structure					
Real Assets Structure					
Manager Searches (as needed)					
Monitoring & Evaluation					
Quarterly Performance Reviews	4Q19	1Q20	2Q20	3Q20	4Q20
Monthly “Flash” Report					
Ongoing Monitoring and Qualitative Review					
Research & Education					
Research Papers and Publications					
“Callan College”					
Regional Workshops					
National Client Conference					