



# Investment Committee

## Item number 12 – Open session

**Subject:** Input on FY 2026-27 Committee Work Plan

**Presenter(s):** Scott Chan

**Item type:** Information

**Date and time:** May 27, 2026 – 10 minutes

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**Attachment(s):** Draft Work Plan

**PowerPoint presentation(s):** Investment Committee Work Plan Timeline

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### **Item purpose**

The development of the Investment Committee Work Plan and setting annual objectives/projects is covered by the Teachers' Retirement [Board Governance Manual](#), starting on page 16.

### **Recommendation**

The Investment Committee Chair and the Chief Investment Officer recommend that the Committee approve the proposed Work Plan at the July Retirement Board meeting.

### **Executive summary**

At the July Retirement Board meeting, the Investment Committee Chair will present the FY 2026-27 Investment Committee Work Plan for its formal adoption. The Plan includes all major agenda items across the respective Investment Committee meetings. These items include policies to revise, performances to monitor, and major objectives to accomplish. This item is to decide the specific projects the Committee wants to devote additional time and attention to.

### **Background**

Within the Retirement Board meeting schedule, the Investment Committee meeting has developed a consistent rhythm.

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In the upcoming fiscal year, the Investment Committee will continue to focus on our two workplan projects, Shared Vision and Portfolio Resiliency, as well as overseeing and monitoring the overall investment portfolio.

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Strategic Plan linkage: [Goal 1 of the Strategic Plan](#). Ensure a well-governed, financially sound trust fund

Board Policy linkage: [CalSTRS Investment Policy Statement](#)

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