

**INVESTMENT COMMITTEE
2026-27 Meeting Work Plan**

	July (Offsite)	September	November	February	March	May
<i>CIO Report</i>	Routine Significant Updates (I)	Routine Significant Updates (I)	Routine Significant Updates (I)	Routine Significant Updates (I)	Routine Significant Updates (I)	Routine Significant Updates (I)
<i>Strategic Plan & Major Projects</i>	Shared Vision					
	Portfolio Resiliency					
	TRB Inv. Comm. Work Plan (A)	Workplan Project Placeholder (I)	Workplan Project Placeholder (I) Engagement Strategy (I)	Workplan Project Placeholder (I)	Workplan Project Placeholder (I)	Real Estate Consultant RFP (C/A) Annual Review of Committee Charter (C/I) Committee Work Plan FY 2026-27 (I) Engagement Strategy (I) Workplan Project Placeholder (I)
<i>Investment Policies</i>		Potential Investment Policy Revisions and/or Creation (C/I/A)	Potential Investment Policy Revisions and/or Creation (C/I/A)	Potential Investment Policy Revisions and/or Creation (C/I/A)	Potential Investment Policy Revisions and/or Creation (C/I/A)	Potential Investment Policy Revisions and/or Creation (C/I/A)
<i>Performance Reports</i>		FY Inv. Performance:	GIPS Performance Report (C/I)		Calendar Year Inv. Perf.:	

	July (Offsite)	September	November	February	March	May
		Total Fund (I) Real Estate (I) Private Equity (I)			Total Fund (I) Real Estate (I) Private Equity (I)	
<i>Investment Oversight / Monitoring Annual Reports</i>		RMS & SISS Semi-Annual Monitoring Report (I) AB2833 Report (C/I) Review of Staff Delegation (C/I)	Semi-Annual Investment Compliance Report (I) Annual Investment Cost & Savings Report (I)	SISS - Stewardship Priorities Update (I)	RMS & SISS Semi - Annual Monitoring Report (I)	Semi-Annual Investment Compliance Report (I) Diversity in the Management of Investments (DIMI) Annual Update (C/I) Net Zero Strategy Annual Update (C/I)
<i>Annual Reports Posted to the CalSTRS.com website</i> <i>*Investment Committee can request an agenda item</i>					Diversity in the Management of Investments Annual Report (I)	Ancillary Investments Programs Annual Report (I)
<i>Education</i>	Geopolitical Risk Education Item AI Governance Principles					