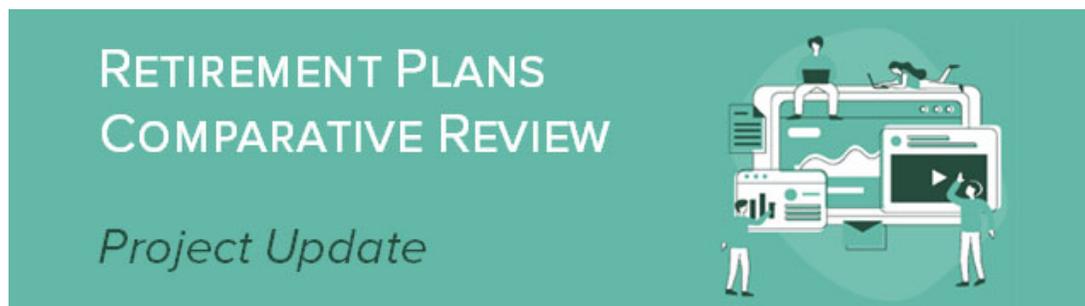


**From:** MyHR  
**Sent:** Friday, May 7, 2021 11:00 AM  
**To:** All Faculty & Staff  
**Subject:** Retirement Plans Review: Spring Project Update

Please send questions or responses to the Committee Chair, [joseph.diverdi@colostate.edu](mailto:joseph.diverdi@colostate.edu).



Colleagues, Partners and Friends,

I write to you today to share a brief update on the recent activities of the Retirement Plan Review Committee (RPRC) before our colleagues on nine-month appointments depart for the summer.

The RPRC continues its efforts on the complex and important work of developing an update to the University's thirty-year-old Retirement Plan. It communicates regularly with the University's Human Resources (HR) staff and with the consultants, Innovest Portfolio Solutions of Denver.

Committee work since the last shared project status report in February has centered around:

- carefully reviewing the desires and preferences of faculty and staff communicated in the responses to the October 2020 participant survey;
- deepening members' understanding of the details and inner workings of defined contribution, tax deferred retirement plans;
- exploring the trends in such plans within the higher education environment;
- analyzing the RFQ responses of the three responding vendors in the areas of organization, participant services, cyber security, plan systems, code compliance, investment management and participant pricing.

Over the summer, the Committee will continue its study and deliberations with the intention of arriving at a set of recommendations in the fall of 2021 for an updated Retirement Plan. These recommendations will be presented early in the semester to the campus community and the Faculty and Administrative Professional Councils and to the campus leadership. The choice of in-person or video briefings will depend critically upon the logistics and state of return-to-campus and on-campus activities at the time.

Additional information on the project can be found [here](#). Questions and comments to the Committee Chair are always welcome.

Sincere thanks to the other Committee members for the time and effort they've devoted to this project over the past year:

**Sue Doe** | Faculty Council Chair  
**Catherine Douras** | Admin Pro Council Chair  
**Bolivar Senior** | University Benefits Committee Chair  
**Lacey Snyder** | Higher Ed ORP Review Committee Member

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Joseph A. DiVerdi  
Retirement Plan Review Committee Chair

