

Timeline: Starting In January, 2011

- **Month of January :** Collect plan data from the City and current vendors
Bolton Partners drafts customized RFP
The City reviews and approves RFP draft
- **Week of February 1st :** Bolton Partners issues the RFP to vendors
Bolton Partners develops an Investment Policy Statement
- **Week of March 1st :** Bolton Partners collects responses from vendors
- **Week of May 2nd :** Bolton Partners presents written report with findings to the City
- **Week of May 23rd :** Bolton Partners and the City conduct finalist interviews
- **Week of May 30th :** Bolton Partners negotiates with finalist(s); the City selects and approves contract with winning vendor
- **Week of June 13th :** Bolton Partners presents investment lineup with recommendations; the City approves investment lineup
- **Week of June 27th :** Bolton Partners and the City conduct kick off meeting with new vendor
- **July - September :** Program Implementation: Vendor works with the City to communicate new program to participants and install/convert new plan
- **Week of October 1, 2011 :** **New Plan Goes Live!**