

Overview of a typical

OCIO SEARCH PROCESS

PHASE 1: PREPARATION

2-4 WEEKS

- Identify selection team
- Determine goals and requirements
- Establish search components, deliverables and timeline



PHASE 2: DUE DILIGENCE

6-8 WEEKS

- Identify “semi-finalists”
- Create RFP and disseminate
- Collect and review completed RFPs
- Create summary report



PHASE 3: SELECTION

4-6 WEEKS

- Identify “finalists”
- Conduct finals interviews
- Select OCIO provider
- Document selection process

