

**April 2021 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

No.	Solicitations	Details	Program	Release	Anticipated Contract Start	Description of Services
1.	CalPERS Health Program Pharmacy Benefit Manager (PBM) (Solicitation No: TBD)	Solicitation; five-year contract term; estimated contract amount to be negotiated.	HPBB/HPRA	TBD	January 2024	CalPERS seeks to contract with one firm to provide pharmacy benefit management services for Preferred Provider Organization (PPO) and some Health Maintenance Organization (HMO) plans.
2.	Long-Term Care Managed Care Firm(s) (Solicitation No: TBD)	Solicitation; one or more awards; five-year contract term(s); estimated contract amount(s) to be negotiated.	SHOD	TBD	TBD	CalPERS seeks to contract with one or more firms, service providers and/or managed care organizations who have experience with innovative programs that have improved policyholder satisfaction and reduced costs of long-term care (LTC) risk pools (e.g., LTC insurance policies, Managed Long Term Services and Supports (MLTSS) programs, etc.) through the deployment of Aging-in-Place strategies.

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No.	New Contracts / Amendments	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
1.	OptumRx (Contract No. 2016-8198)	Amendment; add \$21M to the current contract; extend contract term through December 31, 2023; estimated contract amount not to exceed \$143M.	HPBB/HPRA	September 2020	January 2021	To provide pharmacy benefit management services for Preferred Provider Organization (PPO) and some Health Maintenance Organization (HMO) plans.
2.	State Controller's Office (SCO) Contract (Contract No. TBD)	Interagency agreement; five-year contract for premium deduction register to replace the current contract that will expire on June 30, 2021; estimated contract amount not to exceed \$5.5M.	HPBB/HPRA	N/A	July 2021	To provide CalPERS with state employee payroll deduction services to process the collection and remittance of both the state employee's contribution and remittance of the State of California's contribution for health benefit premiums to the Public Employee's Medical and Hospital Care Act (PEMHCA).
3.	Blackrock Financial Management, Inc. (Contract No. 2019-8702) INVOWide	Contract Amendment to add services; fees to be negotiated.	INVO	Existing	Summer 2021	Portfolio management system for the Investment Office.

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4.	Jefferies LLC (Contract No. TBD) INVOWide	Exemption from Competitive Bid; 5-year contract; fees to be netted from sales proceeds; fees may exceed \$2M per year.	INVO	Spring 2021	Summer 2021	Intermediary Sales services for the Investment Office.
5.	State Street Bank and Trust Company (Contract No. 2018-8344) INVOWide	Contract Amendment to increase total value of contract to \$95M.	INVO	Existing	Summer 2021	Master custody and accounting services.

No.	Undefined – Legal Services Contracts	Details	Program	Award/ Initiate	Contract/ Amendment Start	Description of Services
1.	Berman Tabacco (Contract No. 2018-8496)	Contract began September 2018. Total estimated contract amount expected to exceed \$2M.	LEGO	Existing	Existing	Outside Legal Counsel services related to securities and health class-action litigation.
2.	Orrick, Herrington & Sutcliffe, LLP (Contract No. 2019-8866)	Contract began June 2020. Total estimated contract amount expected to exceed \$1M.	LEGO	Existing	Existing	Outside Legal Counsel services in connection with IT, Cybersecurity, Investigation and Special Advice related legal issues.

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No.	Purchase Orders	Details	Program	Initiate	Change Order Effective	Description of Services
1.	Axioma (Purchase Order No. TBD) INVOWide	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2021-2022.	INVO	Existing	N/A	Optimizer tool for portfolio construction used by Global Equity.
2.	Barra/MSCI LLC (Purchase Order No. TBD) INVOWide	Subscription agreement; annual renewal; total purchase order amount may exceed \$2M for FY 2021-2022.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assists in internal portfolio management.
3.	Bloomberg LP dba Bloomberg SEF LLC (Purchase Order No. 77320) INVOWide	Subscription agreement; annual renewal; total purchase order amount may exceed \$4M for FY 2021-2022.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assist in internal portfolio management.
4.	Carahsoft Technology Corp. (Purchase Order No. TBD) INVOWide	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2021-2022.	INVO	Existing	N/A	Technology Platform for vendor management services for the Investment Office.
5.	Factset Research Systems Inc. (Purchase Order No. 77543) INVOWide	Subscription agreement; annual renewal; total purchase order amount may exceed \$5M for FY 2021-2022.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assist in internal portfolio management.
6.	FTSE International Limited (Purchase Order No. TBD) INVOWide	Subscription agreement; annual renewal; total purchase order amount may exceed \$1.5M for FY 2021-2022.	INVO	Existing	N/A	Benchmark data services for the investment portfolios of the fund.

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7.	MSCI ESG (Purchase Order No. TBD) INVOWide	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2021-2022.	INVO	Existing	N/A	Data service for the investment portfolios of the fund.
8.	RIMES Technologies Corporation (Purchase Order No. TBD) INVOWide	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2021-2022.	INVO	Existing	N/A	Benchmark data services for the investment portfolios of the fund.
9.	Ryedale (Purchase Order No. TBD) INVOWide	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2021-2022.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assists in internal portfolio management.
10.	S&P Global Market Intelligence (Purchase Order No. TBD) INVOWide	Subscription agreement; annual renewal; total purchase order amount may exceed \$2M for FY 2021-2022.	INVO	Existing	N/A	Multiple asset classes. Analytics Service provider; assists in internal portfolio management.

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No.	Letters of Engagement (LOEs)	Details	Program	Initiate	Contract / Amendment Start	Description of Services
1.	Propoint Technology Inc. Contract No. 2020-8812 Investment Office	Investment Office Spring Fed Pool; multiple awards; estimated amount may exceed \$4M for FY 21/22	INVO	Spring 2021	July 2021	Provide technology and project management consulting services for multiple investment technology solutions.
2.	Vendor TBD Contract No. TBD Investment Office	Investment Office Spring Fed Pool; competitive bid; estimated amount may exceed \$2M total in FY 20/21 and FY 21/22.	INVO	Spring 2021	Spring 2021	Transaction advisor for secondary sales services for the Real Assets Unit.
3.	My CalPERS Maintenance & Support (Contract No. TBD)	IT Spring-Fed Pool LOE; multiple awards; estimated amount \$3M through FY 21/22.	ITSB/ESDD	Summer 2021	Summer 2021	Data analysis, data correction, system testing, test tool administration support, test automation services, application development coding, system defect analysis and resolution, system architecture design and enhancement, report and batch generation and support, business analysis, and solution architecture services.

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Legend:

ESDD – Enterprise Solutions Development Division

HPBB – Health Policy and Benefits Branch

HPRA – Health Plan Research & Administration

INVO – Investment Office

ITSB – Information Technology Services Branch

LEGO – Legal Office

SHOD – Strategic Health Operations Division