

**April 2022 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.	<p>CalPERS Preferred Provider Organization (PPO) Third-Party Administrator (Solicitation No. TBD)</p>	<p>Solicitation; five-year contract term; estimated contract amount to be negotiated.</p>	<p>HPBB/HPRA</p>	<p>TBD</p>	<p>January 1, 2025</p>	<p>Provide medical benefit management services for Self-Funded Preferred Provider Organization (PPO) third-party administrator and Exclusive Provider Organization (EPO) health plans.</p>
2.	<p>Long-Term Care Third-Party Administrator (Solicitation No. 2024-9132)</p>	<p>Solicitation for long-term care third-party administrator services. If a new vendor is selected, a two-year transition and standard term five-year contract will be awarded; if the current incumbent is selected a standard term five-year contract will be awarded; Estimated contract amount to be negotiated.</p>	<p>HPBB/SHOD</p>	<p>TBD</p>	<p>TBD</p>	<p>The CalPERS Long-Term Care Program third party administrator to provide all administrative services for the program, including but not limited to: customer service, premium collection, claims administration, care coordination, policy oversight and administration, policyholder communication, implements rate increases and benefit increase options, processes coverage changes, and performs underwriting among other administrative functions.</p>

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3.	CalPERS Search Firm Services Spring-Fed Pool (Solicitation No. TBD)	Solicitation; multiple contract awards; five-year term; estimated contract amount to be negotiated.	HRSD	Fall 2022	April 2023	Search and recruitment services for CalPERS senior and executive level management positions.

No.	New Contracts / Amendments	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
1.	OptumRx Inc. (Contract No. 2016-8198)	Amendment; extend the current six-year contract term for two years to December 31, 2024; add \$38M for contract extension with estimated administrative services fees not to exceed a contract total of \$160M.	HPBB/HPRA	May 2016	January 1, 2023	Provides pharmacy benefit management services for Preferred Provider Organization (PPO) and some Health Maintenance Organization (HMO) plans.
2.	Long-Term Care Third-Party Administrator (Contract No. 2017-8341)	Amendment; extend the current contract term up to two years, ending no later than December 31, 2024; estimated contract amount to be negotiated.	HPBB/SHOD	June 2017	January 1, 2023	Provides a full range of long-term care third-party administration services in support of the CalPERS long-term care program.

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3.	Charles River System Inc. dba Charles River Development (Contract No. TBD)	Exemption from Competitive Bid; renewal contract; five-year term; fees to be negotiated.	INVO	Spring 2022	Spring 2023	Investment Trading Platform for Global Equity.
4.	eFront Financial Solutions, Inc. (Contract No. TBD)	Exemption from Competitive Bid; renewal contract; five-year term; fees to be negotiated.	INVO	Spring 2022	Spring 2023	Accounting and Reporting Solution for Private Equity.
5.	Hamilton Lane Advisors, LLC (Contract No. TBD)	Exemption from Competitive Bid; renewal contract; five-year term; fees based on aggregate net proceeds to CalPERS from sale proceeds or acquisition or tender offer of portfolio securities during each calendar quarter and will be negotiated.	INVO	Spring 2022	Spring 2023	Investment Manager; oversee liquidation of Portfolio Securities.
6.	MUFG Capital Analytics LLC (Contract No. TBD)	Exemption from Competitive Bid; renewal contract; five-year term; fees to be negotiated.	INVO	Spring 2022	Spring 2023	Financial Data and Reporting Solution for Private Equity.

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7.	State Street Bank and Trust (Contract No. TBD)	Exemption from Competitive Bid; renewal contract; five-year term; fees to be negotiated.	INVO	Spring 2022	Spring 2023	Master Custodian of the CalPERS funds.
8.	State Street Corporation: Data GX (Contract No. TBD)	Exemption from Competitive Bid; renewal contract; five-year term; fees to be negotiated.	INVO	Spring 2022	Spring 2023	Financial Data Management Platform for the Investment Office.

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No.	Undefined – Legal Services Contracts	Details	Program	Award/ Initiate	Contract/ Amendment Start	Description of Services
1.	Durie Tangri, LLP (Contract No. 2018-8571)	Contract began January 2019. Total estimated contract amount may exceed \$4M.	LEGO	Existing	January 2019	Outside Legal Counsel services related to representation of the Board in state and federal judicial hearings, and representation of the Board in class action lawsuits.
2.	Pillsbury Winthrop Shaw Pittman LLP (Contract No. 2019-8797)	Contract began March 2020. Total estimated contract amount expected to exceed \$1M.	LEGO	Existing	March 2020	Outside legal counsel services for Real Estate investments.
3.	Orrick, Herrington & Sutcliffe, LLP (Contract No. 2019-8866)	Contract began June 2020. Total estimated contract amount may exceed \$2M.	LEGO/INVO	Existing	June 2020	Outside Legal Counsel services in connection with Information Technology/ Information Security, Investigations, Compliance and Investment related matters, and other services requested by the Board or General Counsel.

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No.	Purchase Orders	Details	Program	Initiate	Change Order Effective	Description of Services
1.	Axioma (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2022-2023.	INVO	Existing	N/A	Optimizer tool for portfolio construction used by Global Equity.
2.	Barra/MSCI LLC (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$5M for FY 2022-2023.	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. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$5M for FY 2022-2023.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assist in internal portfolio management.
4.	Carahsoft Technology Corp. (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2022-2023.	INVO	Existing	N/A	Technology Platform for vendor management services for the Investment Office.
5.	Factset Research Systems Inc. (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$5M for FY 2022-2023.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assist in internal portfolio management.
6.	FTSE International Limited (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$2M for FY 2022-2023.	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)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2022-2023.	INVO	Existing	N/A	Data service for the investment portfolios of the fund.
8.	RIMES Technologies Corporation (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2022-2023.	INVO	Existing	N/A	Benchmark data services for the investment portfolios of the fund.
9.	Ryedale (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2022-2023.	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)	Subscription agreement; annual renewal; total purchase order amount may exceed \$2M for FY 2022-2023.	INVO	Existing	N/A	Multiple asset classes. Analytics Service provider; assists in internal portfolio management.

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No.	Letters of Engagement (LOE)	Details	Program	Initiate	Contract / Amendment Start	Description of Services
1.	Callan LLC Contract No. 2020-8708	Investment Office Spring-Fed Pool; multiple awards; estimated amount may exceed \$3M for FY 22/23	INVO	Spring 2022	FY 22/23	Investment advisory services for multiple program areas in the Investment Office.
2.	Data Strategy Project Manager 2 LOE No. 2021-0410	Investment Office Spring-Fed Pool; 2- year LOE upon execution; estimated amount may exceed \$1M	INVO	Spring 2022	Summer 2022	Project Management resources for the INVO Data Strategy.
3.	Mercer Investment Advisers LLC Contract No. 2020-8711	Investment Office Spring-Fed Pool; multiple awards; estimated amount may exceed \$1M for FY 22/23	INVO	Spring 2022	FY 22/23	Investment advisory services for multiple program areas in the Investment Office.
4.	Propoint Technology Inc. Contract No. 2020-8812	Investment Office Spring Fed-Pool; multiple awards; estimated amount may exceed \$4M for FY 22/23	INVO	Spring 2022	FY 22/23	Investment advisory services for multiple program areas in the Investment Office.
5.	Salesforce Application Development and System Support 5 LOE No. 2021-0423	IT Spring-Fed Pool; 2-year LOE upon execution; estimated amount may exceed \$2M	INVO	Spring 2022	Summer 2022	Development resources for the Salesforce platform which supports multiple critical INVO processes.

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6.	myCalPERS Maintenance & Support (Contract No. TBD)	IT Spring-Fed Pool LOE; multiple awards; estimated amount \$3M through FY 22/23.	ITSB/ESDD	Summer 2022	Summer 2022	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.

Legend:

- ESDD – Enterprise Solutions Development Division
- HPBB – Health Policy and Benefits Branch
- HPRA – Health Plan Research & Administration Division
- HRSD – Human Resources Division
- INVO – Investment Office
- ITSB – Information Technology Services Branch
- LEGO – Legal Office
- SHOD – Strategic Health Operations Division