



CalPERS Board of Administration PRA Summary Report, July 2013

Stakeholder Relations

July 1 - July 31, 2013	
New PRAs received	38
PRAs closed	36

Monthly Averages for Previous 12 Months	
PRAs received	19
PRAs closed	21

Annual Totals	2011*	2012	2013
PRAs received	219	282	150
PRAs closed	194	292	167

*2011 totals - STRL received the process on 4/15/2011 through 12/31/2011

Total Active PRAs	
As of July 31, 2013	22

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Closed Public Records Act Requests

	Closed Date	Requesting Organization	Requestor's Name	PRA #	Brief Description	Date Received
1	7/2/2013	N/A	Margaret Thum	1190	All documents between 1/1/01 and 12/31/03 regarding the City of Pacific Grove.	4/8/2013
2	7/3/2013	LA Times	Abigail Sewell	1216	Any communications between CalPERS and the cities of Hawthorne and/or Inglewood in the past year regarding Jan Vogel. Records of enforcement action taken in 2006 relating to another retired annuitant in the City of Hawthorne, Richard Prentice, and any other enforcement actions related to annuitants in Hawthorne since.	4/24/2013
3	7/3/2013	Freedom of Information Act Pension Coalition	Mark Sutherland	1227	Copies of all contractual documents between 12/31/1989 and 12/31/2012 related to a pension investment(s) by your organization in an Enhanced Equity Index fund(s) or separate account(s) managed by State Street Global Advisors and/or Blackrock Investment Management (known as Barclays Global Investors prior to December 9, 2009).	5/6/2013
4	7/5/2013	N/A	Suzanne Quitarano	1142	Names, years of service and retire date/membership date for retirees and active employees with a break in service from City of Oxnard.	3/12/2013
5	7/5/2013	N/A	Enrico Ferroni	1248	Copy of the current contract between CalPERS and Blue Cross.	5/30/2013
6	7/5/2013	N/A	Keith Bishop	1261	Requesting copies of all memoranda, letters, email, notes or other records pertaining to compliance by the California Public Employees' Retirement System (CalPERS) with Government Code Section 7603. The period covered by this request is April 8, 2013 to the date of your response ("Covered Period"). The request includes the following records: <ul style="list-style-type: none"> • All memoranda, letters, email, or other correspondence to or from the Department of Corporations with respect to review of CalPERS' security lending agreements; • All memoranda, letters, email, or other correspondence to or from CalPERS' staff to any member of the Board of Administration (or any committee thereof) with respect to a review of CalPERS' security lending agreements by the Department of Corporations. • All documents pertaining to changes to CalPERS' security lending agreements, whether proposed or adopted. 	6/17/2013
7	7/9/2013	Michael Savage Show	Neal Osincup	1262	Any and all pension or retirement information for officials in the City of Larkspur, elected or appointed, for the last 5 years.	6/17/2013
8	7/11/2013	City of Glendale	Andrew Rawcliffe	1228	Request to produce the years of service, benefit plan, and date of hire for Dawn Devine Pelt a.k.a. Dawn Pelt.	5/7/2013
9	7/11/2013	Law Office of John Michael Jensen	John M. Jensen	1260	All documents mentioning or describing one or more reasons why delayed payments have occurred from January 1, 2000 to the present because of issues affecting the timing and implementation of any CalPERS computer systems.	6/13/2013
10	7/11/2013	Diepenbrock Elkin LLP	Jennifer Dauer	1284	All records, including without limitation timesheets or invoices, submitted to CalPERS on the PSR project between May 1, 2008 and June 30, 2012, which reflect time spent or tasks performed by Keshmi Mishra.	7/3/2013
11	7/12/2013	N/A	Daniel Lee	1279	A copy of the Request for Information (RFI) relating to environmental, social and governance (ESG). The data vendor was GMI.	7/3/2013
12	7/12/2013	N/A	Linda Mussetter	1287	Requesting all current Simplified Factor Tables - cost for post retirement survivor continuance (hired post 7/1982) to include option 2, 2W, 3, 3W and 4, as well as, Service and Industrial Disability Retirement.	7/10/2013
13	7/17/2013	Bloomberg	Nick Madrid	1288	Documents relating to CalPERS' PE Program Fund Performance Review and Court Square Capital Partners II LP.	7/11/2013
14	7/17/2013	N/A	Angelo Margozzi	1291	Retiree name, gross monthly pension amount, base allowance, cost of living adjustment, years of service, retirement date, benefit formula, final compensation and last agency worked for Daniel Kimberly, Campbell, CA CALTRANS.	7/14/2013
15	7/18/2013	Sacramento Bee	Jon Ortiz	1290	All individual retiree pension data underpinning CalPERS pension information website reported in the Sacramento Bee on July 9, 2013, including: (1) each pensioner's name; (2) each pensioner's monthly gross pension amount; (3) each pensioner's base allowance; (4) each pensioner's cost of living adjustment; (5) each pensioner's years of service; (6) each pensioner's retirement date; (7) each pensioner's benefit formula; (8) each pensioner's final compensation; (9) each pensioner's last employer.	7/9/2013

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16	7/18/2013	Center for Investigative Reporting	Kendall Taggart	1286	Electronic copy of the names and benefit amount of CalPERS benefit recipients. Please include the following fields: name, employee category, title (when available), retirement date, years of service, base amount, cost of living adjustment, monthly gross, final, and benefit formula.	7/10/2013
17	7/18/2013	First Amendment Coalition	Peter Scheer	1295	All individual retiree pension data used to create the CalPERS Online Pension Database reported in the Sacramento Bee on July 9, 2013.	7/11/2013
18	7/18/2013	Bay Area News Group	Thomas Peele	1297	Retiree name; monthly gross pension amount; base allowance; cost of living adjustment; years of service; retirement date; benefit formula; final compensation; and last employer for 2012.	7/11/2013
19	7/18/2013	First Investors	Cheryl Cousino	1152	Information on ALL active CalPERS members as follows: last name; first name; employment location; position / title; and total years of service / date of hire.	3/19/2013
20	7/18/2013	Activist Insight	Jamie Dickson	1296	The names and monthly net performance from and including April 2013 of any funds in which CalPERS currently invests which have an activist or corporate governance strategy, including BLUM Strategic Partners II, BLUM Strategic Partners III, BLUM Strategic Partners IV, Breeden European Partners, Breeden Partners, Cartica Capital Partners, Governance for Owners, Knight Vinke Institutional Partners, Lazard Korea Corporate Governance Fund, Relational Investors, Relational Midcap, Taiyo Cypress and Taiyo Pearl Fund.	7/15/2013
21	7/18/2013	Techwire.net	Bill Maile	1300	Retiree Pension data for December 2012.	7/15/2013
22	7/22/2013	California Common Sense	Madhusudan Ravi	1282	Copies annual financial reports for each year (1975 - 2013).	7/9/2013
23	7/23/2013	NTT Data, Inc.	Joseph Wells	1292	Information about IT service contracts that CalPERS has awarded in the past, who they were awarded to and the amount that those contracts were worth.	7/9/2013
24	7/25/2013	N/A	Lenora Frazier	1308	Please provide any and all pension information relative to the amount of monthly pension benefit(s) paid to Alvin Frazier.	7/22/2013
25	7/25/2013	Sacramento Bee	Dan Morain	1310	Documents relating to Mr. Tom McClintock purchase of service credit.	7/22/2013
26	7/26/2013	N/A	Denise Manoogian	1303	Long Term Care Documents: The evidence of coverage book and a copy of the contract between CalPERS and the third party administrator.	7/17/2013
27	7/26/2013	Sacramento Bee	Jon Ortiz	1298	Copy of the annual report CalPERS runs that show summary statistics of retirement payments by the various pension categories/formulas administered by CalPERS (Petrosino Reports).	7/12/2013
28	7/29/2013	Kirby Noonan Lance & Hoge LLP	Christopher T. Wright	1289	All documents and communications related to CalPERS investments and/or funding placements with HEARTHSTONE. The time period is from January 1, 1992 to the present.	7/3/2013
29	7/29/2013	N/A	Matthew DeMatteis	1307	A copy of the list names of all CalPERS AIM Private Equity funds. Please include all active and exited commitments, including funds sold in secondary sales (as of the most recent date available). Please also include fund holdings of separate account vehicles (e.g. funds held by California Emerging Ventures IV, L.P.).	7/22/2013
30	7/30/2013	N/A	Jon Brines	1299	A list of monthly pensions for all retirees from the City of Rocklin for the most recent month data is available.	7/15/2013
31	7/30/2013	N/A	Denny Amundson	1315	Request for copies of the most recent internal and external audits for the CalPERS Long Term Care Program.	7/23/2013

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32	7/30/2013	RPEA	Jim Spaulding	1317	List of retirees from the City of Carson, CA. Names and retirement date only. Date ending December 2012.	7/30/2013
33	7/30/2013	Judicial Watch	Sterling Norris	1320	<p>1. Any and all records of monies donated between January 2004 and December 31, 2008 by California Public Employees' Retirement System (CalPERS) to CaliforniaALL, a partnership fund, consisting of partners: California Public Employees' Retirement System, California Public Utilities Commission (PUC), State Bar of California, and California Department of Insurance (CDI).</p> <p>2. Any and all records of distribution of funds from CaliforniaALL, between January 2004 and December 31, 2008.</p> <p>3. All correspondence, memoranda, documents, reports, records, statements, audits, list of names, applications, diskettes, letters, expense logs and receipts, calendar or diary logs, facsimile logs, telephone records, call sheets, tape recordings, video/movie recordings, notes, examinations, opinions, folders, files, books, manuals, pamphlets, forms, drawings, charts, photographs, electronic mail, and other documents, and things that refer or relate to the above, in any way.</p>	7/30/2013
34	7/31/2013	Former Sacramento Union reporters	Stephen Chaneka and Robert Taylor	1246	Last monthly gross pension amounts for former and current state officials.	5/24/2013
35	7/31/2013	N/A	Mark Lowenthal	1266	Copy of the current CVS Caremark PBM contract.	6/19/2013
36	7/31/2013	N/A	Keith Bishop	1311	A copy of the analysis of the discretionary nature of staff travel in order to reduce unnecessary costs, per the Governor's Executive Order, if an analysis was performed.	7/23/2013

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1	4/17/2013	Law Office of John Michael Jensen	John Michael Jensen	1205	Documents relating to payments in addition to retirement, death benefit, refund check, etc. (Adjustment and one time payments).
2	4/26/2013	Smith Lillis Pitha, LLP	Martin Pitha	1217	All documents relating to estimates, calculations, allowances, communications and other documents relating to Rick A. Coleman.
3	5/6/2013	Israel Divestment Campaign	Mikos Fabersunne	1232	Correspondence between CalPERS staff and Investment Committee members regarding Elbit Systems, Ltd., and Veolia Environment S.A.
4	6/20/2013	Schiff Hardin LLP	Karol Dinneston	1272	Sanitary District 5 of Marin County records regarding termination payment amounts, financial reports, replacement benefit program, communications to and from the District, and termination payment calculations.
5	6/21/2013	N/A	Brendan Shannon	1268	A listing of the pension formulas each member agency in the San Diego County region on December 30, 2012. For agencies with more than one category of employee (e.g., safety, miscellaneous), list all formulas.
6	6/28/2013	Law Office of John Michael Jensen	John M. Jensen	1273	Any and all documents referring or relating to financial bonuses, financial incentives or monetary enhancement offered and/or paid directly or indirectly by CalPERS to any entity, employee, or individual associated with deadline, delivery date, timeliness, or implementation date related to computer software, computer hardware, information processing, database, or related systems.
7	6/28/2013	Open The Books Portal	Laura Reigle	1274	An electronic copy of all active employee data broken down by name, employer, years of service, employer zip code, and membership contributions.
8	6/28/2013	Open The Books Portal	Laura Reigle	1275	An electronic copy of all retiree data broken down by name, monthly gross allowance, retirement date, years of service, last employer, last employer zip code, state of residency, and final compensation.
9	7/5/2013	N/A	Richard Lewis	1283	True and correct copies of all documents in CalPERS possession or under its control referring or relating to or bearing on pension benefits, communications between the city and of San Bernardino Fire Department (SBFD), and the settlement between the city and/or SBFD and Mr. Richard Lewis.
10	7/6/2013	N/A	Dwayne Milnes	1280	City of Stockton retiree data listing name of retiree, date of retirement, number of years of retirement credit, monthly gross retirement amount for June 2013, and agency from which the retiree retired.
11	7/11/2013	Procopio, Cory, Hargreaves and Savitch, LLP	Adriana Sanchez	1294	Any and all documents related to Dehesa Charter School's denial of participation in CalPERS pension plan.
12	7/11/2013	PERS Retirement Betterment Committee, Inc.	Jake Petrosino	1293	Request for July 1, 2013 Local Public Agency Rates and related Funding Status.
13	7/15/2013	Techwire.net	Bill Maile	1302	Retiree Pension data for April 1, 2013 to June 30, 2013.
14	7/17/2013	Los Angeles Times	Paul Pringle	1316	Requesting corresponding dollar amounts for unused sick leave that was converted into service credit for all retirees who retired between 2009 and 2012.
15	7/19/2013	N/A	Joseph Niehus	1304	Requesting highest year salary or retirement salary, benefit factor, years of service, and any other compensation that would affect their retirement payments for Steven Williams and Michael Milliner both employees of Metropolitan Water District in Los Angeles Ca.

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16	7/21/2013	N/A	Elizabeth Uremovic	1305	A copy of the City of Burlingame Funding Contribution for all three of their Employee Benefit Plans for the year ending June 30, 2013.
17	7/21/2013	N/A	Elizabeth Uremovic	1306	A copy of the Funding Contributions for the Employee Benefit Plans for the City of Beaumont as of June 30, 2013.
18	7/22/2013	Analysis Group	John Drum	1312	Requesting information from January 1, 2003 to December 31, 2012 pertaining to: 1. The financial institutions with which the Program has (or had) custody arrangements; 2. The types of assets held at each custodian; 3. The market value of the assets held at each custodian; 4. Preliminary and executed copies of custody agreement; 5. The fee breakdown charged by each custodian including investment advisory, trustee, management, custodial, securities lending fees, administrative fees, and any other fees; 6. Any securities lending agreements, and any other documents that contain provisions relating to securities lending and other services provided by custodians, fees for securities lending and other services provided by custodians; 7. The market value of each investment in funds at each quarter end between January 1, 2003 and December 31, 2012; 8. The identity of funds that participate in securities lending (if any) in which the Program invested; and 9. For each fund identified above, the breakdown of fees (investment advisory, trustee, management, custodial, securities lending fees, administrative fees, and any other fees) paid by the Fund.
19	7/23/2013	Friends of Torrance Group / California's Aware	Ashton Yeshica	TBD	1. Report with all CalPERS Agency's Hypothetical Termination Liability (HTL) amounts by City location, or City CalPERS ID. 2. A report with all of the CalPERS active, retired or inactive members that are receiving CalPERS annuity disbursements or payments greater than or equal to \$100,000 per annual period (FY/CY). 3. The actual algorithm or valuation methodology for CalPERS' Hypothetical Termination Liability formula.
20	7/24/2013	N/A	Adam Johnson	1313	Copies of the following reports: 1. The CUSIPs, security names, and positions of all non-equity investment products held by CalPERS. 2. The trading activity consisting of buy and sell dates and transaction prices for all non-equity investment products between June 2007 and July 2013.
21	7/30/2013	N/A	Michael Sabin	1319	State and School Actuarial Valuation reports from 1978-2005.
22	7/30/2013	Kirby Noonan Lance & Hoge LLP	Christopher Wright	1322	Any and all investment records from January 1, 1992 to present that pertains to CalPERS investments with entities that have "Hearthstone" in their name.