

CalPERS Board of Administration PRA Summary Report, August 2013

August 1 - August 31, 2013	
New PRAs received	21
PRAs closed	17

Monthly Averages for Previous 12 Months	
PRAs received	19
PRAs closed	20

Annual Totals	2011*	2012	2013
PRAs received	219	282	171
PRAs closed	194	292	184

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

Total Active PRAs	
As of August 31, 2013	26

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	Date Received	Requesting Organization	Requestor's Name	PRA #	Brief Description
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	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.
3	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.
4	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.
5	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.
6	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.
7	7/11/2013	PERS Retirement Betterment Committee, Inc.	Jake Petrosino	1293	Request for July 1, 2013 Local Public Agency Rates and related Funding Status.
8	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.
9	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.
10	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.

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11	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.
12	8/2/2013	Law Office of John Michael Jensen	John Michael Jensen	1335	Complex 5 point request tied to pending litigation and Death Benefit Payments.
13	8/2/2013	Law Office of John Michael Jensen	John Michael Jensen	1336	Complex 4 point PRA tied to pending litigation, requesting documents and electronic files regarding computer vendors and system delays.
14	8/2/2013	Law Office of John Michael Jensen	John Michael Jensen	1337	Complex 7 point request regarding comp review appeal of Richard Lewis.
15	8/2/2013	Law Office of John Michael Jensen	John Michael Jensen	1338	Complex 6 point request regarding comp review appeal of James Towns.
16	8/8/2013	Hanson Bridgett LLP	Steven Miller	1339	The current contract between CalPERS and Truven Health Analytics and communications associated with the expiration, extension, or amendments to that contract.
17	8/14/2013	Sacramento Bee	Dan Morain	1341	Any and all letters regarding Mr. Tom McClintock in or about November 2008 regarding his options related to the pension system, informing him of his pension options, as well as, any generic letter that LRS or CalPERS issues to retiring legislators whose service predates Proposition 140 of 1990.
18	8/15/2013	N/A	Jerusha Dressel	1340	Contribution ranges for multiple retirement formulas.
19	8/15/2013	Bay Area News Group	Thomas Peele	1342	A copy of CalPERS written PRA policy, as well as, 2012 gross pension amounts.
20	8/21/2013	Activist Insight	Jamie Dickson	1343	The names and monthly net performance for May and June 2013 of any funds in which CalPERS currently invests which have an activist or corporate governance strategy.
21	8/22/2013	N/A	Vannia De La Cuba	1349	Any and all documents between CalPERS and the City of Pasadena in which CalPERS and/or the City refer to categories of City employees whose exclusion from enrollment in CalPERS is proposed, agreed upon, or otherwise mentioned.
22	8/27/2013	California State Assembly	Gus Demas	1355	For the LRS only, requesting the employer contribution rate from 1982-2000 and 2012-2013.
23	8/27/2013	Roberts Ryan Investments, Inc.	Gary Cuiper	1348	Contracts for two specific External Equity Managers for the CalPERS retirement system. 1) Pzena Investment Management 2) Arrowstreet Capital
24	8/29/2013	N/A	Tim Risch	1350	All retirees that worked for the City of Sunnyvale, regardless if Sunnyvale was the last employer.

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	Date Received	Requesting Organization	Requestor's Name	PRA #	Brief Description
25	8/30/2013	LaHabra Heights News Website	Stephen (no last name)	1351	Copies of letters, emails, or correspondences between CalPERS and the City of La Habra Heights or its representatives.
26	8/30/2013	Trust Builders, Inc.	Jason Braun	1356	Contribution ranges for multiple retirement formulas.

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	Closed Date	Requesting Organization	Requestor's Name	PRA #	Brief Description	Date Received
1	8/1/2013	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.	7/19/2013
2	8/7/2013	Ram, Olson, Cereghino & Kopczynski, LLP	Karl Olson	1328	How much money CalPERS is paying Mr. Tom McClintock.	8/2/2013
3	8/8/2013	N/A	Anjeli Kapal	1325	CalPERS gross returns as of 6-30-13 for the following time periods: 3 mo., 1 year, 3 year, 5 year, 7 year, 10 year, 15 year. As of 6/30/2013.	8/2/2013
4	8/9/2013	N/A	Elizabeth Uremovic	1305	Copy of the City of Burlingame Funding Contribution for all three of their Employee Benefit Plans for the year ending June 30, 2013.	7/21/2013
5	8/9/2013	N/A	Elizabeth Uremovic	1306	Copy of the Funding Contributions for all three of their Employee Benefit Plans for the City of Beaumont as of June 30, 2013.	7/21/2013
6	8/9/2013	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.	6/21/2013
7	8/13/2013	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 of San Bernardino and of San Bernardino Fire Department (SBFD), and the settlement between the City of San Bernardino and/or SBFD and Mr. Richard Lewis.	7/5/2013
8	8/15/2013	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.	6/20/2013
9	8/19/2013	N/A	Mike Hewitt	1334	Copies of all submitted bids and also a copy of the selection and evaluation criteria report for the Request For Proposal 2012-6710, Actuarial Valuation System (AVS) Redesign, that was completed and awarded in July 2013.	8/13/2013
10	8/20/2013	Smith Lillis Pitha, LLP	Martin Pitha	1217	All documents relating to estimates, calculations, allowances, communications and other documents relating to Rick A. Coleman.	4/26/2013
11	8/20/2013	Israel Divestment Campaign	Mikos Fabersunne	1232	Correspondence between CalPERS staff and Investment Committee members regarding Elbit Systems, Ltd., and Veolia Environnement S.A.	5/6/2013
12	8/26/2013	N/A	Adam Johnson	1313	Copies of the following reports: 1. The Committee on Uniform Security Identification Procedures (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.	7/24/2013

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13	8/26/2013	City of Huntington Park	Julio Morales	1345	Requesting information about the amount Linda Guervara withdrew from her CalPERS pension account.	8/22/2013
14	8/29/2013	LaHabra Heights News Website	Stephen (no last name)	1332	A copy of the letter dated July 31, 2013 to the City of La Habra Heights.	8/9/2013
15	8/29/2013	My Public Pension	Jim Niehaus	1329	Requesting the following Best, Unisex, Simplified Option, Simplified II Option, and any other actuarial factors used in the calculation of retirement benefits.	8/7/2013
16	8/29/2013	N/A	Michael Sabin	1319	Total of 19 actuarial valuations for State and Schools as of June 30th from 1987 through 2005.	7/30/2013
17	8/30/2013	Techwire.net	Bill Maile	1302	Retiree Pension data for April 1, 2013 to June 30, 2013.	7/15/2013