

SERVICES TO BE PROVIDED BY PRINCIPAL REPRESENTATIVE

The Federal Principal Representative will be responsible for providing consultation and representation in a timely manner to CalPERS on any Federal Executive or Congressional plan to enact legislation or to impose regulations potentially impacting CalPERS and its members. The Principal Representative will also assist in the development and implementation of strategies to prevent or accomplish the enactment of laws or regulations, as described in the following subdivisions. CalPERS intends to enter into a contract with the selected firm for a term of approximately four years.

Key Personnel

The Proposer must designate a primary advocate and principal assistant to the CalPERS account in addition to other personnel who may be needed to complete a CalPERS assignment. The role of the primary advocate is to provide meaningful advocacy on behalf of the CalPERS Board before Congressional committees, administrative agencies, and appropriate staff. The primary advocate must maintain excellent working relationships with Members of Congress, committee staff, and control agencies and, when necessary, facilitate meetings. The role of the principal assistant is to be sufficiently knowledgeable regarding CalPERS issues in order to assume a lead role should the primary advocate be temporarily unavailable.

Routine Services

The Principal Representative will perform the following services on a routine, regular basis throughout the term of the contract:

- Identify and monitor proposed legislation, proposed regulations, and issues of interest or concern to CalPERS. To accomplish this, the Contractor must maintain an informed level of communication and involvement with key Congressional staff, the Executive Branch, and administrative agencies, as well as an effective working relationship with organizations with an interest in issues of concern to CalPERS. Contractor must also participate in organizations, coalitions, and forums related to issues of concern to CalPERS, to the extent necessary to maintain an awareness of the development of those issues.
- Prepare an analysis of the potential impact on CalPERS of proposed legislation or regulations.
- Two times each calendar year, in Sacramento, make presentations to the members of the CalPERS Board of Administration and/or its committees and stakeholder groups. Each calendar year attend and make a

presentation, if requested, at the CalPERS Board of Administration Off-Site meetings. Each calendar year attend and make a presentation at the CalPERS Educational Forum.

- Each calendar year produce a workshop for the CalPERS Board of Administration in Washington, D.C.
- Respond to inquiries from Congressional offices, the Executive Branch, and administrative agencies and coordinate CalPERS response to special inquiries from Congressional offices and administrative agencies.
- Prepare letters notifying appropriate Congressional representatives and Executive Branch representatives of CalPERS positions on federal issues.
- For each Congressional Session, prepare legislative priorities in the three primary areas of interest.
- Prepare the following reports in a timely and appropriate manner:
- Proposed Project Analysis— Prepare a proposed project analysis when services beyond those included in the monthly rate charged for Routine Services are recommended by the Proposer or requested by CalPERS. This should include the objective, an analysis of the alternatives for attaining the objective, a recommended course of action, the likelihood of attaining the objective under the recommendation, and a budget for the recommended activities. CalPERS, in its exclusive discretion, may approve the recommendation and recommended budget. Services approved under a Proposed Project Analysis are hereafter referred to as an Approved Project (See “Services as Assigned”, Paragraph 5).

Services as Assigned

The Principal Representative will perform the following services as assigned by the CalPERS Chief Executive Officer or designee:

- Develop strategies to achieve CalPERS desired results on pending federal legislation, regulations, or issues.
- Testify at Congressional committee hearings and administrative/regulatory hearings on behalf of the CalPERS Board; accompany CalPERS representatives to, and advise CalPERS representatives with respect to, meetings with members of Congress, committee staff, Executive Branch, and other individuals or entities, as appropriate; and accomplish other activities consistent with those identified above, as necessary.

- Assist in press and media relations in cooperation with the CalPERS Public Affairs Office.
- Obtain congratulatory Congressional resolutions.
- Any other activities approved pursuant to paragraph 8 of Routine Services.
- Any services performed that are not specifically listed in this Subdivision or approved by the Chief Executive Officer or designee will be considered Routine Services.

SERVICES TO BE PROVIDED BY SPRING-FED POOL CONSULTANTS

Consultants in the Pool will perform the following services as assigned by the CalPERS Chief Executive Officer or designee:

- Develop strategies to achieve CalPERS desired results on pending federal legislation, regulations, issues, projects or events.
- Brief and accompany CalPERS representatives to, and advise CalPERS representatives with respect to, meetings with members of Congress, committee staff, Executive Branch, and other individuals or entities, as appropriate; and accomplish other activities consistent with those identified above, as necessary.
- Assist in press and media relations in cooperation with the CalPERS Public Affairs Office.