

PRAs for May 2015

New PRAs Received	28
PRAs Closed	43

Monthly Averages from June 2014 to May 2015

PRAs Received	32
PRAs Closed	28

Annual Totals¹

Year	PRAs Received	PRAs Closed
2011	366	167
2012	606	266
2013	405	257
2014	413	303

¹ PRAs received in one year may carry over to the following. Some PRAs can be handled through normal business processes and are routed to program areas for handling. These are not reflected in the closed numbers. Closed PRAs are considered those that the requestor receives a final correspondence and information from CalPERS.

2015	136	143
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Total PRAs as of May 31, 2015

Active PRAs	14
Received PRAs	1975
Closed PRAs	1146
Canceled PRAs	765

Open Public Record Act Requests

	Date Received	Requesting Organization	Requestor's Name	PRA #	Brief Description
1	09/15/2014	Open The Books Portal	Adam Andrzejewski	1736	2013 employee records (employer name; employer zip code; year of compensation; first name, middle initial, last name; hire date; gross annual wages; position; etc., broken down by employer, employee, and year
2	09/30/2014	Law Office of John Michael Jensen	John Michael Jensen	1761	Complex 85 point PRA regarding CalPERS processes, delays in processes, Risk Assessment and Employer Paid Member Contributions.
3	10/15/2014	Law Office of John Michael Jensen	John Michael Jensen	1782	Complex, 116-point request, duplicative of previous 85 point PRA, but adding Community Property information and retirement counseling information.
4	11/26/2014	Meyers Nave	Spencer Wilson	1820	Multi-point request for documents relating to special compensation and final compensation for last 5 years. Narrowed scope to the last 6 months.
5	03/09/2015	N/A	Paul Mast	1926	Please send me within 10 days all writings, including emails, notes, memoranda, and communications of any kind within your agency and any other person concerning that Claim and subsequent Administrative Hearing brought by Paul Mast on about 1995-1996 concerning his retirement benefits.
6	03/09/2015	N/A	Paul Mast	1927	All writings and documents of any kind as follows: Regarding judges and justices who served on any of the following courts: Municipal Court Judges, Superior Court Judges, Appellate Court Judges, or Supreme Court Judges (judge), starting with January 1, 1953 and ending December 31, 1994. Identify each judge who assumed his/her first judicial office before attaining the age of 40 years and who had total service in office in any court or courts for less than 20 years.
7	03/09/2015	N/A	Paul Mast	1928	A copy of all my records with the Judges Retirement System and all my records under the control of the Judges Retirement System.

8	04/14/2015	Transparent California	Robert Fellner	1969	2013 and 2014 pensionable earning data for Lake, Alpine, Trinity, and Modoc Counties. Specifically, please provide the following pieces of information: Employee Name, Job Title, and Pensionable Earnings for the respective year. If only pensionable earnings are available and not job title, that would suffice as well.
9	04/16/2015	Palico.com	Oren Baumerder	1972	As a private equity fund community doing research on Private Equity, we would like to have access to your 2014 Q1, 2014 Q2 and 2014 Q4 data records concerning alternative investments. Precisely, we are contacting you to have access to all types of Private Equity asset investments (including Buyout, venture capital, distressed debt, mezzanine, fund of funds, infrastructure, real estate and special situations) in which the California Public Employees' Retirement System (CalPERS) has been an investor.
10	05/21/2015	N/A	Mary Harris	2017	I am requesting pension data on Michael Phelan, who worked for the City of Willits, CA. He retired between 2002-2005. He was the interim GM for the Brooktrails Community Services District around this time as well.
11	05/22/2015	Secondarylink.com	Sara Ou	2021	8-point request on alternative investments, including limited partnerships, Net Asset Value, and Internal Rate of Return.
12	05/29/2015	pension360.org	Edward Ballantine	2026	Hello: Pursuant to the Freedom of Information Act and the analogous state statute (collectively, the Freedom of Information Statutes) we hereby submit the following request: - My request concerns the CalPERS Retirement Estimate Calculator, which can be found here: http://www.calpers.ca.gov/index.jsp?bc=/phx/eip/self-id-member.jsp If possible, I would like to receive the algorithm that underlies the calculator. In other words, I am interested in the back-end calculation process that is used to make estimates based on the data entered into the calculator by the user.
13	05/29/2015	pension360.org	Edward Ballantine	2027	Hello - Pursuant to the Freedom of Information Act and the analogous state statute (collectively, the Freedom of Information Statutes), we hereby request the following data on all currently retired members of CalPERS: - First and last name- Annual benefit amount received by retiree in 2014 - Years of serviceExample: John Doe; \$34,000; 24 years of service We prefer the data in excel format.
14	05/29/2015	California Public Information, Inc.	Ken Mandler	2028	Employment opportunity information including Job Postings, Duty Statements, and interview materials.

Closed Public Record Act Requests

Closed Date	Requesting Organization	Requestor's Name	PRA #	Brief Description	Date Received
05/01/2015	TrustVIP	Ellen Mooneyham	1981	We would like to learn areas where we can improve our proposals should another opportunity arise by reviewing our competitors` bids for CalPERS IT Spring Fed Pool Opportunity Solution and Application Architect, submitted April 20, 2015. We would also like copies of any materials that you produced as part of your evaluation. I would like to submit a Public Records Act (PRA) request for these materials for our review. Please send the materials to my attention.	04/22/2015
05/01/2015	TrustVIP	Ellen Mooneyham	1983	We would like to learn areas where we can improve our proposals should another opportunity arise by reviewing our competitors` bids for CalPERS IT Spring Fed Pool Opportunity - Test Script Inventory Optimization (Script Automation), submitted April 8, 2015. We would also like copies of any materials that you produced as part of your evaluation. I would like to submit a Public Records Act (PRA) request for these materials for our review. Please send the materials to my attention.	04/22/2015
05/01/2015	TrustVIP	Ellen Mooneyham	1984	We would like to learn areas where we can improve our proposals should another opportunity arise by reviewing our competitors` bids for CalPERS IT Spring Fed Pool Opportunity - Application Development and Support, submitted March 30, 2015. We would also like copies of any materials that you produced as part of your evaluation. I would like to submit a Public Records Act (PRA) request for these materials for our review. Please send the materials to my attention.	04/22/2015

4	05/01/2015	TrustVIP	Ellen Mooneyham	1985	We would like to learn areas where we can improve our proposals should another opportunity arise by reviewing our competitors` bids for CalPERS IT Spring Fed Pool Opportunity - Test Script Inventory Optimization - Script Clean-up, submitted April 6, 2015. We would also like copies of any materials that you produced as part of your evaluation. I would like to submit a Public Records Act (PRA) request for these materials for our review. Please send the materials to my attention.	04/22/2015
5	05/05/2015	Placer County	Ann McNellis	1997	A copy of CalPERS contract with State Street Bank & Trust.	05/04/2015
6	05/05/2015	VJALexis	Vicki Vernon	2000	A supplier has asked me to do a PRR on the existing Disaster Recovery contract held by EMC/SunGuard. They want to understand current needs, etc.	05/05/2015
7	05/06/2015	N/A	Marvin Smith	1942	<p>1. A list of any and all law enforcement agencies which are currently, or have previously been members of CalPERS; for the calendar years beginning 1982 through 2014;</p> <p>2. A list of any and all California State hospitals within the following counties: a. San Diego County; b. Riverside County; c. Santa Clara County; d. Los Angeles County; and e. San Luis Obispo County; and finally,</p> <p>3. A list of any and all fire departments under the County of San Diego which are CalFire) or those in the city of San Diego), that are CalPERS retirement affiliates for the calendar years 2009-2015.</p>	03/18/2015
8	05/06/2015	N/A	Lisa Hilder	2002	The member is requesting all communication between her and CalPERS which she would like the following included if possible: Notes from our system, documents from her member file and any recorded calls that CalPERS may have from her contact with the call center.	05/06/2015

9	05/07/2015	N/A	Paula Zaby	1995	I ask to obtain copies of any and all documentation you have to prove the overpayment that CalPERS Refund Unit claims to have paid me.	05/04/2015
10	05/07/2015	WSGR.com	Susan Pennypacker	1996	A particular request for proposals (RFP) that CalPERS issued in 2005 for the Pharmacy Benefits Management contract.	05/04/2015
11	05/07/2015	N/A	Gabriel Guerro	2001	Wishes to know the modular installing contract, how much the contract is charging per hour as an MTA contractor. Believes it was awarded to Miles Austin.	05/06/2015
12	05/07/2015	N/A	Paul Urban dba: Quite Eye Investigations	2004	I am a Private Investigator, (CA Lic. # PI21465), working with attorney Daniel Mitchell of Alameda, CA. He has a case that involves a Mr. Donnie Alexander, how is now retired from his job as the Director of the Foster Grandparent Program, of the Division of Juvenile Justice, part of the Department of Corrections and Rehabilitation, where he was working when the event took place. I have the task of locating Mr. Alexander, and serving him with the Summons and Complaint documents for the case. If you can please provide me either his age, or his contact information. Sincerely,Paul W. Urban	05/06/2015
13	05/08/2015	N/A	Jake Petrosino	1961	It would be most appreciated if your office will provide the report formerly known as the Contract Activity Bulletins, covering the first quarter of the calendar year 2015 (January 1 through March 31).	04/02/2015
14	05/08/2015	N/A	John Michael Jensen	1964	Dawn Hale has been attempting for a year or more to obtain basic calculations from CalPERS` Compensation Review Unit about these matters. CalPERS provided more detailed calculations on another of BCN`s clients previously, and Ms. Hale has simply asked CalPERS to provide similar calculation breakdowns for the other clients. Despite repeated emails, however, CalPERS has yet to provide the information requested.	04/07/2015

15	05/08/2015	City of San Clemente	Sam Penrod	1973	<p>The 2014 information requested is the following:</p> <ol style="list-style-type: none"> 1. Retiree name 2. Year of retirement 3. Title/position at retirement 4. Years of service 5. Final salary 6. Total dollar amount of received pension payments for 2014 7. Total dollar amount of any additional compensation or financial distribution of any kind made by CalPERS to the employee that is not already included in item #6. 	04/16/2015
16	05/08/2015	Truven Health	Matt Love	2006	<p>Hi, I was wondering if your site provides a list of vendors currently under contract with CalPERS or if such a list would be releasable under a formal public records request. Thank you.</p>	05/08/2015

17	05/12/2015	Pension360.org	Edward Ballantine	1968	<p>1. Amounts paid in fiscal year 2013-14 for reimbursement of expenses accrued for travel, education and lodging by staff and/or trustees of the California Public Employees Retirement System, with itemizations to the extent provided in the original records.</p> <p>2. Amounts paid in fiscal year 2014-15 (to date) for reimbursement of expenses accrued for travel, education and lodging by staff and/or trustees of the California Public Employees Retirement System, with itemizations to the extent provided in the original records.</p> <p>3. Copies of employment contracts for any staff member of the California Public Employees Retirement System.</p>	04/10/2015
18	05/12/2015	Charlotte Observer	Deion Roberts	1999	I'm seeking communications between CalPERS, Bank of America, and any other parties regarding the Bank of America decision to recombine their (B of A`s) chairman and CEO roles.	05/05/2015
19	05/13/2015	N/A	Vivian Chang	2007	Hello - I would like to see the annual open enrollment plan transfers for the requested time periods: 2003, 2004, 2005, 2006	05/11/2015
20	05/15/2015	City of Pasadena	Lesley Cheung	1954	<p>1. Any and all correspondence from CalPERS to the City of Pasadena that accompanied advanced disability pension payment reimbursement checks from 2002 to present. We believe the enclosed document is an example of such a document. The City of Pasadena received this (redacted for Member confidentiality) in December 2004 and that there were similar documents accompanying the City`s monthly ADPP checks from CalPERS.</p> <p>2. With respect to any Member for which CalPERS took ADPP deductions from the member`s monthly retirement benefit, any and all documents showing the name of the Member, the date of the ADPP deduction, and the amount of the ADPP deduction from 2002 to present.</p>	03/26/2015

21	05/19/2015	Transparent California	Robert Fellner	1897	Employee name, job title and pensionable earnings received for 2013 from the Los Angeles Law Library.	02/17/2015
22	05/19/2015	SF Chronicle	Melody Gutierrez	1963	A list of all retirees in the LRS that includes the pension amount, final pay, and years of service.	04/06/2015
23	05/19/2015	Harvard.edu	Michael Flaherman	1990	Please provide me with a copy of the two most recent investment program benchmarking reports, including any appendices, produced for CalPERS by Cost Effectiveness Measurement ("CEM").	04/23/2015
24	05/19/2015	Mastagni	Jeffrey Edwards	1993	<p>1. Any and all writings which constitute, reflect, refer to, or contain information concerning any correspondence between any employee of the Los Angeles County Office of Education and any employee of CalPERS regarding Jose A. Fernandez prior to October 4, 2013.</p> <p>2. Any and all writings which constitute, reflect, refer to, or contain information concerning the pension benefit of Jose A. Fernandez.</p> <p>3. Any and all writings which constitute, reflect, refer to, or contain information concerning the amount the Centinela Valley Union High School District reported to CalPERS as Jose A. Fernandez's compensation.</p>	04/29/2015
25	05/19/2015	TruvenHealth	Matt Love	2010	I would like to request any additional scoring details that may be available in reference to Request for Proposal NO. 2012-6367 Generation 3 Data Warehouse (GEN 3) issued on or about January 11, 2013.	05/14/2015

26	05/19/2015	N/A	Jake Petrosino	2012	<p>1. Annual Financial Report and Report of Operation for the FY ending June 30, 1956</p> <p>2. Annual Financial Report and Report of Operation for the FY ending June 30, 1955</p> <p>3. Annual Financial Report and Report of Operation for the FY ending June 30, 1954</p> <p>4. Annual Financial Report and Report of Operation for the FY ending June 30, 1953</p> <p>5. Annual Financial Report and Report of Operation for the FY ending June 30, 1952</p>	05/18/2015
27	05/20/2015	N/A	David Slama	2013	A copy of the Public Agency Contract and all Resolutions for the City of Indio, Zip 92201.	05/19/2015
28	05/20/2015	N/A	Bob Reinhard	2014	<p>Please send me the following CalPERS Publications:</p> <ul style="list-style-type: none"> Publication Title PUB 1 Planning Your Service Retirement PUB 6 State Miscellaneous & Industrial Member Benefit Publication PUB 14 Partial Service Retirement PUB 18 Retirement Option 4 PUB 30 Power of Attorney PUB 43 A Guide to Completing Your CalPERS Service Retirement Election Application HBD 65 CalPERS Medicare Enrollment Guide HBD 120 Health Program Guide 	05/20/2015
29	05/22/2015	TrustVIP	Ellen Mooneyham	1982	<p>We would like to learn areas where we can improve our proposals should another opportunity arise by reviewing our competitors' bids for CalPERS IT Spring Fed Pool Opportunity - Project Implementation Manager for VMware & Office 365, submitted April 9, 2015. We would also like copies of any materials that you produced as part of your evaluation. I would like to submit a Public Records Act (PRA) request for these materials for our review. Please send the materials to my attention.</p>	04/22/2015

30	05/22/2015	TrustVIP	Ellen Mooneyham	1988	We would like bids for CalPERS IT Spring Fed Pool Opportunity - Application Development and Support submitted March 30, 2015. We would also like copies of any materials that you produced as part of your evaluation.	04/22/2015
31	05/27/2015	Harvard	Keith Bishop	2005	Please provide me with copies of all records reflecting approval of, and/or payment by, the California Public Employees` Retirement System (CalPERS) of travel expenses incurred by Anne Simpson in connection with travel to or from the United Kingdom.	05/07/2015
32	05/27/2015	N/A	Terrie Robinson	2015	I would like copies of any pension plan contracts or contracts of any kind to provide pension services between CalPERS and the following entities: The California School Boards Association, the League of California Cities, the California State Parks Foundation and the Foundation for California Community Colleges.	05/20/2015
33	05/27/2015	N/A	Gar Richman	2019	I googled my name and found my PERS income posted on the internet. I`m a Reserve Police Office with the City of Arcadia and I am requesting my Private Income be removed from the internet. Thank You ,Gar Richman	05/22/2015
34	05/28/2015	SF Chronicle	Melody Gutierrez	1962	A list for all legislative employees who have retired from the California Senate and Assembly in the last five years that includes the retiree name, pension amount, final pay, and years for service.	04/06/2015

35	05/28/2015	SEIU 1000	Jack McGlenn	2008	<p>1. The retention rate of 118 insourced IT positions reported by CalPERS to SEIU in response to questions that arose in an Article 14.8 JLMC at the end of 2013. CalPERS provided a list of "ITSB External Hires 11/1/12 through 12/20/2013 (attached). Please identify those individuals that have remained on the CalPERS payroll.</p> <p>2. Also provide a list of IT job classifications (both in management and bargaining unit) that have remained vacant longer than three months ago.</p> <p>3. Please list the employees` names, job classification and hire dates.</p> <p>4. Please provide one or more documents, such as de project management report, that would provide a status update on the CalPERS Cloud Project.</p> <p>5. We are most interested in the numbers of user profiles, visits and other relevant metrics showing how many people are using the tool and how frequently since its launch.</p> <p>6. Currently effective engagement letters for each of the following actuary service vendors:a. AON Hewittb. Millimanc. Gabriel Roeder Smith and Companyd. All other vendors with current contracts for GASB related actuarial services.</p> <p>7. Provide last six billings and/or invoices related to GASB valuations showing hours worked, rates charged by consultant for the above mentioned actuary service vendors.</p>	05/12/2015
36	05/28/2015	N/A	Zaby Paula	2020	<p>Evidence re: the alleged overpayment in the form of a warrant number reflecting the amount of \$6,855.63 with a date of issue to me and the name of the CalPERS employee who performed and/or documented the transaction.</p>	05/22/2015

37	05/28/2015	Trustee of Teflon of America Inter Vivos Trust	Shantell Cohen	2023	<ol style="list-style-type: none"> 1. All policies bearing and indicating the name Equilla Anne Harris, 2. Any and all other policies that Equilla Ann Harris was the beneficiary of 3. The sum of any and all payouts that were issued as a result of Equilla Ann Harris` death, medical, and retirement benefits; 4. Any and all names of the beneficiaries that received distributions as a result of Equilla Ann Harris` death, medical, and retirement benefits. 	05/27/2015
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38	05/29/2015	BART	BART Transit	1958	<p>1. Please provide copies of all written and electronic correspondence with contracting agencies regarding the implementation of PEPR A for transit employees.</p> <p>2. State CalPERS` position with regard to whether or not each of the following groups of BART employees are or are not subject to PEPR Aa) Those hired between January 1, 2013 and June 30, 2013 when collective bargaining agreements were in effect;b) those hired between July 1, 2013 and December 20, 2014; andc) Those hired after December 30, 2014.</p> <p>3. Explain in detail how CalPERS intends to calculate the pension benefits of members in each of the three groups listed in (2) above.</p> <p>4. Describe in detail, with supporting actuarial documentation and analysis, how CalPERS intends to calculate the normal cost for each group of BART employees it believes is subject to PEPR A.</p> <p>5. Please provide us with an actuarial projection covering at least the next 15 years showing the total estimated contributions that BART will have to make for "classic" employees who are not subject to PEPR A, with a separate column showing the projected normal costs for classic employees.</p> <p>6. Please provide us with an actuarial projection covering at least the next 15 years showing the total estimated contributions that BART will have to make for each group of "new" employees CalPERS believes is subject to PEPR A, with a separate column showing the projected normal costs for those employees.</p>	04/01/2015
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39	05/29/2015	TrustVIP	Ellen Mooneyham	1986	We would like to learn areas where we can improve our proposals should another opportunity arise by reviewing our competitors` bids for CalPERS IT Spring Fed Pool Opportunity PeopleSoft HCM Improvements, submitted April 7, 2015. We would also like copies of any materials that you produced as part of your evaluation. I would like to submit a Public Records Act (PRA) request for these materials for our review. Please send the materials to my attention.	04/22/2015
40	05/29/2015	TrustVIP	Ellen Mooneyham	1987	We would like to learn areas where we can improve our proposals should another opportunity arise by reviewing our competitors` bids for CalPERS IT Spring Fed Pool Opportunity - Investment Technology Services submitted April 3, 2015. We would also like copies of any materials that you produced as part of your evaluation. I would like to submit a Public Records Act (PRA) request for these materials for our review. Please send the materials to my attention.	04/22/2015
41	05/29/2015	Active Insight	Husein Bektic	2016	Monthly net returns of each of the funds either currently or historically included in CalPERS` corporate governance equity fund portfolio, since and including December 2014 to April 2015	05/21/2015
42	05/29/2015	FOIA.com	Rose Santos	2022	<p>Good morning, under the provisions of the California Public Records Act, I hereby request a copy of the following documents identified to RFP 20147159 / Information Technology MyCALPERS Functional Optimization:</p> <ol style="list-style-type: none"> 1. The full contract documents with Accenture 2. All proposals submitted by vendors who responded to the solicitation 3. Bid tabulations or bid scoring sheets for the submitted proposals Please confirm receipt and processing of this request. 	05/27/2015

43	05/29/2015	Brayton Law	Jessica Krista	2025	Including but not limited to any and all documentation regarding locations Herbert Bridgeford worked at, supervisors he worked for, coworkers he worked with, and manufacturers, brands, and types of electrical equipment he worked on.	05/27/2015
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