

PRAs for January 2016

New PRAs Received	32
PRAs Closed	26

Monthly Averages from February 2015 to January 2016

PRAs Received	30
PRAs Closed	32

Annual Totals¹

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

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.

2014	413	303
2015	354	367
2016	29	24

Total PRAs as of January 31, 2016

Active PRAs	16
Received PRAs	2344
Closed PRAs	1452
Canceled PRAs	875

Open Public Record Act Requests

	Date Received	Requesting Organization	Requestor's Name	PRA #	Brief Description
1	07/30/2015	Law Office of John Michael Jensen	John Michael Jensen	2116	28-point request regarding Military Service Credit.
2	07/30/2015	Law Offices of John Michael Jensen	John Michael Jensen	2117	28-point request regarding Airtime Service Credit. Very similar to #2109.
3	12/19/2015	N/A	Leonard Johnson	2339	The purpose of my inquiry is to identify CalPERS members who earned Temporary Upgrade Pay during the course of their careers, and subsequently had the Temporary Upgrade Pay included in their final retirement compensation calculations. As Temporary Upgrade Pay is meant to be earned for a limited duration and not earned solely within the members' final compensation period (one year or three years), I am trying to determine the minimum and maximum amount of time that a member earned Temporary Upgrade Pay, while also having it included in their final retirement compensation calculations. The time period start date for this request corresponds with the Roy T. Ramirez case (Precedential Decision 00-06).
4	01/07/2016	PERS Retirement Betterment Committee	Jake Petrosino	2359	It would be most appreciated if your office will provide the report formerly known as the Contract Activity Bulletins, covering the fourth quarter of calendar year 2015 (October 1 through December 31).

5	01/11/2016	Aurora Advisors	Susan Webber	2363	<p>With respect to CalPERS' proprietary data and analytics system PEARS (Private Equity Accounting and Reporting Solution), please provide the following records:</p> <ol style="list-style-type: none"> 1. Copies of all user documentation, including documentation for staff members engaged in data entry/input into the system. 2. A charter of accounts. 3. Copies of all reports generated from November 1 to December 15, with data items specific to particular private equity funds redacted (i.e., please show the report name, column and row heads, total amounts, and any text items within the reports that would be unchanged any time a report is generated). 4. If not included in Item 1, any documents that would show a list of all data fields
6	01/12/2016	Preqin	Haley Parker	2366	<p>Are you able to provide a list of all partnerships interests bought/sold to date by CalPERS, the price received, as well corresponding net asset value date and net asset value associated with each purchase/sale? This list should include secondary market transactions involving all private partnership funds, i.e. private equity, venture capital, distressed debt, mezzanine, fund of funds, real estate, natural resources and private debt investments This data would be very helpful for our research.</p>
7	01/14/2016	Foresters Financial Services	Alyssa Topusidis	2368	<p>I plan to give a presentation on the CalPERS pension, Social Security, and planning for retirement (what they can expect from their pensions). My request is to have an Excel spreadsheet of employees that I can contact to invite personally to this free seminar. I will need:-Full Name-Email Address-Employer/Agency-Date of Hire -Phone Number/extensions (if available)</p>
8	01/19/2016	N/A	Trent Sunahara	2374	<p>I would like to know how many of the 82 public agencies audit cases went before an Administrative Law Judge hearing?</p>
9	01/21/2016	N/A	Nicole Lewis	2377	<p>We would like the public records of all of your current members and wanted to know how to go about handling this. We would like the records to consist of data from the last couple of years if possible.</p>

10	01/24/2016	N/A	Pete Wessel	2382	Please provide a copy of program information document or related descriptions for "Phase IV, COMET"
11	01/24/2016	N/A	Pete Wessel	2383	<p>1. Please provide a copy of the circa 2001 Employer Services Division policy which allows agencies to interpret how they use an "hourly" exclusion (policy for definition of use of hourly exclusions).</p> <p>2. Please provide a copy of the letter that was mailed out to agencies by CalPERS as indicated by Recommendation 1 in the January 3, 2001 CalPERS Memo to SalliAnne Malguine from Bobbie Talbert and Steve Propp with Subject: UPDATE - HOURLY EXCLUSION REMOVAL PROJECT.</p>
12	01/24/2016	N/A	Pete Wessel	2384	<p>Please provide a copy of the following for the City of Thousand Oaks:</p> <ol style="list-style-type: none"> 1. The written agency interpretation with regard to their hourly exclusion; 2. The Hourly Exclusion Project CalPERS questionnaire response; 3. The agency contract file; and, 4. The agency perpetual file.
13	01/25/2016	N/A	Jim Niehaus	2386	I'm looking for the Town of Ross' contracts with CalPERS during this time. I'm interested in any employment exclusions they may have had.
14	01/25/2016	Megastar Advisors	Ryan McCarthy	2396	Under the POIA, our company is formally requesting a public records list of all California employees that are currently enrolled in the state pension fund. We seek the information broken down for each employee. First Name Middle Name/Initial Last Name Email address Mailing address, including city, state, and zip code Employer Name Employment Start Date Retirement Date Our company falls under the category Commercial Use - The requester or a representative seeks the records to further the commercial interest of the requester. The requester must pay for all search time, review time, and the cost of duplication.

15	01/28/2016	Propublica.org	Cezary Podkul	2393	Pursuant to the California Public Records Act, please provide me a copy of any projections made by CalPERS staff or outside actuaries of annual future benefits payments CalPERS is projected to pay out to its beneficiaries. For example, I am looking for a spreadsheet that would show annual benefits due to CalPERS beneficiaries over the next thirty years, year by year.
16	01/29/2016	UC Davis	Moses Diaz	2397	This is a Public Records Act request for a copy of any list, spreadsheet, or other compilation of the names of all judges, from the following counties, who have submitted a Notice of Retirement under the JRS or JRS II between July 1, 2015 through the present time: Los Angeles County, Fresno County, and Tulare County. Please see Government Code section 75025 et seq. if you are unfamiliar with the Notice of Retirement alluded to above. Please provide an initial response within ten days as required by the Public Records Act. If any requested record exists in electronic format (e.g. .PDF, .XLS, .doc), please provide the electronic copy.

Closed Public Record Act Requests

	Closed Date	Requesting Organization	Requestor's Name	PRA #	Brief Description	Date Received
1	01/04/2016	East Bay Express	Darwin BondGraham	2283	<p>1. Please provide any letters or emails sent by any CalPERS board members to one another regarding the subjects of private equity; and investment management fees; and carried interest.</p> <p>2. Please provide me with copies of any lists of questions submitted by CalPERS board members to CalPERS staff regarding private equity; and investment management fees; and carried interest. Please provide also any responses to any lists of questions.</p> <p>3. Please provide me with any and all emails between staff and CalPERS board members, and between CalPERS board members, regarding private equity; alternative investments; and investment management fees; and carried interest.</p> <p>4. Please provide me with any contracts between CalPERS and any external company, person, adviser, consultant, etc., regarding media communications and the subject of private equity and fees. For this item, please search for any records created from January 1, 2015 to the present date.</p>	11/03/2015
2	01/04/2016	Chicago Booth	Jamey Forkins	2337	I'd like to examine the recovery awards received by CALPERS due to their participation in securities class action settlements in 2014 and 2015. I would also like to see all fees related to the recovery of these awards--if there is a third party vendor specifically hired to execute the recoveries, I would like to see their contract; if the custodian performs the claims filings, I would like to see the Master Custody Agreement contract with the Custodian. Thank you.	12/16/2015
3	01/05/2016	PERS Retirement Betterment Committee	Jake Petrosino	2318	It would be most appreciated if your office will provide a current listing of local public agencies with miscellaneous and/or safety plans other than those specifically listed under PEPRRA-related legislation effective January 1, 2013.	11/30/2015

4	01/06/2016	California State Retirees	Stephanie Hueg	2346	PBM for CVS Contract.	12/30/2015
5	01/06/2016	N/A	Trent Sunahara	2347	I would like to request a complete list of public agencies that have been audited by CalPERS in the past five years (2011-2015) whose cases have been open for more than 365 days. In addition, I would like to request that the list specify the date of the originating audit, and if the public agency audit case is currently open or closed.	01/03/2016
6	01/06/2016	NASDAQ	Sheila Mosby	2350	Please provide a breakdown of you shareholdings along with the investment advisors for each of our clients (see attached spreadsheet) or a breakdown of internally verses externally managed shares in each company as of December 31, 2015 or current.	01/04/2016
7	01/07/2016	City University of NY	Marnie Brady	2344	CalPERS investment in Blackstone funds	12/28/2015
8	01/07/2016	ACERA	Marguerite Malloy	2353	Please provide me (via email attachment) a copy of the CalPERS contracts with the following employers (plan sponsors who provide retirement benefits to their employees through CalPERS) for the period between 2000 and present:ALAMEDA COUNTY WATER DISTRICTCENTRAL MARIN POLICE AUTHORITYCITY OF ALAMEDACITY OF ANTIOHCITY OF BELLCITY OF BURBANK	01/06/2016
9	01/08/2016	N/A	Wendy Lack	2362	Circular Letter 200-001-16 advises public employers that 2014 actuarial reports are now available. However, I do not find them on the CalPERS website accessible to the public.When will these reports be publicly available via the CalPERS website? Please advise.	01/07/2016
10	01/11/2016	Blue Shield CA	Norma Vega	2336	I am requesting the contract for all the Health Plan Partners (Anthem, United Healthcare, HealthNet, Kaiser and Sharp, CVS). We have obtained these in past years but were unsure on the new process. Please let me know if there is anything else I need to do.	12/16/2015

11	01/11/2016	PERS Retirement Betterment Committee	Jake Petrosino	2358	It would be most appreciated if your office will provide a listing of those CalPERS 457 Plan Program agencies added and those terminated during the past year beginning January 1, 2015	01/07/2016
12	01/12/2016	CDFA	Stephen Brown	2356	Pursuant to the Public Records Act, I am writing to request copies of certain documents related to the implementation of Government Code Section 20035.11. I am specifically requesting that CalPERS provide any documents, including emails, which discuss the implementation of Government Code 20035.11 with Bargaining Unit 10, California Association of Professional Scientists (CAPS).	01/07/2016
13	01/12/2016	N/A	Trent Sunahara	2367	I am writing to make a formal California Public Records Act request for final audit reports of public agencies CalPERS' Office of Audit Services has audited in the past five years. According to my recent public records request (#2347), 82 public agencies had audit cases open for more than a year between January 1, 2011 and December 31, 2015. I would like to request copies (electronic copies if available) of the final audit reports for all of these public agencies.	01/12/2016
14	01/13/2016	N/A	Francis Coats	2348	Follow up to PRA #2311 and #2322	01/04/2016
15	01/14/2016	PERS Retirement Betterment Committee	Jake Petrosino	2357	It would be most appreciated if your office will provide a listing of PEMHCA Program new participating local public agencies and those agencies terminating coverage during calendar year 2015. (Please include county location for each agency listed.)	01/07/2016
16	01/15/2016	SEIU 1000	Jack McGlenn	2355	Pursuant to the California Government Code Sec. 6250-6268, I am submitting a request for information and records related to the utilization of contracted actuary and security guard services since December 2014.	01/07/2016
17	01/15/2016	PERS Retirement Betterment Committee	Jake Petrosino	2360	It would be most appreciated if your office will furnish a listing of public agency employers added and terminated in the California Employers Retiree Benefit Trust (CERBT), during calendar year 2015. An update of the document provided last year, which included the number of covered lives with each employer, would be most informative.	01/07/2016

18	01/19/2016	N/A	Larry Luong	2369	(1) all medical, dental, vision, and/or other health-related insurance plan information, including all premium amounts, offered by CalPERS to its employee, Jennifer Luong, for calendar year 2016; and(2) all information regarding the salary in calendar year 2016 for CalPERS employee Jennifer Luong, including without limitation any cost of living adjustment, salary increase, eligibility for salary increase, schedule of salary increase(s), and effective date(s) of salary increase(s).	01/14/2016
19	01/20/2016	Aurora Advisors	Susan Webber	2330	All written communications to or from CalPERS' "fiduciary counsel" Robert Klaunser	12/09/2015
20	01/20/2016	N/A	Larry Luong	2378	I am in receipt of the CalPERS response letter dated 1/19/16 (Tracking # 2369). Based on the documents provided, I request the following information:* The premiums associated with the EPO, HMO, and PPO basic plans identified in the 2016 Health Benefits Summary for individual and family options.	01/20/2016
21	01/22/2016	Pension Benefit Information	Susan McDonald	2345	Two Market Research RFI's were issued by CalPERS for Mortality Identification/Verification. I am requesting the Market Analysis that was performed and copies of all submissions by vendors to CalPERS.	12/29/2015
22	01/25/2016	AB Global	Jason Kucharski	2379	I would like Annual Investment Report For 2015The old version, 2013-2014 can be found here: https://www.calpers.ca.gov/docs/forms-publications/annual-investment-report-2014.pdf . Is the new version available?	01/21/2016
23	01/26/2016	RWR Law	Aaron O'dell	2385	Updated request from PRA #2209	01/22/2016
24	01/26/2016	N/A	Jim Niehaus	2387	I'm interested in all compliance reviews for the Town of Ross. Perhaps in the 80's they may have been called audits. In any case I'm looking for audits done on the Town of Ross	01/25/2016
25	01/28/2016	Reeves Amodio	Thomas Amodio	2373	4 point request regarding the Pebble Limited Partnership.	01/15/2016

26	01/28/2016	California Orthopaedic Association	Diane Przepiorski	2394	<p>I was looking for a list of hospitals that are currently designated as a preferred facility for total joint replacement procedures, hip and knee for CalPERS members. Some years ago CalPERS established the list based on quality measures, but also their willingness to accept a \$30,000 reimbursement for the facility fee. Kathy Donneson was involved in setting up this program. Originally there about 9 hospitals on the list statewide. This was later expanded to 30 or so. So, I am trying to get an updated list of preferred hospitals statewide and then more specifically see if the Sutter Hospitals have been added to the list. It would also be good to know if the reimbursement threshold is still set at \$30,000.</p>	01/19/2016
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