

PRAs for February 2016

New PRAs Received	37
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PRAs Closed	33
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Monthly Averages from March 2015 to February 2016

PRAs Received	32
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PRAs Closed	32
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Annual Totals¹

Year	PRAs Received	PRAs Closed
2011	195	167
2012	292	266
2013	269	257
2014	313	303
2015	368	383
2016	71	59

Total PRAs as of February 29, 2016

Active PRAs	21
Received PRAs	2404
Closed PRAs	1435
Canceled PRAs	895

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.

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	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
4	01/21/2016	N/A	Nicole Lewis	2377	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.

5	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.
6	02/08/2016	Zawadzki Attorney at Law	Roman Zawadski	2406	Follow up to PRA #2320
7	02/10/2016	University of St. Gallen	Christoph Hasler	2410	I'm interested in using CalPERS Private Equity data for my Master's thesis at University of St. Gallen (Switzerland). I saw that you provide some basic information on your PE investments on your webpage. Now I want to ask if it is possible to get more specific data because the "Private Equity Program Fund Performance Review" is not detailed enough for my thesis. I would need the Cash Flows (amount of Capital Call/Distribution including the date and name of the fund).
8	02/12/2016	National Educational Services	Paul Bain	2416	We would like to obtain a list of members who are receiving benefits and members who are not receiving benefits, with their names and addresses.
9	02/17/2016	N/A	Matt Love	2425	I would like to request copies of all responses provided in reference to solicitation 2015-1002 RFI on cloud solutions for a data warehouse.
10	02/18/2016	AARM Corp	Sophia Johnson	2429	I am contacting you from Alternatives Data Cell, enables investors in alternative asset funds, to make, monitor and communicate their investment decisions. We are requesting historical Alternative Investments performance report for your fund, as per the Fee Reporting Template since inception till date. Please see enclosed template.
11	02/19/2016	The Desert Sun	Robert Hopwood	2431	We're looking for a list of all retirees in the Coachella Valley from 2013 to 2015.

12	02/22/2016	Evans, Wiechkowski, Ward, and Scoffielf, LLP	Mathew Evans	2439	Follow up to PRA #2304
13	02/25/2016	Sudden Link	Leonard Johnson	2440	7 point request regarding Temporary Upgrade Pay.
14	02/25/2016	Department of Industrial Relations	Irina Nemirovsky	2446	I am a researcher with the Department of Industrial Relations. Our research requires us to know the number of disability retirement claims for firefighters and peace officers. Could you please let me know if CalPERS would be able to provide us with this data for the last 3 years?
15	02/25/2016	Libow & Wellman Municipal Law	Brian Libow	2447	20-point follow up request to PRA #2280, Schuld.
16	02/25/2016	Deltek	Arjay Cruz	2448	I am writing regarding the RFI # 2015-1001 IT Infrastructure Modernization Research project. I was hoping to learn if the responses to the RFI were favorable, and if so, is an RFP developing? Do you have any anticipated RFP release timeline? Also I was wondering if the list of the RFI respondents is available.
17	02/25/2016	Whitecase	Christopher Jury	2449	I would like to know the current value of the equity and the bond investments that CalPERS has in France, Germany, Italy, and Spain. The data should be itemized by country, and by type (equity/bond).
18	02/29/2016	N/A	Donna Snodgrass	2452	List of CalPERS employers and the addresses with an address in Yucaipa, Calimesa, Redlands and Highland, CA. List of employees (CalPERS members) First, last name, Middle Initial who are employed by those employers listed above and who they are currently employed with. List of Retirees (annuitants) First, last name, middle initial, who have retired from the employers listed above who are currently receiving a pension check. The employer last worked for and date of retirement. Electronic copy is acceptable.
19	02/29/2016	Desert Sun	Jesse Marx	2453	CalPERS Actuarial Valuation Reports for various districts.

20	02/29/2016	Law Offices of John Michael Jensen	John Michael Jensen	2454	I am requesting that you provide me, on behalf of BCN, with simplified factors at 7.5% with a 2% COLA for (i) service retirement, (ii) industrial disability retirement, and (iii) disability retirement.
21	02/29/2016	N/A	Sarah Gibson	2455	We are interested in learning about CalPERS stock investments in China in the last 9 years and how those investments have performed? Also we would like to know which outside asset managers are the most responsible for arranging the China investments.

Closed Public Record Act Requests

	Closed Date	Requesting Organization	Requestor's Name	PRA #	Brief Description	Date Received
1	02/01/2016	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.	01/28/2016
2	02/03/2016	Foresters Financial Services	Alyssa Topusidis	2368	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)	01/14/2016
3	02/04/2016	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.	01/25/2016
4	02/05/2016	N/A	Trent Sunahara	2374	I would like to know how many of the 82 public agencies audit cases went before an Administrative Law Judge hearing?	01/19/2016
5	02/05/2016	State Compensation Insurance Fund	Dana Kirby	2399	We would like to know the average number of service credits a state employee has when retiring during years 2014 and 2015.	02/01/2016
6	02/09/2016	N/A	Pete Wessel	2382	Please provide a copy of program information document or related descriptions for "Phase IV, COMET"	01/24/2016

7	02/09/2016	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>	01/24/2016
8	02/09/2016	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 4. The agency perpetual file. 	01/24/2016
9	02/10/2016	Dept. of Managed Health Care	Lynn Castro	2409	<p>I am the Senior Personnel Specialist at the Department of Managed Health care. I am requesting a copy of the death certificate for Department of Managed Health Care deceased employee Rodney P. Hurst. I was not able to obtain a copy from the deceased employee's spouse. His death was on or about January 8, 2016.</p>	02/09/2016
10	02/12/2016	N/A	Matthew Owen	2408	<p>I'm looking for the annual rates of return for the CalPERS investment portfolio from 1995 through 2015 and up to and including the current YTD 2016 investment return numbers.</p>	02/09/2016
11	02/12/2016	N/A	Larry Woodson	2411	<p>Request for Submittal for the PBM contract</p>	02/08/2016
12	02/16/2016	N/A	Emma Guillen	2419	<p>I am requesting all documents of Mike Guillen retirement. All documents regarding death benefits and one time payments.</p>	02/16/2016

13	02/17/2016	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).	12/19/2015
14	02/17/2016	Preqin	Haley Parker	2366	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.	01/12/2016
15	02/17/2016	N/A	Freddie Moore	2424	Domestic partnership verification.	02/17/2016
16	02/18/2016	CA Foundation for Fiscal Responsibility	Marcia Fritz	2423	Please provide me a list of CalPERS member agencies that provide social security benefits for safety workers.	02/16/2016
17	02/19/2016	N/A	Walter Chance Jr	2376	My wallet was lost or stolen and I need to replace it.	01/20/2016

18	02/19/2016	UC Davis	M 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.	01/29/2016
19	02/19/2016	Nasdaq	Shelia Mosby	2401	Please provide a breakdown of you shareholdings along with the investment advisors for each of our clients or a breakdown of internally verses externally managed shares in each company as of December 31, 2015 or current.	02/03/2016
20	02/19/2016	Activist Insight	Husein Bektic	2421	Monthly net returns of each of the funds either currently or historically included in CalPERS' corporate governance equity fund portfolio for all months in 2015 and January 2016 if available.	02/15/2016
21	02/19/2016	N/A	Sabrina Spears	2430	Health Resolution between the South San Luis Obispo County Sanitation District and PERS in order to correct Agency and Retiree percentage of Health Premium for 2016.	02/18/2016
22	02/22/2016	Shepardson Law	John Shepardson	2414	Email to Jon McGee of sexually inappropriate material.	02/11/2016

23	02/23/2016	Kivel Law	Scott Kivel	2426	<ol style="list-style-type: none"> 1. CalPERS Rulemaking file for title 2, California Code of Regulations, section 570.5; 2. CalPERS Rulemaking file for title California Code of Regulations, section 571 3. All DOCUMENTS from January 1, 2012 to the present establishing or referencing CalPERS policies or procedures regarding the circumstances under which the payment of special compensation incentive pay conforms or does not conform to CalPERS creditable compensation requirements 4. All DOCUMENTS from January 1, 2012 to the present establishing or referencing CalPERS policies or procedures interpreting Government Code section 20630 5. All DOCUMENTS from January 1, 2012 to the present establishing or referencing CalPERS policies or procedures interpreting Government Code section 20636.1 6. All administrative law judge decisions from January 1, 2012 to the present adjudicating the inclusion of the payment of special compensation incentive pay into reported compensation 7. All CalPERS Board of Administration decisions adopting, rejecting, or modifying all administrative law judge decisions responsive to the previous request. 	02/17/2016
24	02/24/2016	N/A	Jim Niehaus	2436	Mojave Water Agency contract from 1/1/2005-12/31/2007.	02/22/2016
25	02/26/2016	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).	01/07/2016

26	02/26/2016	Kingsdale	Brian Scott	2398	Are shares of Canadian Oil Sands being tendered to the SunCorp offer? What is the current quantity of shares held? CUSIP # 13643E105	02/01/2016
27	02/26/2016	N/A	Jake Petrosino	2413	1. Listing of Non-Pooled Plans and related Funding Ratios including old 4-diget Identification Numbers, as provided last year 2. Listing of Pooled Plans and related Funding Ratios including old 4-diget Identification Numbers, as provided last year.	02/11/2016
28	02/26/2016	Brea First	Chris Gaarder	2427	Annual Valuation Reports for City of Brea from 2000 to present.	02/17/2016
29	02/12/2016	Littler	Alison Hightower	2415	1. All CalPERS audits that included a finding that a public agency enrolled one or more persons in CalPERS as CalPERS eligible when CalPERS determined that the person(s) in fact were not employees of a CalPERS eligible public entity. 2. All administrative law judge decisions regarding appeals of CalPERS' determination(s) to exclude one or more persons from CalPERS membership. 3. All decisions by the CalPERS Board of Directors that rejected or refused to confirm a proposed decision by an administrative law judge resolving an appeal of CalPERS membership exclusion.	02/29/2015
30	02/19/2016	Bell, McAndrews & Hiltachk, LLP	Terry Martin	2432	Please produce or allow all writings that indicate or evidence the total amount of rebates obtained by CalPERS directly or indirectly (e.g. from its Pharmacy Benefits Manager) for each calendar year commencing in 2014. As you know, beginning in 2014, CalPERS contracted for the services of a Pharmacy Benefit Manager (currently CVS Caremark) to negotiate prescription drug benefits for enrollees/members in four of its six HMO health plans and for CalPERS' self-funded PPO plans.	02/29/2016

31	02/19/2016	University of East Anglia	Dr Francesca Cuomo	2433	<p>I'm contacting you as I'm looking for the most recent complete list of portfolio holdings by country (updated at the end of 2015 or at least at June 2015).</p> <p>If it is possible, I'm looking also for a complete list of 2015 voting records for European equities.</p>	02/29/2016
32	02/22/2016	Pretium Partners LLC	Nicky Aimcharoen	2437	<p>I would like to get a sample of an investment memorandum from a firm that provides an investment allocation recommendation to CALPERS. I am focused on real estate investment recommendations</p>	02/29/2016
33	02/25/2016	Alternatives Data Cell	Sophia Johnson	2442	<p>I am writing this email with reference to the following article on https://www.pehub.com/2016/01/660033/. The Institutional Limited Partners Association (ILPA) in an attempt to boost transparency has made a template that shows all money collected by GP's from LP's and portfolio companies, including fees, fund expenses, offsets that have been applied, carried interest amounts and income received through related parties or parallel vehicles to the fund.</p>	02/29/2016