

**April 2018 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

| No. | Solicitations | Details | Program | Release | Anticipated Contract Start | Description of Services |
|-----|---|--|-----------|-----------|----------------------------|--|
| 1. | Independent Financial Statement Auditor (Solicitation No. TBD) | Solicitation; five-year contract term; estimated contract amount to be negotiated. | FINO/FRAS | TBD | TBD | Annual external audit services including work on GASB 68 and 75 opinions. |
| 2. | HMO Health Plan Administrator (Solicitation No. TBD) | Solicitation; multiple contract awards; five-year contract term; estimated contract amounts to be negotiated. | HPAD | TBD | TBD | Medical third-party administration and similar services. |
| 3. | PPO Health Plan Administrator (Solicitation No. TBD) | Solicitation; five-year contract term; estimated contract amount to be negotiated. | HPAD | TBD | TBD | Medical third-party administration and similar services. |
| 4. | CalPERS Search Firm Services Spring-Fed Pool (Solicitation No. TBD) | Solicitation; multiple contract awards; five-year contract term; estimated pool amount to be negotiated. Letters of Engagement from the CalPERS Search Firm Services SFP that are \$1M or more will be reported separately under the Letter of Engagement section of the Prospective Report. | HRSD | Fall 2018 | April 2019 | Search and recruitment services for CalPERS senior and executive level management positions. |
| 5. | CalPERS Talent Management Spring-Fed Pool (Solicitation No. TBD) | Solicitation; multiple contract awards; five-year contract term; estimated pool amount to be negotiated. Letters of Engagement from the CalPERS Talent Management SFP that are \$1M or more will be reported separately under the Letter of Engagement section of the Prospective Report. | HRSD | Fall 2018 | July 2019 | Organizational and Leadership Development; Employee Training and Development; Succession and Workforce Planning; Performance Management. |

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| 6. | Human Resource Management Solution (HRMS) (Solicitation No. TBD) | Solicitation; single award; five-year contract term; estimated contract amount to be negotiated. | HRSD | Summer 2018 / Fall 2018 | Winter 2018 / Spring 2019 | Hosted HRMS Solution to replace PeopleSoft Human Capital Management (HCM). |
| 7. | Investment Consulting Spring Fed Pool 2020 (Solicitation No. TBD) INVO-Wide | Solicitation; multiple contract awards; five-year contract term; estimated pool amount to be negotiated. | INVO | Fall 2018 | Winter 2019 | Investment Office Spring-Fed Pool which will replace all current Investment Office Spring-Fed Pools. Service categories to include: portfolio assistance, portfolio diligence, prudent person opinions, etc. |
| 8. | Solicitation Name TBD (Solicitation No. TBD) INVO-Wide | Solicitation; five-year contract term; estimated contract amount to be negotiated. | INVO | Summer 2018 | November 2018 | Data Platform for Data Strategy Roadmap Initiative. |
| 9. | Contact Center Cloud Migration Project (Solicitation No. TBD) | Solicitation; five-year contract term; contract amount to be negotiated. | ITSB/TISD | Spring 2018 | Summer 2018 | Cloud-hosted Contact Center platform. |
| 10. | Private Equity/Infrastructure Outside Legal Counsel Services (Solicitation No. TBD) | Solicitation; multiple contract awards; five-year contract term; estimated amount to be negotiated. | LEGO | August 2018 | January 2019 | Outside legal counsel services for Private Equity and Infrastructure investments. |

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| No. | New Contracts/Amendments | Details | Program | Award/ Initiate | Contract/ Amendment Start | Description of Services |
|-----|---|---|-----------|-----------------|------------------------------|--|
| 1. | To Be Selected (Contract No. TBD) | Exemption from Competitive Bid; one-year contract term; estimated amount to be negotiated. | FINO/FRAS | Spring 2018 | Spring 2018 | Independent Financial Statement Auditor. Annual external audit services including work on GASB 68 and 75 opinions. |
| 2. | Contractor Name TBD (Contract No. TBD) | Solicitation; five-year contract term; estimated amount to be negotiated. | HPRD | TBD | TBD | Health Care Data Warehouse Administrator and Actuarial/Analytical Services Provider. |
| 3. | Capital Analytics MUFG (Contract No. 2017-8337) Investment Services | Originally reported in the April 2017 Prospective Report for estimated amount of \$20M; estimated amount is increasing to \$34M. | INVO | Fall 2017 | September 2018 | Accounting Book of Record (ABOR) services for private equity system known as PEARS. |
| 4. | eFront Financial Solutions Inc. (Contract No. 2017-8336) Investment Services | Originally reported in the April 2017 Prospective Report for estimated amount of \$6M; estimated amount is increasing to \$9M. | INVO | Fall 2017 | September 2018 | Investment Book of Record (IBOR) services for Private Equity Investments and PEARS. |
| 5. | State Street Bank and Trust Company (Contract No. 2018-8344) INVO-Wide | Exemption from Competitive Bid; five-year contract term; estimated contract amount not to exceed \$80M. | INVO | Summer 2017 | July 2018 | Master Custody and accounting services. |
| 6. | Contract Name TBD (Contract No. TBD) Global Equity | Exemption from Competitive Bid; five separate contracts awarded; five-year contract term; contract amounts are "undefined" and based on assets under management; estimated contract amounts may exceed \$1M/year for each contract. | INVO | December 2018 | Winter 2018 | Investment Advisory services for an external model provider delivering solutions that are focused on providing protection from severe drawdowns. |

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|-----|---|---|-----------|-----------------|------------------------------|---|
| 7. | Enterprise Services, LLC (ES) (Contract No. 2017-8374) Systems and Data Backup and Restore and Systems and Data Disaster Recovery (BR/DR) | Solicitation, five-year contract term, estimated contract amount not to exceed \$11,493,962 over the duration of the contract. The BR/DR solicitation was reported in the December 2016 Prospective Report. | ITSB/TISD | March 2018 | March 2018 | Provide data protection and recovery services for CalPERS business systems. |

| No. | Purchase Orders | Details | Program | Initiate | Change Order Effective | Description of Services |
|-----|---|--|---------|----------|---------------------------|---|
| 1. | Factset Research Systems Inc. (Purchase Order No. TBD) INVO-Wide | Subscription agreement; purchase orders may overlap fiscal years; total purchase order amount not to exceed \$5M for FY 18/19. | INVO | Existing | N/A | Multiple asset classes. Analytics service provider; assists in internal portfolio management. |
| 2. | FTSE International Limited (Purchase Order No. TBD) INVO-Wide | Subscription agreement; annual renewal; total purchase order amount may exceed \$1.5M for FY 18/19. | INVO | Existing | N/A | Benchmark data services for the investment portfolios of the fund. |
| 3. | IPC Systems (Purchase Order No. TBD) INVO-Wide | Subscription agreement; five-year term; total purchase order amount may exceed \$2M for entire subscription. | INVO | Existing | N/A | Trading Solutions. |
| 4. | Moody's Analytics, Inc. (Purchase Order No. TBD) INVO-Wide | Subscription agreement; annual renewal; total purchase order amount may exceed \$1.5M for FY 18/19. | INVO | Existing | N/A | Multiple asset classes. Data/Analytics service provider; assists in internal and external portfolio management. |

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| No. | Purchase Orders | Details | Program | Initiate | Change Order Effective | Description of Services |
|-----|--|--|---------|-------------|------------------------|--|
| 5. | Thomson Reuters Markets, LLC (Purchase Order No. TBD) INVO-Wide | Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 18/19. | INVO | Existing | N/A | Multiple asset classes. Data/Analytics service provider; assists in internal portfolio management. |
| 6. | Contractor Name – TBD (Purchase Order No. TBD) INVO-Wide | Subscription agreement; total purchase order amount may exceed \$2M for FY 18/19. | INVO | Summer 2018 | N/A | Benchmark data services for the investment portfolios of the fund. |
| 7. | Contractor Name – TBD (Purchase Order No. TBD) INVO-Wide | Subscription agreement; three-year term; total purchase order amount may exceed \$1.5M for FY 18/19. | INVO | Summer 2018 | N/A | Performance Subscription for Data Strategy Roadmap initiative. |
| 8. | Contractor Name – TBD (Purchase Order No. TBD) INVO-Wide | Subscription agreement; three-year term; total purchase order amount may exceed \$1M for FY 18/19. | INVO | Summer 2018 | N/A | Benchmark Aggregation for Data Strategy Roadmap initiative. |
| 9. | Contractor Name – TBD (Purchase Order No. TBD) INVO-Wide | Subscription agreement; three-year term; total purchase order amount may exceed \$1M for FY 18/19. | INVO | Summer 2018 | N/A | Enterprise Data Management for Data Strategy Roadmap initiative. |
| 10. | Contractor Name – TBD (Purchase Order No. TBD) PAA/Real Assets | Subscription agreement; contract term TBD; estimated amount may exceed \$1M annually. | INVO | Summer 2018 | Fall / Winter 2018 | Data Collection and Attribution Services Provider for Real Assets. |

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| No. | Existing Investment Manager Contracts | Details | Program | Award/ Initiate | Contract/ Amendment Start | Description of Services |
|-----|--|---|---------|-----------------|------------------------------|---|
| 1. | State Street Global Advisors Trust Company (Contract No. 2012-6541) Global Equity | Existing Investment Manager, undefined amount; term is without defined duration, may or may not be funded throughout FY 18/19; if funded, base and/or performance fees may exceed \$1M. | INVO | Existing | Existing | Investment management services for Global Equity/Affiliate Investments Program. |

| No. | Undefined – Legal Services Contracts | Details | Program | Award/ Initiate | Contract/ Amendment Start | Description of Services |
|-----|--|--|---------|-----------------|------------------------------|---|
| 1. | King & Spalding, LLP (Contract #2015-8024) | Contract expires December 2019; estimated contract amount is \$1.3M. | LEGO | Existing | Existing | Outside Legal Counsel services for contract negotiations with health plans and third-party administrators of CalPERS health programs. |

| No. | Letters of Engagement | Details | Program | Initiate | Contract/ Amendment Start | Description of Services |
|-----|------------------------------------|---|---------|-------------|------------------------------|--|
| 1. | AVSRE (Contract No. TBD) | IT Spring-Fed Pool LOE; multiple awards; estimated amount \$5.1M. | ACTO | Summer 2018 | Summer 2018 | Application development coding, system defect analysis and resolution, system architecture design and enhancement, and solution architecture services. |

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|-----|---|--|---------|-------------|------------------------------|--|
| 2. | My CaPERS Maintenance and Support (Contract No. TBD) | IT Spring-Fed Pool LOE; multiple awards; estimated amount \$4.25M. | ESDD | Summer 2018 | Summer 2018 | Data analysis, data correction, system testing, test tool administration support, test automation services, application development coding, system defect analysis and resolution, system architecture design and enhancement, report and batch generation and support, business analysis, and solution architecture services. |
| 3. | KearnFord Application Systems Design (Contract No. 2015-7884) | IT Spring-Fed Pool LOE; multiple purchase orders; estimated amount may exceed \$2M through FY 18/19. | ITSB | Existing | Existing | Provide technology and project management consulting services for technology applications and projects. |

Legend:

ACTO – Actuarial Office
ESDD - Enterprise Solutions Development Division
FINO/FRAS – Financial Office/Financial Reporting & Accounting Services Division
HPAD - Health Plan Administration Division
HPRD – Health Policy Research Division
HRSD – Human Resources Division
INVO – Investment Office
LEGO – Legal Office
ITSB - Information Technology Services Branch
TISD - Technology Infrastructure Services Division