

**April 2019 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.	<b>Pharmacy Reference Pricing</b> (Solicitation No. TBD)	Solicitation; two and a half-year contract term; estimated contract amount to be negotiated.	HPAD	June 2019	July 2019	Firm to work with the Pharmacy Benefit Manager to provide Prescription Drug Reference Pricing.
2.	<b>Investment Office Risk Platform RFP</b> (Solicitation No. TBD) Investment Risk and Performance	Solicitation; five-year contract term; estimated contract amount to be negotiated.	INVO	Summer 2019	Fall 2020	Multi-asset platform to perform data reconciliation, analysis and risk measurement capabilities for the CalPERS Investment Office.
3.	<b>Information Technology Consultants Spring-Fed Pool</b> (Solicitation No. TBD)	Solicitation; multiple contract awards; five-year contract term; estimated pool amount to be negotiated.	ITSB	Summer 2019	July 2020	Information technology consulting services.
4.	<b>Multi-Functional Printer/Copier Maintenance Services</b> (Solicitation No. TBD)	Solicitation; may result in two separate contracts; five-year contract term; estimated contract amount(s) to be negotiated.	OSSD/ITSB	Fall 2019	July 2020	Provide enterprise-wide multi-functional print/copy equipment maintenance services for office fleet and large capacity production printers. May develop into two separate solicitations.

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No.	New Contracts/Amendments	Details	Program	Award/ Initiate	Contract/ Amendment Start	Description of Services
1.	<p><b>Health Maintenance Organization (HMO) Health Plan Administrators:</b></p> <ul style="list-style-type: none"> <li>• <b>Anthem Blue Cross</b> (Contract No. 2018-8530)</li> <li>• <b>Blue Shield of CA</b> (Contract No. 2018-8528)</li> <li>• <b>HealthNet of CA</b> (Contract No. 2018-8533)</li> <li>• <b>Sharp Health Plan</b> (Contract No. 2018-8531)</li> <li>• <b>UnitedHealthcare</b> (Contract No. 2018-8532)</li> <li>• <b>Western Health Advantage</b> (Contract No. 2018-8534)</li> <li>• <b>Kaiser Permanente</b> (Contract No. 2018-8529)</li> </ul>	<p>Solicitation reported in April 2018 Prospective Report with an amount to be negotiated. Multiple contract awards; five-year contract term; Estimated contract amounts not to exceed a combined total of \$2.6B</p>	HPAD	June 2018	January 2019	<p>Health Maintenance Organization (HMO) Health plan medical and/or pharmacy third-party administration and similar services.</p>
2.	<p><b>Anthem Blue Cross</b> (Contract No. 2018-8609)</p>	<p>Solicitation reported in April 2018 Prospective Report with an amount to be negotiated. Five-year contract term; estimated contract amount not to exceed \$570M for the duration of the contract.</p>	HPAD	March 2019	January 2020	<p>PPO Health Plan Administrator Medical third-party administration and similar services.</p>

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3.	<b>Regents of University of California, Davis</b> (Contract No. TBD)	Interagency agreement; five-year contract term; estimated contract amount \$2M for the duration of the contract.	HRSD	July 2020	July 2020	Leadership training courses and coaching services.
4.	<b>Contract TBD</b> (Contract No. TBD) Real Assets	Exemption from competitive bid; five-year contract term; estimated contract amount may exceed \$2M for the duration of the contract.	INVO	Summer 2019	January 2020	Collection and aggregation of critical Real Assets portfolio data with a consulting and analytical component to assist CalPERS in its fiduciary duty of making more informed, critical and timely investment decisions for Real Assets and Total Fund.
5.	<b>Contract TBD</b> (Contract No. TBD) Global Equity	Exemption from competitive bid; five-year contract term; contract value is "undefined" and based on assets under management; estimated contract value may exceed \$5M for the duration of the contract.	INVO	Winter 2019	Winter 2019	Investment Advisory services for an external model provider delivering multi-factor solutions.
6.	<b>Contract TBD</b> (Contract No. TBD) Global Equity	Exemption from competitive bid; five-year contract term; contract value is "undefined" and based on assets under management; estimated contract value may exceed \$5M for the duration of the contract.	INVO	Winter 2019	Winter 2019	Investment Advisory services for an external model provider delivering multi-factor solutions.

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7.	<b>Demeter International Investment Ltd.</b> (Contract No. 2017-8329) Global Fixed Income	Existing contract; exemption from competitive bid; five-year contract term; contract amount is "undefined". Contract has been amended which may exceed the value.	INVO	Existing	September 2018	Global Fixed Income Investment Consulting/Brokering Services.
8.	<b>inContact</b> (Contract No. 2018-8565)	Solicitation reported in April 2018 Prospective Report with an amount to be negotiated. Five-year contract term; contract amount not to exceed \$4,656,070 over the duration of the contract.	ITSB/TISD	January 2019	January 2019	Contact Center Cloud Migration. Migration of contact center call and call management platform to cloud services.
9.	<b>Deloitte &amp; Touche LLP</b> (Contract No. 2018-8607)	Solicitation reported in April 2018 Prospective Report with an amount to be negotiated. Five-year contract term; contract amount not to exceed \$17,860,779 over the duration of the contract.	OFAS	February 2019	March 2019	Independent Financial Statement Auditor. Annual external audit services including work on GASB 68 and 75 opinions.
10.	<b>Integrity Voting Systems</b> (Contract No. 2018-8580)	Exemption from competitive bid; one-year contract term; contract amount is \$855,902 but may exceed \$1M if a runoff election is required.	OSSD	March 2019	March 2019	Board of Administration Election Services. Contractor to provide blended election systems to include paper ballot, interactive voice response (telephone voting), and internet voting to conduct the 2019 Retired Member Election.

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11.	<b>Xerox Corporation</b> (Contract No. 2018-8603)	Exemption from competitive bid; one-year contract term; not to exceed \$1.1M for the duration of the contract.	OSSD	Spring/Summer 2019	July 2019	Multi-functional printer/copier maintenance services for the Xerox office fleet and Xerox large capacity production printers.

No.	Purchase Orders	Details	Program	Initiate	Change Order Effective	Description of Services
1.	<b>Axioma</b> (Purchase Order No. TBD) INVO Wide	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2019-20.	INVO	Existing	N/A	Optimizer tool for portfolio construction used by Global Equity.
2.	<b>Barra/MSCI LLC</b> (Purchase Order No. TBD) INVO Wide	Subscription agreement; annual renewal; total purchase order amount may exceed \$2M for FY 2019-20.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assists in internal portfolio management.
3.	<b>Bloomberg L.P.</b> (Purchase Order No. TBD) INVO Wide	Subscription agreement; annual renewal; total purchase order amount may exceed \$4.5M for FY 2019-20.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assists in internal portfolio management.
4.	<b>Factset Research Systems Inc.</b> (Purchase Order No. TBD) INVO Wide	Subscription agreement; annual renewal; purchase orders may overlap fiscal years and total amount may exceed \$5M for FY 2019-20.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assists in internal portfolio management.

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5.	<b>FTSE International Limited</b> (Purchase Order No. TBD) INVO Wide	Subscription agreement; annual renewal; total purchase order amount may exceed \$1.5M for FY 2019-20.	INVO	Existing	N/A	Benchmark data services for the investment portfolios of the fund.
6.	<b>MRI Software, LLC</b> (Purchase Order No. TBD) INVO Wide	Subscription agreement; annual renewal; total purchase order amount may exceed \$1.5M for FY 2019-20.	INVO	Existing	N/A	Provider of AREIS tool used to track and reconcile Real Asset Portfolio activities.
7.	<b>S&amp;P Global Market Intelligence</b> (Purchase Order No. TBD) INVO Wide	Subscription agreement; annual renewal; total purchase order amount may exceed \$2M for FY 2019-20.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assists in internal portfolio management.
8.	<b>Purchase Order TBD</b> (Purchase Order No. TBD) INVO Wide	Subscription agreement; total purchase order amount may exceed \$1M for FY 2019-20.	INVO	July 2019	N/A	Benchmark aggregation services.

No.	Undefined – Legal Services Contracts	Details	Program	Award/ Initiate	Contract/ Amendment Start	Description of Services
1.	<b>Berman Tabacco</b> (Contract No. 2018-8496)	Contract expires September 2023; estimated contract amount expected to exceed \$1M.	LEGO	New	September 2018	Outside Legal Counsel services related to securities and health class-action litigation.

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2.	<b>Durie Tangri, LLP</b> (Contract No. 2018-8571)	Contract expires January 2024; estimated contract amount expected to exceed \$1M.	LEGO	New	January 2019	Outside Legal Counsel services related to representation of the Board in state and federal judicial hearings.
3.	<b>Orrick, Herrington &amp; Sutcliffe, LLP</b> (Contract No. 2014-7781)	Contract expires June 2020; amended for additional funding; estimated contract amount expected to exceed \$1M.	LEGO	Existing	Existing	Outside Legal Counsel services in connection with IT and investment related legal issues.
4.	<b>Reed Smith, LLP</b> (Contract No. 2014-7534)	Contract expires March 2020; amending for additional funding; estimated contract amount expected to exceed \$2.4M.	LEGO	Existing	Existing	Outside Legal Counsel services related to business and investments litigation and general advice.
5.	<b>Pillsbury Winthrop Shaw Pittman LLP</b> (Contract No. 2018-8546)	Solicitation reported in April 2018 Prospective Report with an amount to be negotiated. Contract expires December 2023; estimated contract amount expected to exceed \$1M.	LEGO	New	January 2019	Outside legal counsel services for Private Equity and Infrastructure investments.
6.	<b>Morgan, Lewis &amp; Bockius, LLP</b> (Contract No. 2018-8548)	Solicitation reported in April 2018 Prospective Report with an amount to be negotiated. Contract expires December 2023; estimated contract amount expected to exceed \$2M.	LEGO	New	January 2019	Outside legal counsel services for Private Equity and Infrastructure investments.

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7.	<b>K&amp;L Gates, LLP</b> (Contract No. 2018-8549)	Solicitation reported in April 2018 Prospective Report with an amount to be negotiated. Contract expires December 2023; estimated contract amount expected to exceed \$2M.	LEGO	New	January 2019	Outside legal counsel services for Private Equity and Infrastructure investments.
8.	<b>Foster Pepper &amp; Shefelman, LLP</b> (Contract No. 2018-8558)	Solicitation reported in April 2018 Prospective Report with an amount to be negotiated. Contract expires December 2023; estimated contract amount expected to exceed \$1M.	LEGO	New	January 2019	Outside legal counsel services for Private Equity and Infrastructure investments.
9.	<b>DLA Piper LLP (US)</b> (Contract No. 2018-8555)	Solicitation reported in April 2018 Prospective Report with an amount to be negotiated. Contract expires December 2023; estimated contract amount expected to exceed \$1M.	LEGO	New	January 2019	Outside legal counsel services for Private Equity and Infrastructure investments.
10.	<b>Hogan Lovells US LLP</b> (Contract No. 2018-8554)	Solicitation reported in April 2018 Prospective Report with an amount to be negotiated. Estimated contract amount expected to exceed \$1M.	LEGO	New	TBD	Outside legal counsel services for Private Equity and Infrastructure investments.

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No.	Letters of Engagement (LOEs)	Details	Program	Initiate	Contract/ Amendment Start	Description of Services
1.	<b>Bard Consulting, LLC</b> (Contract No. 2014-7427) Real Assets	Real Assets Investment Consulting Spring-Fed Pool LOEs; multiple awards; estimated amount may exceed \$1M for FY 2019-20.	INVO	Existing	Existing	Investment consulting services for the Real Assets Program.
2.	<b>Crosswater Realty Advisors, LLC</b> (Contract No. 2014-7431) Real Assets	Real Assets Investment Consulting Spring-Fed Pool LOEs; multiple awards; estimated amount may exceed \$1M for FY 2019-20.	INVO	Existing	Existing	Investment consulting services for the Real Assets Program.
3.	<b>Meketa Board Consultant</b> (Contract No. 2015-7616, 2014-7438 & 2015-7609) INVO Wide	Real Assets Investment Consulting Spring-Fed Pool & General Investment Consulting Spring-Fed Pool LOEs; multiple awards; may exceed \$1M for FY 2019-20.	INVO	Existing	Existing	Provide investment consulting services to the Investment Committee regarding the Infrastructure and Private Equity portfolios as well as investment consulting services for the Investment Office.
4.	<b>Mercer Investment Consulting, LLC</b> (Contract No. 2015-7612) Real Assets	General Investment Consulting Spring-Fed Pool LOEs; multiple awards; estimated amount may exceed \$1M for FY 2019-20.	INVO	Existing	Existing	Investment consulting services for the Real Assets Program.

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5.	<b>Propoint Technology, Inc.</b> (Contract No. 2015-7700 & 2015-7874) Investment Servicing Division	Specialty Investment Consulting Spring-Fed Pool & IT Spring-Fed Pool LOEs; multiple awards; estimated amount may exceed \$3.5M for FY 2019-20.	INVO	Spring 2019	July 2019	Provide technology and project management consulting services for investment technology applications.
6.	<b>my CalPERS Maintenance &amp; Support</b> (Contract No. TBD)	IT Spring-Fed Pool LOE; multiple awards; estimated amount \$2.6M through FY 2019-20.	ITSB/ESDD	Summer 2019	Summer 2019	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.
7.	<b>Data Analytics/Reporting Development &amp; Maintenance</b> (Contract No. TBD)	IT Spring-Fed Pool LOE; multiple awards; estimated amount \$1.4M through FY 2019-20.	ITSB/TBMD	Summer 2019	Summer 2019	Analytics, data engineering, report development and testing, analytical tool administration, reporting environment support, dashboard/analytic development, report deployment and change management, data integration services, and dashboard testing.

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8.	<b>Actuarial Valuation System Redesign and Enhancement Project (AVSRE) - Advance Analytics and Integration phase</b> (Contract No. TBD)	IT Spring-Fed Pool, multiple awards; estimated amount \$1.68M through FY 2019-20.	ITSD/ESDD	Summer 2019	Summer 2019	Solution Architecture, design and application development services for AVSRE.

**Legend:**

- ESDD - Enterprise Solutions Development Division
- HPAD - Health Plan Administration Division
- HRSD - Human Resources Division
- INVO - Investment Office
- ITSB - Information Technology Services Branch
- LEGO - Legal Office
- OFAS - Office of Audit Services
- OSSD - Operations Support Services Division
- TBMD - Technology Business Management Division
- TISD - Technology Infrastructure Services Division