

**November 2022 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

**Item 3c, Attachment 1
Page 1 of 13**

No.	Solicitations	Details	Program	Release	Anticipated Contract Start	Description of Services
1.	PeopleSoft Project (Solicitation No. TBD)	CalPERS has not had official Oracle support for PeopleSoft products since 2017. Solicitation for Oracle Peoplesoft support including licensing fees; estimated contract amount to be negotiated.	ESDD	TBD	Spring 2023	Provides Oracle Peoplesoft support and services for Enterprise Resource Management, Human Capital Management and Supply Chain Management.
2.	Active Global Equity Solicitation (Solicitation No. TBD)	Alternative Solicitation Process; without defined duration contract terms; fees to be negotiated.	INVO	Spring 2023	Winter 2023	Investment manager/advisor solicitation for active equity investment strategies.
3.	Board Investment Consultant RFP (Solicitation No. TBD)	Request for Proposal for Board Investment Consulting Services; 5-year contract terms; fees to be negotiated.	INVO	Winter 2022	July 1, 2024	Board Investment Consulting Services for the Board of Administration.
4.	Global Fixed Income Solicitation (Solicitation No. TBD)	Alternative Solicitation Process; without defined duration contract terms; fees to be negotiated.	INVO	Fall 2022	Winter 2022 / Spring 2023	Investment manager/advisor solicitations for Global Fixed Income investment strategies.

**November 2022 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

**Item 3c, Attachment 1
Page 2 of 13**

No.	New Contracts / Amendments	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
1.	Health Maintenance Organization (HMO) (Contract No. TBD)	New five-year contracts; estimated contract amounts to be negotiated.	HPBB/HPRA	March 2023	January 2024	CalPERS new 5-year contracts with various firms to provide HMO medical and/or pharmacy benefit services.
2.	Milliman Solutions, LLC. (Contract No. TBD)	New five-year contract; total contract amount will be \$14.8M.	HPBB/HPRA	August 2022	TBD	Fifth Generation Health Care Decision Support System (HCDSS) data warehouse.
3.	Long-Term Care Managed Care Firm (Contract No. TBD)	New standard five-year contract; estimated contract amount to be negotiated.	HPBB/SHOD	September 2022	October / November 2022	CalPERS seeks to contract with a vendor that has experience with innovative programs that have improved policyholder satisfaction and reduced costs of the LTC risk pools (e.g., LTC insurance policies, Managed Long-Term Services and Supports [MLTSS] programs, etc.) through the deployment of Aging-in-Place strategies.

**November 2022 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

**Item 3c, Attachment 1
Page 3 of 13**

No.	New Contracts / Amendments	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
4.	<p>Long-Term Care Third-Party Administrator (TPA) (Contract No. TBD)</p>	<p>If a new TPA is selected, a two-year transition and standard term five-year contract will be awarded; if the current incumbent is selected, a standard term five-year contract will be awarded; contract amount to be negotiated.</p>	HPBB/SHOD	December 2022	January 1, 2023	<p>The CalPERS Long-Term Care Program third party administrator to provide all administrative services for the program, including but not limited to: customer service, premium collection, claims administration, care coordination, policy oversight and administration, policyholder communication, implements rate increases and benefit increase options, processes coverage changes, and performs underwriting among other administrative functions.</p>
5.	<p>AllianceBernstein L.P. (Contract No. TBD)</p>	<p>Renewal Investment Advisor contract; undefined value; term is without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.</p>	INVO	Fall 2022	Winter 2022	<p>Investment advisor contract for the Global Equity portfolio.</p>

**November 2022 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

**Item 3c, Attachment 1
Page 4 of 13**

No.	New Contracts / Amendments	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
6.	Axa Rosenberg Investment Management LLC (Contract No. 2017-8363)	Existing Investment Advisor; undefined value; amendment to update the term to without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Fall 2022	Winter 2022	Investment advisor contract for the Global Equity portfolio.
7.	BlackRock Financial Management, Inc. (Contract No. TBD)	New Investment Manager; undefined value; term is without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	September 2021	Winter 2022	Investment management services for the Long-Term Care Fund.
8.	Charles River System, Inc. dba Charles River Development (Contract No. 2019-8660)	Investment Trading Platform for Global Equity. Contract expires May 2023 with two, one-year options to renew; amendment will exercise the option to renew; payment is based on assets and may exceed \$6M per year.	INVO	Fall 2022	July 1, 2023	Investment Trading Platform for Global Equity.
9.	Credit Suisse Securities (USA) LLC (Contract No. 2017-8302)	Existing Investment Advisor; undefined value; amendment to update the term to without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Fall 2022	Winter 2022	Investment advisor contract for the Global Equity portfolio.

November 2022 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater

No.	New Contracts / Amendments	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
10.	Franklin Advisors, Inc. (Contract No. 2017-8296)	Existing Investment Advisor, formerly known as QS Investors LLC; undefined value; amendment to update the term to without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Fall 2022	Winter 2022	Investment advisor contract for the Global Equity portfolio.
11.	Goldman Sachs Asset Management, L.P. (Contract No. 2018-8590)	Existing Investment Advisor; undefined value; amendment to update the term to without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Fall 2022	Winter 2022	Investment advisor contract for the Global Equity portfolio.
12.	IMP Partners LLC (Contract No. TBD)	New investment consulting contract; one-year contract with two, one-year options to renew; total fees may exceed \$2M.	INVO	Fall 2022	Winter 2022	Investment support services contract for Global Equity.
13.	Lazard Asset Management LLC (Contract No. TBD)	Renewal Investment Advisor contract; undefined value; term is without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Fall 2022	Winter 2022	Investment advisor contract for the Global Equity portfolio.
14.	MUFG Capital Analytics LLC (Contract No. TBD)	Renewal consultant contract; five-year term; fees to be negotiated.	INVO	Fall 2022	July 1, 2023	Data collection and accounting services for Private Markets.

**November 2022 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

**Item 3c, Attachment 1
Page 6 of 13**

No.	New Contracts / Amendments	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
15.	PGIM Quantitative Solutions LLC (Contract No. TBD)	Renewal Investment Advisor contract, formerly known as Quantitative Management Associates, LLC; undefined value; term is without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Fall 2022	Winter 2022	Investment advisor contract for the Global Equity portfolio.
16.	State Street Bank and Trust (Contract No. TBD)	Master Custodian contract; exemption from competitive bid; contract amendment to extend the current contract for an additional five-year term previously approved by the Board in September 2022; fees for the additional five-year period (2023-2028) may exceed \$85M.	INVO	Fall 2022	July 1, 2023	Master Custodian services for the Investment Office.

No.	Existing Investment Manager Contracts	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
1.	Alliance Bernstein L.P. (Contract No. 2006-4120)	Existing Investment Manager; undefined value; term is without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.

**November 2022 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

**Item 3c, Attachment 1
Page 7 of 13**

No.	Existing Investment Manager Contracts	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
2.	Arrowstreet Capital LP (Contract No. 2014-7483)	Existing Investment Manager; undefined value; term is without defined duration; may or may not be funded throughout FY 2022-23; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Equity portfolio.
3.	Baillie Gifford Overseas Limited (Contract No. 2000-2263)	Existing Investment Manager; undefined value; term is without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Equity portfolio.
4.	Blackstone Liquid Credit Advisors I LLC (Contract No. 2021-9085)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Opportunistic Strategies portfolio.
5.	Blue Bay Asset Management LLP (Contract No. 2014-7473)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.

**November 2022 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

**Item 3c, Attachment 1
Page 8 of 13**

No.	Existing Investment Manager Contracts	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
6.	Columbia Management Investment Advisers, LLC (Contract No. 2008-4960)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
7.	CVC Credit Partners, LLC (Contract No 2020-9014)	Existing Investment Manager; undefined value; term is without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Opportunistic Strategies portfolio.
8.	Goldman Sachs Asset Management, L.P. (Contract No. 2014-7474)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
9.	J.P. Morgan Investment Management, Inc. (Contract No. 2008-4963)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
10.	Logan Circle Partners, L.P. (Contract No. 2008-4962)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.

**November 2022 Prospective Report
 Solicitations, Contracts, Purchase Orders, and Letters of Engagement
 \$1 Million or Greater**

**Item 3c, Attachment 1
 Page 9 of 13**

No.	Existing Investment Manager Contracts	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
11.	Ninety-One North America, Inc. (Contract No. 2014-7475)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
12.	Nomura Corporate Research and Asset Management, Inc. (Contract No. 2001-2621)	Existing Investment Manager; undefined value; term is without defined duration; may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
13.	Pacific Investment Management Company LLC (Contract No. 2001-2620)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
14.	Pacific Investment Management Company LLC (Contract No. 2006-4121)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
15.	State Street Global Advisors Trust Company (Contract No. 2012-6541)	Existing Investment Manager, undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Trust Level Portfolio Management and Implementation portfolios.

**November 2022 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

**Item 3c, Attachment 1
Page 10 of 13**

No.	Existing Investment Manager Contracts	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
16.	The Putnam Advisory Company, LLC (Contract No. 2008-4961)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
17.	Voya Investment Management Co. LLC (Contract No. 2008-4965)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2022-23; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
18.	Wellington Management Company, LLP (Contract No. 2014-7480)	Existing Investment Manager; undefined value; term is without defined duration; may or may not be funded throughout FY 2021-22; fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Equity portfolio.

**November 2022 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

No.	Contracts Without Fixed Values	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
1.	BlackRock Financial Management, Inc. (Contract No. 2019-8702)	Investment Trading Platform for Global Fixed Income. Contract expires September 2024; payment is based on assets and may exceed \$15M per year.	INVO	Existing	Existing	Investment Trading Platform for Global Fixed Income.
2.	Jefferies Financial Group Inc. Db Jefferies LLC (Contract No. 2020-9062)	Existing Secondaries Contract; undefined value; may or may not be funded throughout FY 2022-23; if funded, base and/or performance fees may exceed \$2M.	INVO	Existing	Existing	Secondary Sales contract for the Investment Office.
3.	RERC LLC (Contract No. 2021-9100)	Appraisal services where payment is based on specific fees, terms, and services. Contract expires March 2027; payment is based on assets and may exceed \$11M per year.	INVO	Spring 2021	April 1, 2022	Appraisal services for the Investment Office.

No.	Undefined – Legal Services Contracts	Details	Program	Award/ Initiate	Contract/ Amendment Start	Description of Services
1.	DLA Piper, LLP (Contract No. 2018-8555)	Contract began January 2019. Total estimated contract amount expected to exceed \$2M.	LEGO	Existing	January 2019	Outside legal counsel services for Private Equity and Infrastructure investments.
2.	Lowenstein Sandler LLP (Contract No. 2021-9119)	Contract began December 2021. Total estimated contract amount expected to exceed \$1M.	LEGO	Existing	December 2021	Outside legal counsel services for bankruptcy issues and other legal matters.

**November 2022 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

No.	Purchase Orders	Details	Program	Initiate	Change Order Effective	Description of Services
1.	PeopleSoft Project (Purchase Order No. TBD)	CalPERS has not had official Oracle support for PeopleSoft products since 2017. Purchase Order for Oracle Peoplesoft support including licensing fees; estimated amount to be negotiated.	ESDD	TBD	Spring of 2023	Provides Oracle Peoplesoft support and services for Enterprise Resource Management, Human Capital Management and Supply Chain Management.
2.	Glass Lewis (Purchase Order No. TBD)	Subscription agreement; three-year agreement; total purchase order amount may exceed \$1M.	INVO	Existing	N/A	Proxy Research and Policy used by Global Equity.
3.	IPC Systems, Inc (Purchase Order No. TBD)	Subscription agreement; three-year agreement; total purchase order amount may exceed \$1M.	INVO	Existing	N/A	Trade turret system for the Investment Office.

No.	Letters of Engagement (LOE)	Details	Program	Initiate	Contract / Amendment Start	Description of Services
1.	PeopleSoft Functional Support (LOE No. 2022-0492)	ITSB Spring-Fed Pool; 2-year LOE upon execution; estimated \$580,000 in FY 23/24 and \$580,000 in FY 24/25.	FRAS	FY 23/24	Summer 2023	Supports the financial system software as a financial subject matter expert in both a technical and functional capacity.

**November 2022 Prospective Report
 Solicitations, Contracts, Purchase Orders, and Letters of Engagement
 \$1 Million or Greater**

No.	Letters of Engagement (LOE)	Details	Program	Initiate	Contract / Amendment Start	Description of Services
2.	Callan LLC (Contract No. 2020-8708)	Investment Office Spring Fed Pool; multiple awards; estimated amount may exceed \$4M for FY 22/23.	INVO	FY 2022-2023	FY 2022-2023	Investment consultant services for multiple program areas in the Investment Office.
3.	Data Strategy and Technology Strategy (Contract No. TBD)	Investment Office Spring Fed Pool; may be multiple awards; fees to be negotiated.	INVO	Fall 2022	Winter 2023	Consulting services as input to Data Strategy and Technology Strategy.
4.	Investment Technology Developer Support (Contract No. TBD)	Investment Office Spring Fed Pool; may be multiple awards; fees to be negotiated.	INVO	Fall 2022	Winter 2023	Consulting services for investment technology automation.

Legend:

- ESDD – Enterprise Solutions Development Division
- FRAS – Financial Reporting & Accounting Services
- HPBB – Health Policy and Benefits Branch
- HPRA – Health Plan Research & Administration Division
- INVO – Investment Office
- ITSB – Information Technology Services Branch
- LEGO – Legal Office
- LTC – Long Term Care
- SHOD – Strategic Health Operations Division