

**April 2023 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.	Professional Actuarial Services Spring-Fed Pool (RFP No. 2022-9172)	Request for Proposal; five-year contract term; multiple contract awards; estimated contract amount to be negotiated.	ACTO	Spring 2023	Summer/Fall 2023	Actuarial consulting services for multiple program areas in the Actuarial Office.
2.	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	March 2023	June 2023	Provides Oracle Peoplesoft support and services for Enterprise Resource Management, Human Capital Management and Supply Chain Management.
3.	Investment Advisory Spring Fed Pool (RFP No. TBD)	Spring Fed Pool Request for Proposal; focused solicitation; multiple contract awards; five-year contract term; fees in the pool may exceed \$1M/year.	INVO	Spring 2023	Summer 2024	Spring Fed Pool for investment advisory services for the Investment Office.
4.	Information Technology Consultants Spring-Fed Pool (Solicitation No. TBD)	Solicitation; multiple contract awards; five-year contract term; estimated pool amount to be negotiated.	ITSB	October 2024	July 2025	Information technology consulting services.

**April 2023 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
1.	Health Maintenance Organization (HMO) (Contract No. TBD)	New five-year contracts beginning January 1, 2024, through December 31, 2028; total estimated administrative service fees not to exceed \$2.8B.	HPBB/HPRA	March 2023	January 1, 2024	CalPERS new five-year contracts with various firms to provide HMO medical and/or pharmacy benefit services.
2.	OptumRx Inc. (Contract No. 2016-8198)	Amendment; extend the current six-year contract term for one year to December 31, 2025; add \$21M for contract extension with estimated administrative service fees not to exceed \$181M.	HPBB/HPRA	May 2016	January 1, 2023	CalPERS contracts with a Pharmacy Benefit Manager (PBM) to provide pharmacy benefit management services for Preferred Provider Organization (PPO) and some Health Maintenance Organization (HMO) plans.

**April 2023 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
3.	Long-Term Care Managed Care Firm (Contract No. TBD)	New five-year contract; estimated contract total not to exceed \$28M.	HPBB/SHOD	September 2022	May 2023	CalPERS will be providing an Aging-in-Place Managed Care Program. Services include the deployment of personalized interventions virtually through a case management team and in-person through a vetted national network of service providers. Through predictive analytics models, the program stratifies the risk of eligible policyholders based on their specific needs and develops personalized plans and interventions. The program is meant to improve policyholder satisfaction and reduce costs of the LTC risk pools.
4.	BlackRock Financial Management, Inc. (Contract No. TBD)	Renewal contract; five-year term; undefined value; fees based on AUM; amount to be negotiated.	INVO	Spring 2023	Fall 2024	Investment Trading Platform for Global Fixed Income

**April 2023 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
5.	MUFG Capital Analytics LLC (Contract No. TBD)	Renewal contract; five-year term; total cost over five years may exceed \$48M.	INVO	Spring 2023	July 1, 2023	Data collection and accounting services for Private Markets.
6.	Contract Name TBD (Contract No. TBD)	Exemption from Competitive Bid process; undefined term; contract value is “undefined” and based on assets under management; estimated contract value may exceed \$1M/year. Contract 1 of 3.	INVO	Spring/Summer 2023	Summer 2023	Investment management/consulting services for Global Equity
7.	Contract Name TBD (Contract No. TBD)	Exemption from Competitive Bid process; undefined term; contract value is “undefined” and based on assets under management; estimated contract value may exceed \$1M/year. Contract 2 of 3.	INVO	Spring/Summer 2023	Summer 2023	Investment management/consulting services for Global Equity
8.	Contract Name TBD (Contract No. TBD)	Exemption from Competitive Bid process; undefined term; contract value is “undefined” and based on assets under management; estimated contract value may exceed \$1M/year. Contract 3 of 3.	INVO	Spring/Summer 2023	Summer 2023	Investment management/consulting services for Global Equity

**April 2023 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
9.	NICE InContact (Contract No. 2018-8565)	Renewal contract; TISD is managing this contract for CXD. Services and additional modules/feature are needed in the coming years; the number of years for the renewal is TBD. Contract not to exceed \$5.2M over the duration of the contract.	TISD	TBD	Fall 2023	Call Center SaaS software used to manage Member and Business Partner call interactions. The new modules will include Interactive Analytics and a Knowledge Base.

No.	Undefined – Legal Services Contracts	Details	Program	Award/ Initiate	Contract/ Amendment Start	Description of Services
1.	Alston & Bird LLP (Contract No. 2021-9145)	Contract began June 2022. Total estimated contract amount may exceed \$1M.	LEGO	Existing	June 2022	Outside Legal Counsel services related to litigation.
2.	DLA Piper, LLP (Contract No. 2018-8555)	Contract began January 2019. Total estimated contract amount may exceed \$3M.	LEGO	Existing	January 2019	Outside legal counsel services for Private Equity and Infrastructure investments.

**April 2023 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

No.	Undefined – Legal Services Contracts	Details	Program	Award/ Initiate	Contract/ Amendment Start	Description of Services
3.	Durie Tangri, LLP (Contract No. 2018-8571)	Contract began January 2019. Total estimated contract amount may exceed \$5M.	LEGO	Existing	January 2019	Outside Legal Counsel services related to representation of the Board in state and federal judicial hearings, and representation of the Board in class action lawsuits.
4.	Morgan, Lewis & Bockius LLP (Contract No. 2019-8817)	Contract began April 2020. Total estimated contract amount may exceed \$1M.	LEGO	Existing	April 2020	Outside legal counsel services for Real Estate and Infrastructure investments.

**April 2023 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.	Axioma (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2023-2024.	INVO	Existing	N/A	Optimizer tool for portfolio construction used by Global Equity.
2.	Barra/MSCI LLC (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$2M for FY 2023-2024.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assists in internal portfolio management.
3.	Bloomberg LP dba Bloomberg SEF LLC (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$5M for FY 2023-2024.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assist in internal portfolio management.
4.	Carahsoft Technology Corp. (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2023-2024.	INVO	Existing	N/A	Technology Platform for vendor management services for the Investment Office.
5.	Factset Research Systems Inc. (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$5M for FY 2023-2024.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assist in internal portfolio management.

**April 2023 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
6.	FTSE International Limited (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$2M for FY 2023-2024.	INVO	Existing	N/A	Benchmark data services for the investment portfolios of the fund.
7.	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.
8.	Moody's Analytics Inc. (Purchase Order No. TBD)	Renewal Purchase Order; three-year term agreement; total cost may exceed \$1M over 3 years.	INVO	Existing	N/A	Ratings data and analytics for the investment portfolios of the fund.
9.	MSCI ESG (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2023-2024.	INVO	Existing	N/A	Data service for the investment portfolios of the fund.
10.	RIMES Technologies Corporation (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2023-2024.	INVO	Existing	N/A	Benchmark data services for the investment portfolios of the fund.
11.	Ryedale (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2023-2024.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assists in internal portfolio management.

**April 2023 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
12.	S&P Global Market Intelligence (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$2M for FY 2023-2024.	INVO	Existing	N/A	Multiple asset classes. Analytics Service provider; assists in internal portfolio management.
13.	SAS Viya (Purchase Order No. 81107)	Software product; three-year agreement; not to exceed \$1,006,365	TBMD	Existing	10/1/2022	Primarily supports Health Plan & Research Administration (HPRA); supports Policy Research & Data Analytics (PRDA)

No.	Letters of Engagement (LOEs)	Details	Program	Initiate	Contract / Amendment Start	Description of Services
1.	Callan LLC (LOE No. 2020-8708)	Investment Office Spring Fed Pool; multiple awards; estimated amount may exceed \$4M for FY 23/24	INVO	Spring 2023	FY 2023-2024	Investment advisory services for multiple program areas in the Investment Office.
2.	Mercer Investment Advisers LLC (LOE No. 2020-8711)	Investment Office Spring Fed Pool; multiple awards; estimated amount may exceed \$1M for FY 23/24	INVO	Spring 2023	FY 2023-2024	Investment advisory services for multiple program areas in the Investment Office.

**April 2023 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

No.	Letters of Engagement (LOEs)	Details	Program	Initiate	Contract / Amendment Start	Description of Services
3.	Propoint Technology, Inc. (LOE No. 2020-8812)	Investment Office Spring Fed Pool; multiple awards; estimated amount may exceed \$5M for FY 23/24	INVO	Spring 2023	FY 2023-2024	Investment advisory services for multiple program areas in the Investment Office.
4.	Trinity Technology Group, Inc. (LOE No. 2020-8930)	Information Technology Spring Fed Pool; multiple awards; estimated amount may exceed \$1M for FY 23/24.	INVO	Spring 2023	FY 2023-2024	Technology services for multiple program areas in the Investment Office.
5.	myCalPERS Maintenance & Support (LOE No. TBD)	IT Sprint-Fed Pool LOE: multiple awards, estimated amount \$3M through FY 23/24	ITSB/ESDD	Summer 2023	Summer 2023	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.

**April 2023 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

Legend:

ACTO – Actuarial Office

ESDD – Enterprise Solutions Development Division

HPBB – Health Policy and Benefits Branch

HPRA - Health Plan Research & Administration Division

INVO – Investment Office

ITSB – Information Technology Services Branch

LEGO – Legal Office

SHOD – Strategic Health Operations Division

TBMD – Technology Business Management Division

TISD – Technology Infrastructure Services Division