

**April 2024 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.	CalPERS Board of Administration Election Services (Solicitation No. TBD)	Solicitation; single contract award; up to a four-year contract term; contract amount to be negotiated.	OSSD	July 2024	January 2026	Provide blended election services for the CalPERS Board of Administration.
2.	Supplemental Income Plans Third Party Administrator (Solicitation No. TBD)	Solicitation; five-year contract term; multiple contract awards; contract amounts to be negotiated.	PCPP	Spring 2024	February 1, 2025	To provide administrative and recordkeeping services for two plans managed by the CalPERS Supplemental Income Plan (SIP).
3.	Federal Legislative and Policy Representative Services (Solicitation No. TBD)	Solicitation; five-year term; contract amount to be negotiated.	CSR/LAD	August 2024	February 2025	Provide consultation and representation on federal executive, legislative, and/or regulatory plans in the policy area of investments that may impact CalPERS and its members.
4.	Information Technology Consultants Spring-Fed Pool (Solicitation No. TBD)	Solicitation; multiple contract awards; five-year contract terms; contract amounts to be negotiated. Letters of Engagement (LOE) from the IT SFP that may exceed \$1M will be reported separately under the LOEs section of the Prospective Report.	ITSB	October 2024	July 2025	Information technology consulting services.

**April 2024 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
5.	Health and Long-Term Care Benefits and Actuarial Consulting Services Spring-Fed Pool (Solicitation No. TBD)	Solicitation; five-year contract term; multiple contract awards; contract amounts to be negotiated; LOEs issued from the pool that are \$1M or more will be reported under the LOEs section of the Prospective Report.	HPBB/HPDD	November 2024	July 1, 2025	Provide actuarial and benefit consulting services for the health, pharmaceutical, and long-term care programs to continue to respond to the changes in the national health care marketplace.
6.	Health Plan Member Survey (HPMS), Supplemental Survey, and Health Equity Report (Solicitation No. TBD)	Solicitation; five-year contract term; contract amount to be negotiated.	HPBB/CPD	December 2024	June 2025	HPMS and the Supplemental Survey evaluate members' experiences and satisfaction with their health plan during the previous 12-month period (prior plan year). Both surveys contain questions that are equivalent to specific Consumer Assessment of Healthcare Providers and Systems (CAHPS) health plan performance measures.
7.	CalPERS Preferred Provider Organization (PPO) Third-Party Administrator (Solicitation No. 2024-9264)	Solicitation; five-year contract term; estimated contract amount to be negotiated.	HPBB/HPRA	TBD	January 1, 2025	Preferred Provider Organization (PPO) TPA and Exclusive Provider Organization (EPO) health plans to provide
8.	CalPERS Pharmacy Benefit Manager (PBM) (Solicitation No. TBD)	Solicitation; five-year contract term; estimated contract amount to be negotiated.	HPBB/HPRA	TBD	January 1, 2026	PBM to provide pharmacy benefit services.

**April 2024 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
9.	<p>Long-Term Care Third-Party Administrator (TPA) (Contract No. TBD)</p>	<p>Solicitation; if a new TPA is selected a two-year transition contract followed by a standard term five-year contract will be awarded; if the current incumbent is selected, a standard term five-year contract will be awarded; estimated contract amount to be negotiated.</p>	HPBB/HPDD	May 2024	January 1, 2025 for a two-year transition, January 1, 2027 if the incumbent is selected	<p>The CalPERS Long-Term Care Program TPA provides 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>
10.	<p>Health Actuarial and Benefits Consulting Services Spring-Fed Pool (Solicitation No. 2019-8756)</p>	<p>Solicitation; five-year contract term; multiple contract awards; increasing pool funding to \$13M; increase from \$10M (approved November 2019) is due to increased costs and additional projects in support of the CalPERS Health Benefits Program and Strategic Goal.</p>	HPBB	Winter 2020	July 1, 2020	<p>Provide actuarial and benefit consulting services for the health, pharmaceutical, and long-term care programs to continue to respond to the changes in the national healthcare marketplace.</p>

**April 2024 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
11.	Managed Services (Solicitation No. TBD)	Solicitation; managed services for investment technology operations; contract term TBD; fees to be negotiated.	INVO	Spring 2024	Summer 2024	Resources to provide managed services for investment technology operations.

No.	New Contracts / Amendments	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
1.	Long-Term Care Third-Party Administrator (TPA) (Contract No. 2017-8341)	Amendment; extend the current contract term up to 24-months and ending no later than December 31, 2026 as approved in November 2023 Board meeting. Negotiated increase in Per Member Per Month Fees (PMPM) due to contract provision regarding excessive policyholder lapses in 2023. Estimated amendment amount \$32M.	HPBB/HPDD	November 2023	November 1, 2023	CalPERS seeks to extend the current CalPERS Long-Term Care Program TPA contract for up to 24-months with and increased PMPM to facilitate a TPA Request for Proposal and possible transition to a new administrator.
2.	Altus Group U.S. Inc. (Contract No. TBD)	Contract renewal; exemption from competitive bid; five-year contract; fees may exceed \$2M.	INVO	Summer 2024	Spring 2025	Collection and aggregation of critical Real Assets portfolio data inclusive of consulting and analytical services.

**April 2024 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.	Secondary Sale Advisor (Contract No. TBD)	New Contract; exemption from competitive bid; five-year contract; fees to be negotiated.	INVO	Spring 2024	Spring 2024	Advisor for secondary sale transactions for Private Equity.
4.	Contract Name TBD (Contract No. TBD)	Manager universe continuous search process; undefined term; contract value is "undefined" and based on assets under management; estimated contract value may exceed \$1M/year.	INVO	Spring 2024	Summer 2024	Investment management/consulting services for Global Equity.
5.	Contract Name TBD (Contract No. TBD)	Manager universe continuous search process; undefined term; contract value is "undefined" and based on assets under management; estimated contract value may exceed \$1M/year.	INVO	Spring 2024	Summer 2024	Investment management/consulting services for Global Equity
6.	Contract Name TBD (Contract No. TBD)	Manager universe continuous search process; undefined term; contract value is "undefined" and based on assets under management; estimated contract value may exceed \$1M/year.	INVO	Spring 2024	Summer 2024	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.	INVO	Spring 2024	Summer 2024	Investment management/consulting services for Global Equity

**April 2024 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
8.	ReImagine GRP (Contract No. 2022-9163)	Amendment; increase funding due to increased costs in marketing conferences, event labor and products. Total contract amount \$1.315M.	STRL	TBD	April 30, 2024	Registration for enterprise marketing conferences and show services. Enterprise external event related costs for drayage, labor and purchasing of event products.
9.	Socure, Inc (Contract No. 2023-9327)	New contract to start upon execution through June 13, 2025; contract value is \$1.6M.	RBSD	January 2024	TBD	RBSD will utilize technology provided by Socure for death audit services to identify deaths timely and minimize the issuance of overpayments/incorrect benefit payments. Socure's technology platform will also be utilized for identity verification services and will complement our larger fraud prevention efforts.
10.	State Controller's Office (Contract No. 2024-9333)	Inter-Agency Agreement; renewal of existing agreement for a full five-year term; estimated amount not to exceed \$19M.	RBSD	October 2023	July 1, 2024	SCO issues payments for members, beneficiaries, and survivors who receive CalPERS benefits.

April 2024 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater

Item 3c Attachment 1
Page 7 of 12

No.	Undefined – Legal Services Contracts	Details	Program	Award/ Initiate	Contract/ Amendment Start	Description of Services
1.	Cox Castle & Nicholson LLP (Contract No. 2019-8818)	Contract began April 2020. Total estimated contract amount may exceed \$1M.	LEGO	Existing	April 2020	Outside legal counsel services for Real Estate investments.
2.	Hogan Lovells LLP (Contract No. 2019-8851)	Contract began July 2020. Total estimated contract amount may exceed \$1M.	LEGO	Existing	July 2020	Outside legal counsel services for Real Estate investments.
3.	Morrison & Foerster LLP (Contract No. 2018-8571)	Contract began January 2019. Total estimated contract amount may exceed \$6M.	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.	Morrison & Foerster LLP (Contract No. 2023-9273)	Contract began January 2024. Total estimated contract amount may exceed \$1M.	LEGO	New	January 2024	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.
5.	Seyfarth Shaw, LLP (Contract No. 2023-9290)	Contract began January 2024. Total estimated contract amount may exceed \$1M.	LEGO	Existing	January 2024	Outside legal counsel services for Private Equity and Infrastructure investments.

April 2024 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater

Item 3c Attachment 1
Page 8 of 12

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 2024-2025.	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 2024-2025.	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 2024-2025.	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 2024-2025.	INVO	Existing	N/A	Technology Platform for vendor management services for the Investment Office.
5.	Factset Research Systems Inc. (Purchase Order No. TBD)	Renewal subscription agreement; two-year term agreement, total cost may exceed \$6M over 2 years.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assist in internal portfolio management.
6.	FTSE International Limited (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$2M for FY 2024-2025.	INVO	Existing	N/A	Benchmark data services for the investment portfolios of the fund.

April 2024 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater

Item 3c Attachment 1
Page 9 of 12

No.	Purchase Orders	Details	Program	Initiate	Change Order Effective	Description of Services
7.	FundApps (Purchase Order No. TBD)	Subscription agreement; three-year term agreement; total cost may exceed \$1M over 3 years.	INVO	New	N/A	Tool to assist with regulatory oversight and filings.
8.	Glass Lewis (Purchase Order No. TBD)	Renewal subscription agreement; three-year term agreement, total cost may exceed \$1m over 3 years.	INVO	Existing	N/A	Proxy voting services.
9.	RIMES Technologies Corporation (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2024-2025.	INVO	Existing	N/A	Benchmark data services for the investment portfolios of the fund.
10.	Ryedale (Purchase Order No. TBD)	Subscription agreement; annual renewal; total purchase order amount may exceed \$1M for FY 2024-2025.	INVO	Existing	N/A	Multiple asset classes. Analytics service provider; assists in internal portfolio management.
11.	S&P Global Market Intelligence (Purchase Order No. TBD)	Renewal subscription agreement; two-year term agreement, total cost may exceed \$2m over 2 years.	INVO	Existing	N/A	Multiple asset classes. Analytics Service provider; assists in internal portfolio management.
12.	Stanford University (Purchase Order No. TBD)	New subscription agreement; total purchase order amount may exceed \$1M for FY 2024-2025.	INVO	New	N/A	Long term investor research.

**April 2024 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
13.	Private Markets Deal Management (Purchase Order No. TBD)	New subscription agreement; total amount may exceed \$1M per year.	INVO	Spring 2024	Spring 2024	Private Markets deal flow / deal management.

No.	Letters of Engagement (LOEs)	Details	Program	Initiate	Contract / Amendment Start	Description of Services
1.	Callan LLC (Contract No. 2020-8708)	Investment Office Spring Fed Pool; multiple awards; estimated amount may exceed \$4M for FY 2024-2025.	INVO	Spring 2024	Fiscal Year 2024-2025	Investment advisory services for multiple program areas in the Investment Office.
2.	Propoint Technology Inc. (Contract No. 2020-8812)	Investment Office Spring Fed Pool; multiple awards; estimated amount may exceed \$6M for FY 2024-2025.	INVO	Spring 2024	Fiscal Year 2024-2025	Investment advisory services for multiple program areas in the Investment Office.
3.	SPS Consulting Services (Contract No. 2020-8749)	Investment Office Spring Fed Pool; multiple awards; estimated amount may exceed \$2M for FY 2024-2025.	INVO	Spring 2024	Fiscal Year 2024-2025	Investment Advisory services for multiple program areas in the Investment Office.

**April 2024 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
4.	Vendor TBD (Contract No. TBD)	OSSD Vendor Pool; competitive bid; estimated amount may exceed \$1M for FY 2024-2025.	INVO	Spring 2024	Spring 2024	Power BI support and implementation for the Investment Office.
5.	Cutter (Contract No. 2023-0594)	Investment Office Spring Fed Pool; multiple awards; estimated amount may exceed \$2M for FY 2024-2025.	INVO	Spring 2024	Fiscal Year 2024-2025	Maintenance and operations of systems for the Investment Office.
6.	Vendor TBD (Contract No. TBD)	OSSD Vendor Pool; competitive bid; estimated amount may exceed \$2M for FY 2024-2025.	INVO	Spring 2024	Spring 2024	Cloud Architecture Services for the Investment Office.
7.	myCalPERS Maintenance & Support (Contract No. TBD)	IT Sprint-Fed Pool LOE: multiple awards, estimated amount \$3M through FY 24/25	ITSB/ESDD	Oct 2024	October 1, 2024	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 2024 Prospective Report
Solicitations, Contracts, Purchase Orders, and Letters of Engagement
\$1 Million or Greater**

**Item 3c Attachment 1
Page 12 of 12**

Legend:

CSR – Communications and Stakeholder Relations

CSS – Customer Services and Support

HPBB – Health Policy and Benefits Branch

INVO – Investment Office

ITSB – Information Technology Services Branch

LEGO – Legal Office

OSSD – Operations Support Services Division

PCPP – Pension Contracts & Prefunding Programs

RBSD – Retirement Benefit Services Division

SRS – Strategic Research Services

STRL – Stakeholder Relations