

**November 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.	CalPERS Search Firm Services Spring-Fed Pool (RFP No. 2022-9141)	Solicitation; multiple contract awards; five-year term; Estimated amount updated to \$4.6M.	HRSD	Fall 2022	April 2023	Search and recruitment services for CalPERS senior and executive level management positions.
2.	CalPERS Human Resources Spring-Fed Pool (RFP No. 2023-9240)	Request for Proposal; multiple award; five-year term; contract amounts to be negotiated.	HRSD	Fall 2023	July 2024	Organizational and Leadership Development; Employee Training and Development; Succession and Workforce Planning; Performance Management.
3.	Global Fixed Income Solicitation (ASP No. TBD)	Alternative Solicitation Process; without defined duration contract terms; contract amounts to be negotiated.	INVO	TBD	TBD	Investment manager/advisor solicitations for Global Fixed Income investment strategies.
4.	Portfolio Assistance Investment Consulting Spring Fed Pool (RFP No. TBD)	Renewal of Spring Fed Pool; continuous filing option; without defined duration contract terms; contract amounts to be negotiated.	INVO	Fall 2023	Spring 2024	Renewal of non-fiduciary standard of care Investment Office Spring Fed Pool.
5.	Portfolio Due Diligence Investment Consulting Spring Fed Pool (RFP No. TBD)	Renewal of Spring Fed Pool; continuous filing option; without defined duration contract terms; contract amounts to be negotiated.	INVO	Fall 2023	Spring 2024	Renewal of fiduciary standard of care Investment Office Spring Fed Pool.

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6.	Investment Advisory Spring Fed Pool (RFP No. 2024-9186)	Renewal of Spring Fed Pool; continuous filing option; without define duration contract terms; contract amounts to be negotiated.	INVO	Fall 2023	Spring 2024	Renewal of Investment Advisory Spring Fed Pool.
7.	Board Governance Services (RFP No. 2023-9281)	Solicitation; multiple contract awards; five-year contract term; contract amounts to be negotiated.	LEGO	Fall 2023	April 1, 2024	Outside legal counsel services for independent advice and representation to the Board of Administration and CalPERS staff on board governance matters.

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No.	New Contracts / Amendments	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
1.	University Enterprises, Inc. (Contract No. 2021-9049)	Five-year contract term; estimated contract value \$1.8M.	HRSD	July 2021	January 2024	Student Assistants
2.	IBOR Total Fund System Contract (Contract No. TBD)	New IBOR Total Fund System Contract; exemption from competitive bid; five-year contract; fees to be negotiated.	INVO	Fall 2023	Spring 2024	IBOR Total Fund System contract servicing the investment accounting, trading, reporting and compliance functions in the Investment Office.
3.	Private Markets Deal Management (Contract No. TBD)	New contract; competitive bid; fees to be negotiated.	INVO	Spring 2024	Spring 2024	Private Markets deal flow / deal management.
4.	Ortec Finance B.V. U.S. (Contract No. 2021-9095)	Existing contract; amendment to extend the contract to a five-year term; fees may exceed \$1M.	INVO	Winter 2023	Spring 2024	Custom risk reporting services for the Investment Office.

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No.	New Contracts / Amendments	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
5.	Contractor 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	Winter 2023	Spring 2024	Investment management/consulting services for Global Equity
6.	Contractor 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	Winter 2023	Spring 2024	Investment management/consulting services for Global Equity
7.	Contractor 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	Winter 2023	Spring 2024	Investment management/consulting services for Global Equity
8.	Contractor 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	Fall 2023	Winter 2024	Investment management/consulting services for Capital Markets Group (Global Equity & Global Fixed Income)

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No.	New Contracts / Amendments	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
9.	Contractor 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	Fall 2023	Winter 2024	Investment management/consulting services for Capital Markets Group (Global Equity & Global Fixed Income)
10.	Contractor 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	Fall 2023	Winter 2024	Investment management/consulting services for Capital Markets Group (Global Equity & Global Fixed Income)
11.	NICE InContact (Contract No. TBD)	Approaching the end of a 5-year contract (12/31/2023). TISD is managing this contract for CXD. Call Center Services are still needed in the coming years and CXD also needs additional modules/features, we plan to renew sooner to get the new features. Total contract cost is \$5.2M. Contract term TBD.	TISD	TBD	December 31, 2023 or sooner.	Call Center SaaS software used to manage Member and Business Partner call interactions. The new modules will include Interactive Analytics and a Knowledge Base.

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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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
2.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
3.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
4.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.

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No.	Existing Investment Manager Contracts	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
5.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
6.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
7.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
8.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
9.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.

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No.	Existing Investment Manager Contracts	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
10.	RBC Global Asset Management (UK) Limited (Contract No. 2014-7473)	Existing Investment Manager; undefined value; term is without defined duration, may or may not be funded throughout FY 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
11.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
12.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Fixed Income portfolio.
13.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Equity portfolio.
14.	AXA Rosenberg Investment Management LLC (Contract No. 2017-8363)	Existing Investment Advisor; undefined value; term is without defined duration; may or may not be funded throughout FY 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment advisor services for the Global Equity portfolio.

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No.	Existing Investment Manager Contracts	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
15.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Equity portfolio.
16.	Credit Suisse Securities (USA) LLC (Contract No. 2017-8302)	Existing Investment Advisor; undefined value; term is without defined duration; may or may not be funded throughout FY 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment advisor services for the Global Equity portfolio.
17.	Franklin Advisors, Inc. (Contract No. 2017-8296)	Existing Investment Advisor, formerly known as QS Investors LLC; undefined value; term is without defined duration, may or may not be funded throughout FY 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment advisor services for the Global Equity portfolio.
18.	Goldman Sachs Asset Management LP (Contract No. 2018-8590)	Existing Investment Advisor; undefined value; term is without defined duration' may or may not be funded throughout FY 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment advisor services for the Global Equity portfolio.
19.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Global Equity portfolio.

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No.	Existing Investment Manager Contracts	Details	Program	Award / Initiate	Contract / Amendment Start	Description of Services
20.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Opportunistic Strategies portfolio.
21.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Opportunistic Strategies portfolio.
22.	BlackRock Financial Management, Inc. (Contract No 2022-9176)	New Investment Manager; undefined value; term is without defined duration; may or may not be funded throughout FY 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Long-Term Care Fund.
23.	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 2023-24; if funded, fees to be negotiated.	INVO	Existing	Existing	Investment management services for the Affiliate Funds.

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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; fees to be negotiated.	INVO	Existing	Existing	Investment Trading Platform for Global Fixed Income
2.	Charles River System, Inc. dba Charles River Development (Contract No. 2019-8660)	Investment Trading Platform for Global Equity. Contract expires May 2024; payment is based on assets; fees to be negotiated.	INVO	Existing	Existing	Investment Trading Platform for Global Equity
3.	Hamilton Lane Advisors LLC (Contract No. 2022-9171)	Investment consulting for Private Equity. Contract expires June 2028; payment is based on asset sales and may exceed \$1M per year.	INVO	Existing	Existing	Investment consulting for Private Equity.

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4.	Jefferies Financial Group Inc. Dba 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.
5.	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	Existing	Existing	Appraisal services for the Investment Office.

No.	Undefined – Legal Services Contracts	Details	Program	Award/ Initiate	Contract/ Amendment Start	Description of Services
1.	Alston & Bird LLP (Contract No. 2021-9145)	Total estimated contract amount may exceed \$2M.	LEGO	Existing	June 2022	Outside Legal Counsel services related to litigation.
2.	DLA Piper, LLP (Contract No. 2023-9285)	Total estimated contract amount may exceed \$1M.	LEGO	New	January 2024	Outside legal counsel services for Private Equity and Infrastructure investments.

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No.	Undefined – Legal Services Contracts	Details	Program	Award/ Initiate	Contract/ Amendment Start	Description of Services
3.	Foster Garvey, PC (Contract No. 2023-9295)	Total estimated contract amount may exceed \$1M.	LEGO	New	January 2024	Outside legal counsel services for Private Equity and Infrastructure investments.
4.	K & L Gates (Contract No. 2023-9288)	Total estimated contract amount may exceed \$1M.	LEGO	New	January 2024	Outside legal counsel services for Private Equity and Infrastructure investments.
5.	Morgan, Lewis & Bockius (Contract No. 2023-9291)	Total estimated contract amount may exceed \$1M.	LEGO	New	January 2024	Outside legal counsel services for Private Equity and Infrastructure investments.
6.	Orrick, Herrington & Sutcliffe, LLP (Contract No. 2019-8866)	Total estimated contract amount may exceed \$4M.	LEGO/INVO	Existing	June 2020	Outside Legal Counsel services in connection with Information Technology/ Information Security, Investigations, Compliance and Investment related matters, and other services requested by the Board or General Counsel
7.	Pillsbury Winthrop Shaw Pittman (Contract No. 2023-9296)	Total estimated contract amount may exceed \$1M.	LEGO	New	January 2024	Outside legal counsel services for Private Equity and Infrastructure investments.

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No.	Purchase Orders	Details	Program	Initiate	Change Order Effective	Description of Services
1.	MRI Intermediate Holdings LLC (Purchase Order No. TBD)	Subscription agreement; renewal; total purchase order amount may exceed \$1M.	INVO	Winter 2023	July 1, 2024	MRI software needed for AREIS platform.

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No.	Letters of Engagement (LOE)	Details	Program	Initiate	Contract / Amendment Start	Description of Services
1.	Vendor TBD (LOE No. 2023-0595)	CalPERS Search Firm Services Spring-Fed Pool; single award; estimated LOE amount to be negotiated. Services may continue into FY 24/25.	HRSD	Fall 2023	Fall 2023	Global search and recruitment services for CalPERS to fill the multiple positions in Sustainable Investing (SI).
2.	Data and Tech Strategy Base Capabilities: Total Fund and Capital Markets (LOE Nos. TBD)	Investment Office Spring Fed Pool; may be multiple awards; four years; fees to be negotiated.	INVO	Winter 2023	Winter 2023	Contractors, consultants, and managed services to develop and implement integrated investment platform for Capital Markets and Total Fund.
3.	Data and Tech Strategy Base Capabilities: Data, Infrastructure, Architecture (LOE Nos. TBD)	Investment Office Spring Fed Pool; may be multiple awards; four years; fees to be negotiated.	INVO	Winter 2023	Winter 2023	Contractors, consultants, and managed services to develop and implement capabilities for Data, Infrastructure, and Architecture.
4.	Data and Tech Strategy Base Capabilities: Private Markets (LOE Nos. TBD)	Investment Office Spring Fed Pool; may be multiple awards; fees to be negotiated.	INVO	Winter 2023	Winter 2023	Contractors and consultants to evaluate data and technology needs for Private Markets.

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No.	Letters of Engagement (LOE)	Details	Program	Initiate	Contract / Amendment Start	Description of Services
5.	Maintenance and Operations Support (LOE Nos. TBD)	Investment Office Spring Fed Pool; may be multiple awards; four years; fees to be negotiated.	INVO	Fall 2023	Winter 2023	Maintenance and Operations of investment systems. Leverage contractors, consultants, and managed services until permanent staff is hired.
6.	PeopleSoft Human Capital Management Oracle Fusion Project (LOE No. 2023-0003)	Upgrade and migrate Enterprise Resource Planning (ERP), Oracle PeopleSoft (PS), Human Capital Management (HCM) and Enterprise Performance Management (EPM) applications to Software-as-a-Service (SaaS) Oracle Fusion (OF). Total amount \$5.525M.	ITSB/ESDD	March 2023	June 30, 2023	Provides Oracle Peoplesoft support and services for Enterprise Resource Management, Human Capital Management and Supply Chain Management.
7.	myCalPERS Maintenance & Support (LOE Nos. TBD)	IT Sprint-Fed Pool LOE: multiple awards, estimated amount \$3M through FY 23/24.	ITSB/ESDD	Oct 2023	October 1, 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.

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Legend:

ESDD – Enterprise Solutions Development Division
HRSD – Human Resources Services Division
INVO – Investment Office
ITSB – Information Technology Services Branch
LEGO – Legal Office
TISD – Technology Infrastructure Services Division