

California Public Employees' Retirement System  
Annual Consulting and Service Contract Report (\$100,000 and above)  
July 1, 2023 through June 30, 2024

Contract	Amend- ment #	Contractor Name	Division	Award Process	Contract Purpose/Description	Contract Term			Previous Contract Yes/No
						Effective Date	Expiration Date	Fiscal Year Totals	
2020-9060		BDO USA, LLP	Audits	RFP	Independent Auditing Services	5/11/2021	4/30/2026	\$2,651,682	N
2023-9259		Weaver and Tidwell LLP	Audits	Exempt from Bid	Audit Consulting Services	5/25/2023	6/30/2026	\$185,730	N
2019-8699	#3	State Controller's Office	Benefit Services	Not Subject to Bid	Electronic and Paper Distribution of Benefits Amendment #3: Update Fee Schedule	7/1/2019	6/30/2024	\$3,430,479	Y
2021-9074		First Data Merchant Services LLC	Financial Office	Exempt from Bid	Card and Deposit Processing Services	2/28/2022	5/31/2026	\$204,312	Y
2023-9282		Government Operations Agency	Financial Office	Not Subject to Bid	Reimbursement for Administrative Services	7/1/2023	6/30/2025	\$354,000	Y
2023-9227		Toppan Merrill USA Inc	Health Account Mgmt	RFP	Open Enrollment and Health Plan Statement Communication Dissemination	4/17/2023	3/31/2028	\$130,000	N
2019-8676	#4	Anthem Blue Cross of California	Health Plan Admin	RFP-Board Involvement	Health Benefits Plan Administrator - PPO Amendment #4: Decrease Funding, Update Key Personnel and Revise Language	1/1/2020	12/31/2024	\$114,688,480	Y
2023-9308		Anthem Blue Cross of California	Health Plan Admin	RFP-Board Involvement	Health Benefits Plan Administrator - HMO	1/1/2024	12/31/2028	\$16,481,576	N
2023-9334		Assured, Inc.	Health Plan Admin	RFP-Board Involvement	Long Term Care program	4/1/2024	3/31/2029	\$792,646	N
2023-9343		California Physicians' Service	Health Plan Admin	RFP-Board Involvement	Health Benefits Plan Administrator - HMO	1/1/2024	12/31/2028	\$36,886,291	N
2023-9310		Health Net of California, Inc.	Health Plan Admin	RFP-Board Involvement	Health Benefits Plan Administrator - HMO	1/1/2024	12/31/2028	\$9,480,095	N
2017-8341	#5	Long Term Care Group, Inc. dba LTCG Administrators	Health Plan Admin	RFP-Board Involvement	Long-Term Care Third Party Administrator Amendment #5: Extend Term, Increase Funding and Update Key Personnel	1/1/2018	12/31/2024	\$17,373,851	Y
2016-8198	#5	OptumRx, Inc.	Health Plan Admin	RFP-Board Involvement	Pharmacy Benefits Manager - Acquisition Contract Amendment #5: Increase Funding and Revise Language	1/1/2017	12/31/2024	\$16,783,830	Y
2023-9309		Sharp Health Plan	Health Plan Admin	RFP-Board Involvement	Health Benefits Plan Administrator - HMO	1/1/2024	12/31/2028	\$8,556,800	N
2021-9064		State Controller's Office	Health Plan Admin	Not Subject to Bid	Data and Payroll Processing	7/1/2021	6/30/2026	\$1,066,385	Y
2022-9128	#1	State Controller's Office	Health Plan Admin	Not Subject to Bid	Check Writing, Transaction Auditing, and Support Services for HMO, PPO, and Rx Payments Amendment #1: Increase Funding and Update Fee Schedule	7/1/2022	6/30/2027	\$1,826,757	Y
2023-9373		The Regents of University of California, Davis	Health Plan Admin	Exempt from Competitive Bid	Behavioral Health Survey Services	6/24/2024	6/30/2026	\$433,246	N
2023-9312		United Healthcare of California	Health Plan Admin	RFP-Board Involvement	Health Benefits Plan Administrator - HMO	1/1/2024	12/31/2028	\$46,141,528	N
2023-9314		Western Health Advantage	Health Plan Admin	RFP-Board Involvement	Health Benefits Plan Administrator - HMO	1/1/2024	12/31/2028	\$9,424,732	N
2021-9154		Bates White LLC	Health Policy Research	Exempt from Bid	Health Plan Benefit Strategy	6/30/2022	6/30/2025	\$210,000	N
2019-8955	#4	Health Services Advisory Group, Inc	Health Policy Research	RFP	Health Care Survey Services Amendment #4: Increase Funding	6/23/2020	6/14/2025	\$543,873	Y

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2022-9180	#2	Milliman Solutions LLC	Health Policy Research	RFP	Health Care Data Warehousing and Business Intelligence Services Amendment #2: Update Key Personnel	12/22/2022	9/30/2027	\$3,318,000	N
2018-8542	#5	Milliman, Inc.	Health Policy Research	RFP	Health Care Data Warehouse Administrator and Actuarial/Analytical Services Amendment #5: Revise Language	10/13/2018	11/30/2023	\$403,845	N
2020-9053	#2	Mulkey Consulting, LLC	Health Policy Research	Exempt from Bid	Health Care Training Academy Amendment #2: Extend Term and Increase Funding	4/1/2021	3/30/2026	\$220,000	N
2020-8855		The Regents of University of California, Davis	Human Resources	Not Subject to Bid	Leadership, Management and Professional Training	10/1/2020	9/30/2025	\$132,547	Y
2021-9049		University Enterprises, Inc.	Human Resources	Exempt from Bid	Student Assistants	7/1/2021	6/30/2026	\$290,667	Y
2022-9250		Equinix Inc.	Information Technology	Exempt from Bid	Data Center Services	11/7/2022	3/31/2027	\$218,206	N
2023-9298		inContact, Inc.	Information Technology	Exempt from Bid	Contact Center Applications	1/1/2024	12/31/2028	\$390,593	Y
2020-8990		Altus Group U.S. Inc.	Investments	Exempt from Bid	Real Assets Management and Consulting Services	9/23/2020	6/30/2025	\$340,000	N
2014-7483	#2	Arrowstreet Capital, L.P.	Investments	Alternative Solicitation/ Investment Proposal	Active Global Equity Investment Manager Amendment #2: Revise Language and Update Schedules	12/1/2015	Without Defined Duration*	\$38,838,701	N
2000-2263	#5	Baillie Gifford Overseas LTD.	Investments	RFP-Pool	International Investment Management Amendment #5: Update Authorized Signatories and Update Key Personnel	5/1/2001	Without Defined Duration*	\$799,685	N
2019-8702	#2	BlackRock Financial Management, Inc.	Investments	Exempt from Bid	Investment Data Platform and Risk/Operational Reports Amendment #2: Extend Term and Update Schedules	10/1/2019	9/30/2027	\$13,395,610	Y
2022-9176		BlackRock Financial Management, Inc.	Investments	RFP	Asset Liability Management Services	7/3/2023	Without Defined Duration*	\$1,776,694	N
2014-7473	#1	BlueBay Asset Management LLP	Investments	RFP-Pool	Global Fixed Income Investment Manager Amendment #1: Update Key Personnel and Update Schedules	5/5/2016	Without Defined Duration*	\$10,431,394	N
2019-8660	#2	Charles River Systems, Inc.	Investments	Exempt from Bid	Provide INVO CRIMS Database Amendment #2: Extend Term, Update Key Personnel and Update Schedule	5/25/2020	5/24/2025	\$3,935,453	Y
2008-4960	#11	Columbia Management Investment Advisers, LLC	Investments	RFP-Pool	Fixed Income Non-Investment Grade Portfolio Amendment #11: Update Key Personnel and Update Schedules	6/24/2009	Without Defined Duration*	\$7,965,739	N
2023-9247		eFront Financial Solutions, Inc.	Investments	Exempt from Bid	Private Equity Accounting & Reporting Solution	7/1/2023	6/30/2026	\$1,527,347	Y
2022-9191		Ernst & Young LLP	Investments	Exempt from Bid	Provide Global Tax Services	2/1/2023	1/31/2028	\$520,980	Y
2018-8590	#1	Goldman Sachs Asset Management, L.P.	Investments	Exempt from Bid	Global Equity Program Investment Advisor Amendment #1: Extend Term	6/5/2019	Without Defined Duration*	\$266,999	N
2022-9171	#1	Hamilton Lane Advisors, LLC	Investments	Exempt from Bid	Stock Distribution Manager for CalPERS Private Equity Amendment #1: Update Key Personnel and Update Schedules	6/20/2023	6/19/2028	\$1,076,168	Y
2022-9187		IMP Partners LLC	Investments	Exempt from Bid	Administrative Duties and Data Management	12/22/2022	12/31/2025	\$669,440	N
2008-4963	#7	J.P. Morgan Investment Management Inc.	Investments	RFP-Pool	Fixed Income Non-Investment Grade Portfolio Amendment #7: Update Schedules	6/24/2009	Without Defined Duration*	\$273,448	Y

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2021-9070	#1	Lenox Park Solutions, Inc.	Investments	Facilitate and Analyze Data Aggregation Surveys	Data Aggregation Survey	9/8/2021	6/30/2026	\$125,000	N
2022-9201	#1	McKinsey & Company Inc.	Investments	Exempt from Bid	Develop Strategy for Performance Objectives Amendment #1: Update Fee Schedule and Statement of Work	1/3/2023	12/31/2023	\$750,000	N
2020-8759	#1	Meketa Investment Group, Inc.	Investments	RFP	Private Equity Investment Board Consultant Amendment #1: Extend Term and Increase Funding	7/1/2020	6/30/2024	\$695,000	N
2020-8760	#1	Meketa Investment Group, Inc.	Investments	RFP	Real Estate Investment Board Consultant Amendment #1: Extend Term and Increase Funding	7/1/2020	6/30/2024	\$1,200,000	N
2020-8761	#1	Meketa Investment Group, Inc.	Investments	RFP	Infrastructure Board Investment Consultant Amendment #1: Extend Term and Increase Funding	7/1/2020	6/30/2024	\$175,000	N
2023-9248		MUFG Capital Analytics LLC	Investments	Exempt from Bid	Accounting Book of Record Services	7/1/2023	6/30/2026	\$5,221,591	Y
2001-2621	#10	Nomura Corporate Research & Asset Management Inc.	Investments	RFP-Pool	High Yield Investment Manager Search Amendment #10: Update Schedules	2/1/2002	Without Defined Duration*	\$8,200,236	Y
2021-9095	#4	Ortec Finance U.S. B.V.	Investments	Exempt from Bid	Portfolio Consultant and Technology Services Amendment #4: Extend Term, Increase Funding and Update Schedules	10/21/2021	9/30/2026	\$390,964	N
2001-2620	#11	Pacific Investment Management Company, LLC	Investments	RFP	Domestic Corporate Securities Manager Amendment #11: Update Schedules	2/1/2002	Without Defined Duration*	\$6,947,934	N
2021-9100		SitusAMC Holdings Corporation	Investments	Exempt from Bid	Valuation Services for Real Assets	4/1/2022	3/31/2027	\$9,775,961	Y
2023-9332		Socius Strategies LLC	Investments	Exempt from Bid	INVO People & Culture Roadmap	3/5/2024	6/30/2025	\$142,000	N
2012-6541	#9	State Street Bank and Trust Company	Investments	RFP	Provide Index Fund Products and Training Amendment #9: Update Schedules	9/28/2012	Without Defined Duration*	\$9,263,292	N
2018-8344	#2	State Street Bank and Trust Company	Investments	Exempt from Bid	Master Custody Services Amendment #2: Increase Funding, Extend Term and Update Key Personnel	7/1/2018	6/30/2028	\$15,377,674	Y
2014-7480	#1	Wellington Management Company, LLP	Investments	Alternative Solicitation/ Investment Proposal	Active Global Equity Investment Manager Amendment #1: Revise Language and Update Schedules	7/1/2015	Without Defined Duration*	\$1,944,061	N
2020-8758	#4	Wilshire Advisors, LLC	Investments	RFP	General Pension Investment Board Consultant Amendment #4: Update Key Personnel	7/1/2020	6/30/2024	\$3,450,000	N
2021-9145		Alston & Bird LLP	Legal	Not Subject to Bid	Litigation Matters	6/30/2022	12/31/2024	\$452,811	N
2019-8818		Cox, Castle & Nicholson, LLP	Legal	Not Subject to Bid	Real Asset and Related Investment Matters	4/28/2020	3/31/2025	\$324,671	N
2018-8555	#1	DLA Piper LLP (US)	Legal	Not Subject to Bid	Private Equity, Infrastructure, Trust Level Portfolio and Opportunistic Strategies Outside Counsel Amendment #1: Revise language	1/2/2019	12/31/2023	\$1,220,210	N
2018-8558	#1	Foster Garvey, PC	Legal	Not Subject to Bid	Private Equity and Related Investment Matters Amendment #1: Name Change	1/10/2019	12/31/2023	\$326,031	N
2018-8549		K&L Gates LLP	Legal	Not Subject to Bid	Private Equity and Related Investment Matters	1/1/2019	12/31/2023	\$500,661	Y
2019-8796		K&L Gates LLP	Legal	Not Subject to Bid	Real Estate and Related Investment Matters	4/28/2020	3/31/2025	\$298,757	N

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2021-9131		Katten Muchin Rosenman LLP	Legal	Not Subject to Bid	Outside Counsel for Investment Matters	4/16/2022	4/15/2027	\$103,466	N
2021-9119		Lowenstein Sandler LLP	Legal	Not Subject to Bid	Outside Counsel for Bankruptcy Matters	1/3/2022	12/31/2024	\$186,996	N
2019-8817		Morgan, Lewis & Bockius LLP	Legal	Not Subject to Bid	Real Asset and Related Investment Matters	4/14/2020	3/31/2025	\$427,434	N
2022-9224		Nielsen Merksamer Parrinello Gross & Leoni, LLP	Legal	Not Subject to Bid	California Political Law and Related Matters	3/1/2023	12/31/2027	\$135,505	N
2018-8546		Pillsbury Winthrop Shaw Pittman, LLP	Legal	Not Subject to Bid	Private Equity and Related Investment Matters	1/1/2019	12/31/2023	\$585,301	N
2019-8797		Pillsbury Winthrop Shaw Pittman, LLP	Legal	Not Subject to Bid	Real Estate and Related Investment Matters	4/1/2020	3/31/2025	\$173,640	N
2022-9236		Relativity ODA LLC	Legal	Not Subject to Bid	Investigations eDiscovery & Legal Search Software	3/1/2023	2/28/2026	\$120,200	N
2019-8811		K&L Gates LLP	Legislative Affairs	RFP	Federal Legislation and Policy Representative	2/13/2020	1/31/2025	\$410,898	Y
2023-9301		Lighthouse Policy Group LLC	Legislative Affairs	RFP	Federal Health Policy Representative Services	11/1/2023	3/31/2028	\$222,000	N
2020-9071		Colliers International	Operations Support	RFP	CalPERS Property Management Services	6/1/2021	5/31/2026	\$499,858	Y
2019-8773		Voya Institutional Plan Services, LLC	Pension Contracts and Prefunding	RFP	Plan Administration and Recordkeeping for Supplemental Income Plans	2/1/2020	1/31/2025	\$3,497,449	Y
2022-9156	#1	Office of State Publishing	Retirement Benefits	Not Subject to Bid	Tax Form Printing Amendment #1: Extend Term and Increase Funding	12/12/2022	6/30/2026	\$207,031	Y
2022-9163	#2	Imagination Specialites Inc.	Stakeholder Relations	Exempt from Bid	Exhibition Management Services Amendment #2: Increase Funding	8/1/2022	7/31/2027	\$275,000	Y
2023-9278		Westin Bonaventure Hotel & Suites	Stakeholder Relations	Exempt from Bid	Educational Forum	8/16/2023	12/31/2023	\$838,389	N
<b>Total Fiscal Amount:</b>								<b>\$448,902,833</b>	

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