

Table 1. Standard Agreements

Contractor	Effective Date	Amendment	Amendment Amount	New Agreement	Total Amount	Agreement Type	Service Provided	Details	Branch
Albert Risk Management Consultants	2/1/2020	Yes	\$0.00	\$0.00	\$603,000.00	Standard	Real Estate Consulting	The purpose of the amendment is update and reflect the name change of the contractor, update language to Section B, Agreement Liason, and incorporate new compliance exhibits. The provisions of this amendment are effective February 1, 2020.	Investments
AQR Capital Management Holdings, LLC	4/1/2020	Yes	\$0.00	\$0.00	\$0.00	Standard	MSCI Emerging Markets Custom Index.	This Amendment is to revise the fee section and update exhibits F, G, H and K. Amendment is effective April 1, 2020. All other terms and conditions shall remain the same.	Investments
Avante Solutions, Inc.	9/1/2020	Yes	\$341,000.00	\$0.00	\$1,101,815.00	Standard	Cherwell Service Management (CSM) and Cherwell Asset Management (CAM) Implementation	This amendment is effective 9/1/20. The purpose of this amendment is to extend the term and add fees for continued CSM and CAM service as more fully described in Attachment No. 1 to STD Agreement.	Technology Services
Deloitte Consulting, LLP	7/6/2020	Yes	\$0.00	\$0.00	\$14,572,507.64	Standard	BusinessDirect Retrofit & integration	The provisions of this amendment are effective July 6, 2020. The purpose of this amendment is to incorporate work authorization 5, updating Scope of Work and Fee Schedule to reflect Milestone 15 changes as more further explained in the Attachment No. 4 to STD Agreement.	Technology Services
KPMG, LLP	6/1/2020	Yes	\$145,000.00	\$0.00	\$2,107,493.70	Standard	Audit	The provisions of this agreement are effective June 1, 2020. The purpose of this amendment is to add funds, extend term to June 30, 2020, incorporate new fee schedule, incorporate a new Statement of Work and update key personnel.	Executive
Lockton Insurance Brokers, LLC Lockton Companies LLC	6/30/2020	Yes	\$2,000,000.00	\$0.00	\$2,879,144.28	Standard	Insurance Brokerage	This amendment is effective June 30, 2020. The purpose of this amendment is to extend the contract term and increase fees for continued Cyber Security Insurance.	General Counsel
Olson Remcho, LLP	11/1/2019	Yes	\$45,000.00	\$0.00	\$246,391.00	Standard	Legal	The provisions of this amendment are effective November 1, 2019. The purpose of this amendment is to add \$45,000.00 for a new agreement amount of \$246,391.00; and revise and restate Standard Agreement STD 213, Section D.1 Fees and Exhibits D, E, F and G.	General Counsel
Olson Remcho, LLP	7/1/2020	No	\$0.00	\$100,000.00	\$100,000.00	Standard	Legal	Contractor will provide fiduciary services.	General Counsel
Orrick, Herrington & Sutcliffe LLP	6/1/2020	No	\$0.00	\$50,000.00	\$50,000.00	Standard	Debt Investments Legal	Contractor will provide legal advice, counsel, review and advisory services regarding CalSTRS Investments and debt transactions.	General Counsel
Perspecta State & Local Inc.	9/30/2020	No	\$0.00	\$17,097,364.99	\$17,097,364.99	Standard	Datacenter	This agreement is effective September 30, 2020. The purpose of this agreement is for the contractor to provide Datacenter migration and hosting services as more fully described in Exhibit A, Scope of work.	Technology Services
Pillsbury Winthrop Shaw Pittman LLP	7/1/2020	Yes	\$600,000.00	\$0.00	\$1,265,000.00	Standard	Legal	The provisions of this amendment are effective March 1, 2020. The purpose of this amendment is to extend contract term through June 30, 2023 and update billing rates.	General Counsel
Sheppard Mullin Richter & Hampton LLP	7/1/2020	No	\$0.00	\$100,000.00	\$100,000.00	Standard	Legal	Contractor will provide fiduciary services.	General Counsel
Visionary Integration Professionals LLC	9/1/2020	Yes	\$390,000.00	\$0.00	\$3,279,909.81	Standard	Accounting	The provisions of this amendment are effective September 1, 2020. The purpose of this agreement is to add \$390,000.00 for a new total amount of \$3,279,909.81, amend and replace Exhibit A, Scope of Work, amend and replace Exhibit B, Fee Schedule, and amend and restate Exhibit I, the Work Authorization Form for Ed Crump.	Financial Services
<b>Standard Subtotal</b>			<b>\$3,521,000.00</b>	<b>\$17,347,364.99</b>	<b>\$43,402,626.42</b>				

Table 2. CMAS Agreements

Contractor	Effective Date	Amendment	Amendment Amount	New Agreement	Total Amount	Agreement Type	Service Provided	Details	Branch
GoldLink Pacific, Inc.	10/12/2020	Yes	\$174,720.00	\$0.00	\$524,160.00	CMAS	Senior Natural Software Developer	This amendment effective October 12, 2020 is for extending the contract term by 1 year and adding \$174,720.00 for continued services.	Technology Services
HHS Technology Group LLC	9/1/2020	No	\$0.00	\$259,200.00	\$259,200.00	CMAS	Test Analyst	Test analyst with detailed knowledge and experience of software test planning, development of test scenarios and test cases, conditioning of test data, execution of test cases and documentation of test defects, to work on projects such as the SAP SuccessFactors implementation project as fully described in Exhibit A, Statement of work.	Technology Services
KAI Partners, Inc.	9/1/2020	No	\$0.00	\$307,200.00	\$307,200.00	CMAS	Change Readiness Consultant	Effective September 1, 2020, Change Readiness Consultants with detailed knowledge and experience in the design, development, and evaluation of change readiness activities and deliverables to offer guidance, support and input, share best-practice lessons and deliver industry experience to current staff and leaders working with the Transformation Readiness Change Management Team.	Technology Services
Kanini Infotech Consultants Corporation	8/1/2020	Yes	\$298,480.00	\$0.00	\$647,920.00	CMAS	Senior Natural Software Developer	This Amendment 1 is effective August 1, 2020 to extend the Agreement term and total Agreement amount as more fully described in PURCHASING AUTHORITY PURCHASE ORDER AGREEMENT NUMBER 4400002431, AMENDMENT 1.	Technology Services
The Highlands Consulting Group LLC	8/17/2020	No	\$0.00	\$417,600.00	\$417,600.00	CMAS	Employee Readiness/Change Management Consulting Group	This agreement is effective August 17, 2020. The purpose of this agreement is for the contractor to provide CalSTRS Employee Readiness and Change Management consulting services as more fully described in Exhibits A, Statement of Work.	Technology Services
The Highlands Consulting Group LLC	9/1/2020	No	\$0.00	\$460,800.00	\$460,800.00	CMAS	Change Readiness Consultant	Effective September 1, 2020, Change Readiness Consultants with detailed knowledge and experience in the design, development, and evaluation of change readiness activities and deliverables to offer guidance, support and input, share best-practice lessons and deliver industry experience to current staff and leaders working with the Transformation Readiness Change Management Team.	Technology Services
<b>CMAS Subtotal</b>			<b>\$473,200.00</b>	<b>\$1,444,800.00</b>	<b>\$2,616,880.00</b>				

Table 3. Subscriptions

Contractor	Effective Date	Amendment	Amendment Amount	New Agreement	Total Amount	Agreement Type	Service Provided	Details	Branch
Abel Noser	10/1/2020	No	\$0.00	\$60,000.00	\$60,000.00	Subscription	Subscription	20/21 SUB (GE) Abel Noser	Investments
Activist Insight,	9/1/2020	No	\$0.00	\$21,000.00	\$21,000.00	Subscription	Subscription	20/21 Sub (SISS) Activist Insight Renewa	Investments
AllianceBernstein	4/9/2020	No	\$0.00	\$0.00	\$0.00	Subscription	Subscription	20/21 SUB (GE) Alphalytics	Investments
Bloomberg Finance	2/28/2021	Yes	\$0.00	\$0.00	\$90,000.24	Subscription	Subscription	20/21 Bb Index (5/8/21 # 5/7/22)	Investments
Bloomberg Finance	8/3/2020	No	\$0.00	\$680.00	\$680.00	Subscription	Subscription	Bloomberg All Access Subscription	Executive Office
Business Week	7/3/2020	Yes	-\$415.00	\$0.00	\$108.25	Subscription	Subscription	Businessweek Subscription	Executive Office
Business Week	9/1/2020	No	\$0.00	\$150.00	\$150.00	Subscription	Subscription	Bloomberg Subscription	Executive Office
CNBC LLC dba CNBC	8/1/2020	No	\$0.00	\$299.99	\$299.00	Subscription	Subscription	CNBC Pro Subscription - Media Relations	Communications
DealCloud, Inc.	7/1/2020	No	\$0.00	\$561,850.00	\$561,850.00	Subscription	Subscription	20/21 Yr 1 (7/1/20-6/30/21) Base Rate	Investments
Dow Jones &	7/21/2020	No	\$0.00	\$877.05	\$877.05	Subscription	Subscription	FY19/20 4 Additional WSJ Digital Users	Investments
Dow Jones &	7/21/2020	No	\$0.00	\$1,315.56	\$1,315.56	Subscription	Subscription	FY 19/20 6 Additional WSJ Digital Users	Investments
DTCC ITP LLC	7/1/2020	No	\$0.00	\$102,999.99	\$102,999.99	Subscription	Subscription	Omgeo Alert Subscription	Investments
Feedly, Inc	10/1/2020	No	\$0.00	\$65.00	\$65.00	Subscription	Subscription	Digital Subscription - Multimedia Team	Communications
Gartner, Inc.	9/1/2020	No	\$0.00	\$102,312.00	\$102,312.00	Subscription	Subscription	Subscription service for AM, DM, RS & PB	Financial Services
Gartner, Inc.	7/1/2020	No	\$0.00	\$42,983.33	\$42,983.33	Subscription	Subscription	19/20 Gartner ECS Subscription	Audits
Gartner, Inc.	10/1/2020	No	\$0.00	\$217,022.00	\$217,022.00	Subscription	Subscription	Gartner IT Leadership -Essentials Member	Technology Services
Gartner, Inc.	10/1/2020	No	\$0.00	\$60,700.00	\$60,700.00	Subscription	Subscription	Gartner for Technical Professionals	Technology Services
Getty Images (US),	9/24/2020	No	\$0.00	\$3,999.00	\$3,999.00	Subscription	Subscription	iStock Signature- 750 images/month	Communications
GKD Index Partners	6/30/2020	No	\$0.00	\$8,000.00	\$8,000.00	Subscription	Subscription	20/21 Alerian Market Data	Investments
Harvard Business	7/14/2020	No	\$0.00	\$180.00	\$180.00	Subscription	Subscription	HBR Subscription Renewal	Investments
Hawking LLC	7/9/2020	No	\$0.00	\$6,240.00	\$6,240.00	Subscription	Subscription	20/21EXP Subscription	Investments
Hootsuite Media,	10/1/2020	No	\$0.00	\$72.00	\$72.00	Subscription	Subscription	HootSuite Pro Digital - Multimedia Team	Communications
International Well	6/30/2020	No	\$0.00	\$125.00	\$125.00	Subscription	Subscription	WELL AP Credential renewal	Administrative Services
Intex Solutions,	9/1/2020	No	\$0.00	\$167,739.00	\$167,739.00	Subscription	Subscription	20/21Subscription Intex Renewal	Investments
IPC Systems, Inc.	9/15/2020	No	\$0.00	\$34,762.60	\$34,762.60	Subscription	Subscription	IPC 20/21 MAC BLANKET PO	Investments
KDP Investment	10/1/2020	No	\$0.00	\$37,000.00	\$37,000.00	Subscription	Subscription	KDP 10-1-20/9-30-21	Investments
MarketAxess	10/1/2020	No	\$0.00	\$32,400.00	\$32,400.00	Subscription	Subscription	Subscription Market Axess Bond Ticker	Investments
McClatchy	8/9/2020	No	\$0.00	\$167.30	\$167.30	Subscription	Subscription	Sac Bee 7 day digital only - Investments	Investments
McClatchy	9/8/2020	No	\$0.00	\$99.99	\$99.99	Subscription	Subscription	Sacramento Bee Digital - CalSTRS Newsroom	Communications
McClatchy	9/16/2020	No	\$0.00	\$159.99	\$159.99	Subscription	Subscription	SacBee Unlimited Digital	Executive Office
Morningstar, Inc.	7/1/2020	No	\$0.00	\$63,654.00	\$63,654.00	Subscription	Subscription	FY20-21 Service	Benefits and Services
NAVEX Global, Inc.	9/23/2020	No	\$0.00	\$10,830.45	\$10,830.45	Subscription	Subscription	19/20 NavEx Subscription ECS Hotline	Audits
Pageant Media US Ltd	9/1/2020	No	\$0.00	\$3,000.00	\$3,000.00	Subscription	Subscription	20/21 Subscription (GE) PMR Journals	Investments
PRACTISING LAW	7/7/2020	No	\$0.00	\$284.62	\$284.62	Subscription	Subscription	Proskauer on Privacy - Supplement	General Counsel
Refinitiv US LLC	7/1/2020	Yes	\$27,655.56	\$0.00	\$80,110.20	Subscription	Subscription	Q1 (July 1, 2020 - September 31, 2020)	Investments
Response Global	8/21/2020	No	\$0.00	\$1,600.00	\$1,600.00	Subscription	Subscription	Responsible Investor - Communications	Communications
Riverwalk ToaSTRS	10/1/2020	No	\$0.00	\$102.00	\$102.00	Subscription	Subscription	Riverwalk ToasSTRS Club Dues	Technology Services
Sprout Social	10/1/2020	No	\$0.00	\$15,279.60	\$15,279.60	Subscription	Subscription	SproutSocial 1 Year Subscription	Communications
State Street	8/1/2020	No	\$0.00	\$162,000.00	\$162,000.00	Subscription	Subscription	20/21 Subscription SSGA AUM Fees	Investments
Strategas	7/1/2020	Yes	-\$3,000.00	\$0.00	\$36,093.76	Subscription	Subscription	FY 20/21 (July 1- December 31, 2020)	Investments
SurveyMonkey Inc.	8/27/2020	No	\$0.00	\$384.00	\$384.00	Subscription	Subscription	Advantage Plan Subscription - Admin COG	Benefits and Services
The Economist	1/9/2021	No	\$0.00	\$520.63	\$520.63	Subscription	Subscription	Economist Digital	Executive Office
The New York Times	7/24/2020	No	\$0.00	\$195.00	\$195.00	Subscription	Subscription	FY20/21 New York Times Digital Adtl Users	Investments
TradeWeb LLC	2/1/2020	No	\$0.00	\$16,800.00	\$16,800.00	Subscription	Subscription	20/21 EXP Subscription Tradeweb Renew	Investments
Twitter, Inc.	10/1/2020	No	\$0.00	\$1,500.00	\$1,500.00	Subscription	Subscription	Twitter Advertising Subscription	Communications
Venngage, Inc.	8/27/2020	No	\$0.00	\$936.00	\$936.00	Subscription	Subscription	ESM Subscription	Administrative Services
Venngage, Inc.	8/22/2020	No	\$0.00	\$3,276.00	\$3,276.00	Subscription	Subscription	Business Yearly Subscription	Benefits and Services
<b>Subscriptions Subtotal</b>			<b>\$24,240.56</b>	<b>\$1,743,562.10</b>	<b>\$1,949,873.56</b>				

**Table 4. Interagency Agreements (IAA)**

Contractor	Effective Date	Amendment	Amendment Amount	New Agreement	Total Amount	Agreement Type	Service Provided	Details	Branch
Government Operations Agency - Contracted Fiscal Services	7/1/2020	Yes	\$452,000.00	\$0.00	\$678,000.00	IAA	Administrative Services for Accounting	The provisions of this amendment are effective July 1, 2020. The purpose of this amendment is to extend the contract term through June 30, 2022 and add \$452,000.00 for a new maximum agreement amount of \$678,000.00.	Financial Services
CALPERS	7/1/2020	No	\$0.00	\$0.00	\$0.00	IAA	CalSTRS processing of health premium deductions from CalSTRS retirement warrants	California State Teachers' Retirement System (CalSTRS or Contractor) agrees to provide for CalPERS, service in accordance with the provisions set forth in the Work Statement(Attachment A), which is attached and by this reference incorporated herein.	Benefits & Services
CALPERS	7/1/2020	No	\$0.00	\$226,000.00	\$226,000.00	IAA	CalSTRS processing of long-term care premium deductions from CalSTRS retirement warrants	California State Teachers' Retirement System (CalSTRS or Contractor) agrees to provide for CalPERS, service in accordance with the provisions set forth in the Work Statement(Attachment A), which is attached and by this reference incorporated herein.	Benefits & Services
<b>IAA Subtotal</b>			<b>\$452,000.00</b>	<b>\$226,000.00</b>	<b>\$904,000.00</b>				