

Table 1. Standard Agreements

Contractor	Effective Date	Amendment	Amendment Amount	New Agreement	Total Amount	Agreement Type	Service Provided	Details	Branch
Allied Network Solutions, Inc.	2/10/2021	Yes	\$0.00	\$0.00	\$85,760.00	Standard	VMWARE Professional	This amendment 1 is effective March 6, 2021. The purpose of this amendment is to extend the contract end date for two additional months.	Technology Services
Aspire HR inc.	3/4/2021	Yes	\$31,609.00	\$0.00	\$999,999.00	Standard	SAP SuccessFactors Implementation	The provisions of this amendment are effective February 1, 2021. Agreement is hereby amended as specified on the attached Amendment No. 2 to Standard agreement to incorporate a new work authorization #2 to add \$31,609.00 to the agreement for updated SCO-CLAS to EC Integration.	Technology Services
Avante Solutions, Inc.	1/14/2021	Yes	\$375,000.00	\$0.00	\$1,476,815.00	Standard	Cherwell Service Management (CSM) and Cherwell Asset Management (CAM) Implementation	This amendment is effective 1/15/21. The purpose of this amendment is to add fees for unanticipated tasks as more fully described in Attachment No. 2 to STD Agreement.	Technology Services
BlackRock Institutional Trust, N.A.	1/13/2021	Yes	\$0.00	\$0.00	\$0.00	Standard	Investment Management - Domestic Equity Manager	The purpose of A-6 is to replace in its Entirety Section III, Fees; and Exhibit 2. Active Domestic Equity Manager General Investment Guidelines, Objectives and Performance Criteria. Effective date is 10/1/2020. No other changes to this amendment.	Investments
BLX Group LLC	1/20/2021	No	\$0.00	\$6,000.00	\$6,000.00	Standard	Arbitrage Rebate Compliance	CalSTRS has issued Bonds and now requires consultants to assist with rebate compliance and because of the specialized skilled sets necessary, CalSTRS seeks a consultant to perform the services.	Financial Services
Deloitte Consulting, LLP	1/15/2021	Yes	\$1,544,978.00	\$0.00	\$11,659,318.90	Standard	BusinessDirect SAP Managed Services	This amendment is effective October 1, 2020. The purpose of this amendment is to update the agreement terms and fees more fully described in the attachment titled, Amendment No.3 to Standard agreement.	Technology Services
Grant Thornton LLP	3/9/2021	No	\$0.00	\$95,475.00	\$95,475.00	Standard	Audit Services	Provide CalSTRS with Cash Management Audit Services.	Executive
Sheppard Mullin Richter & Hampton LLP	1/8/2021	Yes	\$150,000.00	\$0.00	\$250,000.00	Standard	Legal Services	The provisions of this amendment are effective September 1, 2020. The purpose of this amendment is to increase the maximum of this agreement by \$150,000.00 for a new maximum amount of \$250,000.00 and revise Sections D Fees.	General Counsel
Sheppard Mullin Richter & Hampton LLP	1/20/2021	Yes	\$249,000.00	\$0.00	\$2,352,455.00	Standard	Legal Services	The provisions of this amendment are effective June 1, 2020 for the purposes of increasing the maximum amount of this agreement by 249,000.00 for a new maximum amount of \$2,352,455.00 and revise section D.1. Fees.	General Counsel
Standard Subtotal			\$2,350,587.00	\$101,475.00	\$16,925,822.90				

Table 2. CMAS Agreements

Contractor	Effective Date	Amendment	Amendment Amount	New Agreement	Total Amount	Agreement Type	Service Provided	Details	Branch
22nd Century Technologies, Inc.	1/4/2021	Yes	\$55,040.00	\$0.00	\$362,240.00	CMAS	Senior Test Analyst Services	This amendment is effective January 1, 2021. The purpose of this amendment is to extend the term and add fees for continued Senior Test Analyst services as more fully described in Amendment 1 to Purchasing Authority Purchase Order CMAS Agreement.	Technology Services
CGI Technologies and Solutions Inc.	1/20/2021	Yes	\$120,000.00	\$0.00	\$950,400.00	CMAS	Data Validation Analyst	Amendment 1 is effective February 1, 2021. The purpose of this amendment is to increase hours/fees for continued data validation services.	Technology Services
Fortuna Business Management Consulting Inc. dba Fortuna BMC	3/5/2021	Yes	\$220,800.00	\$0.00	\$662,400.00	CMAS	Senior Reports Developer	Amendment 1 is effective April 1, 2021. The purpose of this amendment is to add time and monies for continue Senior Reports Developer services as more fully described in Amendment 1 to CMAS agreement.	Technology Services
GoldLink Pacific, Inc.	3/11/2021	Yes	\$174,720.00	\$0.00	\$524,160.00	CMAS	Senior Natural Software Developer	This amendment effective April 1 2021. The purpose of this amendment is to update the CalSTRS Business Liaison, extend the contract term and increase the Agreement amount as more fully described Purchasing Authority Purchase Order CMAS Agreement 4400002432, Amendment 2 document.	Technology Services
GoldLink Pacific, Inc.	3/11/2021	Yes	\$193,920.00	\$0.00	\$581,760.00	CMAS	Senior Natural Software Developer	The provisions of this amendment are effective April 1, 2021, to update the CalSTRS Business Liaison, extend the contract term and increase the Agreement amount as more fully described in Purchasing Authority Purchase Order CMAS Agreement 4400002922, Amendment 1 document.	Technology Services
GoldLink Pacific, Inc.	3/11/2021	Yes	\$318,720.00	\$0.00	\$956,160.00	CMAS	Senior Natural Software Developer	The provisions of this amendment are effective April 1, 2021, to update the CalSTRS Business Liaison, extend the contract term and increase the Agreement amount as more fully described in the Purchasing Authority Purchase Order CMAS Agreement 4400002963, Amendment 1.	Technology Services
Intervision Systems LLC	3/12/2021	No	\$0.00	\$485,760.00	\$485,760.00	CMAS	Change Readiness Consultant	This agreement is effective March 1, 2021. The purpose of this agreement is for the contractor to provide Change Readiness Consulting services as more fully described in Exhibit A, statement of Work.	Technology Services
Maximus Human Services, Inc.	1/31/2021	No	\$0.00	\$1,517,741.28	\$1,517,741.28	CMAS	Independent Verification & Validation (IV&V)	This agreement is effective January 30, 2021. The purpose of this agreement is the Contractor to provide IV&V services as more fully described in Exhibit A, Statement of Work.	Technology Services
Mentis LLC	3/12/2021	No	\$0.00	\$485,760.00	\$485,760.00	CMAS	Change Readiness Consultant	The agreement is effective March 1, 2021. The purpose of this agreement is for the contractor to provide change readiness Consulting services as more fully described in Exhibit A, Statement of Work.	Technology Services
Providence Technology Group	1/11/2021	Yes	\$330,240.00	\$0.00	\$660,480.00	CMAS	Senior Test Analyst	Amendment 1 is effective February 1, 2021. The purpose of this amendment is to update CalSTRS contracts, extend the term date and increase fees as more fully described in Amendment 1 to CMAS Agreement	Technology Services
R Systems Inc.	2/25/2021	No	\$0.00	\$378,000.00	\$378,000.00	CMAS	Application Report Developer	This agreement is effective May 1, 2021. The purpose of this agreement is for the contractor to provide Application Report Developer services as more fully described in Exhibit A, Statement of Work.	Technology Services
Thomas/Ferrous, Inc.	1/27/2021	Yes	\$0.00	\$0.00	\$729,425.00	CMAS	Member Research	This amendment extends the term to the original date of October 16, 2021 and updates CalSTRS contact information.	Executive
CMAS Subtotal			\$1,413,440.00	\$2,867,261.28	\$8,294,286.28				

Table 3. Interagency Agreements (IAA)

Contractor	Effective Date	Amendment	Amendment Amount	New Agreement	Total Amount	Agreement Type	Service Provided	Details	Branch
State Controller's Office	3/9/2021	No	\$0.00	\$11,617.07	\$11,617.07	IAA	Management Information Retrieval System (MIRS) and the California Leave Accounting System (CLAS)	This is an Interagency Agreement effective 7/1/2020 for SCO to provide CalSTRS with the Management Information Retrieval System (MIRS) and the California Leave Accounting System (CLAS).	Administrative Services
IAA Subtotal			\$0.00	\$11,617.07	\$11,617.07				

Table 4. Non-Competitive Bid Agreements

Contractor	Effective Date	Amendment	Amendment Amount	New Agreement	Total Amount	Agreement Type	Service Provided	Details	Branch
Egon Zehnder International Inc	2/2/2021	No	\$0.00	\$250,000.00	\$250,000.00	NCB	Chief Executive Officer Search	The contract shall provide search services for CalSTRS Chief Executive Officer.	Administrative Services
IIA Quality Services LLC	3/12/2021	No	\$0.00	\$23,000.00	\$23,000.00	NCB	External Quality Assessment	CalSTRS is looking to enlist a qualified and experienced assessor to execute an external quality assessment. Results of the assessment will fulfill the requirements of the international Standards for the professional Practice of Internal Auditing (standards) and provide for successful practice implementation.	Executive
NCB Subtotal			\$0.00	\$273,000.00	\$273,000.00				

Table 5. Subscriptions

Contractor	Effective Date	Amendment	Amendment Amount	New Agreement	Total Amount	Agreement Type	Service Provided	Details	Branch
ArchiveSocial, Inc.	2/24/2021	No	\$0.00	\$2,388.00	\$2,388.00	Subscription	Subscription	FY20/21 SC 31338 Social Media	Public Affairs
Barra, LLC	4/1/2021	No	\$0.00	\$151,725.14	\$151,725.14	Subscription	Subscription	FY 20/21 Barra	Investments
Bloomberg Finance L.P.	7/1/2021	No	\$0.00	\$23,640.00	\$23,640.00	Subscription	Subscription	FY 21/22 SC 30761 Bloomberg, LP	Investments
Bloomberg Finance L.P.	7/1/2022	No	\$0.00	\$5,910.00	\$5,910.00	Subscription	Subscription	FY 22/23 SC 30761 Bloomberg, LP	Investments
Bloomberg Finance L.P.	3/5/2021	No	\$0.00	\$10,000.00	\$10,000.00	Subscription	Subscription	FY 20/21 SC 31596 Bloomberg Index	Investments
CCH Incorporated	2/19/2021	No	\$0.00	\$462.61	\$462.61	Subscription	Subscription	FY 20/21 SC 31443 Wolters Kluwer	General Counsel
CCH Incorporated	1/2/2021	No	\$0.00	\$609.83	\$609.83	Subscription	Subscription	FY20/21 SC 31303 Wolters Kluwer	General Counsel
CPR & CDR Alpha LLC	3/1/2021	No	\$0.00	\$60,000.00	\$60,000.00	Subscription	Subscription	FY 21/22 SC 30907 CPR & CDR	Investments
Crain Communications, Inc.	2/8/2021	No	\$0.00	\$2,676.00	\$2,676.00	Subscription	Subscription	FY 20/21 RMS MAP RFP 5-1910	Investments
Department Of Human Resources	7/1/2020	No	\$0.00	\$2,700.00	\$2,700.00	Subscription	Subscription	FY20/21 SC 31267 HR Net	Administrative Services
Dow Jones & Company, Inc.	2/17/2021	No	\$0.00	\$48.00	\$48.00	Subscription	Subscription	FY20/21 SC 31347 WSJ Digital	Public Affairs
Dow Jones & Company, Inc.	1/25/2021	No	\$0.00	\$467.88	\$467.88	Subscription	Subscription	FY20/21 SC:1-31147	Technology Services
Evestment Alliance, LLC	12/1/2020	No	\$0.00	\$4,541.10	\$4,541.10	Subscription	Subscription	FY 20/21 SC 30880 EXP eVestment	Investments
Harvard Business Publishing	2/22/2021	No	\$0.00	\$99.00	\$99.00	Subscription	Subscription	FY20/21 SC 31392 HBR	Executive
Kahoot! AS	1/21/2021	No	\$0.00	\$240.00	\$240.00	Subscription	Subscription	FY20/21 SC 31284 Kahoot	Benefits & Services
MaritzCX Research, LLC	1/1/2021	No	\$0.00	\$26,522.53	\$26,522.53	Subscription	Subscription	FY 20/21 SC 30646 Maritz	Executive
Markov Processes International, Inc	3/1/2021	No	\$0.00	\$15,450.00	\$15,450.00	Subscription	Subscription	FY 20/21 SC 31211 Markov Renewal	Investments
Mergermarket Limited US	1/28/2021	No	\$0.00	\$15,500.00	\$15,500.00	Subscription	Subscription	FY 20/21 SC 31131 Mergermarket LTD	Investments
Moody's Investors Service	1/1/2021	No	\$0.00	\$133,000.00	\$133,000.00	Subscription	Subscription	FY20/21 SC 31318 Moody's Investors	Investments
Morningstar, Inc.	1/1/2021	No	\$0.00	\$26,915.00	\$26,915.00	Subscription	Subscription	FY 20/21 SC 31206 Morningstar P2	Administrative Services
MSCI ESG Research LLC	1/1/2021	No	\$0.00	\$44,500.00	\$44,500.00	Subscription	Subscription	FY 20/21 SC 30973 MSCI (GE)	Investments
MSCI ESG Research, Inc.	1/1/2021	No	\$0.00	\$149,169.00	\$149,169.00	Subscription	Subscription	FY 20/21 EXP SC 31002 MSCI ESG	Investments
REACH Sports Marketing Group, Inc.	4/1/2021	No	\$0.00	\$6,000.00	\$6,000.00	Subscription	Subscription	FY20/21 SC 31103 Reach Media	Public Affairs
REALTIMEBOARD INC. DBA MIRO	1/31/2021	No	\$0.00	\$192.00	\$192.00	Subscription	Subscription	FY20/21 SC:1-31183 Miro	Technology Services
Refinitiv US LLC	1/1/2021	No	\$0.00	\$41,069.44	\$41,069.44	Subscription	Subscription	FY 20/21 Refinitiv Wallboards	Investments
Regents of the Univ of California-	10/14/2020	No	\$0.00	\$700.86	\$700.86	Subscription	Subscription	FY20/21 SC 31088 CEB Invoices	General Counsel
RELX Inc.	1/1/2021	No	\$0.00	\$2,482.20	\$2,482.20	Subscription	Subscription	FY20/21 SC 31175 Lexis Nexis 2021	Public Affairs
RStudio Inc.	3/1/2021	No	\$0.00	\$25,000.00	\$25,000.00	Subscription	Subscription	FY 21/22 SC 31422 RStudio Inc.	Investments
S&P Global Market Intelligence	1/1/2021	No	\$0.00	\$74,000.00	\$74,000.00	Subscription	Subscription	FY 20/21 SC 31089 S&P Global	Investments
S&P Global Market Intelligence	1/1/2023	No	\$0.00	\$39,366.00	\$39,366.00	Subscription	Subscription	FY 22/23 SC 30699 S&P Global	Investments
S&P Global Market Intelligence	1/1/2021	No	\$0.00	\$38,220.00	\$38,220.00	Subscription	Subscription	FY 21/22 SC 30699 S&P Global	Investments
Sacramento Business Journal	3/6/2021	No	\$0.00	\$125.00	\$125.00	Subscription	Subscription	FY20/21 SC:1-31172CC	Technology Services
San Diego Union-Tribune, LLC	2/27/2021	No	\$0.00	\$103.48	\$103.48	Subscription	Subscription	FY20/21 SC 30834 SD Union Digital	Public Affairs
Soundview, Inc.	1/12/2021	No	\$0.00	\$249.15	\$249.15	Subscription	Subscription	FY20/21 SC 31440	Technology Services
StarCompliance Operating, LLC	3/28/2021	No	\$0.00	\$31,255.87	\$31,255.87	Subscription	Subscription	FY 20/21 SC 31403 StarCompliance	Investments
Technical Analysis Group, LLC	2/3/2021	No	\$0.00	\$35,000.00	\$35,000.00	Subscription	Subscription	FY 21/22 SC 30827 FI Technical Group	Investments
The Economist Newspaper N.A. INC	1/4/2021	No	\$0.00	\$3,022.00	\$3,022.00	Subscription	Subscription	FY20/21 SC 31250 Economist 21/22	Investments
The New York Times	1/25/2021	No	\$0.00	\$221.00	\$221.00	Subscription	Subscription	FY20/21 SC:1-31148CC	Technology Services
TradeWeb LLC	2/1/2021	No	\$0.00	\$33,600.00	\$33,600.00	Subscription	Subscription	FY 21/22 SC 30788/31055 Tradeweb	Investments
Zoho Corp	3/27/2021	No	\$0.00	\$300.00	\$300.00	Subscription	Subscription	FY20/21 SC 31142 Zoho 2021	Administrative Services
Subscriptions Subtotal			\$0.00	\$1,007,471.09	\$1,007,471.09				