

State Agency Public Records Questionnaire - [PERSI](#)

1. Please describe your current public records request process and policy for maintaining records that may be requested. **We typically direct people to our website to Contact us – Public Information -to submit their request. This email then goes to the QA and Management Assistant. The QA responds with the MA as a backup. The PIO responds to all requests from media. The majority of our documents and information are stored electronically. On occasion a request will require input from outside investment managers who are required to maintain historic records.**
  - a. office process and policy? **Tracking system – this has improved in 2014 with the implementation of one single tracking spreadsheet accessible to anyone who may respond.**
  - b. How could it be improved?
2. How many public records requests did your agency receive in the calendar year 2013? **40**
  - a. How many through May 2014? **22**
3. Of those requests, how many were granted in full? **2013 – 35 2014-20**
  - a. How many were denied in part? **0**
  - b. In full? **2013 – 5 2014 - 1**
4. Do you have frequent requesters? **We previously had quarterly requests on a regular basis. We have since posted those reports on our website.**
5. For each request, please provide the following information: **Please see attached spreadsheets**
  - a. Type of record requested
    - i. How many of each type of record was requested in total for the year?
  - b. Granted/Denied in Part/Denied in Full
    - i. How many of each?
  - c. Reason for denial whether in whole or in part
  - d. Time elapsed for response
  - e. If the time elapsed was more than the statutory 3-day standard, why? Please explain.
  - f. If the time elapsed was more than the statutory extended 10-day standard, why? Please explain
  - g. What fees did you charge? Please itemize the charges-labor, copying fees, etc...**None**
  - h. Did you provide the first 100 pages and first two hours of labor free, as required by statute? Why or why not? **Yes**
  - i. Type of requester: individual, law firm, NPO, etc..**see attached**
  - j. Volume of request
  - k. Were records provided to the requester with redactions? **No**



Type of Record	How many	Granted/Denied
Actuarial Valuation		G
Invest Manager Agreement & RFP Template		G
Specific Investment Info		G
Domestic Equity Holdings		G
Specific Investment Info-gun/ammunition holdings		G
Investment Report - Cap Guardian & longview 2011-2012		G
specific member information		D
Employer information		G
Employer information		G
Actuarial Valuation		G
Specifc member information		D
FY12 CAFR & Feb 2013 Investment Report		G
FRF Acturial Valuation		G
FRF cities and districts		G
Complete Portfolio Investment		G
Member names and SSN		D
Member names and addresses		D
number of FRF members specific to employer		G
proxy voting policy		G
Employer information		G
# of retirees past 10 yrs & # contributing 2012-2013		G
private equity holdings		G
private equity holdings		G
Salaries and pension benefit of all state employees		D
Health Insurance Actuarial		
private equity holdings		G
PERSI statistics		G
FRF member statistics		G
member information		
FRF Employer information		G
Choice Plan Recordkeeper contract		G
Rate of Return Assumptions 1992-2013		G
Choice Plan Recordkeeper updates & contract		G
Base Plan unfunded Liability question		G
IRS forms for specific investment partners		G
Rexburg & Madison Co Employee records		G
Hagerman FRF info		G
Local Pension systems	no info	G
Complete Holdings and specific ABO, MBO &CDO 2006-201		G
Complete Holdings by Mngr		G

Reason for Denial	Time to respond	More than 3 Why?
NA	Immediate	
	2 days	
	Immediate	
	2 days	
	1 day	
	5 days	obtaining reports fr
exempt from disclosure	1 day	
	1 day	
	1 day	
	immediate	
	immediate	
	3 days	
	immediate	
	2 days	
	5 days	Creating report
exempt from disclosure	immediate	
exempt from disclosure	Immediate	
	2 days	
	3 days	
	2 days	
	2 days	
	3 days	
	2days	
exempt from disclosure	immediate	
Directed to OGI	immediate	
	1 day	
	3 days	
	3 days	
No such member	immediate	
	1 day	
	2 days	
	immediate	
	3 days	
	1 day	
	4 days	Research
	1 day	
	1 day	
	immediate	
	12 days	
	9 days	Create report

More than 10 - Why?	Requestor	Volume	Who Responded
om consultant	Firefighters Assoc	1 copy	Mngmt Asst/QA
	Stanford Researcher		Mngmt Asst/QA
	Preqin		Mngmt Asst/QA
	individual		Mngmt Asst/QA
	individual		Mngmt Asst/QA
	individual		Mngmt Asst/QA
	News Reporter		Mngmt Asst/QA
	SCO		Mngmt Asst/QA
	SCO		Mngmt Asst/QA
	Bureau of Econ Analysis		Mngmt Asst/QA
	Meridian Schools		Mngmt Asst/QA
	individual		Mngmt Asst/QA
	Boise		Mngmt Asst/QA
	Boise		Mngmt Asst/QA
	IPREO		Mngmt Asst/QA
	Lewiston School		Mngmt Asst/QA
	Shore insurance		Mngmt Asst/QA
	Moscow		Mngmt Asst/QA
	Attorney		Mngmt Asst/QA
	SCO		Mngmt Asst/QA
	Idaho Freedom Foundation		Mngmt Asst/QA
	Preqin		Mngmt Asst/QA
	FactSet		Mngmt Asst/QA
	Open the Books		Mngmt Asst/QA
	U of AR		Mngmt Asst/QA
	individual		Mngmt Asst/QA
	individual		Mngmt Asst/QA
	SCO		Mngmt Asst/QA
Attorney		Mngmt Asst/QA	
SCO		Mngmt Asst/QA	
Great West Financial		Mngmt Asst/QA	
PEW		Mngmt Asst/QA	
Prudential		Mngmt Asst/QA	
individual		Mngmt Asst/QA	
individual		Mngmt Asst/QA	
SCO		Mngmt Asst/QA	
SCO		Mngmt Asst/QA	
Census Bureau		Mngmt Asst/QA	
Obtaining Info from investment managers	individual		Mngmt Asst/QA
	IPREO		Mngmt Asst/QA