

WASHINGTON STATE INVESTMENT BOARD
REQUEST FOR QUALIFICATIONS AND QUOTATION #20-07

FOR

PRE-QUALIFIED POOL

OF

INVESTMENT OPERATIONS CONSULTING POOL

MANDATORY MINIMUM QUALIFICATIONS COMPLIANCE CERTIFICATE

This certificate and any supplemental pages must be set forth as Section 4 of your response, the “Minimum Qualifications Compliance Certificate.”

As of January 31, 2020, the offering firm must satisfy the minimum requirements as outlined below in order to be considered for contract award:

- A. The Offeror must possess the system, expertise, and capacity sufficient to provide the services detailed in the Statement of Work section.
- B. The key professionals and organization must not have, nor could they potentially have, a material conflict with the WSIB, its custodian, or its investment managers.
- C. The Offeror must be financially sound and be able to provide its annual financial statement(s) upon request.
- D. The Offeror must accept the general form of the written contract as supplied by the WSIB. The Offeror must have the approval of their legal representative to the Sample Contract formats set forth as Exhibit F prior to submittal of a response, or must provide a redlined version of the sample contract highlighting and explaining any issues or needed amendments to the standard language.
- E. The Offeror must be able to and agree to maintain as secure and confidential all information concerning the business of the WSIB, its financial affairs, relations with its clients and its employees, and any other information which may be specifically classified as confidential by the WSIB in writing.
- F. The Offeror must have the ability to ensure that any personal information collected, used, or acquired in connection with the system will be used solely for purposes of the Contract. Offeror’s systems must have sufficient security to prevent the release, disclosure, publishing, transfer, or sale to unauthorized persons of personal information without the express written consent of the WSIB or as required by law. Offeror must have the demonstrated ability to implement physical, electronic, and managerial safeguards to prevent unauthorized access to personal information.

G. The Offeror must have at least three (3) years of experience providing similar services as requested in the Statement of work.

Signature

Firm

Title

Date