

WASHINGTON STATE INVESTMENT BOARD

REQUEST FOR PROPOSALS #16-01  
FOR  
INVESTMENT PROFESSIONALS AND EXECUTIVES RECRUITMENT SERVICES

QUESTIONNAIRE

Name of firm:

**A. DEMONSTRATED SUCCESS IN IDENTIFYING QUALITY CANDIDATES AND THE NUMBER OF SUCCESSFUL PLACEMENTS**

1. Please list the number of recruitment searches you have done for investment professionals and/or executives within the past two years:
  - a. List the names of clients that have requested searches and, if any, those similar to the WSIB positions.
  - b. The number of times each client has used your services.
  - c. The number of qualified candidates your firm was able to provide to that client for each recruitment.

Clients Name	Number Recruitment Searches	Type of recruitment (Investment professional or executive)	Number of Qualified Candidates Placed for each Recruitment
Name:			

2. Please list the number of successful placements your firm has had over the past four years (not solely institutional investors). An example of a "successful" recruitment would be the referral of a candidate well-matched to the skills sought by the client who remained with that employer for over one year. For each search listed, please also indicate:
  - a. Client
  - b. Date search began
  - c. Position recruited
  - d. Firm consultant assigned to the search
  - e. Time required to fill the position
  - f. Retention (if known)

3. Explain in detail any potential for conflict of interest which would be created by your firm’s representation of the WSIB. Please include any activities of affiliated or parent organizations as well as other client relationships which may inhibit services to the WSIB.

4. Please describe any factors that may limit your firm’s ability to perform all current work or anticipated work under this RFP?

**B. DEPTH OF OVERALL INVESTMENT PROFESSIONAL RECRUITMENT EXPERTISE AND INDUSTRY NETWORK SOURCES**

5. Describe in three pages or less your firm’s knowledge, expertise and real-world experience in public/corporate pension funds management recruitments, recruitment strategies, the process for screening candidates and determining a good fit for the client, how the necessary personnel/expertise will be assembled to provide the services required, and a sample prototypical search process to include a timeline. Describe the entire range of services you provide to clients. Indicate which services are the firm’s specialties or areas of greatest expertise, and describe how expertise is maintained and expanded.

**C. QUALITY AND REPUTATION OF SENIOR RECRUITMENT PERSONNEL TO BE ASSIGNED**

6. Please provide information for each recruitment professional(s) that will be assigned to work with the WSIB on any projects pertaining to possible work identified with this RFP **Include a resume as well as completing the following for each staff:**

<b>Name of Staff</b>				<b>Years with firm</b>	
<b>Length of experience in pension investment professionals recruitment services</b>					
<b>Top three clients assigned</b>	1.	2.	3.		
	<b>Name:</b>	<b>Name:</b>	<b>Name:</b>		
	<b>Contact:</b>	<b>Contact:</b>	<b>Contact:</b>		
	<b>Phone #:</b>	<b>Phone #:</b>	<b>Phone #:</b>		
	<b>E-mail:</b>	<b>E-mail:</b>	<b>E-mail:</b>		

<b>Specialty expertise</b>	
<b>Education</b>	

**D. QUALITY OF EXISTING CLIENT RELATIONSHIPS AND REFERENCES**

7. In one page or less describe: (1) the types of clients with which your firm conducts the majority of its business, (2) your firm's goal(s) in servicing its clients and (3) the type of relationship your firm prefers to have with its clients.

8. Briefly summarize how you envision your relationship with the WSIB and how your firm handles work on a discrete project basis.

9. Please give details on all client relationships you lost in the last three years. Include name, and, if terminated, the reason for termination.

Firm name	Details and reason for termination