

PRE-BID CONFERENCE

MAY 7, 2024

Background Check Services

RFQQ 24-05





DISCLAIMER

- Offerors should only rely on written postings and amendments issued via WEBS or posted on the WSIB website
- All other communications will be considered unofficial and non-binding on the WSIB
- Should Offerors rely on any other communication, they do so at their own risk and expense



AGENDA

- **Introductions**
- **WSIB overview**
- **Background Check Services RFQQ Overview**
- **Additional resources**



INTRODUCTIONS & WSIB OVERVIEW

RFQQ Coordinator

- James Gayton
- Procurement & Legal Services Manager
- Contracts@sib.wa.gov

State Investment Board

- Established to administer the state's investment activity
- Over \$202 billion under control (as of 3/31/2024)
- Manages the following:
 - Defined-benefit retirement funds
 - Hybrid retirement plans
 - Deferred compensation plan (IRC § 457)
 - Large pool of insurance fund assets
 - Permanent and other funds



CURRENT BIDDING OPPORTUNITY





PROCUREMENT SCOPE

Goal (Sec. 1.2)

- Create a pre-qualified pool of Contractors to perform background checks and provide related services in connection with the WSIB's engagement or retention of certain Subjects on an as needed basis
- "Subjects" = international and domestic investment managers, consultants, and certain other third-party contactors

Scope of Services (Sec. 2.1)

- Credit header
- Commercial employment and corporate databases
- Professional license verification and disciplinary history
- Criminal, civil, bankruptcy, and administrative records
- Lien and judgment records
- UCC filings
- International sanctions and watchlists databases
- News and social media profiles and accounts
- All 50 states, U.S. territories, and worldwide
- Prepare comprehensive reports



QUALIFICATIONS SUMMARY

Minimum Qualifications (Sec. 3.1)

- Possess the system, expertise, and capacity sufficient to provide the services
- The key professionals and organization must not have, nor could they potentially have, a material conflict with the WSIB
- Accept the general form of the written contract as supplied by the WSIB, or provide a redlined version of the sample contract highlighting and explaining any issues or needed amendments
- Agree to maintain as secure and confidential all information concerning the business of the WSIB, its financial affairs, and relations with its clients and its employees
- Ensure that any personal information collected, used, or acquired will be used solely for purposes of the contract
- At least three (3) years of experience providing similar services



BID EVALUATION SUMMARY

Evaluation Criteria (Sec. 5.9.3)



Category	Points Available
Depth, Stability, and Capacity of Organization	30
Quality and Experience of Personnel	20
Background Check Services and Approach	30
Cost Proposal	20
Total	100



HOW TO SUBMIT A RESPONSE



Review all RFQQ and Sample Contract terms



Submit a Response before the due date and time

Email bid Responses to: Contracts@sib.wa.gov

Provide all completed Exhibits (Sec. 5.5.1 & 5.5.2)

- Minimum Qualifications Certificate (Ex. A)
- Certifications & Assurances (Ex. B)
- General Information and Questionnaire (Ex. C)
- Sample Contract (Ex. D) (if applicable)

QUESTION AND ANSWER PERIOD

- Offerors are encouraged to ask questions
- Q&A are posted in WEBS and on the WSIB website
- Some Q&A may lead to RFQQ amendments



TIMELINE AND NEXT STEPS

Schedule	
Event	Date
RFQQ Instructions Posted on WSIB Website	May 1, 2024
Pre-Bid Conference	June 7, 2024, 2:30 pm Pacific Time
	<p>Microsoft Teams</p> <p>Meeting ID: 247 922 544 316</p> <p>Passcode: rJ5hDX</p>
	<p>Dial-in by phone</p> <p>+1 564-999-2000, 130854775# United States, Olympia</p> <p>833) 322-1218, 130854775# United States (Toll-free)</p> <p>Find a local number</p> <p>Phone conference ID: 130 854 775#</p>
Offeror Questions Due	June 12, 2024
WSIB Answers to Offerors Questions	June 19, 2024
Responses Due	August 7, 2024, 2:00 pm Pacific Time
In-Person / Telephone / Video Interviews with Semi-Finalists (if necessary)	August 29 – September 6, 2024
Award Decision	September 16, 2024
Optional-Use Contract Begins on or about	October 1, 2024

COMPLAINTS/DEBRIEFS/PROTESTS

Before Due Date (Sec. 7.2.2)

- Complaint period ends 5 business days before the Response due date.

Debrief Conferences (Sec. 7.3)

- Offerors have 3 business days to request a Debrief Conference after announcement of Apparent Successful Offeror(s).

After Due Date (Sec. 7.2.2)

- Offerors may protest the award only for three reasons:
 - Bias, discrimination, or conflict of interest of an evaluator;
 - Error in computing evaluation scores; or
 - Non-compliance with any procedures described in the RFQQ or state policy

ADDITIONAL RESOURCES

- WEBS
- OMWBE
- Washington Department of Veterans Affairs
- Washington Department of Revenue
- Washington Secretary of State



CONTACT INFORMATION

Website: <http://www.sib.wa.gov>

Address: 2100 Evergreen Park Drive SW
P.O. Box 40916
Olympia, WA 98504-0916

Phone: (360) 956-4600

