

RFQQ FOR GENERAL INVESTMENT CONSULTING POOL REFRESH

Amendment 2 – Questions and Answers

May 16, 2024

Q1. The RFQQ states that the WSIB is seeking to contract with “new” firms to include in the pre-qualified pool of consultants. Are consultants that are currently part of the pre-qualified Pool allowed - or recommended - to submit a Response?

- A. No. There is no need for any firm that is currently a member of the Pool to respond. All current members will be eligible to perform the services described in the RFQQ through the existing PWR process.

Q2. Are members of other WSIB pools eligible to participate in this RFQQ?

- A. Yes. Being a member of another WSIB pool alone has no bearing on a firm’s eligibility for this one.

Q3. Where can I find information relating to the Pre-Bid Conference that was held on May 10?

- A. The Pre-Bid Conference presentation has been uploaded to the [WSIB Jobs & Searches webpage](#), and to WEBS.

Q4. Can the WSIB provide a history of projects in which it has used consultants for the services described in the RFQQ?

- A. The WSIB has used its general investment consultants to independently review investment opportunities and strategic asset allocation. Consultants’ recommendations and advice are separate from that of staff, and this parallel process provides the WSIB with additional information and viewpoints to consider in its decision-making process. Investment consultants assist with specific projects and provide independent recommendations to support the WSIB in making prudent decisions. Recent examples of projects include strategic asset allocation studies, liquidity analysis, scenario analysis, investment recommendations, and operational due diligence.

Any capitalized terms used in this Amendment and not defined herein shall have the meaning given to them in the RFQQ.

All other terms and conditions of the RFQQ remain in full force and effect.