

Policy and Procurement Practices

SURS Defined Benefit Investment Policy [1]

Outlines the investment philosophy and practices of SURS and has been developed to serve as a reference point for the management of the System's defined benefit assets.

SURS Self-Managed Plan Investment Policy [2]

Outlines the investment policy for the management of the assets of State Universities Retirement System of Illinois (SURS) Self-Managed Plan (SMP).

Procurement Policy [3]

This policy addresses the general procedures of the State Universities Retirement System in soliciting bids and surveying the market for investment advisers, consultants and other investment services.

Current (Active) RFPs

Active RFPs, if any, will be posted on the [SURS homepage](#) [4] or the [SURS RFP](#) [5] page.

Sample IMA & Sample RFPs

The following sample Investment Manager Agreement is a standard document. In accordance with Public Act 96-0006, it provides typical information SURS requests Investment Managers to agree to prior to entering into an agreement for investment services. The sample Request for Proposals (RFPs) that follow are intended to serve as illustrative examples only. In accordance with Public Act 96-0006, they provide a generic overview of the types of information SURS solicits during the RFP process.

Please note, these PDF documents will be launched in a new session of your web browser.

Document	Pages
Investment Manager Agreement [6]	25
Investment Manager RFP Template [7]	21
Consultant RFP Template [8]	30

Tags:

[Investments](#) [9]

[All Plan Types](#) [10]

[RFP](#) [11]

Source URL: <https://surs.org/policy-and-procurement-practices>

Links

- [1] <https://surs.org/sites/default/files/pdfsx/policy.pdf>
- [2] <https://surs.org/sites/default/files/pdfsx/SMPpolicy.pdf>
- [3] <https://surs.org/sites/default/files/pdfsx/Procurementpolicy.pdf>
- [4] <https://surs.org/home>
- [5] <https://surs.org/rfp>
- [6] <https://surs.org/sites/default/files/pdfsx/SURSStandardFormIMA.pdf>
- [7] <https://surs.org/sites/default/files/pdfsx/InvestmentManagerRFPTemplate.pdf>
- [8] <https://surs.org/sites/default/files/pdfsx/Consultant%20RFP%20Template.pdf>
- [9] <https://surs.org/tags/investments>
- [10] <https://surs.org/tags/all-plan-types>
- [11] <https://surs.org/tags/rfp>