

RFP FOR PORTFOLIO VERIFICATION SERVICES

Amendment 01

April 22, 2025

As of the date listed above, the following changes are made to the RFP:

- Section 4.2, Expected Time Period for Contract, is deleted and replaced with the following:

The WSIB intends to enter into a Contract with each successful Offeror with a 20-year term; provided, however, that the WSIB anticipates that such Contract will include provisions for earlier termination. The WSIB makes no guarantee that the Contract awarded through this RFP will result in a full 20-year service period for the selected Contractor.
- Section 4.3, *Compensation and Payment*, is deleted in its entirety.
- The Schedule found in Section 5.4, *Schedule of Procurement Activities*, is deleted and replaced with the following (new dates highlighted below):

EVENT	DATE
ADVERTISE RFP	APRIL 1, 2025
RELEASE OF RFP	On or about APRIL 1, 2025
PRE-PROPOSAL CONFERENCE	10:00 A.M. PT April 8, 2025 Microsoft Teams Need help? Join the meeting now Meeting ID: 250 868 798 087 Passcode: h8HJ3sB6 Dial in by phone +1 564-999-2000,,578598344# United States, Olympia (833) 322-1218,,578598344# United States (Toll-free) Find a local number Phone conference ID: 578 598 344#
LETTERS OF INTENT AND QUESTIONS DUE	4:30 P.M. PT APRIL 25, 2025
ANSWERS TO WRITTEN QUESTIONS POSTED TO THE WSIB WEBSITE	On or about APRIL 30, 2025
PROPOSALS DUE	4:30 P.M. PT MAY 22, 2025
EVALUATION TEAM RANKS AND DETERMINES SEMIFINALISTS	On or about SEPTEMBER 30, 2025
NOTIFICATION OF SEMIFINALISTS BY THE WSIB	On or about SEPTEMBER 30, 2025
INTERVIEWS & ONSITE VISITS	On or about OCTOBER 13-24, 2025
CONTRACT NEGOTIATIONS WITH FINALISTS	Begins on or about OCTOBER 27, 2025



ANNOUNCEMENT OF APPARENTLY SUCCESSFUL
OFFEROR

On or about NOVEMBER 7, 2025

CONTRACT BEGINS

On or about JANUARY 1, 2026

4. The paragraphs under the heading “SECTION 6: Proposed Fees” of Section 5.6.3, *Information and Format Requirements*, are deleted and replaced with the following:

The compensation for providing services and advice under this RFP shall be subject to negotiation based on the Offeror’s Proposal. Other expenses shall be affixed at the proposed fees accordingly.

The fee proposed must provide the information, and be completed in the format, set forth in Exhibit F. Please note that the total fees to be provided are for the first five years of the Contract but only for the services relevant to the option selected by Offeror (see, Section 2.1). The services included in (1) the scope of the option(s) Offeror has included in its Proposal and detailed in Section 2, *Statement of Work*, and (2) the questionnaire of this RFP, must be used to form the basis for the proposed fee. Front loading of fees is not permitted. In no case will fees for the Contract be higher than the fee contained in the Proposal. Fees associated with the conversion of these services from the Incumbent to Offeror must also be included (see, Section 2.2.5., *Conversion*).

5. The Word document included as Exhibit F, *Fee Proposal*, is deleted and replaced with the attached Exhibit F.
6. Any capitalized terms used in this Amendment and not defined herein shall have the meaning given to them in the RFP.
7. All other terms and conditions of the RFP remain in full force and effect.