

RFP FOR PORTFOLIO VERIFICATION SERVICES

Amendment 03

July 28, 2025

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

1. 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	<i>On or about</i> APRIL 1, 2025
PRE-PROPOSAL CONFERENCE	<p>10:00 A.M. PT April 8, 2025 Microsoft Teams Need help? Join the meeting now Meeting ID: 250 868 798 087 Passcode: h8HJ3sB6</p> <hr/> <p><i>Dial in by phone</i> +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#</p>
LETTERS OF INTENT AND QUESTIONS DUE	4:30 P.M. PT APRIL 25, 2025
ANSWERS TO WRITTEN QUESTIONS POSTED TO THE WSIB WEBSITE	<i>On or about</i> APRIL 30, 2025
PROPOSALS DUE	4:30 P.M. PT MAY 22, 2025
VIRTUAL INTERVIEWS	<i>On or about</i> OCTOBER 20-31, 2025
EVALUATION TEAM RANKS AND DETERMINES SEMIFINALISTS	<i>On or about</i> NOVEMBER 10, 2025
NOTIFICATION OF SEMIFINALISTS BY THE WSIB	<i>On or about</i> NOVEMBER 10, 2025
INTERVIEWS & ONSITE VISITS	<i>On or about</i> NOVEMBER 17-21, 2025
CONTRACT NEGOTIATIONS WITH FINALISTS	<i>Begins on or about</i> DECEMBER 1, 2025
ANNOUNCEMENT OF APPARENTLY SUCCESSFUL OFFEROR	<i>On or about</i> JANUARY 2, 2026
CONTRACT BEGINS	<i>On or about</i> JANUARY 12, 2026



2. Subsection C of Section 5.10.1, *Evaluation Process*, is deleted and replaced with the following:
 - C. Following the selection of semifinalists based upon the written Proposal, the WSIB will:
 1. Initially, the WSIB will conduct virtual interviews with all semifinalists. Requirements will be provided when these interviews are scheduled but are expected to include oral presentations and demonstrations of Offeror's System for WSIB staff. However, the content for each interview will be based on, among other factors, the content of the Offeror's written Response, and will therefore vary. Each of these interviews are expected to last less than one day.
 2. Following these virtual interviews, the WSIB will conduct onsite visits with one or more of the semifinalists. Requirements will be provided when these visits are scheduled but are expected to include oral presentations and more in-depth demonstrations of Offeror's System for WSIB staff visiting in person, as well as staff who will participate remotely. However, the content for each onsite visit will be based on, among other factors, the content of the Offeror's written Response and information learned during the interview, and will therefore vary. Each of these onsite visits are likely to require one day.
3. Any capitalized terms used in this Amendment and not defined herein shall have the meaning given to them in the RFP.
4. All other terms and conditions of the RFP remain in full force and effect.