



REQUEST FOR INFORMATION No. 20-0027
FOR
Operations Based Quality Management Software

Refer ALL Inquiries to:

Jason Atwood and Michael Talbot, Procurement Officers
Purchasing Department
Citizens Property Insurance Corporation
2101 Maryland Circle
Tallahassee, Florida 32303
E-Mail: citizens.purchasing@citizensfla.com

This is a Request for Information (RFI) issued by Citizens Property Insurance Corporation ("Citizens"). This information is sought for planning purposes only. This RFI is not a solicitation and will not result in a contract, nor does it create any obligation on the part of Citizens. Citizens may use the information obtained through this RFI process in future solicitations.

I. INTRODUCTION

This Request for Information (RFI) is issued by Citizens Property Insurance Corporation (Citizens) to obtain market information on quality audit and review software solutions, for use by a property and casualty insurer, that can optimize quality assurance processes and practices that spans various task and phone based operations, including, but not limited to, call center and underwriting operations. Citizens may use the information obtained through this RFI process in future solicitations. Companies responding to this RFI will not be prohibited from responding to subsequent solicitations and contracting opportunities. Responses to this RFI will not be considered offers and cannot be accepted by Citizens to form a binding contract. No direct advantage or disadvantage will be conferred by responding or not responding to this RFI.

II. BACKGROUND

In 2002, the Florida Legislature created Citizens, a not-for-profit governmental entity, whose public purpose is to provide insurance to applicants who are not able to purchase coverage in the private insurance market.

Citizens is governed by Section 627.351(6) Florida Statutes and operates pursuant to a Plan of Operations that is approved by the Financial Services Commission of the State of Florida. Citizens operations are supervised by a Board of Governors whose members are appointed by the Governor, Chief Financial Officer, President of the Senate, and Speaker of the House. Additional information about Citizens can be found at: <https://www.citizensfla.com/about-us>.

III. REQUESTED INFORMATION

The intent of this RFI is to gather information and better understand the technology solutions available in the market that can support and optimize a quality assurance program that spans various task and phone based operations, including, but not limited to, performing Quality Audits related to underwriting tasks and customer service provided by call center agents. Currently, Citizens uses an internally built application to support our quality program. Although it meets the needs of our business, it does not provide for the scalability, flexibility, and maintainability that we desire. The ideal solution is one that:

- Satisfies our business requirements in a highly configurable and scalable manner.
- Supports the creation of dynamic Quality Audit workflows with robust reporting and analytic capabilities.
- Provides flexibility to rapidly adapt to changing business needs.
- Provides for end user configuration ability to reduce dependencies on our internal IT department for routine enhancements to the system.

In responding to this RFI, please provide the information requested below. You may also submit other relevant information to support your answers, including, but not limited to, brochures, white papers, industry case studies, and web links to marketing information.

A. Company Information and Overview

- Company Name
- Company Address
- Company Point-of-Contact for RFI Response (Name, Title, Phone, Email)
- The name(s) of the software product(s) you provide, and whether they are available for purchase through GSA, Florida State Term Contracts, or Alternate Governmental Contracts
- Provide Information or use cases regarding your software and utilization by property and casualty insurance entities.

B. General System Configuration: The following section includes general information requests regarding the quality audit and review software solution (System).

- Describe the extract, transform, load (ETL) capabilities of the System, and how the System can employ data from multiple source systems to be used as part of multiple quality audit programs.
- Describe the data retention and data export capabilities of the System.
- Describe the System's ability to create, define, restrict, and maintain users in a secure hierarchical role/permission-based environment.
- Describe the System's ability to integrate with other third-party software (example: Virtual Observer).
- Describe the System's ability to integrate with SAML 2.0 SSO (Single Sign On) solutions.
- Describe the System's ability to integrate data from across the organization, from multiple platforms, to enable the audit of performance or processes, groups, and people for quality assessment purposes.
- Describe the System's ability to customize notifications for specific levels of the hierarchical environment when a specific event occurs.
- Describe your deployment architecture and implementation methodology.

C. Quality Audit Assignment and Workflow: The ability to configure dynamic workflows is a critical aspect of the desired solution. The following section includes information requests regarding the configurable Quality Audit workflows within the System.

- Describe the System's ability to create, define, restrict, and maintain multiple workflow processes.
- Describe the System's ability to create multiple Quality Audit templates.
- Describe the System's ability to assign work to Quality Auditors based on organization hierarchy, eligible skill sets, and available capacity.
- Describe the System's ability to measure performance and analyze results against best practices, key performance indicators, and compliance requirements.
- Describe the System's ability to identify and track pre-defined errors for subsequent action.

- Describe the Systems' ability to audit performance and productivity at multiple stages in the workflow process and generate a quality metric score for the Auditor.
 - Describe the System's ability to provide insights into quality auditor performance and productivity across multiple workflow paths.
 - Describe the System's ability to conduct Root Cause Analysis within the System.
 - Describe the System's ability to generate emails either via automated or manually triggered events.
 - Describe the System's ability to select an audit for calibration and send out to numerous parties for quality score standardization.
 - Describe the System's ability of the associate to contest/challenge Audit findings using a pre-defined workflow.
 - Describe the System's ability to create, define, edit and maintain questionnaires, data fields, and audit forms that support quality assurance goals, associated workflows, or the organization.
 - Describe the System's ability to notify users when quality audits are performed.
- D. Reporting: Robust reporting capabilities for both pre-defined and ad hoc reporting is a critical aspect of the desired solution. The following section includes information requests regarding the reporting capabilities of the System.
- Describe the System's ability to compare progress, productivity, accuracy at multiple stages in the workflow process in real-time.
 - Describe the System's ability to provide aggregate data for all levels of the hierarchical environment.
 - Describe the System's standard reports and dashboards to quickly understand metrics that matter most
 - Describe the System's ability to create, define and maintain ad-hoc / customizable reporting
 - Describe the System's ability to maintain Quality Audit history and make the information available to end users based on roles/permissions.
- E. Pricing: The following section includes information requests regarding your pricing and contract term(s) structure.
- Please describe your pricing model and typical fees / fee structure associated with your product(s).
 - Please provide the typical contract terms associated with your proposed product/services.

IV. RFI CALENDAR OF EVENTS AND PROCESS

Listed below are the important events and dates for this RFI. Any change to this calendar, modifications to this RFI, or other important notices will be noted by the posting of an addendum on the purchasing section of Citizens' website: <https://www.citizensfla.com/solicitations>.

Documents and information submitted by a vendor, including email correspondence and presentation materials will be maintained by Citizens as a public record (See Section V).

CALENDAR OF EVENTS	
Date	Event
June 2, 2020	RFI Released
June 3 – July 2, 2020	Response Acceptance Period
July 3 – August 4, 2020	Requests for Additional Information

Response Acceptance Period. Responses may be submitted immediately after the RFI is released and will be accepted through the end of the Response Acceptance Period listed in the Calendar of Events. Responses should be submitted **no later than July 2, 2020**. Companies may submit Responses via email to the Procurement Officer on the cover of this RFI.

Companies that submit their Response via email will receive an acknowledgement message within one business day. Companies that do not receive an acknowledgement should contact to the Procurement Officer to confirm that their Response has been received. The subject line for Responses should include the Company name, RFI number, and RFI title.

Request for Additional Information. Citizens may begin reviewing Responses upon receipt. During its review, Citizens may identify a need for clarification, elaboration, or follow up information to enhancing the overall information collected through this RFI. Companies identified for clarification or elaboration or follow up will be contacted by Citizens. Companies may also be requested to provide an online demonstration. These demonstrations are optional and will be at no expense to Citizens.

Amendments. Any change or modification to this RFI will be accomplished by the posting of an addendum on the purchasing section of the Citizens website under the posted RFI Number at <https://www.citizensfla.com/web/public/solcitiations>.

Post RFI. After completion of the RFI process, Vendors should not seek to communicate with Citizens regarding this RFI. Citizens has a statutory obligation to avoid conflicts of interest, both actual and apparent. By avoiding related communications outside of this RFI the vendor protects their opportunity to be eligible for future contract award.

V. PROTECTION OF CONFIDENTIAL, PROPRIETARY, OR TRADE SECRET MATERIAL

By participating in this RFI process and submitting a Response, a company acknowledges the requirements of the Florida Public Record laws found in Ch. 119, Florida Statutes and s. 24(a), Art. I of the Florida Constitution (the “Public Record Laws”) and agrees to the provisions set forth in this section.

All Responses and written communications regarding this RFI become public records upon receipt by Citizens. "Response" is herein defined as all materials submitted by the company pursuant to this RFI.

If a company claims trade secret protection from public record disclosure, they must submit with their Response one redacted version of their Response. The contents must be labeled "Redacted Response" and be void of any information the Vendor deems exempt from Florida's public record law. If a company asserts that any portion of its Response or written communication is exempt from disclosure under the Public Record Laws (a "Protected Record") then the company MUST comply with the following process:

- Clearly identify each portion of its Protected Record(s) that it believes is statutorily protected from disclosure and provide a reason (e.g., the information is considered a "trade secret") and;
- Submit a separate electronic copy of Vendor's Response or written communication with only protected portions redacted.

If a company does not identify each portion of a Protected Record as specified herein, Citizens may produce Vendor's non-redacted copy in response to a public records request. If a company has complied with the provisions of this section by identifying certain documents are Protected Record(s) and Citizens receives a public record request for a Protected Record, then Citizens will produce the redacted copy provided by the company in response to the public record request. In the event a party is seeking the non-redacted portion of the Response and a company continues to assert in good faith that the Protected Record(s) are confidential or exempt from disclosure or production pursuant to the Public Record Laws, then the company shall be solely responsible for defending its position, or seeking a judicial declaration.

Notwithstanding the provisions of this section, in accordance with Federal or State law, Citizens will comply with any court order or government agency directive to produce a Protected Record.

Citizens will not accept any material that requires a non-disclosure agreement.

END OF DOCUMENT