CITIZENS
PROPERTY INSURANCE CORPORATION

ADDENDUM NO.: 1

INVITATION TO NEGOTIATE NO.: 19-0012
VENDOR & CONTRACT MANAGEMENT SYSTEM (PRODUCTS & SERVICES)
5/31/2019

Citizens Property Insurance Corporation (Citizens) hereby formally amends the above referenced solicitation. The purpose of this Addendum is to answer questions received from Vendor(s) prior to the deadline in Paragraph 1.9, Calendar of Events.

Exhibit 1 is attached to further clarify answers to questions #55, #56, #59, and #109.

ANSWERS TO QUESTIONS:

1. What is the potential number of users both internally and externally?

    Answer: *Without considering how a proposed solution's licensing may be structured, the following are approximate estimates of the potential number of users by capability and by user type. The actual number of users for a particular product will be discussed further in negotiations.*

    Contract Management (including Vendor Management):
    1,200 internal users (50 of which are core users and the remaining being viewers); 2,000 vendor users; unlimited external viewers (assuming the proposed solution allows public access to executed contract documents).

    Contract Authoring:
    115 internal users (15 of which are core users and the remaining being reviewers / approvers); 1,000 vendor users.

    Risk Management (Vendor Due Diligence):
    1,200 internal users (50 of which are core users and the remaining being viewers); 2,000 vendor users (assuming the proposed solution permits vendors to utilize the solution; for example, to enter risk mitigation responses). Additionally, if the proposed solution is priced based on the number of inquiries of vendor data, (such as financials, adverse news, and so on), assume 500 inquiries annually (the actual number of inquiries will fluctuate depending on circumstances and market forces).

    In addition, Citizens estimates 2-3 Administrators for the proposed solution.

2. Our firm only offers a supplier risk assessment tool, not an entire suite for a Contract Management System. Would this be considered?

    Answer: *Yes, prospective vendors could propose a supplier risk assessment tool component as a service.*

3. Is a consultant/consultancy assisting you? If so, which firm and in what capacity? with RFP only? Or also in content/process optimization?

   Answer: No, a consultant/consultancy is not assisting Citizens with this project.

4. How many users does Citizens anticipate will need access to the selected solution? e.g., requestors, drafters, reviewers & approvers, signers, contract managers?

   Answer: Please see answer to question #1 above.

5. How many of those users (or what %) will be #1. "Administrators" (to manage content, templates, workflows and/or users) and #2. "Professionals" (actively involved in the contracting process for contract requesting/creation, collaboration, negotiation, approving, etc.). And #3 read-only users?

   Answer: Please see answer to question #1 above.

6. Can you provide the anticipated user growth for the next 1, 2, and 3 years?

   Answer: Subject to how a proposed solution's licensing may be structured, Citizens anticipates there will be no material user growth. However, Citizens anticipates a staged roll-out and expects that pricing for a proposed solution (if user count based) reflect a staged roll-out.

7. Which web browsers does Citizens use across the enterprise?

   Answer: Microsoft Internet Explorer, Google Chrome and Microsoft Edge.

8. Is there a preference for Support hours (9x5, 18x5, 24x7, etc.)?

   Answer: Citizens anticipates a need for normal business hours / business day support, but Citizens will require 24x7 support in the case of a catastrophe event that Citizens will or is responding to. Citizens desires a flexible (in terms of both availability and cost) support solution that allows for 24x7 support when needed.

9. Whether companies from Outside USA can apply for this? (like, from India or Canada)

   Answer: Yes, however please see Attachment H, Citizens Standard Terms and Conditions, Section 13.7, "Except as permitted in writing by Citizens' Contract Manager or designee, Vendor and Vendor Staff are prohibited from: (a) performing any Services outside of the United States; or, (b) sending, transmitting, or accessing any Citizens Confidential Information outside of the United States."

10. Whether we need to come over there for meetings?

    Answer: No.

11. Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

    Answer: Please refer to question #9 with regard to offshore/onshore issues.

12. Can we submit the proposals via email?

    Answer: No. Per Sections 3.4 and 3.5 of the ITN, Replies must be submitted to the physical address on the cover of the ITN and must be on an Original CD or USB removable media as well as a Redacted Copy (as applicable) on a separate CD or USB. Paper copies are not requested.

13. Would Citizens be working with a partner for the implementation process? Is there a preferred partner for this?

    Answer: No, Citizens desires the selected Vendor(s) to provide implementation services and initial user training for their product(s). If third-party assistance is required, please state so in you answers to the Vendor Questionnaire.

14. What would be the top 3 evaluation criteria for this RFP?

Answer: *The Evaluation Process and Evaluation Criteria are listed in Section 3.7 of the ITN.*

15. Has any Citizens potential CLM user or executive sponsors had any previous experience with other 3rd party CLM solution in the past? If so, who and what was your experience?

Answer: *Yes; however, solutions within the contract lifecycle management marketplace continue to evolve rapidly and any prior experience of Citizens' staff is irrelevant for purposes of this solicitation and negotiating the best value solution(s).*

16. What is compelling Citizens to progress this initiative? Is there an option to do nothing?

Answer: *There is an option to continue with the current toolset; however, Citizens has a decentralized vendor management function and an automated, integrated solution will provide for time and process efficiencies. Please also see answers to questions #57 and #119 below.*

17. The ITN states that there are 40 contract managers. Are there additional VMO users, and if so how many that need more than view only access? Are there additional users such as contract approvers, and if so, how many?

Answer: *Please see answer to question #1 above.*

18. What would be procured using a VCMS? Commodities, Outsourced Services or Temp Labor?

Answer: *Citizens is not seeking a sourcing capability as a part of this solicitation. Citizens predominately procures indirect categories.*

19. If Outsourced Services, please provide examples of types of services, and high level tracking requirements for the procurement and management of the service?

Answer: *Please see answer to question #18 above.*

20. If Temp labor please provide categories of labor – IT, Office, Legal, Marketing?

Answer: *Please see answer to question #18 above.*

21. Please provide aggregate spend information for what is being procured by category of Outsourced Services and Temp Labor.

Answer: *Please see answer to question #18 above.*

22. To comply with Attachment G, Financial Review section, we would be submitting an audited financial report along with W9 form. Will this information be uploaded publicly?

Answer: *No, Citizens will not make vendor financial information available to the public. The information is exempt from Florida's public records laws.*

23. Are we required to submit our proposed contractual terms and conditions; redlined Attachment H as part of RFP response?

Answer: *No, redline edits to Attachment H, Citizens Standard Terms and Conditions should not be submitted as part of the initial response.*

24. What documents are expected as part of proposed contract and pricing documents in the mandatory folder?

Answer: *Vendor's Proposed Contract (Vendor standard contract) and applicable Pricing Documents are required in Section 3.6, Folder 2 of the ITN. These documents can be submitted in preliminary form and subject to further discussion in the negotiations phase.*

25. Are there any State of Florida laws/regulations or Citizens Property Insurance policies that would

prevent Citizen's Property Insurance from doing business with a supplier with offshore operations? Or where a foreign national may have access to data stored in the United States as part of the support of the system and its users?

Answer: No, but please see answer to question #9 above.

26. How many Citizens Property Insurance Users will need the ability to add, edit, approve or change entries or documents within the VCMS solution?

Answer: Please see answer to question #1 above.

27. How many Citizens Property Insurance Users will need the ability to view or approve entries or documents within the VCMS solution?

Answer: Please see answer to question #1 above.

28. How many users of the system do you anticipate? Can you differentiate between full users and read only?

Answer: Please see answer to question #1 above.

29. How many different contract types do you wish to manage? Can you list them?

Answer: The contract types currently under management vary widely, but are focused on indirect and services categories, including: legal services, financial services, professional services, staff augmentation, reseller agreements, software licenses, and software-as-a-service agreements.

30. Do you prefer an on-premise solution or a hosted/SaaS solution?

Answer: While Citizens prefers a vendor-hosted solution, either would be considered as part of the ITN process.

31. What is the current state of your contract documents? For example- all centrally located, or dispersed across the organization in various states?

Answer: Centrally located, but currently housed in Oracle Enterprise Contracts, a legacy Access database, and a shared directory.

32. How many contracts are currently active? How many new contracts are created per year?

Answer: Including purchase orders with terms and conditions, approximately 2,000 contracts. Approximately 500 contracts documents are created annually (which includes task orders, amendments, successor agreements, and other such contract documents).

33. Confirm the number of licenses (users of the VMC/Contract Management system) needed under this ITN?

Answer: Please see answer to question #1 above.

34. Currently using KANBAN approach for VMO to process. Is this part of the CA Technologies Rally service?

Answer: Yes.

35. Will Citizen's integrate the Contract Management system with this 3rd party service provider system in place?

Answer: No.

36. The request specifically states you are not seeking a replacement but looking for reporting on procurement activity. This can be managed by our product in standard through licensing for

procurement users to add status updates in the contract file.

Answer: Correct, Citizens is not seeking a sourcing capability as a part of this solicitation, but does seek to report on how contracts were originated or procured.

37. Vendor Due Diligence: currently manual. What automation are you seeking? Links to search databases for update?

Answer: Citizens is seeking automation of due diligence through databases or other services as well as automating Citizens' decisions and actions; for example, whether Citizens has accepted any risks or has put any mitigating measures in place.

38. Which version of Oracle Fusion Supplier portal are you running? Is this hosted on on-premise?

Answer: Oracle Fusion Supplier Portal is a software-as-a-service solution and Citizens is using version19b.

39. I know you are seeking a two-way integration. I need details such as how many fields are going to integrate? and is this a flat file exchange?

Answer: Citizens is seeking a solution that integrates with Oracle Fusion for purposes of the vendor master. Two-way integration may not be necessary; for example, Citizens does not anticipate any data contained within the selected solution to update or change the vendor master. Citizens anticipates that many, if not all, data elements contained within the vendor master are exposed through the selected solution. Specific fields will need to be determined by the selected vendor(s) at the time of implementation for purposes of integration.

40. Ideally, we will have a flow chart showing how the information will flow into our tool, and how you will push information back into Oracle Fusion Supplier portal. Examples: Requester (field 1) contract value (field 2), duration (field 3), document repository to receive vendor paper (field 4), etc.

Answer: Please see answer to question #39 above.

41. Is there a standard API offered by the Oracle Fusion Supplier portal version Citizen's is running?

Answer: Citizens is unaware of the capability within Oracle Fusion. Please refer to Oracle Fusion documentation contained on Oracle's website to make that determination.

42. Is there any architecture information available?

Answer: Please refer to Oracle Fusion documentation contained on Oracle's website.

43. Will there be a test or QA environment for testing the integration?

Answer: Citizens would make available the appropriate development and testing environments.

44. Have you prepared Specs for this integration?

Answer: Please see answer to question #39 above.

45. For the contract managers, does HR currently track any of the metrics for these employees? Does the legal department want to maintain an employee record, and would you want HR to update the employee record maintained by Legal? For example, for a mandatory training schedule?

Answer: No, Citizens' Vendor Management Office tracks the metrics and there is no need for the data to be contained within an employee record outside of the solution,

46. Please indicate what Citizen's is using for Identity & Access and management?

Answer: We have a custom built application that leverages SAML 2.0.

47. Section2. Page 10 of the ITN – Automation of the Vendor Classification Model – Vendor Off-boarding:

Ref: The Excel tool. Is this an Excel formatted spreadsheet that is updated using Excel? Is this maintained in a shared drive? Is this done manually?

Answer: *Yes, it is an Excel spreadsheet that is contained on an internal portal for access by Contract Managers. A Contract Manager then downloads the spreadsheet and makes specific updates (as needed) for the applicable vendor. Ideally, this would be an automated and integrated checklist contained within a centralized repository and that is tied to the applicable vendor.*

48. Section2. Page 10 of the ITN – Automation of the Vendor Classification Model – Vendor Off-boarding: What is the goal for the automation?

Answer: *Ideally, this would be an automated and integrated checklist contained within a centralized repository and that is tied to the applicable vendor.*

49. Section2. Page 10 of the ITN – Automation of the Vendor Classification Model – Vendor Off-boarding: Please describe, for example, how does the vendor classification model work today?

Answer: *The spreadsheet contains a series of questions / statements and selectable responses. Based on user selections, the spreadsheet then calculates a score which corresponds to a range for each of the four classifications. Similar to other tools produced by Citizens' Vendor Management Office for use by Contract Managers, a Contract Manager downloads the spreadsheet and enters specific responses for the applicable vendor. The spreadsheet is renamed by the Contract Manager to reflect the applicable vendor and then is emailed to the Vendor Management Office where it is subsequently stored on a shared drive. Ideally, this would be an automated and integrated tool contained within a centralized repository and that is tied to the applicable vendor.*

50. Section2. Page 10 of the ITN – Automation of the Vendor Classification Model – Vendor Off-boarding: Is the goal for the information or calculations or data in the excel sheets to be displayed or calculated by the software?

Answer: *Ideally, the off-boarding spreadsheet would be replaced by the selected solution and be an automated and integrated tool contained within a centralized repository that is tied to the applicable vendor.*

51. Attachment D – Vendor Questionnaire: Can you clarify your requirements for: Vendor Management: Including account reviews, assessments, scorecards?

Answer: *There are a series of activities performed by Citizens' Vendor Management Office and Contract Managers that reflect vendor management leading or best practices; for example; conducting account reviews with vendors, classifying vendors, utilizing the tools described herein (such as vendor onboarding, off-boarding), and creating / maintaining vendor performance scorecards. To the extent possible, Citizens seeks to automate those activities within an integrated solution.*

52. Attachment D – Vendor Questionnaire: Would you like to create scorecards in the application?

Answer: *Yes.*

53. Attachment D – Vendor Questionnaire: Is the goal to manage the supplier/vendor account in our software?

Answer: *To the extent possible, Citizens seeks to automate its vendor and contract management activities in an integrated solution but to maintain its vendor master record within Oracle Fusion.*

54. Attachment D – Vendor Questionnaire: Can you clarify your requirements for: Risk Management

(Vendor Due Diligence): Including provisioning, and/or assessment of financial data, litigation history, adverse news reports, etc.?

Answer: *Please see answer to question #55 below.*

55. Attachment D – Vendor Questionnaire: Can you give an example of a due diligence process that you would like to automate?

Answer: *Please see Exhibit 1.*

56. Attachment D – Vendor Questionnaire: Could you list the manual processes you want to automate?

Answer: *The ITN describes the manual processes, including the manual resources and tools that Citizens seeks to automate. Additionally, Citizens is interested in a solution that further enhances its capabilities by offering automated leading and best practices that Citizens may not currently employ. The Exhibit 1 includes the Vendor and Contract Management Playbook (the "Playbook") describes other processes and procedures that Citizens' Vendor Management Office is responsible for performing. Note that the Playbook contains links to materials not available outside of Citizens' technology environment; however, the body of the Playbook briefly and sufficiently describes the processes and procedures.*

57. Attachment D – Vendor Questionnaire: Do you want to create a communication between federal resources and our software?

Answer: *Citizens utilizes federal resources and, to the extent possible, would like to automate data obtained from such resources through the selection solution.*

58. Attachment D – Vendor Questionnaire: Is the goal to store information and documents on Contract Managers training records?

Answer: *Yes, that is one of the goals.*

59. Attachment D – Vendor Questionnaire: Can you specify for each document Vendor Classification Model / Vendor Risk Profile / Vendor Relationship Management Guidelines and Checklist / Contract Monitoring Tool / Vendor Performance Assessment/ Training, Kick-Off, and Onboarding Checklist / Vendor Off-boarding and Closeout Checklist / Vendor Account Review Job Aid?

- Is the goal for the information or calculations or data in the excel sheets to be displayed or calculated by the software?
- Can you provide us with a sample of these documents?

Answer: *The goal of the VMO regarding the Contract Manager tools and resources described in Section 2.1 of the ITN is to replace and automate those resources and tools within a solution to the extent possible, meaning that the solution would, depending on the resource or tool, present statements or questions to users, allow users to select responses, and then calculate a results such as a vendor classification or a vendor risk score. The tools and resources utilized by Citizens' Vendor Management Office are contained within Exhibit 1.*

60. Is the pricing we provide considered a protected proprietary response?

Answer: *If you mark the pricing document "Confidential Trade Secret" or give it a similarly conspicuous marking, it will be considered a protected proprietary response.*

61. Will there be a migration of legacy data from the current systems to the new VMO? If so, will Citizens be able to participate in the following steps?

Provide sample data dump to Vendor for review	Citizens

Identify the artifacts to be handed to Vendor: - Excel file. The Vendor importer is built on a flat file enviornment. (SQL can also be accepted but must be flat file)	Citizens
Identify mapping of column header to Vendor data field	Citizens
Identify expected behavior of mapping and value set population/validation process as files and values are being created/populated during the migration process	Citizens
Validate and confirm if behavior during the mapping process is feasible and can be done	Vendor
Identify default values for required Vendor data fields not present in excel file provided by PROSPECT	Citizens
Provide final database dump to Vendor	Citizens
Write script and load test data into PROSPECT staging environment	Vendor
Subject to completed Vendor script published in the PROSPECT staging environment, PROSPECT PM – validate data samples	Citizens
Provide go/no go decision to Vendor for loading into production version of Vendor environment	Citizens
Load excel file and PROSPECT files into production	Vendor
Run extract report of migrated data	Citizens

Answer: *Yes, Citizens seeks to migrate / consolidate data from Oracle Fusion Enterprise Contracts and from a legacy Access database. While Citizens can provide an oversight and quality assurance role for the migration, Citizens would prefer the selected vendor to perform the extract, transformation, and load of the legacy data into the solution.*

62. How do you communicate with one another in the department? Email? Chat?

Answer: *Depending on the nature of the subject matter, communications within the department and with other departments may take a variety of modes. Email is used frequently because of the need to include more than one individual on a communication.*

63. How do you communicate with your internal clients?

Answer: *Please see answer to question #62 above.*

64. Do you have a consumer complaint department? And does the legal department work directly on consumer complaints? How is the activity tracked?

Answer: Consumer complaints are not within the scope of this solicitation.

65. Do you have a record retention policy? Does the legal department drive this policy? Have you mapped your custodians of electronic records?

Answer: Citizens has State of Florida mandated responsibilities relating to record retention and has an applicable policy, procedures, and roles in-place to ensure compliancy. While record retention schedules vary based on the record, for purposes of this solicitation, assume that contract documents must be retained for 10-years after completion or termination of the contract document.

66. Can you describe the relationship between the goals of the VMO and the Legal Department?

Answer: There are shared goals between Citizens' Vendor Management Office and the Legal Services department that achieve the requirements of Citizens' Vendor Management Policy. Broadly, for purposes of the scope of this solicitation, Citizens' Legal Services department reviews and approves contracts negotiated by the Vendor Management Office.

67. Do you have a company objective affecting the legal department or the VMO that is a reason for this RFP?

Answer: Citizens constantly seeks to innovate, automate, and integrate in an effort to reduce costs and improve performance.

68. Does legal manage any of the contract process?

Answer: Citizens' Legal Services department reviews and approves contracts negotiated by the Vendor Management Office. Additionally, there are Contract Managers in Legal Services that are assigned responsibility for certain contracts.

69. Can you describe the current system used by the litigation team? Does it offer litigation monitoring, Legal Hold, a portal with outside counsel?

Answer: Citizens' Legal Services uses a variety of tools to monitor the specific activities of outside counsel and associated billing. Citizens does not seek to replace such tools as a part of this solicitation; rather, Citizens desires a solution that will automate the macro-level and contract lifecycle management aspects of such relationships described in the solicitation, such as vendor classification, vendor risk management, onboarding and off-boarding, and contract administration.

70. Describe a few examples of litigation matters you manage?

Answer: Predominately insurance defense.

71. For the legal team managing HR, do you plan to give HR employees access to parts of the legal department system?

Answer: No.

72. How many outside law firms do you work with?

Answer: Over 100. For purpose of this solicitation, an outside law firm is a "vendor" and included within the estimated user counts described in the answer to question #1 above.

73. What is your outside legal spend total per year?

Answer: Please see answer to question #70 above.

74. How do you communicate with outside counsel today?

Answer: Email and a stand-alone case management system (which will not be replaced and is

---

outside the scope of this ITN). Please see answer to question #69 above.

75. How are your current law firm billings managed? Does the bill come into an attorney for auditing? Does the bill go directly to AP?

   Answer: Citizens uses a third-party system called Acuity (which will not be replaced and is outside the scope of this ITN). The bills are reviewed by a bill review team within the Citizens Legal Department. Please see answer to question #70 above.

76. Do you have a plan to on-board your law firms if you adopt an e-billing solution?

   Answer: No. Please see answer to question #69 above.

77. What is the current timeline for the selection of a vendor?

   Answer: Please see Section 1.9, Calendar of Events in the ITN.

78. Once selected is there a targeted or mandated goal for go-live?

   Answer: No. This will be discussed during the negotiations phase.

79. Has a Project Management team been established on the Citizen's side or this project?

   Answer: Yes.

80. Regarding a data migration into your new VMO system, do you anticipate documents to migrate into the new system? How many documents? System? Current Matters? Fields?

   Answer: In addition to data contained in Oracle Fusion Enterprise Contracts and a legacy Access database, Citizens has approximately 30,000 individual contract documents (masters, task orders, statement of works, exhibits, schedules, amendments, and so on) that are stored in a shared directory that may require migration (some of the contract documents may be versions of redlined documents that are unnecessary to retain—this will be determined during implementation). Some of these contract documents (such as active contracts) are more critical to migrate than others. Citizens would consider a proposed implementation scope that would include the migration of a certain number of contracts by the selected Vendor with Citizens' staff then migrating the remainder over-time. In Oracle Fusion Enterprise Contracts and the legacy Access database, Citizens tracks approximately 150 fields (such as contract name, contract number, and date executed). Depending on the proposed solution, it may be unnecessary to track certain data elements currently being tracked (for example, names of associated contract documents—these data elements could be eliminated by a solution that allows associated contract documents to be logically and visually "tied" together.)

81. ITN Section 2.1, Page 9 Citizens has approximately $2B of contracts under management across approximately 2,000 vendors. How many contract type does Citizens have in use today?

   Answer: Please see answers to questions #29 and #32 above.

82. ITN Section 2.1, Page 10 Citizens has approximately 40 Contract Managers at any one time. These Contract Managers may be assisted in their responsibilities by other staff (such as administrative professionals). How many users will need full read write access to the VCMS? How many users will require Read Only or Approve Only access to the VCMS?

   Answer: Please see answer to question #1 above.

83. ITN Section 2.1, Page 10 The VMO maintains a rudimentary terms and conditions library and authors, negotiates, and maintains contract documents utilizing Microsoft® Word. How many clauses does the VMO maintain?

   Answer: Approximately 500 across all different contract types and associated documents. Some of

---

these may be variations (such as unilateral and mutual indemnification).

84. ITN Section 2.1, Page 13 Does Citizens require integrations with Service Now and Salesforce as part of this ITN including the Pricing Documents?

   Answer: No. To the extent that a proposed solution utilizes ServiceNow or Salesforce as a platform, Citizens has already licensed those platforms and has in-house staff skilled on that platforms.

85. ITN Section 2.1, Page 13 Can Citizens provide further detail regarding data migration requirements? What format is the data in? What platform(s) is the data currently stored in?

   Answer: Citizens utilizes Oracle Fusion Enterprise Contracts, a legacy Access database, Microsoft Office products, and shared directories.

86. ITN Section 1.9, Page 7 Can material and an attendee list form the pre-proposal conference be shared?

   Answer: Citizens did not create a list of the attendees of the pre-proposal conference.

87. ITN Section 1.9, Page 7 Will Citizens consider a one-week extension to the submission date?

   Answer: Not at this time. Vendors should assume the submission date will remain as is, but any monitor the website for any changes.

88. ITN Section 2.1, Page 9 Are there other systems, other than Oracle and DocuSign that require integration?

   Answer: No.

89. ITN Section 2.1, Page 11 Is there a standard integration tool currently being used?

   Answer: Oracle Fusion Middleware.

90. ITN Section 2.1, Page 10-11 Can the tools listed on pages 11-12 be shared to more accurately estimate the work effort required to automate the current tools and resources developed and maintained by the VMO?

   Answer: See answer to question #59 above.

91. ITN Section 2.1, Page 10 The ITN outlines 40 Contract Managers and 2000 Vendors. Will any other internal users be accessing the system?

   Answer: Please see answer to question #1 above.

92. ITN Section 2.1, Page 13 How many systems will data be migrated from?

   Answer: Please see answer to question #85 above.

93. ITN Section 2.1, Page 13 How many Citizens resources will be assigned to the project team, and what are their roles?

   Answer: Citizens anticipates the following project team but can augment or modify the team based on the proposed solution: Project Owner; Project Manager; Contract Manager (4 – for design and testing); Contract Administrator (1); IT Technical Support (types and numbers dependent upon the proposed solution).

94. For contract authoring, how many individual contract "templates" exist today?

   Answer: Please see answers to questions #29, #32, and #83 above.

95. For each of those templates, how many fields are estimated per template?

Answer: Please see answers to questions #29, #32, and #83 above.

96. Can you share details around the desired workflows for Contract Management? How many workflows exist today and what are some of the key actions as part of those workflows (i.e. routing, reviews, approvals, updating systems, etc)?

Answer: Please see answer to question #56 above.

97. Is 40 unique users all that is needed for the contract authoring and contract management functionality?

Answer: Please see answer to question #1 above.

98. Can you share what each platform is used for and any details around the desired integrations with each?

- Salesforce
- Oracle Fusion'
- ServiceNow
- Any others?

Answer: Oracle Fusion is Citizens' enterprise resource planning system used for human capital management, finance and accounting, source-to-settle, and vendor registration / vendor master. Salesforce will be used to support an insurance agency / agent management system. ServiceNow is used for IT end user services and support. Citizens will require integration with Oracle Fusion for purposes of the vendor master. Citizens will require a migration of contract data and associated attachments from Oracle Fusion Enterprise Contracts to the selected solution. No other integrations are desired.

99. Is FedRAMP a requirement? Any other security certifications and/or authorizations?

Answer: No. During the negotiations phase, Citizens will require a SOC 2 Type 2 or ISO 27001 attestation for a software-as-a-service solution. See Section 3.8 of the ITN.

100. Are you exploring AI capabilities to analyze contract data?

Answer: Yes.

101. Where does Citizens store contracts currently? SharePoint? Any other locations?

Answer: Please see answer to question #85 above.

102. How many contracts/files are currently being stored?

Answer: Please see answer to question #80 above.

103. What is the plan to migrate contracts and their associated metadata to the new VCMS?

Answer: Citizens desires Vendors to propose a migration plan.

104. What metadata do you plan to report out of the new VCMS?

Answer: All fields contained in the VCMS, in various report types.

105. How is the Citizens Contract Template Ratio process handled?

Answer: Citizens seeks to execute procurement contracts using its own contract templates. Citizens includes contract documents as a part of its Request for Proposal and Invitation to Negotiate solicitation types.   The Contract Template Ratio is a

measurement of staff's success in using Citizens' contract templates.

106. ITN 2.1 Page 10. Approximately how many contracts are awarded per year to the 500 Strategic, Tactical, Operational, and Commodity contractors?

    Answer: A new contract may be awarded to an existing vendor as a result of a competitive procurements that is or could be a fraction of contracts awarded. For volume scoping purposes, please see answer to questions #32 above.

107. ITN 2.1 Page 10. Of these contracts, how many are construction related?

    Answer: Less than 10, and they are trade-related such as electrical services. Construction agreements such as design-build are uncommon and infrequent.

108. Does Citizens have an anticipated launch date for this project?

    Answer: Please see answer to question #78 above.

109. ITN 2.1 Page 10-11. Can Citizens provide an example of an anonymized vendor risk profile spreadsheet or state all the categories used to determine vendor risk (that will be automated)?

    Answer: Please see answer to question #59 above.

110. What single-sign-on (SSO) or identity management systems or standards should the system integrate with to manage user identity and authentication?
    Answer: For authentication, it should integrate with our custom SAML 2.0 authentication application.   API's will be needed for provisioning, de-provisioning and user synchronization

111. Citizens RFP - Attachment D - Vendor Questionnaire: Page 1 What is the current Contract Lifecycle Management process and associated business challenges with the current process??
    Answer: Please see answer to question #56 above.

112. Citizens RFP - Attachment D - Vendor Questionnaire: Page 1 What are the number of current contracts (ballpark)?
    Answer: Please see answers to questions #32 and #85 above.

113. Citizens RFP - Attachment D - Vendor Questionnaire: Page 1 Are all the contracts in an electronic format? If not, please provide a break-up of electronic vs paper contracts?
    Answer: Yes, either Word, PDF, or other scanned file type.

114. Citizens RFP - Attachment D - Vendor Questionnaire: Page 1 Applicable in-case of paper contracts only - Is Citizen expecting the vendor to extract meta data elements?
    Answer: No.

115. Citizens RFP - Attachment D - Vendor Questionnaire: Page 1 How many users will be using the Contract Management solution for authoring contracts?

    Answer: Please see answer to question #1 above.

116. Citizens RFP - Attachment D - Vendor Questionnaire: Page 1 How many users will be read-only (with no authoring rights but can view, redline, approve contracts etc.)?

    Answer: Please see answer to question #1 above.

117. Citizens RFP - Attachment D - Vendor Questionnaire: Page 1 Does the current scope of this ITN include buy-side as well as sell-side contract? Or only buy-side/ sell-side?
    Answer: Only buy-side.

118. Citizens RFP - Attachment D - Vendor Questionnaire: Page 1 What is the current Supplier Management process and associated business challenges with the current process?

> *Answer:* *Please see answer to question #56 above. Additionally, the business challenges are predominately a lack of automation of resources, tools, and processes as well as a lack of a centralized repository. Therefore, Contract Managers must maintain electronic files for each vendor / contract (for example, the Vendor Classification Model) in disparate file share locations. Reporting or mining of data therefore requires significant logistical effort. Further, contract documents have very limited meta-data, which requires significant staff effort to report on or leverage. For example, simple contract administration activities such as certificate of insurance compliance present resource challenges. Vendor (including sub-entities or related entities) and document relationships (such as master, subordinate, and amendments) is also a significant challenge. From a vendor risk perspective, conducting due diligence is entirely manual and can take several hours to perform thorough due diligence on a single vendor.*

119. Citizens RFP - Attachment D - Vendor Questionnaire: Page 2. Does Citizen leverage any third party tool for supplier repository and performance? If yes, please mention the providers name?

> *Answer:* *Along with Microsoft Office products, Citizens currently uses Oracle Fusion Supplier Portal (for supplier registration and the vendor master) and Enterprise Contracts. Citizens will continue to use Oracle Fusion Supplier Portal and is seeking to layer in contract lifecycle management capabilities not available in Enterprise Contracts.*

120. Citizens RFP - Attachment D - Vendor Questionnaire: Page 2. How many users will be using the Supplier Management solution create scorecards, KPI's for a supplier?

> *Answer:* *Please see answer to question #1 above.*

121. Citizens RFP - Attachment D - Vendor Questionnaire: Page 2. How many users will be read-only (no creation rights but can view, score a KPI etc.)?

> *Answer:* *Please see answer to question #1 above.*

122. Citizens RFP - Attachment D - Vendor Questionnaire: Page 2. Does Citizen need real-time TIN/OFAC validation? If yes, please provide the number of suppliers for which this is required??

> *Answer:* *Yes, however the future volume of validations is difficult to predict because Citizens performs such a validation as a part of its procurement due diligence process and the number of prospective vendors that respond to a solicitation can be significant and may vary widely from procurement to procurement. For purposes of this solicitation, assume 500 TIN/OFAC validations annually.*

123. Citizens RFP - Attachment D - Vendor Questionnaire: Page 2. Does Citizen need supplier risk management services which includes supplier screening for OFAC, Tax form validation, Bankruptcy etc.? If yes, please provide the number of suppliers for which this is required??

> *Answer:* *Yes; please see answer to question #122 above.*

124. Citizens RFP – Attachment D – Vendor Questionnaire: Page 3. Do you require integrations with Salesforce or ServiceNow? If yes, please provide us a business case for such integration?

> *Answer:* *Not required.*

125. Citizens RFP – Attachment D – Vendor Questionnaire: Page 1. Is Citizen currently using Oracle Fusion as the Supplier Master? If Yes, then please clarify which system will be the Supplier 'Master' and its corresponding 'Slave' system?

> *Answer:* *Yes; Oracle Fusion will be the vendor master and the selected solution will be the*

subordinate system.

126. Citizens RFP – Attachment D – Vendor Questionnaire: Page 1. Please let us know of all the systems or tools or ERP (and their instances) that Citizen wants our system vendor management system to integrate with and what is the purpose of integration?

Answer: Please see answers to questions #84, #85, and #98 above.

127. Citizens RFP – Attachment D – Vendor Questionnaire: Page 1. "As P2P is not in scope for this initiative, how do you envision capturing spending on contracts? We can suggest two approaches,
    1. Integration with Citizen's P2P system. (Please provide name and instance of P2P system)
    2. Citizen can provide an extract of their transactional data to be uploaded on the platform, where Citizen users can create reports within the platform to track utilization."

Answer: Citizens expects to continue capturing financial transaction associated with a contract document within Oracle Fusion and will use Oracle Fusion for vendor spend and category management activities; however, Citizens is open to a proposed solution that would allow extracts of transactional data to be uploaded to the selected solution provided that such extracts are user-friendly to perform.

128. ITN Section 2.3.B. Page 13: How many months/years of audit history will Citizens require?

Answer: Please see answer to question #65 above.

129. ITN Section 2.1. Page 10: 2000 Vendors are listed in the ITN, will additional vendors require access?

Answer: Please see answer to question #1 above.

FAILURE TO FILE A PROTEST WITHIN THE TIME PRESCRIBED IN SECTION 627.351 (6)(e), F.S., CONSTITUTES A WAIVER OF PROCEEDINGS. SEE SECTION 4, GENERAL CONDITIONS, WITHIN THE SOLICITATION DOCUMENT FOR DETAILS REGARDING HOW AND WHERE TO FILE A PROTEST.