**INSTRUCTIONS:**

**This questionnaire covers both Personal Lines and Commercial lines. All questions should be answered for both Personal Lines and Commercial Lines, if applicable.**

**Select each Service Category Vendor is proposing to provide to Citizens:**

**Personal Lines:**

**Commercial Lines:**

This document serves as the required Questionnaire as noted on Reply Checklists on page 4 of the ITN. Vendors should provide a response to each of the questions in this attachment. To the extent that you have provided an answer to the question in another area of your Reply, repeat your answer in the space provided AND provide a reference to the original answer.

The space for answers below will expand as necessary. Please be thorough but concise in your response. Responses to individual questions should be limited to two pages, excluding attachments. If a response attachment is required, the attachment must be provided in either MS Word, Excel, or Adobe PDF format, unless otherwise specified. See Section 3.7 (Evaluation Process) of the ITN for additional details regarding the evaluation process.

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| **SECTION A**  **VENDOR EXPERIENCE (up to 20 points)** |
| 1. Describe the industries for which you currently provide underwriting services (i.e., insurance, healthcare, automobile, etc.) and to what extent/in what capacity (i.e., customer relations, scheduling/appointments, etc.). What percentage of your business is for Property and Casualty (P&C) insurance? |
| Click here to enter text. |
| 1. Does your organization have recent (past 5 years) experience providing underwriting services for P&C insurers?    1. To what extent/in what capacity?    2. How many are you currently providing services for?    3. How many are in Florida and writing policies specifically for Florida?    4. What is the approximate associated volume specific to P&C insurance in Florida? Nationally?    5. What percentage of underwriting is for Personal Lines? What percentage is for Commercial Lines?    6. Describe any scalable support provided for a weather related response or event. |
| Click here to enter text. |
| 1. Identify your top five largest clients for Personal Lines and/or Commercial Lines (by completed transaction / activity volume) including how long you have provided these underwriting services. Please include attrition rate for each program. If client names are confidential, please identify the industry involved. |
| Click here to enter text. |
| 1. Provide your completed underwriting services transaction / activity volumes for the most recent 3 years (on a monthly) basis for all insurance lines. |
| Click here to enter text. |
| 1. Describe what differentiates your organization’s history or experience relative to its competitors in providing underwriting services, specific to P&C insurers. |
| Click here to enter text. |
| 1. Does your organization use subcontractors to provide the Services? If so, in what percentage of your staff, who they are, and how are they utilized? |
| Click here to enter text. |

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| **SECTION B**  **SERVICE METHODOLOGY (up to 30 points)** |
| 1. Describe your organization’s current methodology and processes, used in the management of Personal and / or Commercial Lines, which are being utilized to perform Task Based Processing Services to other clients, including scalability in response to storm related events. Please provide any workflow or process diagrams. |
| Click here to enter text. |
| 1. List the number of transactions that you have completed, broken down by type of transaction and type of policy (Personal vs. Commercial) on a monthly basis for the last 3 years for (this may be provided as an attachment to your reply):  * Endorsements: * Reinstatement; * New Business; * Cancellations; and * Automated Underwriting. |
| Click here to enter text. |
| 1. Describe all current Quality Assurance Processes used to evaluate your staff’s underwriting of policies. List and describe your Quality Assurance measurements (Goal vs. Actual) broken down by month for the last 3 years. |
| Click here to enter text. |
| 1. Describe your organization’s current Quality Assurance Guidelines. Do you currently have your own quality program outside of programs for other clients? If so, explain details regarding your quality program(s) including goals/metrics as well as the frequency at which your staff is evaluated? |
| Click here to enter text. |
| 1. Describe your organization’s average Cycle Time (Calendar Days) for Personal and /or Commercial Lines broken down by month for the last 3 years for:  * Endorsements: * Reinstatement; * New Business; and * Cancellations. |
| Click here to enter text. |
| 1. Vendor will be required to continuously monitor and record its performance related to the Services and provide related reporting to Citizens. Describe the Vendor’s proposed Service Level Standards related to the Services, including service credits for missed standards. For each Service Level Standard, explain how the standard is measured or tracked? Please provide samples of Service Level Standards Vendor uses for similar customers. |
| Click here to enter text. |
| 1. What reporting does your organization provide other clients that may be useful to Citizens? Please provide samples. |
| Click here to enter text. |

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| **SECTION C**  **STAFFING and SUPPORT (up to 20 points)** |
| 1. Describe all roles and positions within your organization that would be involved in providing underwriting Processing for Personal and/or Commercial Lines Services to Citizens including any proposed insurance specific qualifications, and include copies of all position descriptions for each role or position. |
| Click here to enter text. |
| 1. Describe the new hire/applicant screening process (e.g., background checks, pre-hire skills testing, etc.) and provide a copy of current/recent position description posting for representatives that would be supporting Citizens. |
| Click here to enter text. |
| 1. Provide a position description for the Vendor’s Account Manager responsible for managing the day-to-day operations and working with Citizens’ contract manager. |
| Click here to enter text. |
| 1. Describe your organization’s average time required for ramp-up to provide services to Citizens including recruitment, onboarding, training, etc. Explain how you can quickly scale up / down to handle temporary spikes in volume. Also, what is the average time from onboarding to production? |
| Click here to enter text. |
| 1. Describe how your organization handles multiple programs (clients) and what priority Citizens will have if your organization is awarded a contract? |
| Click here to enter text. |
| 1. Describe your organization’s business continuity and disaster recovery strategies (alternate processing methods) to continue critical business functions for support of service(s) currently provided to Citizens' or being considered in the event of a disaster or significant disruption? |
| Click here to enter text. |

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| **SECTION D**  **TRAINING (up to 10 points)** |
| 1. Describe and explain how your organization rolls out training for new products or campaigns to staff? |
| Click here to enter text. |
| 1. Does your organization have dedicated trainers for your programs? If yes, how many and describe their experience? What priority will Citizens have if your organization is awarded a contract? |
| Click here to enter text. |
| 1. How does your organization handle ad-hoc trainings? |
| Click here to enter text. |
| 1. How does your organization validate the effectiveness of the trainings? Is an assessment provided at the conclusion of training? What is the minimum score to be considered a successful training? |
| Click here to enter text. |
| 1. How frequently are refresher trainings required? |
| Click here to enter text. |