ADDENDUM NO.: 1

INVITATION TO NEGOTIATE NO.: 15-0016
GUIDEWIRE SOFTWARE VERSION UPGRADE
PLANNING AND DESIGN ADVISORY SERVICES

Citizens Property Insurance Corporation hereby formally amends the above referenced solicitation. The purpose of this addendum is to advise of any changes to the solicitation and answer questions received prior to the deadline in Section 1.7, Calendar of Events.

CHANGES TO THE SOLICITATION (noted in red):

- **1.1 Statement of Purpose:** Citizens Property Insurance Corporation ("Citizens") is seeking responses from qualified companies ("Vendors") capable of providing the following services ("Services"):

    A) Version Upgrade Planning and Execution Services: Provide consulting to support planning and execution for the ongoing support, enhancement, and product-version upgrades to Citizens' Insurance Suite ("Insurance Suite"), Citizens' next-generation insurance operating system based on the Guidewire Software, Inc. ("Guidewire") Insurance Suite platform and other integrated vendor software.

    B) Design Advisory and Support Services: Provide design advisory, validations, and verifications to identify Insurance Suite design issues and determine whether such issues are due to configuration and customization of Insurance Suite or other root causes including with the Guidewire platform.

    Vendors should have demonstrated experience in the implementation and support of Guidewire Insurance Suite (version 7.0.5) to provide the Services. Vendor(s) must be designated by Guidewire as being in the "Advantage", "Premier", or "Select" tiers in the Guidewire PartnerConnect program.

    Citizens may elect to enter into Contracts with one (1) or more Vendors to provide any one or more of the Services. For example, Citizens may enter into a Contract with a Vendor to provide the Version Upgrade Planning and Execution Services and another Contract with a different Vendor to provide Design Advisory and Support Services. Consequently, a Vendor that can only provide one of the Services is encouraged to respond to this ITN. If this ITN results in a multi-vendor award, Citizens will assign work at its discretion and no guarantee of work is provided.

- **2.2 Minimum Requirements:**

    - Vendor must be identified in any of the three (3) Guidewire tiers: "Advantage", "Premier", or "Select" tiers as part of the Guidewire PartnerConnect Program.

    - Vendor must receive a PASS determination regarding financial stability, viability and capacity as described in Section 3.6 (Tab 4) and Attachment K of this ITN.

- **Attachment C – Responsible Vendor Review Form** – *Revised 05/19/15.*

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ANSWERS TO QUESTIONS:

1. What are biggest pain points with your current implementation - ideally broken out by system and functional area (e.g., PolicyCenter - assignment logic - policies are being assigned to junior underwriters when the rules should direct to Underwriting Manager ; BillingCenter - delinquency - policies are not exiting delinquency when marked as paid-in-full)?
   Answer: We currently have a backlog of 328 total production defects. The critical defects get addressed first. We are averaging one release per month to address the most critical issues. For more information please refer to questions 39, 83 and 85.

2. How closely have you kept to the out of the box Guidewire solution (ideally broken down by each line of business implemented and each Guidewire component)?
   Answer: Citizens has not performed conformance checks. An original principle of implementation was to stay close to 'out-of-the-box'. However, Citizens has some unique requirements, such as depopulation. Though emphasis was placed on maintaining close conformance, significant configuration has occurred. This likely equates to a typical implementation of Guidewire at other carriers, with the exception of the unique depopulation functionality.

3. Are there any efforts underway to rationalize the software associated with Guidewire (e.g., ImageRight and Alfresco)?
   Answer: At this time, Citizens is not planning to switch software solution components that are part of the current solution. However, Citizens acknowledges that it may need to deploy some later version of underlying software packages necessary for running a later version of Guidewire (i.e. SQL Server, Tomcat, etc.). Alfresco is currently considered the long-term document repository for Citizens. The version of ImageRight that we are currently running will eventually be retired.

4. How many Citizens employees are allocated to this effort (by role)?
   Answer: Please see the response to question number 42.

5. What are the exact versions of each Guidewire module (PolicyCenter (PC), BillingCenter (BC), ClaimCenter (CC)) currently in production (are all of them at 7.0.5, are any patches applied to these versions)?
   Answer: PC 7.0.6; BC 7.0.6; CC 7.0.5; ContactManager (CM) 7.0.5

6. How would Citizens score each Guidewire module against Guidewire's conformance indicator as a measure of "out-of-the-box" functionality?
   Answer: Please see the response to question 2 above.

7. What integrations exist for each Guidewire module in current production?
   Answer: Ephesoft – document intake, Alfresco – Document repository, Thunderhead – Document generation, Insbridge – Rating, ISO – ratings prefill, Bolt clearinghouse, Aperta – validating external payments, General Ledger, virtual data transport – data interface to internal warehouse, IVR/IVANS – view latest policy information, HP Payment, FLUX – job scheduling, SendSuite – shipment/integrate w/Fedex, UPS, ITV 360 – property valuations, CAG – internal authentication system, EIS/GPS – address/phone verification, MMP – internal system/manage my policy, Power2Pay – generates checks, Xactimate – loss estimate software, producer management system – manage agents/agency, CAIS – Adjuster credentialing system, KB – Knowledge base integration, GW Contact Manager, C4 – mailing management.

8. What is the frequency of check production?
   Answer: Claims checks are produced twice a day: 8AM and Noon.

9. How does Citizen handle void payments and stop check requests?
   Answer: Citizens sends files to the bank on what checks to "honor" through the BillingCenter application.

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10. What is the volume of claims by line of business per year, and what is the volume projected to be over the course of the project?
Answer: Approximately 30,000 claims per year based on current Policies in Force (PIF) count, excluding any catastrophes.

11. How does Citizens capture First Notice of Loss (Call Center, Portal, Other)?
Answer: There is a data feed to our general ledger.

12. Are claims financials generated in ClaimCenter?
Answer: Yes.

13. Does Citizens bill on the account level, policy level, or both?
Answer: Both. We have list bill accounts, and direct bill accounts.

14. What payment plans does Citizen offer?
Answer: Citizens offers full, semi-annual, and quarterly payment plans.

15. What delivery methodology and what project management tools were used for the original implementation? Will the same methodology/tools be used for the upgrade?
Answer: We used Agile SCRUM methodology and the Rally toolset. Sprints last one month, and multiple sprints make up a release. We had roughly 10 Agile teams during the implementation, and we now have 4 Agile teams for our current releases. We will use the same methodology and Rally for the upgrade. We understand that we may need to change team structures to support the upgrades.

16. What was the sequence of Guidewire module implementation (was one implemented before the other, or was the whole suite implemented simultaneously)?
Answer: Commercial claims was first implemented in May 2013, followed by Commercial Policy and Billing together in November 2013. Personal Lines Claims deployed in March 2014, followed by Personal Lines Policy and Billing together at the end of 2014.

17. Can Citizens provide a line of business / product matrix currently processed using Guidewire PolicyCenter?
Answer: The following is information about Citizens' Book of Business as of April 2015:

Account - Product Line	Policies In-Force
PLA - Personal Residential Multi-Peril (PR-M)	333,157
COASTAL - Personal Residential Wind-Only (ePAS) (PR-W)	149,550
COASTAL - Personal Residential Multi-Peril (PR-M)	84,080
COASTAL - Commercial Residential Wind-Only (CR-W)	7,575
COASTAL - Commercial Residential Multi-Peril (CR-M)	598
COASTAL - Commercial Non-Residential Wind-Only (CNR-W)	16,184
COASTAL - Commercial Non-Residential Multi-Peril (CNR-M)	200
CLA - Commercial Residential Multi-Peril (CR-M)	2,882
CLA - Commercial Non-Residential Multi-Peril (CNR-M)	1,445
Total	**595,671**

18. What is the volume of policies by product and by line of business and what is the volume projected to be over the course of the project?
Answer: Citizens is working towards depopulating policies into the private market. Substantial

progress has been made. It is anticipated that there will be some additional reductions in our book of business policy counts. Policy counts are not expected to fall below 500,000 based on latest projections. See table in number 17 above.

19. Is Guidewire rating engine used?
Answer: No, we use Oracle Insbridge for rating. See Section 2.3 A.1.b.

20. What is the composition of Citizens producers (direct, captive agents, independent agents, brokers, etc.) and how does Citizens manage commissions?
Answer: This is not relevant to the scope of the ITN; however, general information on Citizens agents and commissions can be found on Citizens' website at www.citizensfla.com.

21. How were the hours specified in Attachment F determined? What was the estimation methodology used? Can vendors refine these hours based on their experience?
Answer: The hours specified in Attachment F were based on historical data at a very high level. Vendors must complete Attachment F as written. However, the actual amount of hours required in the future will be determined at a later date.

22. We noticed that there is a significant drop in hours between years 2015 and 2018 versus years 2016 and 2019. Are years 2015 and 2018 planning years and years 2016 and 2019 years when upgrades occur (development and deployment)? Please confirm.
Answer: Yes, your understanding is correct. See Attachment F, Instructions.

23. Where does reporting occur, within Guidewire or outside of Guidewire?
Answer: There are two sources for reporting against Guidewire data at Citizens. Some reporting occurs against the Guidewire v7 DataMart (no longer generally available as part of the Guidewire offering). The majority of reporting occurs against Citizens Data Warehouse (CDW).

24. Have any specific new functional areas in future state been identified?
Answer: Citizens is planning to implement an integration to a new Producer Management system later this year. Citizens will eventually need to integrate with a new ERP system (general ledger replacement). Citizens will also expand the lines of business that go through our ClearingHouse solution.

25. Are any of the current state integrations retiring after the upgrade?
Answer: No, none have been identified as retiring, but that needs to be verified as part of the upgrade planning activity.

26. Are any new Guidewire integrations planned?
Answer: No, there are currently no Guidewire integrations planned.

27. What is the address of physical location where work will be performed?
Answer: The planning work is expected to occur at 8120 Nations Way, Jacksonville FL 32256. Citizens is currently planning a transition to a downtown Jacksonville building in the fourth quarter of this year, and that may result in a shift in project physical work location if the work is not completed by that time. See Section 2.5 E.

28. Can Citizens confirm that Guidewire Select tier partners are allowed to bid on this RFP?
Answer: Guidewire Select Tier partners will need to demonstrate experience with upgrade planning and execution, and sufficient mastery of Guidewire software in order to be selected. Citizens encourages Select Tier Partners to bid, if they feel they can demonstrate the sufficient expertise. See Revised Sections 1.1 and 2.2 above.

29. Can a vendor jointly propose services along with Guidewire?
Answer: Yes, a vendor can jointly propose services along with Guidewire as long as the responding vendor meets the minimum requirements as identified in Section 2.2 of the solicitation.

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30. Can Citizens clarify the nature of engagement they are seeking? Is it T&M, Fixed Bid, or Managed T&M?
Answer: Time & Material. See Attachment F, Price Sheet.

Section 2.3 - A

31. Is Citizens planning to upgrade to Guidewire Suite 8.0 or 9.0?
Answer: Given the expected release timeframe of version 9.0, Citizens anticipates upgrading to v8.0.

32. What are the reasons to consider an upgrade?
Answer: ActiveX components in the Guidewire v7.x platform is inhibiting our Agency force from using later browser versions to access Citizens Insurance Suite.

33. Is the expectation that Vendor will provide support in upgrading Guidewire platform and integrations or also upgrade external systems like – Alfresco, Oracle Insbridge etc?
Answer: Given the level of regression testing that will be required to test the upgraded suite, Citizens will consider upgrading related components at the same time. The components to be selected for the upgrade will be part of the planning activity. See Section 2.3 A. 1. Upon mutual agreement, Citizens may ask for additional support.

34. Point 13, Guidewire currently doesn't allow its partners to provide training services to its customers. Is Citizens looking for the selected vendor to provide training services on Guidewire platform?
Answer: Citizens will consider training options that will most efficiently result in training existing staff on the new platform. This may entail a handful of Citizens leads being trained, and then those leads mentoring remaining staff.

Section 2.3 - B

35. Can Citizens provide any guidance on type(s) and size of service requests? Will the service requests be some group of defects, or new integrations or targeted towards a specific product in the Suite or new enhancements?
Answer: We would like guidance and design advice on some of our more complex enhancement or refactoring designs. We also would like assistance in estimating, planning and designing for Guidewire suite upgrade.

36. Are the service requests geared towards design and recommendations only or vendor owning the entire solution development for a service request?
Answer: Vendor will contribute to design solution, but Citizens will own.

General

37. Please provide insight on the product conformance of the current Guidewire Suite implementation and the amount of customization at each product level (PolicyCenter, BillingCenter and ClaimCenter).
Answer: Please see the response to question 2 above.

38. Guidewire provides basic version and standard version of templates for lines of business implementation. Which version of template is used for the Citizen PolicyCenter Personal and commercial property lines implementations.
Answer: Application Version: 7.0.6.323, Platform Version: 7.22.0.323.

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39. Please provide details on key pain points in the Insurance Suite (involving Alfresco, Insbridge, Ephesoft, Thunderhead and other associated systems) implementation which may be required to be taken up as part of Application support services ?

Answer: Citizens continues to add monitoring, balancing, and error recovery in several areas of the Citizens Insurance Suite. Document balancing across Guidewire, Alfresco, and Thunderhead is being added to minimize manual effort associated with managing document output. Citizens is also resolving root causes for event messages that get stuck in processing within each Guidewire application. The Insbridge interface has been fairly reliable, with the exception of occasional time-out errors. Improvements are needed to ensure optimal use of ContactManager, and reduce duplication of contacts.

40. We understand System testing/Deployments/Integration will be handled by Citizens. Please confirm.

Answer: Citizens has sufficient expertise in these areas for our current maintenance releases. However, all resource impacts must be considered in the upgrade planning activity.

41. For Application support services, can we assume that each of the work orders will have specific product backlog and will require the vendor to complete the development and testing. i.e. each of them should be managed as mini-projects covering requirements elicitation, design, development and functional/unit testing and hand over the work to Citizens production support staff.

Answer: Citizens will require the selected partner to work in accordance with Citizens' Agile methodology, using Rally, and Citizens' tools and environments. Citizens needs the vendor's expertise and work capacity to complete a greater number of work items (particularly those that may be of complex nature). The vendor will collaborate with existing Citizens personnel, and work within Citizens' Agile framework.

42. Provide details on the current team structure (size and role types) supporting the Insurance Suite platform?

Answer: Below is the current structure of our Agile teams. There is a scrum master for each team.

Team 1 - PC	**Team 3 - CC**
2 Systems Analysts	2 developers
6 developers	1 Systems Analyst
3 QA	2 QA
Team 2 - PC	**Team 4 - BC**
3 Systems Analysts	1 systems analyst
4 developers	6 developers
4 QA	2 QA

43. What are is the total no. of interfaces (Enterprise Systems as well as External Systems) in the current implementation of Insurance Suite? Please share details on the mode (Service, Batch, Queue, etc.) of integration for each of the interface.

Answer: See answer to question 7 above.

44. Do we need to consider reporting solution as part of the upgrade scope? Please share details (Guidewire provided or homegrown solution, technology stack details) for existing reporting solution.

Answer: We will need to fully understand the upgrade effort from the standpoint of reporting. We currently use the Guidewire v7 Data Mart that is no longer offered by Guidewire. If Citizens elects to retain the Data Mart, estimates are needed for any changes necessary to extract/transform/load data from the new Guidewire transactional tables to the existing Data Mart. The alternative is an upgrade to Guidewire Standard Reporting. A final decision is not yet made regarding the direction

Citizens will take regarding reporting, but it is likely that we would defer the upgrade to Standard Reporting if integration with the existing Data Mart can be achieved at a reasonable cost.

General/Sizing

45. Does Citizen expect any services from vendor for ongoing maintenance support. Please confirm. If affirmative, please provide the following additional details.
Answer: At this time, Citizens expects to handle ongoing maintenance support internally. Citizens reserves the right to negotiate mutually agreed upon services at a later date.

1) What is the average no. of defects logged per month?
Answer: Citizens has a backlog of defects that are prioritized by product owners. Citizens conducts change management meetings to approve content of releases based on priority and capacity. The below tables are a snapshot of Citizens' Production Defects over the last 5 months.

January

Week of	# Defects Reported	# of Defects Closed	Cumulative Open
1/4 - 1/10/2015	24	1	23
1/11 - 1/17/2015	22	2	43
1/18-1/24/2015	18	10	51
1/25 - 1/31/2015	28	7	72
Monthly Totals	**92**	**20**	**72**

February

Week of	# Defects Reported	# of Defects Closed	Cumulative Open
2/1 - 2/7/2015	24	6	90
2/8 - 2/14/2015	22	11	101
2/15 - 2/21/2015	26	7	120
2/22 - 2/28/2015	22	7	135
Monthly Totals	**94**	**31**	**135**

March

Week of	# Defects Reported	# of Defects Closed	Cumulative Open
3/1 - 3/7/2015	32	12	155
3/8 - 3/14/2015	44	23	176
3/15 - 3/21/2015	36	10	202
3/22 - 3/28/2015	27	8	221
3/29 - 4/4/2015	32	8	
Monthly Totals	**171**	**61**	**245**

April

Week of	# Defects Reported	# of Defects Closed	Cumulative Open
4/5 - 4/11/2015	30	15	260
4/12 - 4/18/2015	42	9	293
4/19 - 4/25/2015	24	8	309
4/26 - 5/2/2015	28	13	324
Monthly Totals	**124**	**45**	**324**

May

Week of	# Defects Reported	# of Defects Closed	Cumulative Open
5/3 - 5/9/2015	18	13	329
5/10 - 5/16/2015	4	5	328
5/17 - 5/23/2015			328
5/24 - 5/30/2015			328
Monthly Totals	**22**	**18**	**328**

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2) What is the current SLA for fixing the defects by severity?
Answer: Urgent defects are fixed within 1 business day, very high defects are fixed within 2 business days, and high defects are fixed within 4 business days. Medium and low defects are incorporated into future releases. A new production support process and SLA definitions are in progress.

3) What is the approximate frequency of State regulatory changes that were implemented until now? *Answer: Citizens usually has some mid-year filing changes, and a larger annual rate filing release.*

4) What is the total no. of coverages and forms currently in production?
Answer: Estimated 40+ coverages between personal and commercial lines. Approximately 400+ forms in production today.

5) What are the billing types supported by Billing Center (Agency, Direct Bill)
Answer: Direct Bill, and List Bill (to mortgage companies).

46. Does Citizens' current implementation of Insurance Suite include any enterprise architecture model such as ESB to integrate the different systems. What are the technologies (web services, ftp, etc.,) and mode (real time, batch) involved in the communication between the systems.
Answer: Citizens has implemented Oracle SOA Suite as an intermediary for the majority of integrations. Citizens has a center of excellence that maintains the integrations and adds any new integrations.

47. What is the total no. of interfaces in the current implementation of Insurance Suite.
Answer: 50 integrations across the suite.

General/Performance Testing

48. Please advice if the vendor is expected to provide performance engineering services including tuning, profiling, capacity planning etc.? If yes, please provide the response to following questions. Else, please ignore
Answer: We would ask for guidance on performance, meaning that vendor consider performance when reviewing design and when advising on upgrade but we do not expect vendor to perform profiling and make changes to tune or improve performance.

49. Will Citizen provide a dedicated performance test environment(Production like configuration) hosted at Citizen's network ? Is performance testing through internet in-scope?
Answer: Citizens has two performance testing environments for use with the Citizens Insurance Suite. Citizens' Loadrunner and monitoring tools will be used. Citizens has staff dedicated to performance testing.

50. Does Citizen have any Non-Functional requirements defined/documented for the insurance suite?
Answer: Yes, these are documented throughout a variety of user stories that reside in our Agile software.

51. Has Citizen conducted any load tests on the current system (Guidewire insurance suite)? If yes, can the vendor get access to the existing test scripts and artifacts?
Answer: Yes, Citizens has a performance test work unit that has tools and expertise for performance testing. Citizens does annual testing for catastrophe preparation. In addition, performance testing occurs on critical functionality of new releases.

52. What is the current user/transaction volume? Also, what is the expected data growth in next 6 months and 1 year?
Answer: Citizens' book of business may drop slightly as the Florida market for insurance continues

to improve. Data will grow in the suite as policies renew every year. Personal lines policies will finish converting into PolicyCenter by the end of this year. All claims from Citizens legacy systems have been migrated into Guidewire, and all new claims are entered into Guidewire. Citizens has not yet added archiving mechanisms into the Insurance suite. All Agent users sign into PolicyCenter, and interact directly with Citizens Insurance Suite.

53. Provide the list of applications/Domains(Channels, Guidewire, Reporting, ETL and document management…etc.) in-scope for performance testing.
Answer: PC, BC, CC, Thunderhead, Alfresco, CAG (internal system), Insbridge rating engine.

Attachment I – Information for Services Sizing

54. Please let us know the monthly defect count in Production and the anticipated enhancements, if any? We assume that Application support will continue to be provided by Citizen and the vendor may have to assume work on defects /enhancements as per the work-orders.
Answer: See response to question 45.

55. For the defects given, please provide the split of defects by Guidewire Product type or configuration/integration and/or defect fix type (code fix, data fix) etc.? Please mention the period when these were raised/closed.
Answer: We estimate the following breakdown: PC: 40%, BC: 30%, CC: 20%, CM: 10%. We have had some significant problems with managing contacts. Please see answer to question 45.

Tab 3: Vendor Proposal

56. Please clarify the expectation on the "Description of project schedule". What does project here refer to and what is the scope of the project?
*Answer: **The "Description of project schedule" to be provided in Tab 3 refers only to the 2016 Guidewire version upgrade.** The description should include all anticipated tasks, timelines, resource assignments, dependencies, etc. [Note: The remainder of the Vendor Proposal provided in Tab 3 should cover all of the requested Services and should not be limited to just the 2016 upgrade.]*

57. Please clarify the expectation on the "Estimated number of employees required to complete anticipated projects". Is the Vendor expected to provide an estimate as part of the response. If so, please describe the anticipated projects and its scope in detail and what the estimates needs to include. Also are the "employees" here refer to Citizen staffs, or vendors or both.
Answer: We expect Vendor to estimate, for each year during the term of the contract, the number of employees, hours, resources, dependencies, etc. needed (i) for Vendor to perform the planning, design, oversight and validation Services as described in the ITN, and (ii) for Citizens staff to perform the actual 2016 and 2018 upgrade work.

Attachment G – Insurance Suite Technology Stack / Alfresco related requirements

58. Are Alfresco, Thunderhead, Oracle Insbridge, Softrater version upgrades in-scope? If yes, what will be the target version for these systems?
Answer: No, unless there is a hard dependency from Guidewire.

59. Is Alfresco currently being used only for Document Management? Or, does Record Management/ Web Content Management also comes under scope?
Answer: Alfresco is only used as a document archive for Citizens Insurance Suite. We do not leverage any workflow or user interface features available in Alfresco. Workflow is driven within the Guidewire applications.

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60. How many workflows currently exist in Alfresco? Please mention their complexities. Which workflow engine is currently being used (Activity/JBPM)?
Answer: None. Alfresco is just a document repository for the Citizens Insurance Suite.

61. How many custom-developed components/ Custom Extended Services/Custom Permissions have been deployed? Please mention their functionalities and levels of customization.
Answer: Homeowner's product model is not part of base product, so it was customized and implemented using accelerators. Producer's module was also customized. Access and privileges were customized (new privileges added).

62. Is SSO/LDAP implemented?
Answer: Citizens has developed an internal authentication application called CAG (Citizens Authentication Gateway). People sign into the Citizens Insurance Suite by first going to a CAG screen and entering their user ID and password. CAG will continue to be the authentication solution for the foreseeable future.

Attachment G – Insurance Suite Technology Stack / Thunderhead related requirements

63. Please provide a list of the most critical use cases that are currently fulfilled by Alfresco, ThunderHead & Ephesoft.
Answer: These are used for document management. Use cases are related to new policies, renewals, billing/invoices. These systems are used to manage creating, sending these documents as well as storing.

64. Please provide the number of templates expected to be used. Any marketing messages or logos need to be applied to the template? Please share some samples if available.
Answer: Approximately 300 templates. We don't expect templates to be impacted by upgrade.

65. What are the delivery channels in scope - Email, Print, electronic copy (ECM archival)? What are the specific formats for each of the channels? E.g.. Print - AFP / Post script / etc.?
Answer: Delivery channels include: Email, print, electronic copy. PDF is standard format.

66. Please share the different modules / components of ThunderHead NOW installed / configured? E.g.. Interactive now, Correspond now, Analyze now, etc.
Answer: We use Draft Editor and Web Services that are exposed from Thunderhead NOW.

67. Please suggest any specific custom components / wrappers built around the vanilla components of ThunderHead?
Answer: Review Case Editor Layer is added.

68. Please share the details of different ways documents are generated using ThunderHead- Batch, Interactive and real time?
Answer: Documents are generated by Batch and Interactive.

69. Is a service layer required to be built on top of ThunderHead for the services to be later extended to other platforms sending out communication other than Guidewire?
Answer: We already use the Oracle SOA service layer that may be updated with this version upgrade.

70. Are there any specific components / integrations with other core admin systems (if any) which need to be tested? Please share the details?
Answer: For upgrades we would want to test all integrations. For normal enhancements, we would likely not test every integration. Please see answer to question 7.

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71. Please confirm , if there are any testing / Output compare tools incorporated in Citizens Insurance for the document testing (e.g. xTest, Paloma print - STREAMDiff, Home grown testing tools)
Answer: There are no automated compare tools incorporated in Citizens Insurance Suite for document testing.

72. Are there any SLAs to be followed in communications?
Answer: Yes.

73. Please provide details on any approval Workflows and User Entitlement that needs to be done.
Answer: The current assumption is that there would not be any changes to the workflow or user entitlement in Thunderhead as part of Guidewire version upgrade.

Attachment G - Insurance Suite Technology Stack / Ephesoft related requirements

74. How many Lines of Business use Ephesoft application? For each line of business, please provide the number of capture processes used? How many different application are interfacing with Ephesoft and the input channels (E.g. Email, Fax, and Scanner) and external systems are to be considered as in-scope for this RFP?
Answer: There are 4 lines of business using the application. We do not expect this to change with the upgrade.

75. Please describe the high level functionalities of the Ephesoft system. (E.g. Scan ,Recognition , Auto classification , Index and export)
Answer: Scan, recognition, auto class, index and export. Again, we don't expect this to change with a Guidewire upgrade.

76. What is the level of automation implemented in the solution? Describe the Auto classification /extraction/validation features of current application . Please provide the average number of Data fields extracted from the scanned images during Ephesoft Capture applications process?
Answer: Not relevant for this upgrade.

77. What type of documents is being processed by current system (Ex : structured , semi-structured and unstructured documents)
Answer: All 3, however, we do not expect this to change for this upgrade.

78. Is there any OCR/ICR features used in Ephesoft application ?
Answer: Yes, we use OCR.

79. Any Custom Modules developed and Integrated with Ephesoft application ?
Answer: Yes, e.g. Document stamp on each page, renaming batches, document assembly, export, etc.

80. What is the volume of documents scanned/imported on a daily /Monthly basis?
Answer: We scan/import approximately 1,000 to 2,000 documents daily. This varies by time of week, month, and year.

Section 1.1

81. Based on our understanding from "Services" as mentioned in "Statement of Purpose" the scope of service expected from vendor is limited to consulting and advisory. Please confirm if Citizen also expects vendor to provide implementation services as well including development and testing. Or Can the work related to development and testing as part of upgrade, ongoing support, enhancements be considered out of scope for vendor at this point of time?
Answer: The anticipated scope of work is found in Section 2.3. At this time, Citizens does not expect Vendor to provide implementation and testing services. However, Citizens may as part of the contract request Vendor to perform some implementation and/or testing work in place of

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Citizens' staff, but the terms of such an engagement will be subject to the availability of Vendor's resources and the mutual consent of the parties.

82. Please provide the approximate timelines expected for the Suite upgrade
Answer: Definite decisions are not currently made for exact timelines. However, we would not want to upgrade the ClaimCenter application during storm season. In addition, Citizens may entertain implementing the ClaimCenter upgrade first, if we can appropriately manage integration with other v7 components. Combining the PC/BC upgrade with the 2017 rate filing would provide a production release date at the end of November 2016. This is a scenario of interest for consideration in the upgrade planning activity.

83. Please provide a list of issues all the critical and recurring issues that are currently faced
Answer: We have faced a few high profile issues. Documents not getting generated properly for a variety of reasons, event messages are stuck in queues causing workflow interruptions, issues with managing contacts and addresses via contact manager where edits were allowed in some cases and propagated to policies and invoices incorrectly.

84. Please share the typical development methodology followed in Citizens Insurance? what are the different testing phases / environments - System Testing, QA, User Testing, Performance testing, etc.?
Answer: Here is an outline of the milestones defined for an upcoming release. Note that many of these phases overlap. Citizens uses an Agile SCRUM methodology, and that will continue. We have 4 Agile teams, 4 scrum masters, a product owner from each business unit, lead developers, and delivery managers that help facilitate delivery according to business needs.

Release 2.3 Effective Dates	
Milestone	**Target**
Requirements/Defect Elaboration/Test Planning	*4/06 - 6/25/15*
Coding, Unit Testing, and Code Review	*4/13 - 6/25/15*
Code Lockdown	*6/25/2015*
UAT Complete	*7/3/2015*
Code Freeze	*7/15/2015*
Release Branch Cut	*7/15/2015*
Regression	*6/26 - 7/15/15*
Business Sign-off	*7/16/2015*
Gold Packages Created for Prod	*7/16/2015*
Code deployed to CON03/Prod Support	*7/20/2015*
Production Code Push	*7/25/2015*

Section 2.1

85. Please provide details on Business issues, challenges and IT issues experienced by Citizen during initial implementation of Insurance Suite?
Answer: Availability of skilled Guidewire resources has been a challenge. Ensuring documents are generated, sent to the print vendor, and stored in Alfrecso reliably on a consistent basis has been an area of challenge. Ensuring appropriate integration with Guidewire contact manager from all of the individual Guidewire applications has been a challenge. Implementing all necessary monitoring and error handling has taken effort, and the process continues to get enhanced as needed. During the implementation, simply getting all the work done according to the schedule was a challenge.

Section 2.3.A.1

FAILURE TO FILE A PROTEST WITHIN THE TIME PRESCRIBED IN SECTION 627.351 (6)(e), F.S., CONSTITUTES A WAIVER OF PROCEEDINGS.

86. Oracle Insbridge (4.6.1) is only mentioned under software version upgrades, other than upgrades and testing will the vendor be responsible for other functions related to Insbridge? Such as package deployment, production releases, rating maintenance, new development?
Answer: Citizens has employees that are responsible for Insbridge package deployment, rating maintenance, and new development. Some assistance may be needed if any enhancements are made to the rating integration with Guidewire.