



## **AGREEMENT FOR LEADERSHIP COACHING AND TEAM DEVELOPMENT**

---

This Agreement (“Agreement”) is between CITIZENS PROPERTY INSURANCE CORPORATION (“**Citizens**”), a legislatively created Florida governmental entity, having its principal place of business at 2101 Maryland Circle, Tallahassee, Florida 32303, and MY EXECUTIVE SOLUTIONS INC (“**Vendor**”) having its principal place of business at 830 A1A North STE 13 Box 106 Ponte Vedra Beach, FL 32082. Citizens and Vendor shall each be known as a “Party,” and collectively shall be known as the “Parties.”

### **Recitals**

On January 6, 2020, Citizens issued a Request for Proposal No. 20-0013 for Leadership Coaching and Team Development (the “Solicitation”). Vendor’s response to the Solicitation was accepted by Citizens, subject to the terms set forth in this Agreement.

In consideration of the mutual promises and restrictions stated in this Agreement, the Parties acknowledge and agree as follows:

### **Terms of Agreement**

1. **Definitions.** As used in this Agreement, the following terms have the following meanings:
  - 1.1. “360-degree Feedback” means a Behavioral Assessment that evaluates a Leader’s performance by collecting and analyzing feedback from a Leader’s subordinates (direct reports), peers (colleagues), and direct manager, as well as a self-evaluation by the Leader to determine strengths and areas for development. A 360-degree Feedback may be requested by Citizens to be provided by Vendor and conducted by a Coach as a part of a Coaching Assignment or a 360-degree Feedback may be conducted independently by Citizens and provided to a Coach for use as a part of a Coaching Assignment.
  - 1.2. “Behavioral Assessment(s)” means an assessment or analysis of psychological preferences or behavior traits relating to a Leader’s or Team’s perception of self, work, and decision making. A Behavioral Assessment may be requested by Citizens to be provided by Vendor and conducted by a Coach as a part of a Coaching Assignment or a Behavioral Assessment may be conducted independently by Citizens and provided to a Coach for use as a part of a Coaching Assignment.

- 1.3. "Citizens Confidential Information" means all information, data, and documentation, whether marked as confidential or not, disclosed to Vendor in the course of this Agreement that is either: (a) Protected under any applicable state or federal law (including Chapter 119, Florida Statutes; Sections 501.171, and 627.351(6), Florida Statutes; Chapter 690-128, Florida Administrative Code; and, 15 U.S.C. § 6801 et seq.); (b) private information concerning Citizens employees or policyholders (including social security numbers, personal health information, personal credit information, banking information, drivers' license numbers, personal email addresses, personal phone numbers, and home addresses); or, (c) related to any Citizens manuals, lists, operating and other systems or programs, business practices or procedures, insurance policies, claimants or claims, or any business, governmental, and regulatory matters affecting Citizens. "Citizens Confidential Information" does not include any information, data or documentation that: (a) is publicly available through no fault of Vendor or Vendor Staff; or, (b) Vendor developed independently without relying in any way on Citizens Confidential Information.
- 1.4. "Citizens' Contract Manager" means the individual identified in Section 11.2. and shall also include that individual's designee authorized to perform and fulfill one or more of the duties or responsibilities, as further described in this Agreement, of the Citizens' Contract Manager.
- 1.5. "Coach" means a Vendor Staff Member responsible for providing Services directly to a Leader or Team, as the case may be, pursuant to a Coaching Assignment.
- 1.6. "Coaching Assignment" means the placement and delivery of Services by a Coach to a Leader or Team, as the case may be, as approved by the Citizens' Contract Manager in accordance with this Agreement and the corresponding Purchase Order.
- 1.7. "Deliverables" means the quantifiable, measurable, and verifiable items required to be delivered to Citizens by Vendor under this Agreement.
- 1.8. "DISC" means a Behavioral Assessment based on the DISC theory, which centers on the four following behavioral traits: dominance, inducement, submission, and compliance.
- 1.9. "Effective Date" means the date on which the last Party executes this Agreement.
- 1.10. "Leader" means a Citizens employee who is responsible for leading a Team, selected by Citizens to receive Services from Vendor pursuant to a Coaching Assignment.
- 1.11. "Leader Coaching Assignment" means a Coaching Assignment that is intended for the development of a Leader, as detailed in Section 3.2.1. herein.
- 1.12. "Leader Coaching Plan" means the written plan, including specified tasks and processes, that the Coach and Leader agree to follow in carrying out the objectives of the Leader Coaching Assignment. The Leader Coaching Plan is tailored to a specific Leader and is developed by the Coach in accordance with Citizens' directives.
- 1.13. "Leader Development Plan" means the written plan, including specified tasks and processes, for a Leader's continued development following completion by the Coach of the Coaching Assignment. The Leader Development Plan is tailored to a specific Leader and is developed by the Coach in accordance with Citizens' directives.

- 1.14. "Myers-Briggs Type Indicator" or "Myer-Briggs" means a Behavioral Assessment and analysis of psychological preferences relating to an individual's perception of the world and decision-making.
- 1.15. "Purchase Order" means a formal request for Services that is issued by Citizens pursuant to the terms of this Agreement. Each Purchase Order will identify the Coach, the Leader or Team, as the case may be, and the Services for the Coaching Assignment.
- 1.16. "Services" means all services and Deliverables to be provided by Vendor to Citizens under this Agreement. The Services are described in Section 3. herein and in each applicable Purchase Order. If any service or Deliverable is not specifically described in this Agreement (including applicable Purchase Orders) but is an inherent, necessary or customary part of the Service, that service shall be included within the definition of the Services to the same extent and in the same manner as if specifically described herein.
- 1.17. "Standard Team Assessment" means an assessment identified as needed for the Team to include an interview of Team members as needed, an analysis of observations, and an in-person Team debriefing session.
- 1.18. "Team" means a group of Citizens' employees, who interact on a regular basis to achieve a specified goal or to provide a service.
- 1.19. "Team Coaching Assignment" means a Coaching Assignment that is primarily intended for enhancement of dynamics within a Leader's Team, as detailed in Section 3.2.2. herein.
- 1.20. "Team Coaching Plan" means the written plan, including specified tasks and processes, that the Coach, Leader, and Team agree to follow in carrying out the objectives of the Team Coaching Assignment. The Team Coaching Plan is tailored to a specific Team and is developed by the Coach in accordance with Citizens' directives.
- 1.21. "Team Development Plan" means the written plan, including specified tasks and processes, for a Team's continued development following completion by the Coach of the Team Coaching Assignment. The Team Development Plan is tailored to a specific Team and is developed by the Coach in accordance with Citizens' directives.
- 1.22. "Team Development Session" means a planned meeting with the Coach, Leader, and Team that is designed and conducted by the Coach for the purposes furthering the objectives of the Team Coaching Assignment.
- 1.23. "Team Engagement Session" means a planned meeting with the Coach, Leader, and Team that is designed and conducted by the Coach for the purposes of engaging the Team in the Leader's Coaching Assignment.
- 1.24. "Vendor Staff" means any of Vendor's employees, agents, subcontractors or representatives who: (a) provide the Services; or, (b) have access to Citizens Confidential Information or Restricted Confidential Information.
- 1.25. "Work Product" means each Deliverable and any drawing, design, specification, rendering, notebook, tracing, photograph, reference book, equipment, material, negative, report, finding, recommendation, data and memorandum of every description, created for Citizens under this Agreement and shared with or delivered to Citizens by Vendor or Vendor Staff in the course of performing this Agreement.

**2. Term and Renewals.**

- 2.1. Term of Agreement. This Agreement shall commence on the Effective Date and, unless terminated as provided for herein, shall continue for three (3) years.
- 2.2. Renewals. This Agreement may be renewed for one (1), two (2) year renewal period either: (a) by Citizens, at its discretion upon twenty-one (21) calendar days prior written notice to Vendor; or, (b) by mutual written agreement of the Parties. Renewals shall be subject to the same terms and conditions set forth in this Agreement at the time of renewal, including any amendments signed by the Parties.

**3. Services; Service Requirements.** As requested by Citizens from time to time, Vendor will provide Services, as further described herein, related to: (a) one-on-one coaching of a Leader; and, (b) Team development.

- 3.1. Assignment Consultation. Upon Citizens' request, Vendor will meet with Citizens' Contract Manager to discuss objectives and to recommend a Coach for a contemplated Coaching Assignment (the "Assignment Consultation"). As part of the Assignment Consultation, the Citizens' Contract Manager and the Vendor shall discuss the subject of the Coaching Assignment, the context for coaching, the objectives, and the resources of Vendor and Vendor Staff available to support Citizens' objectives. As requested by Citizens, the Assignment Consultation may also include an initial meeting between the proposed Coach and the Leader or Citizens' Contract Manager to confirm the suitability of the Coach. Assignment Consultation will not include the Team. Vendor will provide the Assignment Consultation at no cost to Citizens.
- 3.2. Coaching Assignments. From time to time, following an Assignment Consultation, Citizens may provide a Leader or Team Coaching Assignment to Vendor. Citizens will provide each Coaching Assignment pursuant to a Purchase Order. Each Purchase Order will specify that it is a Leader or Team Coaching Assignment, the Services included in the Assignment, and the Coach, the Leader, and the Team (if applicable). Vendor is not authorized to commence a Coaching Assignment unless and until Citizens issues a Purchase Order. Citizens will not provide compensation for Services except as pre-authorized pursuant to a Purchase Order. If the Citizens' Contract Manager identifies a need for additional Services during a Coaching Assignment, the additional Services are not authorized by Citizens until the issuance of an amended Purchase Order describing such additional Services.

Vendor acknowledges that Citizens does not in any way represent or guarantee that Vendor will receive any specific or minimum volume of Coaching Assignments under this Agreement. At its sole discretion, Citizens will assign Coaching Assignments to vendors based on, as solely determined by Citizens, vendor performance, capability, and capacity.

- 3.2.1. Leader Coaching Assignments. Except as otherwise specified in a Purchase Order, each Leader Coaching Assignment will have a six (6) month duration and will include the following:

- 3.2.1.1. Leader Coaching Plan Development. The Coach is responsible for developing and delivering a Leader Coaching Plan in accordance with the following:

- A. The Coach will conduct an in-person intake interview with the Leader and, if directed by Citizens, will also conduct an

intake interview with the Leader's direct manager. The interview will include, but is not limited to, a review of the Leader's personal history, career history, current team and organization, competencies, organizational capability, and business outcomes. The purpose of the intake interview is to obtain a thorough understanding of the Leader's view of Coaching Assignment objectives as well as to identify the Leader's areas of opportunity and strengths.

- B. As part of the intake interview process, the Coach and Leader will also define the Coaching Assignment objectives and desired outcomes, determine what Behavioral Assessments may be needed, and, if directed by Citizens, the Coach will discuss the results of the intake interview separately with Leader and his or her direct manager to secure the Leader's direct manager's commitment to the Leader's development.
- C. The Coach will perform an analysis of a 360-degree Feedback or other Behavioral Assessment. Citizens will either: (a) provide a previously completed 360-degree Feedback or other Behavioral Assessment for analysis by Coach; or, (b) may request that Vendor perform one or more of the agreed-upon Behavioral Assessment(s) per Section 3.2.1.4.
- D. The Coach and Leader will discuss the Behavioral Assessment(s) and the Coach will interpret the results for purposes of the Leader's understanding and for purposes of drafting the Leader Coaching Plan.
- E. The Coach will collaborate with the Leader to prepare an initial draft of the Leader Coaching Plan and, if needed, will prepare the Leader for the Leader's discussion with his or her direct manager. The Coach may be requested to participate in the Leader's discussion with his or her direct manager.
- F. The Coach will develop the Leader Coaching Plan, to include: (a) integration of the Behavioral Assessment(s) and any interviews with the Leader's direct reports, the Leader's peers, or others as identified by Citizens; (b) addressing strengths, opportunities, impact on the Leader's team and others; and, (c) identify specific actions for development. The Coach will deliver the Leader Coaching Plan to Citizens' Contract Manager, the Leader, and the Leader's direct manager.
- G. The Coach will submit the Leader Coaching Plan to Citizens' Contract Manager within thirty (30) calendar days from the date of issuance of the Leader Coaching Assignment to Vendor by Citizens. Before the Coach may proceed with the Leader Coaching Plan, the Leader Coaching Plan is subject to final written approval by Citizens' Contract Manager.

- 3.2.1.2. Coaching to Plan. Upon approval of the Leader Coaching Plan by Citizens' Contract Manager, the Coach will proceed to provide coaching Services as follows and in accordance with the Leader Coaching Plan:
- A. The Coach and Leader will engage in one-on-one meetings at least one time per month to assess progress on the Leader's development, provide the Leader with additional insight and awareness with respect to the topics of the Leader Coaching Plan, and provide development assignments to the Leader.
  - B. Completion of any Citizens-approved Additional Services, including analysis and interpretation by the Coach, included as part of the Coaching Plan.
  - C. After the first ninety (90) calendar days following the start of the Assignment, the Coach will provide Citizens' Contract Manager with a summary report (the "90 Day Status Report") which identifies the status of the Coaching Assignment, progress made by the Coach and Leader, next steps, and any concerns or issues identified by that point.
  - D. The Coach will assist the Leader in the measurement and evaluation of success from the beginning to the end of the Coaching Assignment.
  - E. The Coach will develop and provide a Leader Development Plan, including recommendations to the Leader for sustained and continued development as well as future goals and actions to accomplish those goals, along with anticipated timelines to be followed by the Leader upon completion of the activities described in this Section 3.2.1.2.
- 3.2.1.3. Close Out. Upon completion of the activities described in Section 3.2.1.2. herein, the Coach will complete the following activities to close out the Coaching Assignment:
- A. The Coach and Leader will meet to close out the Coaching Assignment, including finalization of the Leader Development Plan.
  - B. Leader Close-Out Summary. As part of the Coach's off-boarding activities for each Coaching Assignment, the Coach shall develop and provide a Close-Out Summary that recaps all knowledge gained from the Services provided thereunder. A Close-Out Summary is a high-level written summary report for Citizens' Contract Manager and will address: (a) the validation of findings acquired during the Coaching Assignment; and, (b) distribution of materials provided or developed by Vendor for Citizens during the Coaching Assignment.
- 3.2.1.4. Optional Leader Coaching Services. Citizens may require that Vendor provide one or more of the following as part of a Leader Coaching Assignment, as specified in the Purchase Order.

(1) 4 Hour Team Engagement Session

(2) Behavioral Assessment(s) listed in Table C

3.2.2. Team Coaching Assignments. Except as otherwise specified in a Purchase Order, each Team Coaching Assignment will have up to a six (6) month duration and will include the following:

3.2.2.1. Intake Interviews. The Coach will conduct in-person intake interviews in accordance with the following:

- A. The Coach will conduct thirty (30) minute intake interviews with the Leader and, if directed by Citizens', with one or more member(s) of the Leader's Team and/or the Leader's direct manager. The interview will include, but may not be limited to, a review of the team structure, team dynamics, Team history, current team dynamic and organization, the Leader's and Team's competencies, organizational capability, and business outcomes. The purpose of the intake interview is to obtain a thorough understanding of the Leader's view of Coaching Assignment objectives as well as identify the Leader and Team's areas of opportunity and strengths.
- B. As a part of the intake interview process, the Coach and Leader will also define the Coaching Assignment objectives and desired outcomes, determine what Behavioral Assessments may be needed, and, if directed by Citizens, the Coach will discuss the results of the intake interview separately with Leader and his or her direct manager to secure the manager's commitment to the Leader's and Team's development.

3.2.2.2. Behavioral Assessments and Team Coaching Plan. The Coach will perform Behavioral Assessments and deliver a Team Coaching Plan in accordance with the following:

- A. The Coach will perform and analyze any agreed upon Leader and / or Team Behavioral Assessment(s). Citizens may also provide a previously completed Behavioral Assessment for analysis by Coach at no additional cost to Citizens.
- B. Behavioral Assessments may include:
  - a. A Standard Team Assessment, which includes an interview of Team members as needed, an analysis of observations, and an in-person Team debriefing session
  - b. Behavioral Assessment(s) listed in Table C
- C. Coach and Leader will discuss the Behavioral Assessment(s) with the Team during one of more Team debriefing session(s), to include at least one in-person debriefing session for a Standard Team Assessment. The Coach will interpret the results for purposes of the Leader's and Team's understanding and for purposes of

drafting the Team Coaching Plan.

- D. The Coach will collaborate with the Leader and Team to prepare an initial draft of the Team Coaching Plan and, if needed, will prepare the Leader for the Leader's discussion with his or her direct manager. The Coach may be requested to participate in the Leader's discussion with his or her direct manager.
- E. The Coach will develop the Team Coaching Plan, to include: (a) integration of the Behavioral Assessment(s) and any intake interviews with the Leader's Team, the Leader's peers, or others as identified by Citizens; (b) addressing strengths, opportunities, impact on the Leader's team and others; and, (c) identify specific actions for development, including the Team Development Session(s) that will be performed as part of the Team Coaching Assignment, and any feedback from Citizens regarding proposed actions. The Coach will deliver the Team Coaching Plan to Citizens' Contract Manager, the Leader, and the Leader's direct manager.
- F. The Coach will submit the Team Coaching Plan to Citizens' Contract Manager within thirty (30) calendar days from the date of issuance of the Coaching Assignment to Vendor by Citizens. Before the Coach may proceed with the Team Coaching Plan, the Team Coaching Plan is subject to final written approval by Citizens' Contract Manager.

3.2.2.3. Team Development Sessions and Development Plan. Upon approval of the Team Coaching Plan by Citizens' Contract Manager, the Coach will proceed to Team Development Session(s) and delivery of a Team Development Plan as follows and in accordance with the Team Coaching Plan:

- A. The Coach, Leader, and Team will engage in Team Development Session(s) and related meetings as described in the Team Coaching Plan. The Coach will assess progress on the Leader's and Team's development, provide additional insight and awareness with respect to the topics of the Team Coaching Plan, and provide development assignments to the Leader and Team. The Coach will provide a debriefing assessment for each Development Session, which will include discussion of the results for the purposes of the Leader's and Team's understanding, and for the purposes of drafting the Team Development Plan.
- B. Completion of any Citizens-approved Additional Services, including analysis and interpretation by the Coach, included as part of the Coaching Plan.
- C. After the first ninety (90) calendar days following the start of the Assignment, the Coach will provide Citizens Contract Manager with a 90 Day Status Report which identifies the



status of the Coaching Assignment, progress made by the Coach, Leader, and Team, next steps, and any concerns or issues identified by that point. This 90 Day Status Report is only required for Team Coaching assignments that exceed four (4) months.

- D. The Coach will assist the Leader in the measurement and evaluation of success from the beginning to the end of the Team Coaching Assignment.
- E. The Coach will develop and provide a Team Development Plan, including recommendations to the Leader and the Team for sustained and continued development as well as future goals and actions to be accomplish those goals, along with anticipated timelines to be followed by the Leader and Team upon completion of the activities described in this Section 3.2.2.2.

3.2.3. Close Out. Upon completion of the activities described in Section 3.2.2.2. herein, the Coach will complete the following activities to close out the Coaching Assignment:

- A. The Coach, Leader, and Team will meet to close out the Coaching Assignment, including finalization of the Team Development Plan.
- B. Team Close-Out Summary. As part of the Coach's off-boarding activities for each Coaching Assignment, the Coach shall develop and provide a Close-Out Summary that recaps all knowledge gained from the Services provided thereunder. The Close Out Summary is a high-level written summary report for Citizens' Contract Manager, and will address: (a) the validation of findings acquired during the Team Development Plan; and, (b) distribution of materials provided or developed by Vendor for Citizens during the Coaching Assignment.

3.3. Additional Services. Citizens may require that Vendor provide one or more of the Additional Services listed in Table C as part of a Coaching Assignment, as specified in the Purchase Order.

3.4. Hourly Rate Services. Citizens may require that Vendor provide Leader or Team Coaching Services at an hourly rate as provided in Table C of Section 8.2. Citizens will not provide compensation for Services at an hourly rate except as specified in the Purchase Order.

3.5. Service Delivery.

3.5.1. Vendor will ensure confidentiality of assessment results.

3.5.2. All Services will be provided via telephone unless explicitly provided in the associated Purchase Order. As requested by Citizens, the Services will be provided in any of Citizens facilities located in Jacksonville, Tampa, and Tallahassee.

3.5.3. All Services will be overseen by Citizens' Contract Manager or other Citizens designated personnel identified in the Purchase Order for the Coaching Assignment.

- 3.5.4. All Services will be provided Monday through Friday between the hours of 8AM and 5PM, Eastern Time, except as otherwise agreed between the parties.
- 3.6. Project Lead. The Coach will serve as the primary point of contact for the Vendor and will manage the day-to-day operations and delivery of the Services as they relate to the Coaching Assignment. This includes but is not limited to the following responsibilities:
- 3.6.1. identifying and coordinating the necessary resources for the Coaching Assignment;
  - 3.6.2. maintaining and tracking project calendars/timelines;
  - 3.6.3. identifying and escalating issues to the Citizens' Contract Manager;
  - 3.6.4. status reporting to management and other stakeholders;
  - 3.6.5. identifying and managing significant project risks;
  - 3.6.6. ensuring content quality for services produced;
  - 3.6.7. ensuring the timely delivery of business requirements, business rules, and ensuring link to business strategies and scope;
  - 3.6.8. coordinating project scheduling and costs; and,
  - 3.6.9. conduct meetings to provide status and progress updates and review outcomes and feedback from training and coaching activities.
- 3.7. Vendor Staff Qualifications and Removal. Within thirty (30) calendar days of the Effective Date, Vendor will provide bios, resumes and other applicable documentation in order to validate the qualifications and experience of each of its Vendor Staff that are being proposed to provide Services under this Agreement. During the term of this agreement, should Vendor add additional Vendor Staff, Vendor must update Citizens with the same information within fourteen (14) calendar days in order to be eligible to provide Services under this agreement.
- All Vendor Staff shall be properly trained and qualified. Upon request, Vendor shall furnish a copy of all technical certifications or other proof of qualification to Citizens. All Vendor Staff must comply with all reasonable administrative requirements of Citizens and with all controlling statutes, laws, and regulations relevant to the Services.
- If Vendor knows or learns of circumstances indicating that a Vendor Staff member (i) lacks the proper training or qualifications to perform the Services; or, (ii) is lacking in honesty or integrity, then Vendor will not allow that person to perform Services under this Agreement. Further, if Citizens determines that a Vendor Staff member is unsuitable for his/her role under this Agreement, Agreement for any reason, including but not limited to knowledge, skills, experience, abilities, academic qualifications, credentialing, licensure, veracity, or conduct, Citizens has the right to disallow that person from performing in such role and to require Vendor to promptly provide a qualified replacement reasonably acceptable to Citizens.
- 3.8. Background Checks. Vendor shall also conduct reasonable background checks to verify that the proposed Vendor Staff has met the minimum education, qualifications, or experience requirements as required by Citizens' Contract Manager.
- 3.9. Compliance with Fair Credit Reporting Act. Vendor will comply with all

requirements of the federal Fair Credit Reporting Act, including the provision to Vendor Staff of all required pre-notification and post-report notices. Vendor is responsible for any adverse action notices that may apply to its employment decisions.

#### **4. Service Warranties and Standards.**

- 4.1. General Warranty. Vendor warrants that the Services will be performed and delivered in a professional, first-class manner in accordance with this Agreement and the standards prevailing in the industry. To this end, Vendor will undertake the following actions without additional consideration during the term of this Agreement and for one (1) year thereafter: (a) promptly make necessary revisions or corrections to resolve any errors and omissions on the part of Vendor; and, (b) confer with Citizens as Citizens deems appropriate for the purpose of interpreting any of the Services or information furnished. Acceptance of or payment for the Services by Citizens shall not relieve Vendor of these responsibilities. The warranty and covenants in this Section will extend to and bind Vendor's subcontractors, if any.
- 4.2. Ability to Perform. As of the Effective Date, Vendor warrants that, to the best of its knowledge, there is no pending or threatened action, proceeding, or investigation, or any other legal or financial condition, that would in any way prohibit, restrain, or diminish Vendor's ability to perform the Services or satisfy its contractual obligations. During the term of this Agreement, Vendor shall immediately notify Citizens Contract Administrator of any change in circumstances that would in any way diminish Vendor's ability to perform the Services or satisfy its contractual obligations. Whether by Vendor's notification, Citizens' sole determination, or otherwise, in any case where Citizens is concerned with Vendor's ability or willingness to perform this Agreement is in jeopardy, Vendor acknowledges and agrees that, upon Citizens' request, Vendor shall timely provide Citizens with all reasonable assurances requested by Citizens to demonstrate that Vendor will continue to be able and willing to perform this Agreement.
- 4.3. Monitoring of Performance. Vendor shall continuously monitor and record its performance to ensure that all of Vendor's responsibilities and obligations hereunder are being met and fulfilled. Citizens may conduct programmatic and other administrative contract monitoring during the term of this Agreement. The purpose of this monitoring is to ensure that all of Vendor's responsibilities and obligations are being met and fulfilled. Such monitoring may include on-site visits, report reviews, invoice reviews, compliance reviews, and a review of any other areas reasonably necessary. Vendor acknowledges and agrees that Citizens may also monitor and record Vendor Staff communications to the extent they occur within or are connected to any Citizens' resource, such as electronic or telecommunications systems.

#### **5. Deliverables and Work Product.**

- 5.1. Deliverables and Financial Consequences. Each Deliverable must be delivered by Vendor to Citizens in the time and manner specified in this Agreement. Failure to do so will entitle Citizens to enforce financial consequences which can include: (a) withholding any payment associated with the Deliverable until such delivery is made; and/or, (b) terminating this Agreement in whole or in part for cause subject to the notice and cure provisions set forth in Section 12.3 below.

	<b>Deliverable</b>	<b>Due</b>
<b><u>Leader Coaching Assignment</u></b>	Completed intake interview process including delivery of an agreed-upon Leader Coaching Plan.	Within thirty (30) calendar days of issuance of the Leader Coaching Assignment
	Ninety (90) Day Status Report	Within five (5) business days following the end of the first ninety (90) calendar days of the Leader Coaching Assignment.
	Delivery of the Leader Development Plan and Leader Close-Out Summary	Within ten (10) business days following the close out meeting between the Coach and Leader.
<b><u>Team Coaching Assignment</u></b>	Completed intake interview process to include interviews with Leader and/or Team	Within thirty (30) calendar days from the issuance of the Team Coaching Assignment, unless otherwise agreed upon in writing.
	Behavioral Assessment(s) and Team Coaching Plan	Within thirty (30) calendar days from the issuance of the Team Coaching Assignment, unless otherwise agreed upon in writing.
	Team Development Session(s) and Team Development Plan	Per the Team Coaching Plan
	Ninety (90) Day Status Report (only required if engagement lasts more than four (4) months.	Within five (5) business days following the end of the first ninety (90) calendar days of the Team Coaching Assignment.
	Delivery of the Team Development Plan and Team Close-Out Summary	Within ten (10) business days following the close out meeting between the Coach and Leader.

- 5.2. **Title to Work Product.** With the exception of the Pre-Existing Materials described in Section 5.3., Citizens will have all right, title and interest in and to each Work Product and any derivative works relating thereto (including ownership of copyrights). The use of these Work Products in any manner by Citizens shall not support any claim by Vendor for additional compensation. Each Work Product, and any portion thereof, shall be a "work made for hire" for Citizens pursuant to federal copyright laws. To the extent any of the Work Product is not deemed a

work made for hire by operation of law, Vendor hereby irrevocably assigns, transfers, and conveys to Citizens, or its designee, without further consideration all of its right, title, and interest in such Work Product, including all rights of patent, copyright, trade secret, trademark, or other proprietary rights in such materials. Vendor acknowledges that Citizens shall have the right to obtain and hold in its own name any intellectual property right in and to the Work Product. Vendor agrees to execute any documents or take any other actions as may reasonably be necessary, or as Citizens may reasonably request, to perfect or evidence Citizens' ownership of the Work Product. This Section shall survive the termination of this Agreement.

### 5.3. Pre-Existing Materials.

5.3.1. Citizens acknowledges that, in the course of performing the Services, Vendor may use materials, software, reports, routines, language, instructions, methods, techniques, trade secrets, patents, copyrights, or other intellectual property that have been previously developed, purchased, licensed, or acquired by Vendor or by third parties (collectively, the "Pre-Existing Materials"), and that such Pre-Existing Materials shall remain the sole and exclusive property of Vendor or the third parties. Where Vendor seeks to embed Pre-Existing Materials in the Work Product, Vendor must first obtain written approval from Citizens.

5.3.2. If and to the extent any Pre-Existing Materials of Vendor are embedded or incorporated in the Work Product, Vendor hereby grants to Citizens the irrevocable, perpetual, non-exclusive, worldwide, royalty-free right and license to: (a) use, execute, reproduce, display, perform, distribute copies of and prepare derivative works based upon such Pre-existing Materials and any derivative works thereof for Citizens' internal business purposes only; and, (b) authorize others to do any or all of the foregoing for Citizens' internal business purposes only.

5.3.3. If and to the extent any Pre-Existing Materials of third parties are embedded or incorporated in the Work Product, Vendor shall secure for Citizens an irrevocable, perpetual, non-exclusive, worldwide, royalty-free and fully paid-up right to use, execute, display, and perform such Pre-Existing Materials. Vendor shall secure such right at its expense and prior to incorporating any such Pre-Existing Materials into any Work Product, and such right must include, if practicable, a right to: (a) copy, modify, and create derivative works based upon such Pre-Existing Materials; and, (b) sublicense all or any portion of the foregoing rights to an affiliate or a third party service provider of Citizens. This Section does not apply to standard office software (e.g., Microsoft Office).

5.4. The provisions of this Section shall survive the termination of this Agreement.

## 6. Changes.

6.1. Change Process. Citizens may require changes altering, adding to, or deducting from the Services (each, a "Change"), provided that: (a) such Change is within the general scope of this Agreement; and, (b) Citizens will make an equitable adjustment in Vendor's compensation or delivery date if a Change materially affects the cost or time of performance of the Services. Such equitable adjustments require the written consent of Vendor, which consent shall not be unreasonably withheld, delayed or conditioned. The Parties will cooperate in good faith to

determine the scope and nature of a Change, the availability of Vendor Staff, the expertise and resources to provide such Change, and the time period in which such Change will be implemented.

- 6.2. Modifications. A Change resulting in an increase or decrease to Vendor's compensation or the scope of Services must be evidenced by a formal amendment to this Agreement. All other changes shall be evidenced by either a writing signed by the Contract Manager or designee of each Party or a formal amendment to this Agreement.

## 7. Acceptance.

- 7.1. Acceptance Period. For all Services provided under this Agreement, Vendor grants to Citizens a thirty (30) calendar day acceptance period ("Acceptance Period") commencing on the date completed Services are delivered to Citizens. Citizens shall have the right to reject the Services, in whole or in part, during the Acceptance Period for Vendor's failure to meet the specifications associated with the delivered Services (a "Defect"), with such determination to be made in Citizens' reasonable judgment. At the end of the Acceptance Period, if Citizens has not rejected the Services, the Services shall be deemed to be accepted by Citizens; provided, however, that Citizens' acceptance of the Services shall not be deemed a waiver of any of Citizens' warranty rights as expressly provided in this Agreement.
- 7.2. Corrective Action Plan. At any stage during the thirty (30) calendar day period provided above or whenever Citizens identifies a deficiency in Vendor's performance of this Agreement, Citizens may require Vendor to take the following actions: (a) perform a cause analysis to identify the cause of the deficiency; (b) provide a written plan (the "Corrective Action Plan") detailing the cause of, and procedure for, correcting such deficiency (Citizens will be afforded the time necessary to review and approve the proposed Corrective Action Plan or require Vendor to make revisions); (c) implement the Corrective Action Plan as approved by Citizens; and, (d) provide Citizens with satisfactory assurance that such deficiency will not reoccur following the implementation of the Corrective Action Plan. In the case of a Defect identified by Citizens during an Acceptance Period, completion of the cause analysis and implementation of the Corrective Action Plan by Vendor must occur before the end of the thirty (30) calendar day period provided above, unless otherwise agreed to by Citizens in its sole discretion.

## 8. Compensation.

- 8.1. Maximum Compensation and Budget Requirement. Citizens' obligation to pay Vendor for all Services accepted and reimbursable expenses under this Agreement (i) shall not exceed a total dollar amount of \$95,000.00; and, (ii) is contingent on the availability of budgeted funds approved by Citizens' Board of Governors on an annual basis.
- 8.2. Compensation Schedule. Vendor will be paid for Coaching Assignments as set forth below upon completion and acceptance of each Deliverable. Citizens will not provide compensation for Services except as pre-authorized pursuant to a Purchase Order. Vendor's compensation may not exceed the rates set forth below and in Section 8.1 above.

<b>Table A: Leader Coaching Assignment Fees</b>			
<b>Services included</b>	<b>Base Term Fee (years 1-3)</b>	<b>Renewal Term Fee (years 4-5)</b>	<b>Payment</b>
All Leader Coaching Services described in Section 3.2.1, with the exception of Optional Leader Coaching Services described in Section 3.2.1.4.	\$3,500.00 per Leader Coaching Assignment	\$3,500.00 per Leader Coaching Assignment	One-third (1/3) upon acceptance of Leader Coaching Plan
			One-third (1/3) upon acceptance of 90-Day Status Report
			One-third (1/3) upon acceptance of Leader Development Plan and Leader Project Plan
4 Hour Team Engagement Session	\$2,500.00 per session	\$2,500.00 per session	Upon acceptance of Team Engagement Session
360-degree Feedback	\$7,500.00 per leader	\$7,500.00 per leader	Upon acceptance of 360-degree Feedback

<b>Table B: Team Coaching Assignment Fees</b>				
<b>Services included</b>	<b>Service Options</b>	<b>Base Term Fee (years 1-3)</b>	<b>Renewal Term Fee (years 4-5)</b>	<b>Payment</b>
Intake Interview(s) in accordance with Section 3.2.2.1.	N/A	\$100.00 per interview	\$100.00 per interview	Upon acceptance of Team Coaching Plan
Behavioral Assessments in accordance with Section 3.2.2.2.	Standard Team Assessment	\$1,500.00 per assessed Team member	\$1,500.00 per assessed Team member	Upon acceptance of Behavioral Assessment
Team Development Session(s) in accordance with Section 3.2.2.3.	4 Hour Team Development Session	\$2,500.00 per session	\$2,500.00 per session	Upon acceptance of debriefing assessment
Fixed Fee for eight (8) hour	8 Hour Team Development	\$5,000.00 per session	\$5,000.00 per session	Upon acceptance of

Team Development Session	Session			debriefing assessment
Team Coaching Plan, 90-Day Status Report, Team Development Plan, and Close-Out in accordance with Sections 3.2.2.2, 3.2.2.3. and 3.2.2.4.	N/A	\$5,000.00 per Team Coaching Assignment	\$5,000.00 per Team Coaching Assignment	One-half (1/2) upon acceptance of Team Development Plan One-half (1/2) upon acceptance of Team Service Project Plan

<b>Table C: Behavioral Assessments</b>		
	<b>Base Term Fee (years 1-3)</b>	<b>Renewal Term Fee (years 4-5)</b>
Myers-Briggs	\$550.00 per participant	\$550.00 per participant
DISC	\$550.00 per participant	\$550.00 per participant
FIRO-B	\$550.00 per participant	\$550.00 per participant
Hogan Derailer	\$550.00 per participant	\$550.00 per participant
Power of You	\$6,500.00 per participant	\$6,500.00 per participant

<b>Table D: Additional Services</b>		
	<b>Base Term Fee (years 1-3)</b>	<b>Renewal Term Fee (years 4-5)</b>
Ad Hoc Leader Coaching Services	\$350.00 per hour	\$350.00 per hour
Ad Hoc Team Coaching Services	\$350.00 per hour	\$350.00 per hour
Hourly rate for Team Development Session	\$625.00 per hour	\$625.00 per hour
Leadership Development	\$2,500.00 for ten (10)	\$2,500.00 for ten (10)



Seminars for four (4) hours	participants, additional participants \$100.00 each	participants, additional participants \$100.00 each
-----------------------------	---	---

- 8.4. Invoices. Vendor must submit all requests for compensation for Services or expenses, where permitted, in sufficient detail for a pre- or post-audit within thirty (30) calendar days of completion of Coaching. The compensation request must include a unique invoice number, be in US dollars, legible, page-numbered, signed, and dated. Vendor shall submit the original invoice to Citizens' Contract Manager as identified in Section 11.2. herein. All late payment inquiries must be submitted to the attention of Citizens' Accounts Payable department at [AccountsPayable@citizensfla.com](mailto:AccountsPayable@citizensfla.com) or Post Office Box 10749, Tallahassee, Florida 32302-2749 and must include, at a minimum, the following: (a) Agreement/task order number/purchase order number, if applicable; (b) Vendor's name, address, phone number (and remittance address, if different); (c) Vendor's Federal Employment Identification Number; (d) Citizens' Contract Manager's name; (e) invoice date; (f) Services period; (g) taxes listed separately, if applicable (see Section 8.9.); and, (h) itemized Services for which compensation is being sought.
- 8.5. Payment Processing. Citizens may require any other information from Vendor that Citizens deems necessary to verify any compensation request placed under this Agreement and Vendor agrees that it will provide such information as reasonably requested by Citizens. Payment shall be due net thirty (30) calendar days of Citizens' actual receipt of a complete and undisputed invoice. Where a submitted invoice is incomplete, such as not containing the information described in this Section, Citizens will return the incomplete invoice to Vendor for correction within thirty (30) calendar days of Citizens' actual receipt of such invoice. Where Citizens reasonably disputes any part of a complete invoice, such as the amount of the compensation request, Citizens shall pay any undisputed portion of the invoiced amount within (30) calendar days of Citizens' actual receipt of the complete invoice and will describe the basis for the disputed portion of the invoiced amount. Where Vendor disagrees with Citizens dispute of any invoice, the Parties shall seek to resolve the dispute in accordance with the Dispute Resolution Process further described in this Agreement. In no case shall Citizens be subject to late payment interest charges where Vendor has submitted an incomplete invoice or where Citizens has reasonably disputed an invoice. Where Vendor fails to submit an invoice within twelve (12) calendar months of the Services for which compensation is being requested, Vendor acknowledges and agrees that any payment due for such Services is forfeited by Vendor for its failure to timely submit an invoice.
- 8.6. Early Payment Discount. Citizens and Vendor agree to an early payment discount where payment is net ten (10) calendar days of Citizens' actual receipt of a complete and undisputed invoice. Citizens shall be entitled to reduce the invoiced amount by a two-percent (2%) early payment discount. The invoice will be marked "early payment discount" by Citizens' Contract Manager.
- 8.7. Travel-related Expenses. Citizens will not reimburse for travel-related expenses.
- 8.8. No Additional Charges. Except for the compensation described in the Compensation Schedule Citizens shall not be billed for or be obligated to pay to Vendor any charges, expenses, or other amounts for the Services or otherwise.
- 8.9. Offsets and Credits. Any amounts due from Vendor may be applied by Citizens against any amounts due to Vendor. Any such amounts that are not so applied shall be paid to Citizens by Vendor within thirty (30) calendar days following

Citizens' request.

- 8.10. Taxes. Citizens is a State of Florida, legislatively created, governmental entity which does not pay federal excise or state sales taxes on direct purchases of tangible personal property. Vendor represents and warrants that it is an independent contractor for purposes of federal, state, and local employment taxes. Vendor agrees that Citizens is not responsible to collect or withhold any federal, state, or local employment taxes, including personal property tax, income tax withholding, and social security contributions, for Vendor or Vendor Staff. Any and all taxes, interest or penalties, including personal property tax or any federal, state, or local withholding or employment taxes, imposed, assessed, or levied as a result of this Agreement shall be paid or withheld by Vendor or, if assessed against and paid by Citizens, shall be immediately reimbursed by Vendor upon demand by Citizens.

**9. Indemnification and Limitation of Liability.**

- 9.1. Indemnification. Vendor shall be fully liable for the actions of Vendor Staff and shall fully indemnify, defend, and hold harmless Citizens, and its officers, members of the Board of Governors, agents, employees, and policyholders (each, an "Indemnitee" and collectively, the "Indemnitees") from suits, actions, damages, liabilities, demands, claims, losses, expenses, fines, penalties, fees, and costs of every name and description (collectively, "Claims"), including reasonable attorneys' fees, costs, and expenses incidental thereto, which may be suffered by, accrued against, charged to, or recoverable from any Indemnitee, by reason of any Claim arising out of or relating to any act, error or omission, or misconduct of Vendor, its officers, directors, agents, employees, or contractors, including without limitation: (a) a violation of federal, state, local, international, or other laws or regulations; (b) bodily injury (including death) or damage to tangible personal or real property; (c) breaches of any representations made by Vendor under this Agreement; (d) any claim that any portion of the Services violates or infringes upon a trademark, copyright, patent, trade secret or intellectual property right; or, (e) Vendor's failure to timely forward a public records request to Citizens for handling.
- 9.1.1. Vendor's obligations of indemnification with respect to any Claim are contingent upon Citizens (or other Indemnitee) providing Vendor: (a) written notice of the Claim; (b) the opportunity to settle or defend against the Claim at Vendor's sole expense; and, (c) assistance in defending against or settling the Claim at Vendor's sole expense. Vendor shall not be liable for any cost, expense, or compromise incurred or made by an Indemnitee in any legal action without Vendor's prior written consent, which shall not be unreasonably withheld.
- 9.1.2. Notwithstanding anything in this Agreement to the contrary, Vendor shall not indemnify for that portion of a Claim proximately caused by: (a) a negligent act or omission of an Indemnitee; or, (b) an Indemnitee's misuse or modification of the Service or Work Product.
- 9.1.3. The obligations in this Section are separate and apart from, and in no way limit Citizens' rights under any insurance provided by Vendor pursuant to this Agreement or otherwise.
- 9.1.4. The provisions of this Section shall survive the termination of this Agreement.

- 9.2. Limitation of Liability. NOTWITHSTANDING ANY OTHER PROVISION OF THIS AGREEMENT TO THE CONTRARY, NEITHER PARTY SHALL BE LIABLE TO THE OTHER FOR ANY: (A) SPECULATIVE OR REMOTE DAMAGES, INCLUDING LOST PROFITS, ARISING OUT OF OR IN CONNECTION WITH A BREACH OF THIS AGREEMENT; OR, (B) ANY DAMAGES ARISING OUT OF OR IN CONNECTION WITH THIS AGREEMENT IN EXCESS OF \$250,000. THESE LIMITATIONS APPLY REGARDLESS OF WHETHER THE ACTION OR CLAIM IS BASED IN CONTRACT, EQUITY, TORT, OR OTHERWISE. THESE LIMITATIONS SHALL NOT APPLY TO: (A) ANY OBLIGATION OF INDEMNIFICATION SET FORTH IN THIS AGREEMENT; (B) ANY CLAIM OR DAMAGE CAUSED BY A PARTY'S GROSS NEGLIGENCE OR WILFUL MISCONDUCT; (C) ANY CLAIM OR DAMAGE TO THE EXTENT COVERED BY AN INSURANCE POLICY REQUIRED IN THIS AGREEMENT; OR, (D) ANY CLAIM OR DAMAGE CAUSED BY VENDOR'S BREACH OF ITS OBLIGATIONS OF CONFIDENTIALITY SET FORTH IN THIS AGREEMENT. NOTHING IN THIS SECTION OR IN THIS AGREEMENT SHALL BE CONSTRUED AS A WAIVER OF THE LIMIT ON CITIZENS' LIABILITY FOR TORT CLAIMS UNDER SECTION 768.28, FLORIDA STATUTES. THIS SECTION SHALL SURVIVE THE TERMINATION OF THIS AGREEMENT.

## 10. Insurance.

- 10.1. Vendor Insurance Requirements. During the term of this Agreement, Vendor will maintain at its sole expense the following insurance, purchased from an insurer licensed to transact business in the State of Florida:
- 10.1.1. Workers' Compensation which provides coverage for Vendor's employees and independent contractors' employees, regardless of the state of hire, in at least the minimum statutory limits required by the State of Florida, and Employers' Liability with limits of \$1 million per accident; provided, however, that such workers' compensation policy may exclude coverage for independent contractor employees who are covered by a workers' compensation policy that meets the requirements (including Employers' Liability coverage) set forth herein. The workers' compensation policy may also exclude coverage for Vendor's corporate officers or owners who have met all requirements for a coverage exemption in accordance with Florida law; and,
- 10.1.2. Commercial General Liability with minimum limits of \$1 million per occurrence (to include contractual liability for liability assumed hereunder) and \$2 million in the aggregate.
- 10.2. Insurance Company Qualifications. Each company issuing policies required under Section 10.1. must: (i) be licensed to transact business in the State of Florida; and, (ii) have an AM Best Financial Strength rating of "A-" or above.
- 10.3. Vendor's Insurance is Primary. The insurance required under Section 10.1. shall apply on a primary basis to, and shall not require contribution from, any other insurance or self-insurance maintained by Citizens, Citizens' Board Member, or any Citizens employee.
- 10.4. Citizens to be an Additional Insured. The Commercial General Liability policies in Section 10. shall include Citizens as an additional insured. For Commercial General Liability coverage, the policy must include ISO Form #CG 20 10 10 01 or a comparable company specific endorsement.

- 10.5. Waiver of Subrogation. The insurance required under Section 10.1 shall include a provision waiving the insurer's rights of recovery or subrogation against Citizens.
- 10.6. Coverage for Indemnity Obligations. The Commercial General Liability coverages shall cover claims made under the indemnity provisions of this Agreement.
- 10.7. Notice of Cancellation or Change. To the extent practicable, the Commercial General Liability policies shall require thirty (30) calendar days prior written notice to Citizens of cancellation, non-renewal or change in any coverage, except for ten (10) calendar days prior written notice for non-payment of premium.
- 10.8. Proof of Coverage. Within thirty (30) calendar days of execution of this Agreement, and upon renewal or reissuance of coverage thereafter, Vendor must provide current and properly completed in-force certificates of insurance to Citizens that evidence the coverages required in Sections 10.1.. The certificates for Commercial General Liability must correctly identify the type of work Vendor is providing to Citizens under this Agreement. The agent signing the certificate must hold an active Insurance General Lines Agent license (issued within the United States). Vendor shall provide copies of its policies upon request by Citizens.

**11. Contract Administration.**

- 11.1. Contract Administrator. Citizens shall name a Contract Administrator during the term of this Agreement whose responsibility shall be to maintain this Agreement. Except for written notices not otherwise specifically required to be delivered to the Citizens' Contract Manager (such as those relating to background checks, invoicing, data security requirements and subcontractors), all written notices shall be delivered to the Contract Administrator in addition to the Citizens Contract Manager named below. As of the Effective Date, the Contract Administrator is:

Lori Newman, Vendor Management Office  
301 W Bay Street, Suite 1300  
Jacksonville, Florida 32202  
904-407-0225  
[Lori.Newman@citizensfla.com](mailto:Lori.Newman@citizensfla.com)

Citizens shall provide written notice to Vendor of any changes to the Contract Administrator; such changes shall not be deemed Agreement amendments.

- 11.2. Contract Managers. Each Party will designate a Contract Manager during the term of this Agreement whose responsibility shall be to oversee the Party's performance of its duties and operational obligations pursuant to the terms of this Agreement. As of the Effective Date, Citizens' and Vendor's Contract Managers are as follows:

Citizens' Contract Manager  
Anna Goodin  
Citizens Property Insurance Corporation  
301 W Bay Street, Ste 1300  
Jacksonville, FL 32202  
904-407-0540  
[Anna.Goodin@Citizensfla.com](mailto:Anna.Goodin@Citizensfla.com)

Vendor's Contract Manager  
Jane Shannon  
My Executive Solutions Inc  
830 A1A N Ste 13 #106  
Ponte Vedra Beach, FL 32082  
904-705-9288  
[jane@myexecutivesolutions.com](mailto:jane@myexecutivesolutions.com)

Each Party shall provide prompt written notice to the other Party of any changes to their Contract Manager; such changes shall not be deemed Agreement amendments.

**12. Suspension of Services; Agreement Termination; Transition Assistance.**

- 12.1. Temporary Suspension of Services. Citizens may, in its sole discretion, temporarily suspend all or certain portions of the Services at any time by providing written notice to Vendor. Upon receiving a suspension notice, Vendor shall cease performing the Services in accordance with the suspension notice. Within ninety (90) calendar days after Citizens provides the suspension notice, or any longer period agreed to by Vendor, Citizens shall either: (a) issue a notice authorizing resumption of the Services, at which time the Services shall resume; or, (b) exercise its right under Section 12.2. to terminate this Agreement without cause. Nothing in this Section allows Citizens to withhold or delay any payment for Services satisfactorily performed prior to the suspension. However, Vendor shall not be entitled to any additional compensation for the suspension of Services.
- 12.2. Termination without Cause. By thirty (30) calendar days advance written notice, Citizens may terminate this Agreement in whole or in part, at its sole discretion and without the need to specify a reason for termination. The actual date of termination of this Agreement will be thirty (30) calendar days from the date of the written notice, or as otherwise specified in Citizens' written notice (the "Termination Date"). Where Citizens elects to terminate this Agreement in part, Vendor shall continue to provide Services on any portion of the Agreement not terminated. Vendor shall be entitled to payment for Services satisfactorily performed and accepted by Citizens through the Termination Date but shall not be entitled to recover any cancellation charges or damages, including lost profits or reliance damages. Vendor shall not have a reciprocal right to terminate without cause; it being understood that Citizens' payment for Services forms the consideration for Vendor not having this right. In the event of Citizens' termination without cause, Citizens, at Citizens' sole election, may also require Vendor to provide the Transition Assistance as further described in this Agreement.
- 12.3. Termination for Cause. Either Party may terminate this Agreement if the other Party fails to honor its material obligations under this Agreement. Unless otherwise provided herein, before terminating this Agreement, the Party that believes the other Party is failing to perform this Agreement shall notify the breaching Party, in writing, of the nature of the breach and provide a reasonable time certain to cure the breach. The cure period will generally be ten (10) calendar days from receipt of the notice, provided that a cure period is not required if a cure is not feasible as determined by the non-breaching Party or if the breaching Party has already been notified of the breach and given at least ten (10) calendar days to correct it. If the breaching Party does not cure the breach within the time provided by the non-breaching Party, and its breach is not legally excusable, the non-breaching Party

may thereafter notify the breaching Party, in writing, that it considers the breaching Party in default and may terminate this Agreement and pursue any remedies allowed in law or equity. Instead of terminating this Agreement in whole, Citizens may elect to terminate this Agreement in part, in which case Vendor shall continue to provide Services on any portion of the Agreement not terminated. If after termination it is determined that Vendor was not in default, or that the default was excusable, the rights and obligations of the Parties shall be the same as if the termination had been issued without cause under Section 12.2.

- 12.4. Scrutinized Companies; Termination by Citizens. In addition to any other termination rights of Citizens as provided for in this Agreement, Citizens may, at its sole election, terminate this Agreement if Vendor: (a) is found to have submitted a false certification as provided under Section 287.135(5), F.S.; (b) has been placed on the "Scrutinized Companies with Activities in Sudan List;" (c) has been placed on the "Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List;" (d) has been placed on the "Scrutinized Companies that Boycott Israel List;" (e) has been engaged in business operations in Cuba or Syria; or, (f) is engaged in a boycott of Israel.

### 13. Disputes.

- 13.1. Dispute Resolution Process. Each Party will make a good faith effort to resolve any disputes relating to this Agreement prior to commencing a legal action. These efforts may include an offer to arrange for executive-level discussions or an offer to submit the dispute to non-binding mediation. This Section shall not apply if (i) a Party considers the immediate commencement of a legal action for an injunction necessary to protect its interests (e.g., to protect against the improper use or disclosure of its confidential information); or, (ii) the dispute is subject to another provision in this Agreement that includes a different dispute resolution process. For the sake of clarity, Citizens is not subject to the dispute resolution processes set forth in The Florida Administrative Procedure Act, Chapter 120, Florida Statutes.
- 13.2. Jurisdiction and Venue; Waiver of Jury Trial. This Agreement shall be deemed to have been made in the State of Florida and shall be subject to, and governed by, the laws of the State of Florida, and no doctrine of choice of law shall be used to apply any law other than that of the State of Florida. Each Party hereby irrevocably consents and submits to the exclusive jurisdiction of the Circuit Court of Leon County, Florida, for all purposes under this Agreement, and waives any defense to the assertion of such jurisdiction based on inconvenient forum or lack of personal jurisdiction. The Parties also agree to waive any right to jury trial.
- 13.3. The provisions of this Section shall survive the termination of this Agreement.

### 14. Records; Audits; Public Records Laws.

- 14.1. Record Retention. Vendor shall retain all records relating to this Agreement for the longer of: (a) five (5) years after the termination of this Agreement; or, (b) the period specified by Citizens as necessary to comply with Florida law.
- 14.2. Right to Audit and Inquire. Citizens shall have reasonable access to Vendor's facilities and has the right to review and audit any of Vendor's records relating solely to this Agreement, upon written notice to Vendor of at least three (3) business days. Vendor also agrees to reasonably cooperate with any independent inquiries made by Citizens' Office of Internal Audit and Office of the Inspector

General. Vendor shall cooperate with the requestor and provide requested documentation in a timely manner (preferably within five (5) business days). Vendor must resolve any deficiencies discovered during an audit within ninety (90) calendar days from being reported. Citizens may extend the response time period in its sole discretion. Citizens has the right to conduct follow-up audits to assess Vendor's corrective action(s). Any entity performing auditing services on behalf of Citizens pursuant to this Section shall execute a non-disclosure agreement with regard to Vendor's proprietary information, unless precluded from doing so by law. Vendor shall not unreasonably delay or inhibit Citizens' right to audit as set forth in this Section. Vendor agrees to reimburse Citizens for the reasonable costs of investigation incurred by Citizens for investigations of Vendor's compliance with this Agreement which result in termination for cause or in regulatory or criminal penalties in connection with performance of this Agreement. Such costs shall include but shall not be limited to: salaries of investigators, including overtime; travel and lodging expenses; expert witness fees; and, documentary fees.

14.3. Public Records Laws. Vendor acknowledges that Citizens is subject to Florida public records laws, including Chapter 119, Florida Statutes, (collectively, "Florida's Public Records Laws"). Therefore, any information provided to Citizens or maintained by Vendor in connection with this Agreement may be subject to disclosure to third parties.

14.3.1. Protection of Vendor's Confidential Information. Section 627.351(6)(x)1.e., Florida Statutes, provides that proprietary information licensed to Citizens under a contract providing for the confidentiality of such information is confidential and exempt from the disclosure requirements of Florida's Public Records Law. Other Florida Statutes allow for various protection of vendor's trade secrets and financial information. In order to protect any information provided to Citizens that Vendor considers to be protected from disclosure under Florida law ("Vendors Confidential Information"), Vendor should clearly label and mark each page or section containing such information as "Confidential", "Trade Secret" or other similar designation.

14.3.2. Responding to Request for Vendor Confidential Information. If Citizens receives a Public Records Request ("PRR") or a request from any regulatory or legislative entity regarding Vendor's Confidential Information, it shall promptly notify Vendor in writing. To the extent permitted by law, Citizens shall not produce Vendor's Confidential Information unless authorized by Vendor, or by order of a court of competent jurisdiction. In the event a legal proceeding is brought to compel the production of Vendor's Confidential Information, the Parties agree that Citizens is authorized to deliver Vendor's Confidential Information to the court or other legal tribunal for disposition. If Vendor continues to assert in good faith that Vendor's Confidential Information is confidential or exempt from disclosure or production pursuant to Florida's Public Records Laws then Vendor shall be solely responsible for defending its position, or seeking a judicial declaration. Nothing in this Agreement shall create an obligation or duty for Citizens to defend or justify Vendor's position. Vendor also agrees to reimburse Citizens for any attorneys' fees, costs, and expenses incurred by Citizens or awarded against Citizens in any legal proceeding in which the issue is a third party's challenge to Vendor's assertion of an exemption under Florida's Public Records Laws.



- 14.3.3. Vendor's Duty to Forward Records Requests to Citizens. If Vendor receives a PRR that is in any way related to this Agreement, Vendor agrees to immediately notify Citizens' Records Custodian and forward the PRR to Citizens' Records Custodian for logging and processing. Citizens' Records Custodian's email address is: [Recordsrequest@citizensfla.com](mailto:Recordsrequest@citizensfla.com). Citizens shall be the Party responsible for coordinating the response and production to the PRR. Vendor shall communicate with Citizens to determine whether requested information is confidential and/or exempt from public records disclosure requirements. Vendor agrees to assist Citizens in responding to any PRR in a prompt and timely manner as required by Florida's Public Records Laws.
- 14.3.4. Additional Duties. To the extent Vendor is "acting on behalf of" Citizens as provided under Section 119.011(2), Florida Statutes, Vendor must: (a) keep and maintain public records required by Citizens to perform the Services; (b) upon request of Citizens' Records Custodian, provide Citizens with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes, or as otherwise provided by law; (c) ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law, for the duration of the term of this Agreement and following the completion of this Agreement if Vendor does not transfer the records to Citizens; and, (d) upon completion of this Agreement, transfer at no cost to Citizens all public records in possession of Vendor or, alternatively, Vendor may keep and maintain all records required by Citizens to perform the Services. If Vendor transfers all public records to Citizens upon completion of this Agreement, Vendor shall destroy any duplicate public records that are exempt, or confidential and exempt from public records disclosure. If Vendor keeps and maintains public records upon completion of this Agreement, Vendor shall meet all applicable requirements for retaining public records. All public records stored electronically must be provided to Citizens, upon request by Citizens' Records Custodian, in a format that is compatible with the information technology systems of Citizens.

**IF VENDOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO VENDOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, PLEASE CONTACT CITIZENS' RECORDS CUSTODIAN AT (i) (850) 521-8302; (ii) [RECORDSREQUEST@CITIZENSFLA.COM](mailto:RECORDSREQUEST@CITIZENSFLA.COM); OR, (iii) RECORDS CUSTODIAN, CITIZENS PROPERTY INSURANCE CORPORATION, 2101 MARYLAND CIRCLE, TALLAHASSEE, FL 32303.**

- 14.4. Vendor's Failure to Respond to Public Records Request. Vendor must comply with Citizens' request for records, including all documents, papers, letters, emails, or other materials in conjunction with this Agreement, within thirty (30) calendar days of Citizens' request. Vendor's failure to comply with Citizens request may be



subject to penalties in accordance with Chapter 119.10, Florida Statutes. Vendor will hold Citizens harmless from any actions resulting from Vendor's non-compliance with Florida's Public Records Laws. Without limiting Citizens' other rights of termination as further described in this Agreement, Citizens may unilaterally terminate this Agreement for refusal by Vendor to comply with this Section unless the records are exempt from Section 24(a) of Article I of the State Constitution and Section 119.07(1), Florida Statutes.

14.5. The provisions of this Section shall survive the termination of this Agreement.

## **15. Security and Confidentiality.**

- 15.1. General Requirements. Vendor shall implement and maintain appropriate safeguards to: (a) ensure the security and confidentiality of Citizens Confidential Information as defined by Citizens; (b) protect against any anticipated threats or hazards to the security or integrity of Citizens Confidential Information; and, (c) protect against unauthorized access to or use of Citizens Confidential Information that could cause harm or inconvenience to Citizens or any customer of Citizens.
- 15.2. Implementation of NIST 800-53 Controls. Except as permitted in writing by Citizens' Contract Manager or designee, Vendor agrees to implement the privacy and security controls that follow the guidelines set forth in NIST Special Publication 800-53, "Security and Privacy Controls for Federal Information Systems and Organizations," as amended from time to time.
- 15.3. Data Encryption. Vendor and Vendor Staff will encrypt all electronic data and communications containing Citizens Confidential Information at rest and in transit using a strong cryptographic protocol that is consistent with industry standards.
- 15.4. Data Storage. Except as permitted in writing by Citizens' Contract Manager or designee, Vendor and Vendor Staff shall not store Citizens Confidential Information on portable external storage devices or media (such as "thumb drives," compact disks, or portable disk drives).
- 15.5. Data Export. 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.
- 15.6. Security of Vendor Facilities. All Vendor and Vendor Staff facilities in which Citizens Confidential Information is located or housed shall be maintained in a reasonably secure manner. Within such facilities, all printed materials containing Citizens Confidential Information should be kept locked in a secure office, file cabinet, or desk (except when materials are being used).
- 15.7. Labeling of Confidential Information. Any documents or electronic files created by Vendor or Vendor Staff that contain Citizens Confidential Information must be conspicuously labeled or marked so that the individual viewing or receiving the information understands that the information is confidential.
- 15.8. Photocopying and Faxing Restrictions. Vendor and Vendor Staff shall not make photocopies or send facsimiles of Citizens Confidential Information unless there is a business need.
- 15.9. Transmission of Confidential Information Materials. In the event it is necessary to transport materials containing Citizens Confidential Information via mail, parcel delivery service or other means, Vendor Staff must subsequently verify that such

materials have been received by the intended parties.

- 15.10. Disposal of Confidential Information. The disposal of all printed materials containing Citizens Confidential Information must be done in a manner that renders the information inaccessible to others (the use of a reputable third-party shredding company is permissible).
- 15.11. Authority to Disclose Confidential Information to Others. Vendor acknowledges and agrees that any Citizens Confidential Information disclosed to or acquired by Vendor is disclosed and/or acquired solely for the purposes of facilitating the provision of the Services. Vendor shall restrict access to Citizens Confidential Information to Vendor Staff who will actually perform Services and Vendor shall provide such Vendor Staff with work environments that protect against inadvertent disclosure to others. Vendor shall be solely responsible for informing any individual or entity with access to Citizens Confidential Information of the provisions of this Agreement and shall be responsible for any acts of those individuals and entities that violate such provisions.
- 15.12. Unauthorized Disclosure of Confidential Information. Vendor will notify Citizens Contract Administrator as soon as possible of any potential or actual unauthorized disclosure, misuse, or misappropriation of Citizens Confidential Information of which it becomes aware and will cooperate in remedying such situation promptly. Pursuant to Section 501.171, Florida Statutes, if Vendor maintains computerized data that includes personal information, as defined in such statute, on behalf of Citizens, Vendor shall disclose to Citizens any breach of the security of the system as soon as practicable, but no later than ten (10) calendar days following the determination of the breach of security or reason to believe the breach occurred.
- 15.13. Return of Confidential Information. During the term of this Agreement, upon Citizens written request or upon the termination of this Agreement for any reason, Vendor shall promptly return to Citizens all copies, whether in written, electronic or other form or media, of Citizens Confidential Information in its possession, or securely dispose of all such copies, and certify in writing to Citizens that Citizens Confidential Information has been returned to Citizens or disposed of securely.
- 15.14. Notification of Anticipatory Breach. Vendor agrees that should it, for any reason, not be able to provide or maintain appropriate safeguards to fulfill its obligations under this Section, it will immediately notify Citizens Contract Administrator in writing of such inability and such inability on Vendor's part will serve as justification for Citizens' termination of this Agreement, at Citizens' sole election, at any time after the inability becomes known to Citizens.
- 15.15. Remedies. Vendor acknowledges that breach of Vendor's obligation of data security and confidentiality may give rise to irreparable injury to Citizens and Citizens' customers, which damage may be inadequately compensable in the form of monetary damages. Accordingly, Citizens may seek and obtain injunctive relief against the breach or threatened breach of the provisions of this Section, in addition to any other legal remedies which may be available, including, at the sole election of Citizens, the immediate termination, without penalty to Citizens, of this Agreement in whole or in part.
- 15.16. Subcontractors. Except as permitted in writing by Citizens' Contract Manager, the provisions of this Section shall apply to each of Vendor's subcontractors at any level who obtain access to Citizens Confidential Information in connection with this Agreement.

15.17. The provisions of this Section shall survive the termination of this Agreement.

**16. Miscellaneous.**

- 16.1. Relationship of the Parties. Vendor is an independent contractor with no authority to contract for Citizens or in any way to bind or to commit Citizens to any agreement of any kind or to assume any liabilities of any nature in the name of or on behalf of Citizens. Under no circumstances shall Vendor or Vendor Staff hold itself out as or be considered an agent, employee, joint venturer, or partner of Citizens. In recognition of Vendor's status as an independent contractor, Citizens shall carry no Workers' Compensation insurance or any health or accident insurance to cover Vendor or Vendor Staff. Citizens shall not pay any contributions to Social Security, unemployment insurance, federal or state withholding taxes, any other applicable taxes whether federal, state, or local, nor provide any other contributions or benefits which might be expected in an employer-employee relationship. Neither Vendor nor Vendor Staff shall be eligible for, participate in, or accrue any direct or indirect benefit under any other compensation, benefit, or retirement plan of Citizens.
- 16.2. Vendor Conflicts of Interests. Vendor, and all principals in its business, must execute a Conflict of Interest Form as required by Citizens. Vendor shall not have a relationship with a Citizens officer or employee that creates a conflict of interest. If there is the appearance of a conflict of interest, Vendor will promptly contact Citizens' Contract Manager to obtain a written decision as to whether action needs to be taken to ensure a conflict does not exist or that the appearance of a conflict is not significant.
- 16.3. No Gifts. Vendor shall not give a gift or make an expenditure to or for the personal benefit of a Citizens officer or employee.
- 16.4. Convicted Vendor List. Vendor shall immediately notify Citizens' Contract Manager in writing if it or any of its affiliates are placed on the convicted vendor list maintained by the State of Florida pursuant to Section 287.133, Florida Statutes, or on any similar list maintained by any other state or the federal government.
- 16.5. Compliance with Laws. Vendor and Vendor Staff will comply with all applicable laws, ordinances, rules, and regulations governing Vendor's performance under this Agreement. This includes: (a) registration and annual renewal of authority to transact business in the State of Florida (via [www.sunbiz.org](http://www.sunbiz.org)) or Vendor's annual written attestation that such authorization is not required; and, (b) maintaining all other necessary permits or licenses from federal, state, and local regulatory/licensing authorities.
- 16.6. Subcontracting. Vendor shall not enter into any subcontracts for the performance of the Services or assign or transfer any of its rights or obligations under this Agreement, without Citizens' prior written consent and any attempt to do so shall be void and without effect. Citizens' consent to Vendor's request to subcontract any of the Services shall not relieve Vendor of any of its duties or obligations under this Agreement, and Vendor shall indemnify and hold Citizens harmless from any payment required to be paid to any such subcontractors.
- 16.7. Severability. If a court deems any provision of this Agreement void or unenforceable, that provision shall be enforced only to the extent that it is not in violation of law or is not otherwise unenforceable and all other provisions shall remain in full force and effect.

- 16.8. Headings. The sections and headings herein contained are for the purposes of identification only and shall not be considered as controlling in construing this Agreement.
- 16.9. Publicity; Use of Names and Logos. Vendor may use Citizens' name and logo in its marketing materials, website and social media to indicate that it is a participating or contracted vendor for Citizens. However, Vendor may not in any way state, imply or infer that it holds a "preferred," "approved," "awarded," "selected" or otherwise special status with Citizens in any such materials. This prohibition includes, but is not limited to, the use of endorsements or quotes from Citizens officials, Citizens vendor scores, or any other Citizens-related materials that may directly or indirectly imply that Vendor enjoys a special or preferred status with Citizens. Citizens reserves the right to determine that its name and/or logo have been misused and to request that Vendor cease using its name and/or logo in any way it deems inappropriate. Failure to comply will result in corrective action, up to and including contract termination. Vendor may only use the approved Citizens logo, which may be obtained by sending a request via email to: [newsroom@citizensfla.com](mailto:newsroom@citizensfla.com).
- 16.10. Waiver. The delay or failure by a Party to exercise or enforce any of its rights under this Agreement shall not constitute or be deemed a waiver of the Party's right thereafter to enforce those rights, nor shall any single or partial exercise of any such right preclude any other or further exercise thereof or the exercise of any other right.
- 16.11. Agreement Disclosure Acknowledgement Addendum ("Addendum"). Vendor agrees that the Addendum attached hereto is hereby incorporated into this Agreement in order to address the public posting of this Agreement and its disclosure to third parties.
- 16.12. Entire Agreement. This Agreement, and any exhibits, schedules and attachments hereto, set forth the entire agreement and understanding of the Parties with respect to the subject matter hereof, and supersedes any prior or contemporaneous proposals, agreements or understandings with respect to the subject matter hereof.
- 16.13. Modification of Terms. Except as otherwise provided for herein, this Agreement may only be modified or amended upon a mutual written contract amendment signed by Citizens and Vendor or as otherwise permitted by this Agreement. Vendor may not unilaterally modify the terms of this Agreement in any manner such as by affixing additional terms to any Deliverable (e.g., attachment or inclusion of standard preprinted forms, product literature, "shrink wrap" or "click through" terms, whether written or electronic) or by incorporating such terms onto Vendor's order or fiscal forms or other documents forwarded by Vendor for payment and any such terms shall have no force or effect upon Citizens or this Agreement. Citizens' acceptance of any Service or processing of documentation on forms furnished by Vendor for approval or payment shall not constitute acceptance of any proposed modification to terms and conditions or any conflicting terms and conditions.
- 16.14. Assignments. This Agreement shall inure to the benefit of, and be binding upon, the successors and assigns of each Party, but only as permitted under this Agreement. Each Party binds itself and its respective successors and assigns in all respects to all of the terms, conditions, covenants and provisions of this Agreement. Vendor shall not sell, assign or transfer any of its rights (including rights to payment), duties or obligations under this Agreement without the prior

written consent of Citizens. In the event of any assignment, Vendor shall remain liable for performance of this Agreement unless Citizens expressly waives such liability. Citizens may assign this Agreement with prior written notice to Vendor of its intent to do so. Nothing herein shall be construed as creating any personal liability on the part of any officer, employee or agent of Citizens.

- 16.15. Notice and Approval of Changes in Ownership. Because the award of this Agreement may have been predicated upon Vendor's ownership structure, Vendor agrees that any transfer of a substantial interest in Vendor by any of its owners shall require Citizens' prior written approval, which approval shall not be unreasonably withheld or unreasonably delayed. By execution of this Agreement, Vendor represents that it has no knowledge of any intent to transfer a substantial interest in Vendor. A substantial interest shall mean at least twenty-five percent (25%) of the voting shares or control over Vendor. This Section shall not apply to: (a) transfers occurring upon the incapacitation or death of an owner; (b) transfers associated with an initial public offering on a major stock exchange; or, (c) transfers to a company whose stock is publicly traded on a major stock exchange.
- 16.16. Assignment of Antitrust Claims. Vendor and Citizens recognize that in actual economic practice, overcharges resulting from antitrust violations are usually borne by the ultimate consumer. Therefore, Vendor hereby assigns to Citizens any and all claims under the antitrust laws of Florida or the United States for overcharges incurred in connection with this Agreement.
- 16.17. Force Majeure. Neither Party shall be responsible for delays or disruptions in performance if the cause of the delay or disruption was beyond that Party's reasonable control (or the reasonable control of its employees, subcontractors, or agents) to the extent not occasioned by the fault or negligence of the delayed or disrupted party. In no case shall Vendor's labor matters, such as strikes or availability of subcontractors, if any, be considered a force majeure event. Further, this Section may not be invoked to excuse or delay Vendor's compliance with its obligations to protect Citizens Confidential Information. To be excused from delays or disruptions hereunder, Vendor must promptly notify Citizens in writing of the delay or disruption. If the delay or disruption is justified, as solely determined by Citizen, Citizens will give Vendor a reasonable extension of time to perform; provided, however, that Citizens may elect to terminate this Agreement in whole or in part if Citizens determines, in its sole judgment, that such a delay or disruption will significantly impair the value of this Agreement to Citizens. **THE FOREGOING EXTENSION OF TIME SHALL BE VENDOR'S SOLE REMEDY WITH RESPECT TO FORCE MAJEURE EVENTS.** Vendor shall not be entitled to any increase in price or payment of any kind from Citizens for direct, indirect, consequential, or other costs or damages arising because of such delays or disruptions.
- Because of the nature of Citizens' business, Citizens requires that Vendor take every reasonable measure to avoid or minimize any delay or disruption under this Section, including the timely activation of Vendor's business continuity and disaster recovery plans. Where Vendor fails to undertake such efforts, the delay or disruption shall be included in the determination of any service level achievement.
- If a force majeure event results in a partial reduction in Vendor's capacity to serve its clients, Vendor agrees that Citizens will receive the same or better priority as Vendor's other clients with respect to the allocation of Vendor's resources.
- 16.18. Execution in Counterparts. This Agreement may be executed in counterparts, each of which shall be deemed an original, and all of which together shall constitute but

one and the same Agreement. The Parties agree that a faxed or scanned signature may substitute for and have the same legal effect as the original signature.

***[Signature Page Follows]***

**IN WITNESS WHEREOF**, this Agreement has been duly executed by authorized representatives of the Parties.

**CITIZENS PROPERTY INSURANCE  
CORPORATION**

**MY EXECUTIVE SOLUTIONS INC**

DocuSigned by:  
Violet Bloom  
F390B38167024A0



Signature

Signature

violet bloom



Print Name

Print Name

CHRO



Title

Title

4/1/2021



Date Signed

Date Signed



**ADDENDUM 1**  
**AGREEMENT DISCLOSURE ADDENDUM (“ADDENDUM”)**

Company Name (“Vendor”): My Executive Solutions Inc
Agreement Name/Number (“Agreement”): Leadership Coaching and Team Development 21-20-0013-02
Primary Vendor Contact Name: Jane Shannon
Telephone: 904-705-9288
Email: <a href="mailto:Jane@myexecutivesolutions.com">Jane@myexecutivesolutions.com</a>

Citizens is subject to Florida public records laws, including Chapter 119, Florida Statutes. As a part of providing public access to Citizens’ records, Citizens makes its contracts available on Citizens’ external website located at [www.citizensfla.com/contracts](http://www.citizensfla.com/contracts). This Addendum is incorporated into the Agreement in order to address Citizens’ public posting of the Agreement and its disclosure to third parties.

If Vendor asserts that any portion of the Agreement is exempt from disclosure under Florida public records laws, (the “Redacted Information”), such as information that Vendor considers a protected “trade secret” per Section 815.045, Florida Statutes, then Vendor must select the corresponding declaration below and provide the following to [Vendor.ManagementOffice@citizensfla.com](mailto:Vendor.ManagementOffice@citizensfla.com):

- (1) **A copy of the Agreement in PDF format with the Redacted Information removed (the “Redacted Agreement”); and,**
- (2) **A dated statement on Vendor’s letterhead in PDF format clearly identifying the legal basis for Vendor’s redaction of the Redacted Information (the “Redaction Justification”).**

If Vendor does not select one of the two declarations below, or if Vendor fails to provide the Redacted Agreement and Redaction Justification within thirty (30) days of Vendor’s receipt of the fully executed Agreement, then without further notice to Vendor, Citizens may post the non-redacted version of the Agreement on its public website and may release it to any member of the public.

<u>Vendor Declaration:</u>
<input checked="" type="checkbox"/> Vendor <b>WILL NOT SUBMIT</b> a Redacted Agreement. Citizens may post Vendor’s full, complete, and non-redacted Agreement on its public website, and may release the Agreement to any member of the public without notice to Vendor.
<p><b>Or</b></p> <input type="checkbox"/> Vendor asserts that a portion of the Agreement is confidential and/or exempt under Florida Public Records law. Therefore, Vendor <b>WILL SUBMIT</b> a Redacted Agreement and a Redaction Justification within thirty (30) days of receipt of the fully executed Agreement. Citizens may post Vendor’s Redacted Agreement on its public website, or release it to any member of the public, without notice to Vendor. If Citizens receives a public records request for the Agreement, Citizens will provide only the Redacted Agreement and Redacted Justification to the requestor. Vendor acknowledges that, in the event of any legal challenge regarding these redactions, Vendor will be solely responsible for defending its position or seeking a judicial declaration.