



Vendor Management and Purchasing

SOLICITATION STATUS REPORT

December 2023

TABLE OF CONTENTS

ITN 23-0001 Adjusting Services for Catastrophe and Non-Catastrophe Claims	3
ITN 23-0012 Claims Quality Assurance Software.....	5
ITN 23-0013 Template Management System.....	6
RFP 23-0019 Mobile Home Demolition Services.....	7
ITN 24-0001 Property Loss Estimating Software.....	8

Adjusting Services for Catastrophe and Non-Catastrophe Claims

ITN 23-0001

ACTIVE

Executive Sponsor: Jay Adams, Chief - Claims

Summary: Citizens currently utilizes a variety of contracts for independent adjusting services to manage catastrophe and non-catastrophe claims for both commercial and residential policies. Under this solicitation a single panel of vendors will be selected to provide comprehensive adjusting services to streamline the various workflows currently used for different claim types, as well as fee schedules, vendors, and contracts. The existing contracts for Fast Track Adjusting Services, Field Inspection Services, Independent Adjusting Services - Non-Litigated, Independent Adjusting Services - Catastrophe, and Commercial Adjusting Services will be replaced. Consolidating these services under one solicitation is intended to result in contracts that provide for scalable, configurable, and consistent workflows suited to the nature of the individual claims.

Upon initial evaluation the top 36 responses were advanced to negotiations. The Negotiators are focusing on establishing a uniform workflow, potential system changes, contract, service levels, and pricing.

Key Events		
No Contact Period	Solicitation Release	02.21.2023
	Responses Due	04.06.2023
	Public Meeting (Initial Evaluation)	08.08.2023
	Public Meeting (Intent to Award)	02.13.2024
	No Contact Period Ends	02.16.2024
	Claims Committee	03.28.2024
	Board Action Item	04.10.2024

Evaluators	
•	Craig Sakraida, Vice President - Claims
•	Greg Rowe, Senior Director - Claims Vendor & System Management
•	Adam Karns, Senior Director - Non Litigated Disputes
•	Keith George, Director - Claims
•	Sean McClung, Director - Claims

Negotiators	
•	Adam Karns, Senior Director - Non Litigated Disputes
•	Greg Rowe, Senior Director - Claims Vendor & System Management
•	Benjamin Ross, Director - Claims
•	Jessica Chapman, Assistant Director - Purchasing

Vendor Outreach

- Vendor Notifications: 3,813
- Targeted Vendors: 31
- Targeted Touchpoints: 129

Initial Evaluation

- *Please see the following page for a complete list of responding vendors.*

Adjusting Services for Catastrophe and Non-Catastrophe Claims

ITN 23-0001

ACTIVE

Initial Evaluation

1. Pilot Catastrophe Services, Inc.*
 2. Cor Partners dba Eberl Claims Services LLC*
 3. Crawford & Company*
 4. CEFCO National Claims Services Inc dba CNC* Catastrophe & National Claims*
 5. Alacrity Parent, LLC dba Alacrity Solutions Group, LLC*
 6. Cross Country Adjusting Inc.*
 7. Pacesetter Claims Service, Inc.*
 8. Allcat Claims Service, LLC*
 9. Wardlaw Claims Service, LLC*
 10. Global Risk Solutions, Inc.*
 11. FKS Insurance Services LLC*
 12. Quality Assurance Adjusting Services, LLC*
 13. Burton Claim Service, Inc.*
 14. Allied American Adjusting Company LLC*
 15. E.A. Refroe & Company, Inc.*
 16. Accelerated Adjusting LLC*
 17. Brent Ellis dba Legacy Claim Services, LLC
 18. Bradley Stinson & Associates, Inc. dba BSA Claims Solutions*
 19. TSI Adjusters, Inc.*
 20. Lozano Insurance Adjusters, Inc.*
 21. Genpact*
 22. Barrett Claims Management, Inc.*
 23. Evans Claims Services, Inc dba EIG Claims Services, Inc.*
 24. Administrative Strategies, LLC*
 25. Seibels Claims Solutions, Inc.*
 26. RYZE Claim Solutions, LLC*
 27. G&G Insurance Adjusters, Inc.*
 28. Inspection Depot, Inc.*
 29. Leading Edge Claims Service, LLC dba Leading Edge Claims Service*
 30. S&S Claims Services, Inc.*
 31. Jimmie Giles Financial LLC*
 32. Acorn Claims LLC*
 33. Compass Adjusting Services Inc.*
 34. Mid-America Catastrophe Service, LLC*
 35. Alternative Claims Services, Inc.*
 36. Catastrophe Response Unit USA, Inc CRU Group*
 37. Legion Claims Solutions LLC
 38. J&D Claim Services, Inc.
 39. Custard Insurance Adjusters, Inc (CIA)
 40. Struction Solutions LLC
 41. WCC, Inc.
 42. CAT Claims Unlimited, Inc.
 43. Claims Questions LLC dba ROL Insurance Consulting
 44. Provencher & Company, LLC
 45. MD Claims Group, LLC
 46. Ampion Group, LLC
 47. Claim Consultant Group, LLC
 48. Aspen Claims Service, Inc.
 49. Bees360, Inc.
 50. Field Pros Direct, LLC
 51. Evolv Claim Solutions LLC
 52. Claims Adjuster Team LLC
 53. Sentry Claims Group, LLC
 54. Mills Mehr & Associates, Inc.
 55. Linetta Bell dba DB Marlin Adjusting Solutions, LLC
 56. John Croom dba Foothill Claims Service
 57. LAD (Aviation) Inc. dba Charles Taylor Adjusting
 58. Zengler & Associates, Inc.
 59. DDA Claims Management, LLC dba DDA Claims Management
 60. Vector, LLC dba Vector Risk Solutions, LLC
 61. TheBest Claims Solutions
 62. Richard J.L. Larson dba Larson Claim Services, LLC
 63. Claims Adjustment Group Incorporated
 64. Xceedance dba Xceedance Claims and Management Services LLC
 65. B&H Claims Service, Inc.
 66. Modern Claims Solutions, LLC
 67. Aadvanced Claims Concepts, Inc. dba Advanced Claims Concepts, Inc.
 68. Millennium Claims Services LLC
 69. Blackswan QA Corp
- *The top 36 were moved forward to negotiation.**

Claims Quality Assurance Software

ITN 23-0012

ACTIVE

Executive Sponsor: Jay Adams, Chief - Claims

Summary: Citizens currently uses third party vendor software to assist in completing claims audit and quality assurance processes. This solicitation will replace the expiring contract. The solicitation will also evaluate the potential use of artificial intelligence as an additional tool, to provide real-time adjusting behaviors or to identify potential issues from audits.

Upon initial evaluation the top four responses were advanced to negotiations. The Negotiators are focusing on potential system changes, contract, implementation, and pricing.

Key Events		
No Contact Period	Solicitation Release	07.10.2023
	Responses Due	08.11.2023
	Public Meeting (Initial Evaluation)	09.12.2023
	Public Meeting (Intent to Award)	01.16.2024
	No Contact Period Ends	01.19.2024
	Claims Committee	03.28.2024
	Board Action Item	04.10.2024

Initial Evaluation
1. Inpoint Inc.
2. EXL Service Holdings Inc.
3. 4AISoft LLC dba Klear.ai
4. CoreLogic, Inc. (Next Gear Solutions, LLC)
5. J. Lodge, LLC
6. Coforge BPS America, Inc.
7. Origami Risk LLC

Negotiators
• Michael Carver, Director - Claims
• Lisa Walker, Director - Claims
• Debra Taylor, Director - Assistant General Counsel Claims Legal
• Anthony Panichelli, Assistant Director - Claims

Vendor Outreach
• Vendor Notifications: 1,642
• Targeted Vendors: 66
• Targeted Touchpoints: 192

Evaluators
• Michael Carver, Director - Claims
• Cherie Hamilton, Director - Claims Vendor & System Management
• Michelle Stark, Director - Quality Improvement
• Anthony Panichelli, Assistant Director - Claims

Template Management System

ITN 23-0013

ACTIVE

Executive Sponsor: Christine Ashburn, Chief - Communications, Legislative & External Affairs

Summary: Citizens uses a variety of communication channels and messaging to interact with key internal and external stakeholders. To ensure that communications are developed consistently and efficiently, and with approved branding and messaging, this solicitation will provide for centralized oversight through a managed templates library.

Upon initial evaluation both responses were advanced to negotiations. The Negotiators are currently focusing on conducting vendor demonstrations and overall negotiation strategy.

Key Events			Initial Evaluation	
No Contact Period	Solicitation Release	09.12.2023	1. Empower	
	Responses Due	10.25.2023	2. Templafy	
	Public Meeting (Initial Evaluation)	12.12.2023		
	Public Meeting (Intent to Award)	01.30.2024		
	No Contact Period Ends	02.02.2024		
	Board Action Item	04.10.2024		

Negotiators	
<ul style="list-style-type: none">• Alden Mullins, Director - Communications & Strategic Services• Jennifer Haveard, Manager - Product Owner• Jessica Chapman, Assistant Director - Purchasing	

Vendor Outreach

- Vendor Notifications: 1,790
- Targeted Vendors: 13
- Targeted Touchpoints: 40

Evaluators

- Alden Mullins, Director - Communications & Strategic Services
- Jennifer Haveard, Manager - Product Owner
- Pete Knowlton, Manager - Digital Communications
- Kamal Yuvaraj, Manager - Enterprise Architecture
- Scott Brown, Systems Engineer - Senior

Mobile Home Demolition Services

RFP 23-0019

ACTIVE

Executive Sponsor: Jay Adams, Chief - Claims

Summary: Citizens utilizes a network of vendors to provide mobile home demolition services for policyholders who have sustained total losses to an insured mobile home. As required by law, these services must be provided by the insurer and include the demolition, removal, and disposal of mobile homes, including attached fixtures. This solicitation will replace the expiring contracts.

Key Events			Vendor Outreach	
No Contact Period	Solicitation Release	12.04.2023	• Vendor Notifications: 1,304	
	Responses Due	01.31.2024	• Targeted Vendors: 10 (<i>ongoing</i>)	
	Public Meeting (Intent to Award)	03.26.2024	• Targeted Touchpoints: 60 (<i>ongoing</i>)	
	No Contact Period Ends	03.29.2024		
	Claims Committee	TBD		
	Board Action Item	07.17.2024		

Property Loss Estimating Software

ITN 24-0001

DRAFT

Executive Sponsor: Jay Adams, Chief - Claims

Summary: Citizens uses property loss estimating software to enable adjusters to gather information regarding a loss, and apply accurate cost estimation for repair, replacement, or restoration of the damages using industry standard pricing. This tool is a critical dependency to the ongoing and accurate estimation of Citizens daily and catastrophe claims adjustment process. This solicitation will replace the expiring contract.

Key Events		Vendor Outreach	
No Contact Period	Solicitation Release	01.03.2024	<ul style="list-style-type: none">• Vendor Notifications: TBD• Targeted Vendors: 10 (<i>ongoing</i>)• Targeted Touchpoints: TBD
	Responses Due	02.15.2024	
	Public Meeting (Initial Evaluation)	03.26.2024	
	Public Meeting (Intent to Award)	07.18.2024	
	No Contact Period Ends	07.23.2024	
	Claims Committee	TBD	
	Board Action Item	09.25.2024	