

Vendor Management and Purchasing

Solicitation Status January 2025

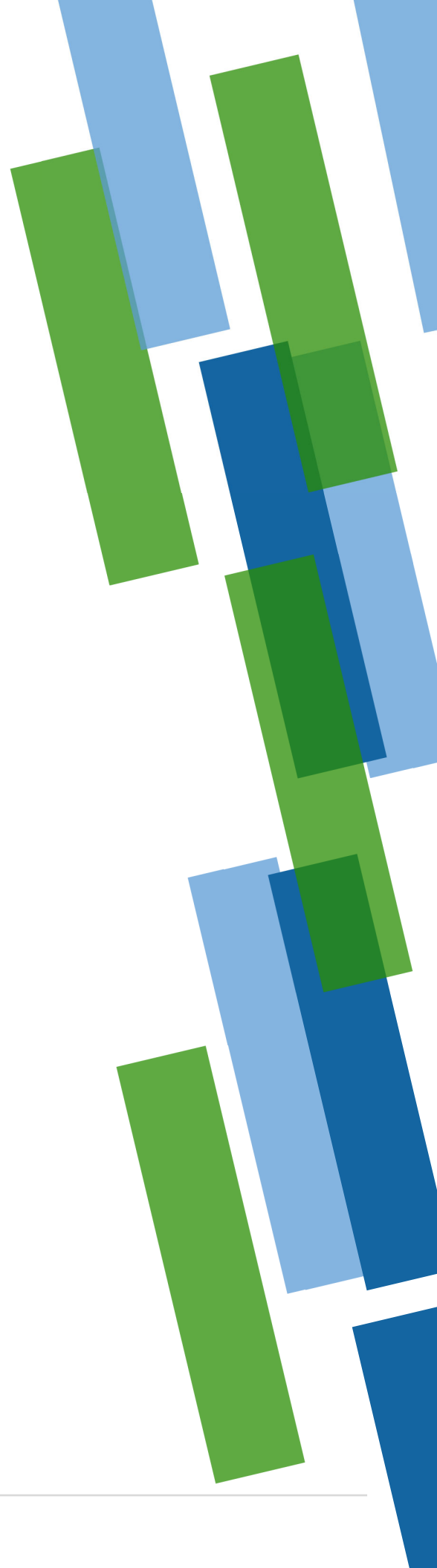


Table of Contents

RFP 24-0015 Independent CPA Auditing Services.....	3
ITN 24-0007 Contingent Workforce Staffing.....	3
ITN 24-0013 Electronic Payment Gateway.....	7
RFP 24-0014 Financial Data Services.....	8
ITN 24-0016 GIS and Location Data Services.....	9
RFP 24-0019 Coaching and Training Services (Lean, Agile, and Continuous Improvement).....	10
ITN 24-0031 Jacksonville Office Space Lease.....	11
ITN 25-0006 Financial Advisory and Investment Consultant Services.....	12
ITN 25-0015 Business Process Outsourcing (BPO) Call Center Services.....	13
ITN 25-0001 Managed Repair Program.....	14
ITN 25-0005 Compensation Analysis Tool.....	15
ITN 25-0014 Health and Wellness Account Services.....	16

Independent CPA Auditing Services

RFP 24-0015

AWARDED

Executive Sponsor: Jennifer Montero, Chief Financial Officer

Summary: Citizens uses a certified public accounting firm to perform independent third-party auditing services consistent with statutory requirements and the Florida Administrative Code. This solicitation will replace the expiring contract.

Following evaluation, Forvis Mazars, LLP was selected for award.

Key Events		
No Contact Period	Solicitation Release	08.29.2024
	Responses Due	10.17.2024
	Public Meeting (Intent to Award)	01.21.2025
	No Contact Period Ends	01.24.2025
	Audit Committee Meeting	03.11.2025
	Board Action Item	03.12.2025

Evaluation
1. Forvis Mazars, LLP
2. Thomas Howell Ferguson, P.A.
3. Johnson Lambert LLP
4. Grant Thornton, LLP
5. BDO USA, P.C.
6. Baker Tilly US, LLP

Awarded Vendor
• Forvis Mazars, LLP

Vendor Outreach

- Vendor Notifications: 659
- Targeted Vendors: 10
- Targeted Touchpoints: 21

Evaluators

- Andrew Woodward, VP - Controller
- Mike Sills, Director - Accounting & Budget
- Kyle Sullivan, Assistant Director - Internal Audit

Executive Sponsor: Jeremy Pope, Chief Administrative Officer

Summary: Citizens uses a panel of contingent staffing vendors that provide temporary staff resources as needed. These contracts support both normal business operations and catastrophe response. This solicitation will replace the expiring contracts.

Upon initial evaluation the top 15 responses were advanced to negotiations. The Negotiators are focusing on the service delivery model and pricing.

Key Events		
No Contact Period	Solicitation Release	09.06.2024
	Responses Due	10.21.2024
	Public Meeting (Initial Evaluation)	12.19.2024
	Public Meeting (Intent to Award)	04.08.2025
	No Contact Period Ends	04.11.2025
	Board Action Item	06.25.2025

Initial Evaluation

- *Please see the following pages for a complete list of responding vendors and the initial evaluation ranking.*

Negotiators

- Denise Bass, Vice President - Human Resources
- Huw O’Callaghan, Senior Director - Talent Experience
- Jessica Chapman, Assistant Director - Purchasing

Vendor Outreach

- Vendor Notifications: 4,226
- Targeted Vendors: 49
- Targeted Touchpoints: 201

Evaluators

- Joanne Nicholls, Assistant Director - Talent Acquisition
- Kristen Kulbick, Talent Acquisition Partner - Intermediate
- Mark Thomas, Talent Acquisition Partner - Lead
- Michael Maitland, Assistant Director - Enterprise Records Management
- Ian Kobler, Manager - Business Technical Support

Initial Evaluation

1. **22nd Century Technologies, Inc***
2. **Allegis Group Holdings, Inc. dba TEKsystems, Inc.***
3. **Vaco, LLC dba Vaco***
4. **Mindlance, Inc***
5. **LanceSoft, Inc***
6. **Randstad North America, Inc. dba Randstad***
7. **Appleone, Inc. dba AppleOne Employment Services***
8. **Rose International, Inc.***
9. **Computer Aid Inc.***
10. **Visium Resources Inc.***
11. **Infojini Inc.***
12. **Tryfacta, Inc.***
13. **Compunnel Software Group, Inc. dba Compunnel, Inc.***
14. **Tad PGS, Inc. dba Akkodis GS***
15. **Kforce Inc***
16. US Tech Solutions, Inc
17. Vidhwan Inc. dba E-Solutions
18. SGS Technologie LLC
19. Tech Army LLC
20. BayInfotech LLC
21. Software Resources, Inc.
22. System Soft Technologies LLC
23. Hays U.S. Corporation
24. Vcarve, Inc
25. Compu-Vision Consulting Inc.
26. KeyStaff, inc.
27. Datson360 LLC
28. Insight Global, LLC
29. CareersUSA, Inc.
30. Michael Clarke LLC dba Gravity IT Resources
31. American Technology Consulting, LLC
32. Techgene Solutions LLC
33. Clovity Inc
34. Procom Services America, Inc.
35. Image Technology Resources Corp dba IT Resources
36. vTech Solution Inc.
37. Atrium Staffing LLC
38. Ad-VANCE Personnel Services, Inc. dba Ad-VANCE Talent Solutions
39. Sparks Personnel Services Inc. dba Sparks Group Inc.
40. Smith Temporaries Inc dba CornerStone Staffing
41. Novalink Solutions LLC
42. CGC Group Inc
43. ZENTECH Consulting LLC
44. EmployBridge Holding Company dba Employ-Bridge LLC, ProLogistix, ResourceMFG, Select Staffing, RemX, ProDrivers, Remedy, Westaff, Hire Dynamics and Decca
45. CII Diversities, LLC
46. Diskriter, Inc
47. Atecca Inc.
48. RADgov, Inc.
49. Direct Interactions, Inc
50. Technical Recruiting Solutions, Inc. dba TRS, Inc.

***Advanced to negotiations**

Initial Evaluation

51. Atwork Franchise, Inc.
52. Xpand Staffing LLC
53. Industrial Staffing Services, Inc. dba Equiliem
54. Innovative Systems Group of Florida Inc dba ISGF
55. Sonus Software Solutions Inc.
56. MGT Impact Solutions, LLC
57. SNI Companies dba Staffing Now, Accounting Now, SNI Legal, SNI Technology, SNI Financial, SNI Banking, Certes Financial
58. Radiant Systems Inc
59. Advantage Technical Resourcing, Inc dba Staffmark Group
60. 4 Corner Resources, LLC
61. Augment HR Solution LLC dba My HR Management
62. Tekfortune Inc.
63. Adroix Corp dba Codeforce 360
64. SYSTECHCORP, INC.
65. A & Associates, Inc. dba A&A Services
66. ACS Consultancy Services INC
67. Blue Chip Talent Inc
68. American Unit Inc
69. HLP Integration LLC
70. E-Logic, Inc.
71. Inteletech Global, Inc.
72. Tri-Force Consulting Services, Inc.

Disqualified Vendors

- *Boston Services LLC*
- *Cognitive Artificial Intelligence, Inc*
- *CSI Companies, Inc. dba CSI Professional, CSI Tech, CSI HCIT*
- *District Partners LLC*
- *E-CQR Inc*
- *Health Advocates Network, Inc dba Staff Today*
- *KASH TECH LLC*
- *NWPS LLC dba Northwest Partners*
- *Providence Staffing LLC*
- *SANROSE Information Services, Inc.*
- *Savio Pais dba Netsynk Inc*
- *Steven Douglas Associates LLC*
- *Sunshine Enterprise USA LLC*
- *Synkriom Inc.*
- *Techie Associates LLC*
- *Vastek Inc.*

Electronic Payment Gateway

ITN 24-0013

ACTIVE

Executive Sponsor: Jennifer Montero, Chief Financial Officer and Jay Adams, Chief Insurance Officer

Summary: Citizens utilizes an electronic payment gateway to facilitate payments related to policies, including premium payments, claims payments, and agent commissions. This solicitation will replace the expiring contract.

Nine responses were received.

Key Events		
No Contact Period	Solicitation Release	11.20.2024
	Responses Due	01.14.2025
	Public Meeting (Initial Evaluation)	02.14.2025
	Public Meeting (Intent to Award)	05.12.2025
	No Contact Period Ends	05.15.2025
	Finance and Investment Committee Meeting	06.24.2025
	Board Action Item	06.25.2025

Responding Vendors
<ul style="list-style-type: none">• Adyen• Duck Creek Technologies LLC• Echo Health Inc.• Govolution by Deluxe• Invoice Cloud, Inc.• JPMorgan Chase Bank, N.A.• One, Inc. Software Corporation• Paymentus Corporation• TransCard Payments, LLC

Vendor Outreach
<ul style="list-style-type: none">• Vendor Notifications: 707• Targeted Vendors: 25• Targeted Touchpoints: 62

Negotiators
<ul style="list-style-type: none">• Angela Lockwood, Director - Product Management• Chelsea Garfield, Director - Product Management• Jessica Chapman, Assistant Director - Purchasing

Evaluators
<ul style="list-style-type: none">• Angela Lockwood, Director - Product Management• Chelsea Garfield, Director - Product Management• Robert Porter, Product Owner - Senior

Executive Sponsor: Jennifer Montero, Chief Financial Officer

Summary: Citizens uses financial data services to facilitate compliance with statutory and regulatory requirements. This service provides financial data and analysis for the Florida insurance market, which supports Citizens' product, rate, and rule filings with the Office of Insurance Regulation. This solicitation will replace the expiring contract.

Three responses were received.

Key Events		
No Contact Period	Solicitation Release	11.20.2024
	Responses Due	12.20.2024
	Public Meeting (Intent to Award)	02.04.2025
	No Contact Period Ends	02.07.2025
	Finance and Investment Committee Meeting	03.11.2025
	Board Action Item	03.12.2025

Responding Vendors

- Bloomberg Financial L.P.
- DehazeLabs Inc
- S&P Global

Vendor Outreach

- Vendor Notifications: 393
- Targeted Vendors: 7
- Targeted Touchpoints: 18

Evaluators

- Bethany Kocher, Director - Reinsurance & Analytics
- John Burns, Business Intelligence Analyst - Senior
- Bob Carey, Insurance Product Manager - Principal

Executive Sponsors: Jay Adams, Chief Insurance Officer

Summary: As a part of the underwriting process, Citizens utilizes GIS and location data services to enable the identification of location-related risk characteristics, based on the property address. This solicitation will replace the expiring contract.

Upon initial evaluation, the top three vendors were advanced to negotiations.

Key Events		
No Contact Period	Solicitation Release	10.29.2024
	Responses Due	12.04.2024
	Public Meeting (Initial Evaluation)	01.13.2025
	Public Meeting (Intent to Award)	03.04.2025
	No Contact Period Ends	03.07.2025
	Actuarial and Underwriting Committee	06.24.2025
	Board Action Item	06.25.2025

Initial Evaluation
1. Insurance Services Office, Inc.
2. CDS Business Mapping, LLC (SMLLC) dba Corelogic, Inc.
3. ESRI
4. MILLIMAN, INC.
5. GCS dba GCS Holdings, Inc.
6. Insurity LLC

Negotiators
<ul style="list-style-type: none"> • Stephen Mostella, Vice President - Underwriting • Forrest White, Director - Underwriting • Kayne Smith, Director - Actuarial Science • Summer Reeves, Vendor Management and Purchasing Consultant - Lead

Vendor Outreach
<ul style="list-style-type: none"> • Vendor Notifications: 2,143 • Targeted Vendors: 11 • Targeted Touchpoints: 43

Evaluators
<ul style="list-style-type: none"> • Aimee Maltby, Manager - Data Science • Bishwas Khanal, Manager - Systems Application Development • Bradley Christensen, Assistant Director - Underwriting • Bridget Clarke, Manager - Underwriting PL • Sarai Roszelle, Senior Director - Product Management

Coaching and Training Services (Lean, Agile, and Continuous Improvement)

RFP 24-0019

ACTIVE

Executive Sponsor: Jeremy Pope, Chief Administrative Officer

Summary: Citizens uses a panel of vendors to provide specialized training and coaching services to employees. This solicitation will replace the expiring contracts and broaden the scope of training topics available.

An Action Item will not be presented since this contract is expected to be less than \$100,000.

21 responses were received.

Key Events		
No Contact Period	Solicitation Release	12.11.2024
	Responses Due	01.29.2025
	Public Meeting (Intent to Award)	03.05.2025
	No Contact Period Ends	03.10.2025

Responding Vendors

- Agile Brains
- Agile for Humans
- Agile Transformation, Inc dba Agility Insights
- Brigitte O'Michaels LLC
- CCS Learning Academy
- Connective Business Solutions
- Cprime
- DIOSS LLC
- EPIC Consultants, Inc.
- Evaltour Technologies LLC
- Icon Technology Consulting, dba Icon Agility Services
- Insite Managed Solutions, LLC
- Lean Training and Consulting, Inc.
- Learning Tree International USA, Inc.
- New Horizons Learning, LLC dba New Horizons
- Nextec Inc.
- Next-Generation Technology
- Pivotal Resources, Inc.
- Product Management Institute
- RefineM LLC
- The Adversity Academy Group

Vendor Outreach

- Vendor Notifications: 2,247
- Targeted Vendors: 16
- Targeted Touchpoints: 45

Jacksonville Office Space Lease

ITN 24-0031

ACTIVE

Executive Sponsor: Jeremy Pope, Chief Administrative Officer

Summary: Consistent with Citizens' real estate strategy, this solicitation will result in a lease for 203,000 to 215,000 square feet of office space in Jacksonville. This lease will replace the current Jacksonville office location. Citizens is subject to state agency property leasing process requirements. Following the Florida Department of Management Services (DMS) process, Citizens is using the DMS designated tenant brokerage firm, CBRE, to market the opportunity and negotiate the lease.

Following initial evaluation, including site visits, the top four ranked vendors were advanced to the negotiation phase.

Key Events		
No Contact Period	Solicitation Release	12.19.2024
	Responses Due	01.17.2025
	Public Opening	01.17.2025
	Initial Evaluation and Site Visits	01.22.2025 -
	Negotiations	01.27.2025 01.28.2025 -
		02.27.2025
	Post Intent to Award	02.28.2025
	No Contact Period Ends	03.05.2025
	Board Action Item	03.12.2025

Initial Evaluation
1. Jacksonville IV FGF, LLC c/o Boyd Waterson Asset Management
2. Blue Cross & Blue Shield of Florida, Inc. c/o Jones Lang LaSalle Brokerage, Inc.
3. Amkin West Bay
4. JAX LC Owner 2 LLC
5. Atlantic Land and Improvement
6. 841 Prudential MOB—ShareMD
7. Rosecrans 2004 LLC

Negotiators

David Hulse, from the DMS designated tenant brokerage firm, CBRE, will negotiate on Citizens' behalf.

Vendor Outreach

Citizens is using the DMS designated tenant brokerage firm, CBRE, to market the opportunity.

Evaluators

- Cherri Linn, Director - Facilities Management and Real Estate
- Mathew Carter, Manager - Systems Engineering

Executive Sponsor: Jennifer Montero, Chief Financial Officer

Summary: Citizens uses a financial advisor/investment consultant to assist in determining Citizens’ capital structure, investment allocations, reinsurance strategies, and risk transfer program. This solicitation will replace the expiring contract.

Key Events		
No Contact Period	Solicitation Release	01.13.2025
	Responses Due	02.21.2025
	Public Meeting (Initial Evaluation)	03.27.2025
	Public Meeting (Intent to Award)	05.28.2025
	No Contact Period Ends	06.02.2025
	Finance and Investment Committee	06.24.2025
	Board Action Item	06.25.2025

Vendor Outreach

- Vendor Notifications: 343
- Targeted Vendors: 25
- Targeted Touchpoints: 42 (ongoing)

Business Process Outsourcing (BPO) Call Center Services

ITN 25-0015

ACTIVE

Executive Sponsor: Jeremy Pope, Chief Administrative Officer

Summary: Citizens uses call center services to augment internal resources and provide resource scalability for inbound and outbound calls including calls with policyholders, agents, and mortgage companies. This solicitation will replace the expiring contracts.

Key Events		
No Contact Period	Solicitation Release	01.14.2025
	Responses Due	02.18.2025
	Public Meeting (Initial Evaluation)	03.24.2025
	Public Meeting (Intent to Award)	05.05.2025
	No Contact Period Ends	05.08.2025
	Consumer Services Committee	06.11.2025
	Board Action Item	06.25.2025

Vendor Outreach

- Vendor Notifications: 1,979
- Targeted Vendors: 110
- Targeted Touchpoints: 228 (*ongoing*)

Managed Repair Program

ITN 25-0001

DRAFT

Executive Sponsor: Jay Adams, Chief Insurance Officer

Summary: Citizens currently uses a vendor to provide and administer a network of licensed contractors that support the managed repair program including providing water mitigation and permanent repair services for non-weather water claims. This solicitation will replace the expiring contract.

Key Events			Vendor Outreach	
No Contact Period	Solicitation Release	02.11.25	• Vendor Notifications: <i>TBD</i>	
	Responses Due	03.24.25	• Targeted Vendors: <i>TBD</i>	
	Public Meeting (Initial Evaluation)	04.24.25	• Targeted Touchpoints: <i>TBD</i>	
	Public Meeting (Intent to Award)	06.10.25		
	No Contact Period Ends	06.13.25		
	Claims Committee	09.11.2025		
	Board Action Item	09.24.2025		

Compensation Analysis Tool

ITN 25-0005

DRAFT

Executive Sponsor: Jeremy Pope, Chief Administrative Officer

Summary: Citizens uses market compensation data and analysis tools to develop and maintain a market-based compensation program. This solicitation will replace the expiring contract.

An Action Item will not be presented since this contract is expected to be less than \$100,000.

Key Events			Vendor Outreach	
No Contact Period	Solicitation Release	03.12.25	• Vendor Notifications: <i>TBD</i>	
	Responses Due	04.14.25	• Targeted Vendors: <i>TBD</i>	
	Public Meeting (Initial Evaluation)	06.05.25	• Targeted Touchpoints: <i>TBD</i>	
	Public Meeting (Intent to Award)	07.22.25		
	No Contact Period Ends	07.25.25		

Health and Wellness Account Services

ITN 25-0014

DRAFT

Executive Sponsor: Jeremy Pope, Chief Administrative Officer

Summary: Citizens uses a plan administrator to provide employee health and wellness account services. This solicitation will replace the expiring contract.

An Action Item will not be presented since this contract is expected to be less than \$100,000.

Key Events			Vendor Outreach	
No Contact Period	Solicitation Release	02.03.2025	• Vendor Notifications: <i>TBD</i>	
	Responses Due	03.05.2025	• Targeted Vendors: <i>TBD</i>	
	Public Meeting (Initial Evaluation)	04.10.2025	• Targeted Touchpoints: <i>TBD</i>	
	Public Meeting (Intent to Award)	05.23.2025		
	No Contact Period Ends	05.29.2025		