

August 24, 2023

RFP 23-4243 CERTIFICATE OF INSURANCE TRACKING SOLUTION

ADDENDUM #3
(Acknowledgment is Required)

The Respondent must acknowledge the receipt of this Addendum by signing below and including a signed copy of this Addendum with its Request for Bid.

Please note that underlined information (*example*) is added wording and stricken information (~~*example*~~) is deleted wording.

I. QUESTIONS AND ANSWERS:

- 1. Question:** In order to direct our communications appropriately, collect supporting documentation for the appropriate requirements, etc., one or more users from your organization will periodically interact with the system. Can you provide an estimate on the number of system users you anticipate needing access to the system for these purposes (please note that reporting can be exported, integrated, etc., and the number of users needn't include those users' requiring visibility, but not direct interaction.)

Answer: Please refer to Section 3.2 Annual Rate.

- 2. Question:** We tailor our services to each client's needs, and our level of direct involvement varies based upon their requirements. The most important question to clarify in this regard is the responsibility for reviewing supporting insurance documentation for compliance. We provide tools in our software to streamline these processes for those clients who wish to retain this responsibility. However, the majority of our clients prefer to outsource these reviews to an insurance professional on our staff who is dedicated to your account and whose work is warranted. These two levels of services (*Essentials* and *Concierge*) would be priced differently. Which level of service would you like us to bid for?

Answer: Please refer to Section 2.1 General Information and Section 3.1 Scope of Work.

- 3. Question:** We realize that this number will generally fluctuate, but do you have an estimate on the number of agreements for which the district would be tracking insurance compliance in a typical year?

Answer: The District's estimated number of agreements is 500.

- 4. Question:** The Specifications field states "Data migration (both data and .pdf) for current district COIs to position the renewal process is required." Our processes are structured to facilitate direct communication with your contracted 3rd parties' agents (as best practice, although alternative workflows are supported,) which streamlines the collection process, reduces the potential for fraudulent documents, enables greater visibility into changes and cancellations, etc. Furthermore, when we review submitted insurance documents for

compliance, we warrant our assessment of those documents. For these reasons and more, our recommended implementation process includes a one-time registration for your contracted 3rd parties (in which we will gather their agent(s)' information), and the collection and review of current documents directly from their agent. We strongly recommend this process as ideal for all parties involved – the district, your contracted 3rd parties, their agents, and us. Would you consider utilizing this process for implementation?

Answer: This process should be described in your response to Section 1.7.5 Methodology/Approach to Scope of Work.

5. **Question:** 1.7.10 states that Respondents may not disclose any information which is a “trade secret” as defined in section 812.081(1)(f), Florida Statutes. Our demonstrations necessarily show the use of our platform, disclose our workflows, support procedures, etc., all of which we consider “trade secrets.”

Answer: The District declines to alter Section 1.7.10 of the RFP and refers all Respondents to the terms of that Section as stated.

6. **Question:** 1.7.11 requires evidence that the signatory for our proposal be an officer listed in our Articles of Incorporation or be authorized by a board authorization. We don't distribute our Articles of Incorporation but could agree to provide satisfactory evidence prior to the signing of a final contract. Would you consider waiving this requirement, or providing an alternative for the RFP cover sheet requirement?

Answer: The language referenced in this question does not appear to be contained in Section 1.7.11 as indicated. As such, the District declines to alter Section 1.7.11 of the RFP and refers all Respondents to the terms of that Section as stated. Refer to Section 1.7.1 for options of acceptable documentation regarding evidence of the signatory.

7. **Question:** Attachment 3 – Public Entity Crime Statement requires a signature “in the presence of a Notary Public or other office authorized to administer oaths.” We can certainly sign this statement, but would you agree to accept a signed statement to this effect without the requirement of it being signed “in the presence of a Notary Public or other office authorized to administer oaths?” We cannot provide a statement on this form, as written, as our signatories will not be in Florida, nor have access to a notary with a “State of Florida Commission”.

Answer: No. The District will not waive the requirement in Attachment 3 that the signature be executed “in the presence of a Notary Public or other officer authorized to administer oaths.” That notwithstanding, the required signature need not be executed while physically in the state of Florida and such authorized officer need not be licensed in the state of Florida to administer oaths.

8. **Question:** Our contract terms, as well as is industry standards, is typically three years with two, one-year options.

Answer: Please refer to Section 2.3 Term of Contract, for the District's standard contract terms.

9. **Question:** Can the district please describe in detail the current workflows and the districts procedures for properly handling the COI process today?

Answer: District stakeholders submit a request into a District system with the Scope of the Project, which Risk Management would review and determine insurance requirements. District staff will then request proof of insurance from the awarded vendor. After receipt of proof, copies are provided to Risk Management via email for review and approval. Once approved the COI is attached in the system and the data from the COI documents is manually entered into interim COI system for maintenance by Risk Management.

10. Question: Is a system being utilized? if so, what is that system?

Answer: Currently, the District's interim COI application is a C# custom built application which allows the user to input metadata including: the certificate number, Vendor Name, Vendor Alias, Vendor Number (from the District's Financial System), and Insurance Provider.

11. Question: How many individuals are directly involved in the day-to-day COI process?

Answer: The District estimates up to three individuals directly involved with the day-to-day process.

12. Question: How many individuals are not actively involved, but need access to reporting functionality?

Answer: The District estimates approximately 12 individuals that may require reporting functionality and that are not actively involved.

13. Question: Can the district please provide describe the amount of historical data that would need to be migrated and stored in the new system?

Answer: Refer to Section 3.1.1 Respondent COI Tracking Software.

14. Question: How many COIs are being managed on an annual basis?

Answer: Please refer to Section 3.2 Annual Rate.

15. Question: How many unique vendors are providing COIs to the district?

Answer: Currently, there are approximately 100 unique vendors.

16. Question: How often are new vendors providing COIs?

Answer: The District receives COIs from new vendors as needed for new agreements; approximately weekly.

17. Question: Can you describe in detail what precisely is needed to be OCR'd?

Answer: The System must be able to capture text within a scanned image and populate that text (data) into the Respondent's COI tracking database so it can be reported on, used for renewals, etc. Please refer to Section 3.1 Scope of Work for further information.

18. Question: How many different formats does the district receive of Acord forms or otherwise?

Answer: This District typically receives two formats.

19. Question: Assuming there are desired interfaces, can the district please provide a table of all potential interfaces?

Answer: The District's interface needs are unknown at this time. This information is contingent upon the Respondent's proposed system capabilities (e.g.: the proposed system may need to interface with the District's email system).

Sherry Wooten
Procurement Specialist
cc: Project Manager

ACKNOWLEDGEMENT OF ADDENDUM #3

BY: _____
DATE

(TYPE/PRINT NAME AND TITLE)

COMPANY NAME

End of Addendum #3 for RFP 23-4243.