**2016 ACORD Surety IT Survey Questions**

**[Draft to be provided to ACORD for distribution]**

*Last Updated: 11/05/15*

**NOTES:**

* The ACORD AUGIE Survey Working Group is looking for volunteers. Please contact Cal Durland at [cdurland@acord.org](mailto:cdurland@acord.org) if you would like to help in the development of this survey.
* Demographic information will be collected early in the survey and include the following questions for comparison / to analyze trends based on previous survey results:
  + Are you an agency/broker or surety company? (logic)
  + Questions 2 (how long in business), 3 & 4 re: surety premium
* Goal: 20-25 questions
* Timeline: **Feb:** send out survey, **Mar**: collect results, **Apr-May**: compile results, **May/June**: release final results
* The broader ACORD survey will already cover email encryption and cyber liability
* SFAA plans to participate, as determined at the JAC meeting in Chicago, 2015.
* Will respondents to the ACORD survey have the ability to “skip” questions they do not want or cannot answer? If so we should leave off “unknown.” In questions 3 & 4. This gives them an “easy way out.”

1. **Professional association memberships: (checkbox)**
   * National Association of Surety Bond Producers Member
   * National Association of Surety Bond Producers Affiliate
   * National Association of Surety Bond Producers Associate
   * Surety and Fidelity Association of America Member
   * ACORD
   * Construction Financial Management Association
   * Associated General Contractors
2. **How long have you been in business? (radio)**
   * < 1 year
   * 1-3 years
   * 3-5 years
   * 5-10 years
   * 10-20 years
   * > 20 years
3. **How much surety premium was booked in 2015? (radio)**
   * < $100,000
   * $100,000-$500,000
   * $500,000-$1,000,000
   * $1,000,001 - $2,500,000
   * $2,500,001 - $5,000,000
   * $5,000,001 - $7,500,000
   * $7,500,001 - $10,000,000
   * > $10,000,000
   * Unknown
4. **What are you projecting for your agency’s total surety premium in 2016? (radio)**
   * < $100,000
   * $100,000-$500,000
   * $500,000-$1,000,000
   * $1,000,001 - $2,500,000
   * $2,500,001 - $5,000,000
   * $5,000,001 - $7,500,000
   * $7,500,001 - $10,000,000
   * > $10,000,000
   * Unknown
5. **Do you use an outside IT vendor or do you have internal staff manage IT? (radio)**
   * We use an outside vendor
   * We utilize internal staff for IT

**5a. LOGIC: (if 5 = “We utilize internal staff for IT”) How many full time employees are supporting the Bond Department from other company departments or from a central resource IT pool? (radio)**

* + 0
  + 1-2
  + 3-4
  + 5-6
  + 7+

1. **How much do you anticipate spending on IT in 2016 compared to 2015? (radio)**
   * our agency will spend less in 2016
   * about the same
   * our agency will spend more in 2016
2. **Which Agency Base Surety System(s) do you use? (radio)**
   * Blair Business Systems: TABS®
   * BondPro®
   * iAutomate: Erlon®
   * InsureVision: Surepath®
   * Nexsure®
   * None
   * Paperwise®
   * proprietary system
   * surety company system
   * Other (text)
3. **Please select the surety company websites your agency uses to execute bonds (checkbox)**
   * Ace Ltd. Group
   * Capitol Insurance Companies - Capitol Express®
   * Chubb
   * CNA bONdLINE™
   * Great American mySurety®
   * Hanover The Agency Place (TAP)®
   * Hartford 1Step Surety®
   * HCC Surety Online (HCCSO)®
   * International Fidelity
   * Insco®
   * Lexon/Bond Safeguard
   * Liberty Mutual Surety Solutions®
   * Merchants™
   * NAS Surety
   * Old Republic Surety Company®
   * Liberty Mutual Surety Online®
   * RLI Surety
   * Selective eSurety®
   * Suretec Surequick®
   * Travelers BondExpress®
   * United Fire ufgBonds®
   * West Bend Connect®
   * Zurich Surety Express™
   * Other: (text)
4. **Has your agency been involved in processing an electronic *(i.e. does not have a printed bond)* surety transaction? (radio)**
   * Yes
   * No
5. **Does your agency participate/use any of the following bond-related systems? (checkbox)**
   * BidExpress®
   * Maryland Electronic Commerce
   * Mississippi Bid System (Procurement Technical Assistance Program)
   * New Jersey Transit Authority
   * Pennsylvania ECMS
   * Pennsylvania Turnpike System
   * Surety 2000®
6. **Have you issued any performance/payment bonds electronically? (radio)** 
   * Yes
   * No

**11a. LOGIC: If 11 = “Yes”, approximately how many times in the last year? (radio)**

* + 1-4
  + 5-19
  + 20-99
  + > 100

**11b. LOGIC: If 11 = “Yes” How many different obligees?**

* + 1-4
  + 5-9
  + 10-25
  + > 25

1. **What processes do you expect to execute using technology (e.g. portal, company system, vendor system, business-to-business interface) within the next 12 to 18 months, excluding email or a secure messaging technology? (checkbox)**
   * Underwriting
   * Management and creation of powers of attorney
   * Billing
   * Electronic reporting of bonds
   * Execution of bonds
2. **Please provide additional details on your last answer. (memo)**
3. **What kind of surety platform does your organization have for underwriting functionality? (radio)**
   * dedicated surety only platform
   * shared/combined platform with P&C
   * other (text)
4. **What kind of surety platform does your organization have for claims? (radio)**
   * dedicated surety only platform
   * shared/combined platform with P&C
   * other (text)
5. **What kind of surety platform does your organization have for billing? (select one)**
   * dedicated surety only platform
   * shared/combined platform with P&C
   * other (text)
6. **Do you have any form of cyber liability insurance coverage?**
   * Yes
   * No
7. **On a scale of 1-5, 1 representing the least and 5 representing the most, How useful would it be if you were able to input data using ACORD standards for an industry form in one location, then import that data into other applications rather than re-keying it? (radio)**
   * 1
   * 2
   * 3
   * 4
   * 5
8. **Approximately how much time per month would this save you? (radio)**
   * No time
   * < 1 hour
   * 1-5 hours
   * 6-10 hours
   * 11-15 hours
   * 15+ hours
9. **On a scale of 1-5, 1 representing the least and 5 representing the most, How useful would it be If your bond processing product or service offered the ability to import these documents easily – as well as export the data into other products and services? (radio)**
   * 1
   * 2
   * 3
   * 4
   * 5
10. **Would your agency be willing to pay more for a bond processing system that used ACORD-standard fields, eliminating the need to re-key data in forms like the Contractor Questionnaire or Work in Progress Report? (radio)**
    * Yes
    * No
    * Undecided
11. **Which credit reporting or risk measurement tools does your Agency use for business reporting? (checkbox)**
    * Dun & Bradstreet®
    * Equifax®
    * Experian®
    * Moody's KMV®
    * TransUnion®
    * Need option for none
12. **Which credit reporting or risk measurement tools does your Agency use for personal reporting? (checkbox)**
    * Dun & Bradstreet®
    * Equifax®
    * Experian®
    * Moody's KMV®
    * TransUnion®
    * Need option for none
13. **Are you doing ACORD b2b? (radio)**
    * Yes
    * No
14. **Do you have any additional input related to IT that you would like to provide or share? (memo)**
15. **Does your agency regularly use any other web sites or applications that you consider important to your bond operations? (radio)**
    * Yes
    * No

**26a. LOGIC: If 26 = “Yes”, Please enter them below. (memo)**

1. **Please rank the top three most useful surety forms used by your agency: (radio? How does ACORD handle this?)**
   * Bank / Credit Reference Form
   * Bid Bond Request Form
   * Commercial Bond Request Form
   * Contract Bond Request Form
   * Contractor Questionnaire
   * Credit Report Authorization and Privacy Disclosure Form
   * Financial Statement Analysis
   * Performance and Payment Bond Request Form
   * Personal Financial Statement
   * Service/Supply Contractor Questionnaire
   * Small Business Contractor Questionnaire
   * Status Inquiry Form
   * Work in Progress