# RISK ASSESSMENT OR MODIFICATION OF INSURANCE TERMS

**Use this form to request a risk assessment and determine proper insurance requirements when developing a contract.** ***Please attach contract and prior Risk Management approval(s) if any****

DATE: 7/6/26

TO: RiskMgmtInsurance@ocgov.com

| FROM: | Aaron Robles | 714-541-7411 | SSA Contracts Services |
|---|---|---|---|
| | County Employee | Phone # (including area code) | County Department |

**CONTRACT TYPE**

☐ Commodities ☐ Public Works ☒ Services

☐ Lease/License ☐ A & E ☐ Other

Vendor Name: Mercy House Living Centers

IFB: ☐ Yes ☐ No Contract or RFP #: MA-063-23010971 Contract Amount: $9,158,000

## Insurance Type to Reviewed for Waiver or Modification of Terms

| | | |
|---|---|---|
| ☒ Commercial General Liability (CGL) | ☐ Workers' Compensation (W/C) | ☐ Property Insurance |
| ☐ Commercial Auto Liability (AL) | ☐ Employer's Liability | ☐ Indemnification |
| ☒ Professional Liab. (Errors & Omissions) | ☒ Sexual Misconduct | ☐ Limitation of Liability |
| ☐ Network Security & Privacy Liab. | ☐ Technology Error & Omissions | ☐ High Risk |
| ☐ Other | | |

**Request and Justification (add another page if necessary)**:

Request to modify insurance terms in contract for Home Safe Services with Mercy House Living Centers to obtain claims-made coverage for both Commercial General Liability, Sexual Misconduct, and Professional Liability. Coverage must be continuous with no lapse in coverage.

**To Be Completed by CEO/Risk Management**

☒ Approved ☐ Denied ☐ Approved as Modified

Comments

Claims Made is acceptable as vendor has agreed to provide continuous coverage with no lapse. If at any time the policy cancels or non-renews, Mercy House has agreed to provide retroactive coverage. A continuous Claims Made policy is essentially occurrence based coverage as there will always be coverage no matter the time line.

CEO/Risk Management: DocuSigned by: Calvin Wong 19EE0532350D4B3... Date: 7/7/2026

**Note**: CEO Risk Management acts as an advisory to departments regarding risk assessment. Any changes to a contract requires a formal modification.