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: 6/5/2026

TO: RiskMgmtInsurance@ocgov.com

FROM:

Emily Burgos	714-245-6271	SSA/CPO Contracts
County Employee	Phone # (including area code)	County Department

CONTRACT TYPE

☐ Commodities ☐ Public Works ☒ Services

☐ Lease/License ☐ A & E ☐ Other

Vendor Name: SSA, HCA, Probation, OCDE, RCOC and First 5 OC

IFB: ☐ Yes ☒ No Contract or RFP #: Non-Financial MOU Contract Amount: 0

Insurance Type to Reviewed for Waiver or Modification of Terms

☒ Commercial General Liability (CGL)
☒ Commercial Auto Liability (AL)
☒ Professional Liab. (Errors & Omissions)
☒ Network Security & Privacy Liab.
☒ Other

☒ Workers' Compensation (W/C)
☒ Employer's Liability
☒ Sexual Misconduct
☐ Technology Error & Omissions

☐ Property Insurance
☒ Indemnification
☐ Limitation of Liability
☐ High Risk

Request and Justification (add another page if necessary):

This is a non-financial MOU with three County departments (SSA, HCA, Probation) and OC Department of Education, Regional Center of Orange County, and First 5 Orange County. This is not a service agreement. The MOU outlines the roles and responsibilities of the Interagency Leadership Team, a convening body that provides high-level oversight and recommendation of services within a System of Care, in compliance with AB 2083. Due to the nature of this agreement, a waiver of standard insurance and indemnification terms is requested, replacing with a "Mutual Hold Harmless" provision.

To Be Completed by CEO/Risk Management

☐ Approved ☐ Denied ☒ Approved as Modified

Comments

Waiver of insurance is acceptable as parties are highly insured or self insured. Mutual Hold Harmless is acceptable. There is no explicit provision for legal defense or indemnity however the mutual hold harmless includes "any and all claims, lawsuits or actions". Argument can be made that the hold harmless extends to third parties essentially providing us indemnity.

CEO/Risk Management: DocuSigned by: Calvin Wong 19EE0532350D4B3... Date: 6/10/2026

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