

RISK ASSESSMENT OR MODIFICATION OF INSURANCE TERMS

Use this form to request a Risk Assessment and determine Proper Insurance Requirements when developing an Agreement. ****Please attach Agreement and prior Risk Approval(s) if any****

Date: October 9, 2023

TO: RiskMgmtInsurance@ocgov.com

FROM: Robert Balma
County Employee (Contact for Questions)
Phone# (Including area code): 714 645-7112

OC Probation
County Department

CONTRACT TYPE: Commodities Public Works Service Lease/License
 A & E Other _____

Vendor Name: Franchise Tax Board (FTB)

Contract#/RFP#: 253102

IFB: Yes No

Contract Amount: FTB will charge a 15% admin fee on all payments

Insurance Type to be 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 Liab.
 Network Security & Privacy Liab. Technology Error & Omissions
 Other _____

Request and Justification: Approve use of State indemnification language for the attached State of California Standard (Add another page if necessary)

Agreement. The indemnification language used is required and is included in all agreements issued by the FTB. County Counsel has reviewed and approved the language as well. (See attached) The FTB is allowed under California Tax and Revenue Code sections 19280-19283 and Penal Code sections 1463.010-1463.012 to form partnerships with counties for collections of court ordered debts. The FTB will collect a 15% administration fee on all payments received by the Orange County Probation Department. This will be a Sole Source agreement.

To Be Completed By CEO/Risk Management

Approved

Denied

Approved as Modified

Comments: Standard state indemnification per GTC is acceptable for services.

Calvin Wong
Manager/CEO/Risk Management

Digitally signed by Calvin Wong
DN: cn=Calvin Wong, o=CEO Risk Management,
email=calvin.wong@ocgov.com, c=US
Date: 2023.10.10 07:24:22 -0700

10/10/2023
Date

Note: CEO Risk Mgmt. acts as an advisory to departments regarding Risk Assessment. Any changes to a contract requires formal modification.