

# Contract Renewal Evaluation Form

|                  |                                                                          |
|------------------|--------------------------------------------------------------------------|
| Date:            | October 15, 2025                                                         |
| Department:      | Finance                                                                  |
| Contract Number: | 24RFP1336388C-MH                                                         |
| Contract Title:  | Property and Casualty Broker Services (Insurance, Surety Bonds and OCIP) |

## Instructions:

It is extremely important that every contract be rigidly scrutinized to determine if the contract provides the County with value. Each renewal shall be reviewed, and answers provided to determine whether services should be maintained, services/scope reduced, services brought in-house or if the contract should be terminated. Please submit a completed copy of this form with all renewal requests.

### 1. Describe what efforts were made to reduce the scope and cost of this contract.

*The County bid this service out in late 2024, approved the bid on January 29, 2025, item 2025-0074. No cost escalation per item has been experienced with this contract. The County has an extensive Insurance (Property & Casualty) Program. The procurement of insurance policies requires the use of a licensed Broker-of-Record, to gain access to a broad range of direct and surplus lines insurance markets (domestic and international). The Broker-of-Record must be a Licensed Insurance Agent/Broker, with a firm licensed to write underwrite insurance policies in the State of Georgia. The scope of services in this contract also includes providing consultation on Owner Controlled Insurance Program (OCIP), dedicated to the consolidation of insurance coverages, issuance of certificates of insurance and claims administration regarding the Capital Improvement Program - Library Construction projects. The Broker is also responsible for placement of the County's Public Official, Blanket/Schedule as well as bonds for the Courts.*

### 2. Describe the analysis you made to determine if the current prices for this good or service is reflective of the current market. Check all applicable statements and provide documentation:

#### ☐ Internet search of pricing for same product or service:

|                                                              |                             |
|--------------------------------------------------------------|-----------------------------|
| Date of search:                                              | Click here to enter a date. |
| Price found:                                                 | Click here to enter text.   |
| Different features / Conditions:                             | Click here to enter text.   |
| Percent difference between internet price and renewal price: | Click here to enter text.   |

#### Explanation / Notes:

#### ☐ Market Survey of other jurisdictions:

|                                   |                             |
|-----------------------------------|-----------------------------|
| Date contacted:                   | Click here to enter a date. |
| Jurisdiction Name / Contact name: | Click here to enter text.   |
| Date of last purchase:            | Click here to enter a date. |

|                                                                   |                                                          |
|-------------------------------------------------------------------|----------------------------------------------------------|
| Price paid:                                                       | Click here to enter text.                                |
| Inflation rate:                                                   | Click here to enter text.                                |
| Adjusted price:                                                   | Click here to enter text.                                |
| Percent difference between past purchase price and renewal price: | Click here to enter text.                                |
| Are they aware of any new vendors?                                | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Are they aware of a reduction in pricing in this industry?        | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| How does pricing compare to Fulton County's award contract?       | Click here to enter text.                                |

**Explanation / Notes:**

*During the selection process in 2024, this firm (EPIC) was selected as the lowest responsive bidder. Additionally, due to the specialization required for OCIP Administration component, only a few qualified firms submit proposals for these services. A "Bundled" Insurance/ OCIP program platform was used in order to obtain cost effective quotes.*

☐ **Other (Describe in detail the analysis conducted and the outcome):**

Click here to enter text.

**3. What was the actual expenditure (from the AMS system) spent for this contract for previous fiscal year?**

\$94,500 has been spent for calendar year 2024. The total paid to date for 2025 is \$86,442.49 for purchase order of \$94,500 with balance expected to be paid by year end.

**4. Does the renewal option include an adjustment for inflation?** ☐ Yes ☒ No  
(Information can be obtained from CPI index)

**Was it part of the initial contract?** ☐ Yes ☒ No

|                                                                   |                           |
|-------------------------------------------------------------------|---------------------------|
| Date of last purchase:                                            | 2022                      |
| Price paid:                                                       | Click here to enter text. |
| Inflation rate:                                                   | Click here to enter text. |
| Adjusted price:                                                   | Click here to enter text. |
| Percent difference between past purchase price and renewal price: | Click here to enter text. |

**Explanation / Notes:**

The fees proposed for 2026 remain at \$94,500 consistent with 2024 and 2025

5. Is this a seasonal item or service? ☐ Yes ☒ No

6. Has an analysis been conducted to determine if this service can be performed in-house? ☐ Yes  
☒ No If yes, attach the analysis.

7. What would be the impact on your department if this contract was not approved?

*We will be unable to renew our policies to include property, crime, cyber, pollution, arts, bonds, excess work comp, airport/pilot insurance*