Administration Committee
1:00 p.m., Wednesday, November 4, 2026
City Hall Council Chambers
1207 Palm Boulevard, Isle of Palms, SC

Public Comment:
Citizens who wish to speak during the meeting must email their first and last name, address and topic to Nicole DeNeane, City Clerk, at nicoled@isleofpalms.gov no later than 3:00 p.m. the day before the meeting. Citizens may also provide written public comment here: https://www.isleofpalms.gov/public-comment-form

Agenda

1. **Call to order and acknowledgement that the press and the public have been notified of the meeting in accordance with the Freedom of Information Act.**

2. **Citizen's Comments –** All comments have a time limit of three (3) minutes.

3. **Approval of previous meeting's minutes –** October 6, 2026 (p.2)

4. **Interviews for Board and Commission vacancies**
   a. 1:05pm - Rebecca Kovalich, ATAX Committee (p.6)
   b. 1:20pm – Chip Bottone, Planning Commission (p.7)
   c. 1:35pm – Tim Ahmuty, Planning Commission (p.9)

5. **Old Business**
   a. Discussion of process for document/ordinance review and approval
   b. Update on Director of Building, Planning & Zoning position (p.10)
   c. Discussion and consideration of business license revenue assurance process/procedures (p.11)
   d. Discussion and consideration of hosting and recodification of City Code (p.12)
   e. Discussion of performance evaluation forms (p.15)

6. **New Business-** Discussion of RFP for engaging an insurance consultant (p.45)

7. **Miscellaneous-** next meeting – Thursday, November 19, 2026 at 2pm.

8. **Adjournment**

Administration Committee Meeting
1:00pm, Tuesday, October 6, 2026
1207 Palm Boulevard, Isle of Palms, SC and
broadcasted live on YouTube: https://www.youtube.com/user/cityofisleofpalms

MINUTES

1. **Call to Order**

Present: Council members Miller, Pierce, and Ward

Staff Present: Administrator Kerr, Deputy Administrator Kuester, Director Hamilton, HR Officer Ladd

2. **Citizen's Comments – none**

3. **Approval of Previous meeting's minutes**

MOTION: Council Member Miller made a motion to approve the minutes of the September 1, 2026 meeting. Council Member Pierce seconded the motion. The motion passed unanimously.

4. **Old Business**

A. **Update on Human Resources Manager position**

Administrator Kerr reported that new HR Manager is expected to begin work on October 26.

B. **Update on Director of Building, Planning & Zoning position**

Administrator Kerr stated that Find Great People made slight modifications to the certifications and education requirements on the job description. Council Member Miller said the classification should be G-102.

C. **Update on business license revenue assurance process/procedures**

Council Member Miller passed out a draft of possible documentation to be included in the business license application and renewal process.

MOTION: Council Member Pierce made a motion to format a proposed one-page document similar to Kiawah Island's checklist, incorporate the suggestions made by Council Member Miller, and send it to the Ways & Means Committee for discussion. Council Member Miller seconded the motion. The motion passed unanimously.

DRAFT

D. Update on Risk Management and insurance review

Director Hamilton reported that the City paid approximately $2.5 million in insurance premiums in FY 2026 Staff has reviewed the most recent asset appraisal, completed in February 2024, and removed items such as ballfield dugouts and soccer field equipment from coverage. She added that collision coverage had been removed from some older vehicles and that policies are being reviewed as they come up for renewal. Staff recommends increasing the deductible on the City's general liability and property insurance from $5,000 to $25,000, which the insurance company's figures project would save approximately $154,000 over five years, or about $30,000 per year, assuming claims remain the same. She noted that a resolution must be signed by the City if the deductible is changed, which is why the item was brought to the committee, and that the general liability policy renews January 1. She also stated that the City has been introduced to a broker it would like to engage to help with the next steps.

Administrator Kerr stated that the savings from the items removed from coverage are separate from the deductible savings and are already tracked on the City's scorecard. He reported that staff will begin tracking the financial goal of saving $1 million at the Ways and Means Committee meetings, with an ongoing dashboard and list of savings. He stated that, having completed the cleanup of insurance lists, staff hopes an insurance broker or consultant can help the City move to a deeper analysis of its risks and potential savings. He reported that the City's banking contacts work with an organization that handles municipal insurance, that at least one candidate has been identified, and that the cost of engaging a consultant would be brought to Council for consideration.

Human Resources Manager Ladd stated that the City averages three to five claims per year, which are primarily accidents rather than lawsuits.

Administrator Kerr shared the City's strategy is to set aside the savings, including in the Disaster Recovery Fund, to prepare for the additional deductible costs expected under the higher deductible. He stated that determining how high a deductible the City can afford, and how much to set aside to cover losses, is an analysis for which staff would like professional assistance. The Committee agreed to move the item to the Ways and Means Committee.

E. Update on Boards & Commissions vacancies

Interviews for the vacancies will be held at the November 4 Committee meeting.

F. Update on hosting and recodification of City Code

Administrator Kerr said the two bids received for the hosting and recodification came from atypical respondents and were very high.

He would like to seek proposals from the current provider and their main competitor, American Legal. He said the cost of this work is below the threshold that requires a sealed bid and is also less than the amount requiring City Council approval, meaning it could be decided by staff. Staff will bring updates to the Committee.

5. **New Business**

A. **Discussion of City's performance evaluation form**

HR Manager Ladd recommends looking at the performance evaluation forms after the first of the year since this year's forms are being distributed shortly.

Council Member Pierce would like to review neighboring community's performance evaluation forms.

B. **Discussion of process for document/ordinance review and approval**

Council Member Pierce would like to set up a quality control process for ordinance review prior to going to Council for a vote. Administrator Kerr will come back to the Committee with some ideas for such a process.

C. **Discussion of potential policy for City staff use of artificial intelligence**

Discussion ensued about City staff's usage of AI in their work. Deputy Administrator Kuester said VC3 suggested surveying the staff to determine who is using what and how. HR Manager Ladd suggested adding wording to the City's computer use policy reviewed during the onboarding process.

6. **Miscellaneous Business**

The next meeting of the Administration Committee will be held on Wednesday, November 4, 2026 at 1pm.

7. **Executive Session**

MOTION: Council Member Miller made a motion to go into Executive Session to discuss candidates for the Leola Hanbury Award. Council Member Ward seconded the motion. The motion passed unanimously.

The Committee, along with Mayor Pounds, entered into Executive Session at 1:58pm.

The Committee returned to open session at 2:09pm.

MOTION: Council Member Pierce made a motion to move forward with the recommendation as discussed in Executive Session. Council Member Miller seconded the motion. A vote was taken as follows:

Ayes: Miller, Pierce, Pounds
Nays: Ward

The motion passed 3-1.

7. **Adjournment**

Council Member Ward made a motion to adjourn, and Council Member Miller seconded the motion. The meeting was adjourned at approximately 2:10pm.

Respectfully submitted,

Nicole DeNeane
City Clerk

REBECCA D. KOVALICH

104 Charleston Blvd, Isle of Palms, SC 29451
rkovalich@yahoo.com **cell: 336.817.3999**

Physician Practice and Laboratory Operations, Sales, Finance & Business Development

Value Offered

Market Expansion & Growth
Asset Productivity & Profit Margin Growth
Bargaining & Negotiations
Laboratory Start-Ups; Joint Ventures; Mergers
STRENGTHS: Identifying Talent and Facilitation

Sales & Sales Management
Team Building & Staff Leadership
Customer Service & Relationship Building
Restructuring & Turnarounds

Career Highlights

Select Laboratory Partners and Select Laboratories of SC
Consultant **June 2006-- present**
Hired sales staff for physicians' laboratories in North Carolina/South Carolina and managed clinical laboratories for physician office laboratories including physician office management and evaluation.

Implemented laboratory procedures for Select Laboratory clients to economically and conveniently process and monitor prescribed medications including controlled drugs. Hired and evaluated technical staff. Established QA/QC and billing protocol. Established immunoassay laboratory for hormone and age management studies.
.

Triad Clinical Laboratory, Inc. • Winston-Salem, NC **July 1991 – Feb 2003**
CEO
Established clinical laboratory to provide customized services for physicians, home-health agencies, and nursing facilities. Achieved market share in the Triad region of NC which expanded to 10 locations within 100 mile radius. Net profits ranged between 18-26% annually. Supported operations with internal financing; net worth greater than 50% of total capitalization. ***Net worth was substantially above industry average****. (Duns: 86-729-0520*)

Salem Laboratory • Highland Oaks Laboratory • Winston-Salem, NC **July 1984 – July 1991**
Operations Manager & Managing Shareholder
Established two physician owned stat laboratories; purchased lab equipment; set up QC/QA protocol; built management team; set up billing procedures including laboratory information systems.

Salem Gastroenterology Associates, PA • Winston-Salem, NC **February 1982 – July 1991**
Practice Administrator
Coordinated daily operations for a 7-physician group practice. Responsible for financial management, contract negotiations, human resources, facility design, strategic planning, and issues related to future growth.

Education

Bachelor of Science, Business Administration (Management Information Systems), 1986. Temple University, Philadelphia, PA and Gardner Webb University • Shelby, NC

MBA, *Babcock Graduate School of Management*, 1988 Wake Forest University • Winston-Salem, NC

ARTHUR "Chip" BOTTONE

27 Seagrass Lane Isle of Palms, South Carolina 29451
704-905-7139, chipbottone@gmail.com

SUMMARY

Global public and private company executive experienced in energy, technology and industrial markets. Expertise includes innovation, technology commercialization, strategic planning, sales & marketing, capital markets, project financing and mergers & acquisitions.

PROFESSIONAL EXPERIENCE

Natably, Board Chairman — *2021-Present*
Talent Realization and Career Development Platform

Torkington Partners, Founder — *2008-Present*
Global Advisory and Investment Firm

Bold Capital, Partner — *2021-2023*
Global Investment and Advisory Firm

FuelCell Energy (*NASDAQ:FCEL*)
Global manufacturer, developer, and service provider of renewable and ultra clean fuel cell power plants and microgrids for the supply, recovery and storage of energy

Public Company Board Member — ***2011-2019***

Board member, Chair of Executive Committee

- Re-established board membership and leadership
- Improved governance, diversity, functional and industry experience

Private Company Board Memberships — ***2012-2019***

Board Chair

- Versa Power (Denver/Calgary Canada)
- FuelCell Energy Solutions GMBH (Munich, Germany)
- Global subsidiaries in Europe and Asia

Chief Executive Officer and President — ***2011-2019***
Danbury, Connecticut

- Global solutions portfolio for supply, recovery and storage of clean and renewable energy
- Delivered $1B in revenue and $2B backlog, world's leading utility and energy companies
- Raised $900M of capital ($500M equity/$400M debt)
- Global policy creator (US and International)

Chief Commercial Officer – Senior Vice President — ***2010-2011***
Charlotte, North Carolina/ Danbury, Connecticut

Conequity Resources
Consulting Firm

Managing Director – Industrial and Energy Sectors ***2008-2010***
Charlotte, North Carolina

Ingersoll Rand Company (*NYSE:IR*)
Global diversified industrial manufacturer and services provider with market leading brands serving customers in industrial, energy, commercial and residential markets

President - Energy Systems ***2004-2008***
Charlotte, North Carolina

Corporate Innovation leader/Acquisition Integration Leader ***2007-2008***
Charlotte, North Carolina

Vice President and General Manager - Power Generation ***2002-2004***
Charlotte, North Carolina

Vice President, Global Product Management and Aftermarket – Portable Power ***1999-2002***
Manchester, England/ Charlotte, North Carolina

General Manager - Rotary Compressor Division, European Served Area ***1995-1999***
Manchester, England

General Manager - Reciprocating Compressors Worldwide ***1992-1995***
Charlotte, North Carolina

EDUCATION

Georgia Institute of Technology- Bachelors Mechanical Engineering (BME)

The Wharton School, University of Pennsylvania-Certificate of Professional Development

Tim Ahmuty

204 Charleston Blvd
Isle of Palms, SC 29451
843-696-1363
tahmuty@comcast.net

EXPERIENCE

Realtor/Property Manager/Investor

March 1991 - PRESENT

Guided buyers and sellers through the home sale process, invested in personal rental properties and management.

Licensed Contractor/Builder-Ahmuty/Rawers LLC

January 2004-January 2013

Specialized in residential construction, reading technical plans, site management, hiring subcontractors, securing permits and ensuring safety compliance.

Loan Officer-Southern Trust Mortgage Corporation, Lucey Mortgage Corporation

January 1999-2003

Specialized in primary, second home, and investment property loans.

EDUCATION

College of Charleston-Charleston, SC

Studied Urban Planning and Development. Internship with City of Charleston Planning and Urban Development.

Roanoke College-Salem, VA

Majored in Physical Education

SKILLS

*Computer competent

*Strong work ethic

*Expertise in property assessment

*Strong observational skills

*Competent in risk analysis and problem solving

*Excellent understanding of building codes

*Ability to communicate well

*Decisive and timely with deadlines

*Possesses a passion for the industry

From: Christin Mack
To: Janice Ladd
Subject: Updated on Planning Role
Date: Friday, October 30, 2026 10:47:35 AM
Attachments: image001.png

Good morning, Janice.

I wanted to share a quick update on where we are in the Director of Planning, Building, and Zoning search process.

So far, we have reached out to 55 candidates to encourage them to apply. We are coordinating a conversation with 1 very promising candidate. We had an initial screening with another candidate who has been eliminated from consideration.

Additionally, there is 1 strong application that we received this morning and will be following up on to coordinate our initial screen.

Our team will continue their sourcing efforts, and I look forward to following up with you again next week!

FIND GREAT PEOPLE

Christin Mack
Practice Lead, Public Sector, Nonprofit, and Community Impact Executive Search
843.585.0310 | www.fgp.com
146 Fairchild Street, Suite 200, Charleston, SC 29492
Recognized as a Top Recruiting Firm by Forbes

CITY OF ISLE OF PALMS
Department of Building, Planning and Licensing
1207 Palm Boulevard
Isle of Palms, South Carolina 29451
Phone (843) 886-9912

BUSINESS LICENSE APPLICATION & RENEWAL CHECKLIST

Business License Year: May 1 – April 30 | Renewal Deadline: April 30

Not every requirement applies to every business. The City may request additional documentation when necessary to verify an application, gross receipts, or compliance with applicable requirements.

ALL BUSINESSES — AS APPLICABLE

☐ Completed Business License Application accepted by the City of Isle of Palms

☐ Copy of IRS EIN Confirmation Letter - if applicable. If ownership type is LLC, partnership, or corporation, provide one of the following: an IRS EIN Confirmation Letter or a signed letter from the company's CPA confirming the EIN or a Federal or State tax return showing the EIN (income information may be redacted). A W-9 form is unacceptable.

☐ Copy of SC Retail License - if applicable - SC Dept. of Revenue (www.dor.sc.gov)

☐ Copy of SC professional/occupational license – if applicable – when the activity is regulated by the state

☐ Copy of SCDA Retail Food Permit – if applicable- Establishment Permit or other applicable food-service permit

☐ Copy of PBW (On Premises Beer/Wine License) and or PLB (On Premises Liquor/Beer License) – if applicable – for selling alcohol

☐ Other required State/Federal license or permit – if applicable

☐ Other city permits or approvals required for the proposed business activity, including home occupations, commercial film and photography, and surf instruction, when applicable

☐ Taxpayer identification documentation may be requested when necessary to verify the taxpayer's identity or reconcile city records:

- ☐ Confirmation of Secretary of State registration/status – may be requested if applicable to the business entity
- ☐ Government-issued photo identification – may be requested when needed to verify the applicant, owner, responsible party, or license qualifier

CONTRACTORS

☐ Copy of current applicable SC LLR contractor license, registration, or qualifying Charleston County trade license, as required for the work performed.

☐ Government-issued photo identification of the license qualifier, if requested.

☐ Contract, project documentation, or other verification of work performed within Isle of Palms, if requested

ACCEPTABLE INCOME VERIFICATION DOCUMENTS FOR NEW LICENSE APPLICATIONS

☐ Contract, job proposal, permit, or other documentation supporting the amount of business performed within Isle of Palms.

☐ Signed letter from the business owner or a corporate officer stating what they will be doing on Isle of Palms and the job cost

ACCEPTABLE INCOME VERIFICATION DOCUMENTS FOR RENEWAL LICENSE APPLICATIONS

Businesses must report gross income in accordance with S.C. Code 6-1-400. Acceptable documentation may include one of the following:

- ☐ Profit and Loss statement (if it shows all company income, provide a breakdown of what is reported to other jurisdictions)
- ☐ Federal or state income tax return (if it shows all company income, provide a breakdown of what is reported to other jurisdictions)
- ☐ 1099s showing total Isle of Palms gross receipts (if they include income earned outside Isle of Palms, provide a breakdown of what is reported to other jurisdictions)
- ☐ Reports from the company's finance software, general ledger, or sales reports showing Isle of Palms gross receipts
- ☐ South Carolina state sales tax returns for businesses whose reported sales tax revenue accurately reflect their gross business revenue.
- ☐ Signed letter from the company's CPA stating the company's Isle of Palms gross receipts and acknowledging they are correct
- ☐ Notarized letter from the business owner or a corporate officer stating the company's Isle of Palms gross receipts and acknowledging they are correct

IMPORTANT: *Submission of an application and payment does not automatically constitute approval or authorization to conduct business. A license will be issued only after all applicable requirements have been satisfied.*

CITY OF ISLE OF PALMS

INFORMATION PAPER - FINAL PROPOSAL ANALYSIS

RFP 2026-10 - Recodification and Hosting of City Code

PURPOSE	Final quality, cost, and value comparison of the four submitted solutions for the City Administrator.

EXECUTIVE SUMMARY

Four solutions were reviewed: CivicPlus/Municode, ICC Code Solutions (General Code), Concourse Tech, and FSH Technologies. On quality/fit, CivicPlus ranks first because it combines the deepest demonstrated municipal codification record, extensive South Carolina experience, incumbent continuity, and a complete attorney-led recodification process. ICC ranks a close second with a mature codification practice, established eCode360 platform, and a substantially lower initial price. Concourse ranks third: its response is the strongest modern technical package, but at the highest five-year cost and with a less-established municipal codification record. FSH ranks fourth because its quoted price excludes the legal/editorial recodification itself, leaving a core RFP requirement to the City or another provider.

Overall value ranking: 1) ICC Code Solutions, 2) CivicPlus, 3) Concourse, 4) FSH. The key decision is between ICC and CivicPlus. ICC is $4,505 cheaper up front ($11,995 versus $16,500) and has lower recurring cost at modest supplementation volume. CivicPlus becomes less expensive on recurring operations when annual supplementation exceeds approximately 157 pages at today's quoted CivicPlus recurring rates; after the 5% CivicPlus increase identified for Year 2, that annual crossover is approximately 168 pages***. We are in an agreement with Civic Plus through May 31st 2027***.

The five-year crossover occurs later because ICC begins with the lower initial price. Using ICC's first-year hosting included in the $11,995 package and four subsequent $1,295 annual renewals, total five-year cost equalizes at approximately 204 supplementation pages per year if CivicPlus recurring fees remain flat, or about 212 pages per year if the stated 5% CivicPlus Year-2 increase is applied and then held. Accordingly, the City's actual historical supplementation-page volume is now a central cost variable.

Recommendation. Focus final due diligence on ICC and CivicPlus. Verify average annual supplementation pages for the last three to five years and normalize both firms to a five-year TCO using that actual volume. If the City historically runs materially below roughly 200 pages per year, ICC is likely the stronger long-term cost value; if it runs materially above roughly 200 pages, CivicPlus becomes increasingly competitive on total cost while retaining the lowest transition and performance risk.

RANKING AT A GLANCE

Vendor	Quality	Cost	Overall Value
CivicPlus / Municode	1	2	2
ICC Code Solutions	2	1	1
Concourse Tech	3	4	3
FSH Technologies	4	3	4

Cost basis: ICC - $11,995 initial + $1,295/year after Year 1 + $25/page supplementation; CivicPlus - $16,500 recodification + $5,225.21 current annual recurring fees; Concourse - $182,141 stated five-year TCO; FSH - $125,000 stated five-year total excluding recodification/legal editing.

ICC vs. CIVICPLUS - COST CROSSOVER

CivicPlus is largely fixed-cost for recurring hosting and full-service supplementation; ICC has a much lower fixed annual platform fee but charges $25 per page for future supplementation. The cost winner therefore changes with supplementation volume.

Measure	ICC	CivicPlus
One-time / initial cost	$11,995	$16,500
Recurring annual structure	$1,295 + $25 x supplement pages	$5,225.21 current quoted annual fees
Escalation	$25/page fixed for 3 years; thereafter PPI-based	Proposal identifies 5% increase in Year 2
Annual recurring break-even	~157 pages now; ~168 pages after CivicPlus 5% increase	Above crossover, CivicPlus is cheaper annually
Five-year total-cost break-even	~204 pages/year flat CivicPlus; ~212 with stated Year-2 5% increase	Above crossover, CivicPlus is cheaper over 5 years

Illustrative Five-Year Cost

Assumptions: ICC $11,995 initial package, four $1,295 renewals after the included first year, and $25/page supplementation in each operating year. CivicPlus includes $16,500 recodification plus current quoted recurring fees; the second CivicPlus column applies the stated 5% increase from Year 2 forward. Taxes, optional services, and extraordinary charges are excluded.

Avg. Supplement Pages / Yr	ICC 5-Year	CivicPlus Flat	CivicPlus w/ 5% Yr 2
100	$29,675	$42,626	$43,671
150	$35,925	$42,626	$43,671
200	$42,175	$42,626	$43,671
212	$43,675	$42,626	$43,671
250	$48,425	$42,626	$43,671
300	$54,675	$42,626	$43,671

Interpretation. ICC retains the five-year cost advantage through roughly 200 annual supplement pages. Around 204-212 pages/year the two approaches equalize. At 250-300 pages/year, CivicPlus becomes materially cheaper despite its higher recodification price.

VENDOR FINDINGS

CivicPlus / Municode. Highest-quality/lowest transition-risk choice. Incumbent since 2009, extensive South Carolina municipal experience, three South Carolina references, and an established attorney-led process. Main drawbacks: 18-30 month schedule, some scope exceptions, and less detailed archive/data-portability treatment.

ICC Code Solutions. Best apparent price-to-quality combination. Long codification history, mature eCode360, 12-14 month recodification, and materially lower fixed cost. Its $25/page supplementation model makes actual historical page volume decisive. Clarify archive/OCR, accessibility, export/transition, and RFP-specific references.

Concourse Tech. Most complete technical response, including migration, OCR, accessibility, service levels, public continuity, and data export, with a 22-week implementation. The tradeoff is a $182,141 five-year TCO and a less-established municipal codification record than CivicPlus or ICC.

FSH Technologies. Least comparable proposal. The platform is technically credible, but the $125,000 five-year price expressly excludes legal/editorial recodification. A separate codification partner or internal capability would still be required.

STAFF ANALYTICAL CONCLUSION

ICC and CivicPlus should receive the closest final consideration. ICC currently ranks first on overall value because it combines a mature codification platform with the lowest initial price and a low fixed annual hosting cost. CivicPlus ranks first on quality and operational risk because it is the incumbent, has the deepest demonstrated South Carolina record, and provides a proven full-service supplementation model. The cost advantage between the two is not absolute; it turns primarily on annual supplementation page volume.

Decision rule. Below roughly 160-170 supplement pages per year, ICC is cheaper on annual recurring cost. Above that level, CivicPlus is cheaper annually. Because ICC starts $4,505 cheaper up front, CivicPlus does not become the stronger five-year cost value until roughly 204-212 supplement pages per year. The City should obtain actual annual supplement-page counts for the last three to five years before treating either firm as the clear cost winner.

Concourse remains a credible premium alternative if the City assigns high value to rapid implementation, an integrated archive/OCR solution, strong accessibility commitments, service-level detail, and data portability. Its cost, however, is several times the likely five-year cost of either ICC or CivicPlus. FSH should not be treated as a complete alternative unless a codification partner and all-in legal/editorial price are added.

RECOMMENDED NEXT STEPS BEFORE SELECTION

1. **Verify supplementation volume.** Request the number of supplementation pages processed for Isle of Palms for each of the last three to five years. This is the single most important unresolved cost input for the ICC-versus-CivicPlus decision.
2. **Normalize five-year pricing.** Ask ICC and CivicPlus to confirm a five-year TCO using the City's actual historical page volume, including all escalators, page charges, hosting, supplementation, transition/export charges, and project-page overage.
3. **Clarify ICC scope.** Confirm historical-ordinance repository/OCR treatment, WCAG/accessibility commitment, export/transition rights, service levels, and comparable municipal references/public code links.
4. **Clarify CivicPlus scope.** Confirm historical ordinance treatment, export/transition terms, precise recurring-price/escalator schedule, recodification page limits/overage pricing, and whether the 18-30 month schedule can be shortened.
5. **Keep Concourse as the technical benchmark.** Identify which enhanced archive, OCR, accessibility, SLA, and portability capabilities are truly required and whether ICC/CivicPlus can provide them at comparable cost.
6. **Resolve procedural status before award.** Confirm the procurement treatment of the CivicPlus and ICC materials. The CivicPlus packet is labeled RFP 2026-07 and dated July 29, 2026; ICC is dated October 20, 2026, while RFP 2026-10 identified October 1, 2026 as the submission deadline. This paper ranks substance and cost only and does not determine procedural eligibility.

BOTTOM LINE

Absent unusually high supplementation volume, ICC is the current best-value proposal; CivicPlus remains the strongest quality/lowest-risk proposal. The City should not finalize the cost ranking between those two firms until it knows its actual historic supplementation-page volume and receives normalized five-year pricing using that volume.

Source basis: submitted vendor proposals and RFP 2026-10. Cost crossover calculations are staff analytical estimates based on stated proposal pricing; taxes and optional/extraordinary charges are excluded unless noted.

City of Isle of Palms

Memo

To: Douglas Kerr

From: Janice Ladd/Kathleen Kelly HR Manager JL

Date: October 30, 2026

Re: Sample Performance Evaluations

Attached please find sample performance evaluations from the following municipalities:

- Town of Mount Pleasant
- City of Hanahan
  - Attachment inclusive of specific City Administrator evaluation form
- City of Goose Creek
- Town of Sullivan's Island

If you have any questions or need assistance with any form, feel free to reach out at jladd@iop.net or 843-886-6428 option 3

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Mount Pleasant

2026 Annual Performance Evaluation

mytompsc

Employee: _____
Job Assignment: _____
Manager: _____

Period: _____ Review Date: _____

Overall Average Rating: _____

Competency

Competency Average Rating: _____

CORE COMPETENCIES

Core Competencies represent seven (7) of the ten (10) competencies within the annual performance evaluation.

Core Competencies apply to every position and job assignment at the Town of Mount Pleasant. Competence is defined as having suitable or sufficient skill, knowledge, experience, etc., for some purpose; properly qualified. For example, Communication is a Core Competency. All employees are expected to communicate effectively and professionally with coworkers, supervisors, direct reports, and the general public.

The seven (7) Core Competencies carry a weight of 70% towards the average review rating.

JOB COMPETENCIES

Job Competencies represent three (3) of the ten (10) competencies within the annual performance evaluation.

Job Competencies are specific to the job functions of each job assignment and position at the Town of Mount Pleasant. For example, Community Outreach is a Job Competency. This Job Competency does not apply to every job assignment, but it is an essential job function for many positions. Job Competencies should focus on the top three critical areas for the employee's assigned position.

The three (3) Job Competencies carry a weight of 30% towards the average review rating.

JOB COMPETENCIES (30%)

1. 2026 Goal 1

Behaviors

_____
_____
_____
_____

Manager's Rating: _____

Please provide details for assigned score.

2. 2026 Goal 2

Behaviors

_____
_____
_____
_____

Manager's Rating: _____

Please provide details for assigned score.

3. 2026 Goal 3

Behaviors

_____

_____

_____

_____

Manager's Rating: _____

Please provide details for assigned score.

CORE COMPETENCIES (70%)

4. Teamwork

Teamwork

Behaviors

_____

_____

_____

_____

Manager's Rating: _____

Please provide details for assigned score.

5. Professionalism

Professionalism

Behaviors

_____

_____

_____

_____

Manager's Rating: _____

Please provide details for assigned score.

6. Personal Integrity

Personal Integrity

Behaviors

_____

_____

_____

_____

Manager's Rating: _____

Please provide details for assigned score.

7. Judgement/Decision Making

Judgement/Decision Making

Behaviors

_____

_____

_____

_____

Manager's Rating: _____

Please provide details for assigned score.

8. Job Knowledge

Job Knowledge

Behaviors

_____

_____

_____

_____

Manager's Rating: _____

Please provide details for assigned score.

9. Initiative

Initiative

Behaviors

_____

_____

_____

_____

Manager's Rating: _____

Please provide details for assigned score.

10. Accountability

Accountability

Behaviors

_____

_____

_____

_____

Manager's Rating: _____

Please provide details for assigned score.

Overall Comments

Overall comments should be comprehensive.

Comprehensive performance review comments should discuss more than just past performance. They should also touch on: employee strengths and accomplishments, weaknesses and areas for improvement.

Signature

Employee: _____ Manager: _____

_____ _____ _____ _____

Signature Date Signature Date

Comments Comments

CITY OF HANAHAN

EMPLOYEE PERFORMANCE EVALUATION

Employee Name: Job Title: Date assigned to current position: Department: Fire Department	Evaluation Period From: _____ To: _____ Type of Evaluation Annual: ☐ Other: ☑
Command Staff /Division Supervisor Name: _____ Title:	Supervisor *(if applicable)*: _____ Title:

DEFINITION OF PEFORMANCE RATINGS	
• **(S) Superior**	Your job performance is outstanding. The high quality of your work provides a model to others in the organization, both in terms of results you achieve and in your interactions with others to achieve those results. Your work is characterized by unusual accomplishments; your performance is significantly above expectations.
• **(E) Exceeds Expectations**	Your job performance is consistently above expectations. You are doing an excellent job in the results you achieve and how you go about completing your work. You can be proud of the quality of your work as your performance is consistently competent and efficient.
• **(M) Meets Expectations**	Your job performance is acceptable. Your work product fulfills the key requirements of your job function in a satisfactory manner.
• **(O) Occasionally Below Expectations**	Your job performance is mostly on task. However, your work requires more supervision than should be necessary. Your performance in some ways may be tolerable, but in total needs to improve as you are not performing at a fully satisfactory level. Areas of additional training in certain areas will be identified to assist you with bringing your work up to the expectations that are required.
• **(F) Failing**	Your performance is deficient and needs significant and immediate improvement in order to maintain employment.

The above rating descriptions are to be used as a guide. If one does not adequately express the employee's performance, explain so in the space provided at the end.

Read each of the following performance areas below and circle the rating that best fits.

A. KNOWLEDGE OF JOB	RATING: Meets Expectations

Understands the scope of job responsibilities and how this job relates to other jobs. Shows knowledge of guidelines and procedures. Demonstrate expertise in job related tasks. Can be counted on to contribute to improvement in the organization. Consistently stays up to date on changes in job requirements.

B. QUALITY OF WORK, PRODUCTIVITY AND DEPENDIBILITY	RATING: Meet Expectations

Delivers work that is accurate, precise, and/or to standard. Seeks to improve job performance. Completes assignments independently and in a timely manner. Keeps supervisor informed of progress toward completion of tasks. Consistently produces an acceptable quantity of work. Adheres to appropriate guidelines, policies, procedures, and regulations. Follows through to completion.

C. COOPERATING WITH OTHERS/COMMUNICATION	RATING: Meets Expectations

Consistently develops and maintains effective working and/or customer/citizen relationships. Offers appropriate assistance to others. Goes out of way to support the team. Communicates effectively and clearly with others. Speaks and listens in a manner that benefits the organization.

D. JUDGMENT	RATING: Meets Expectations

Takes appropriate action in routine and non-routine situations based on careful consideration of the situation, information, policies, customer/citizen needs, and processes. Researches options in terms of risks and consequences. Seeks workable and cost-effective solutions.

E. ATTENDANCE/TIMELINESS	RATING: Superior

Rarely absent or late from work. Is fully ready to work at the scheduled start time and continues until workday and/or shift is done.

F. SAFETY/HOUSEKEEPING/APPEARANCE	RATING Meets Expectations

Diligently follows safety guidelines. Makes suggestions to improve safety. Maintains accurate safety records. Adheres to the City's dress/uniform/grooming policies. Shows an interest in the appearance and maintenance of the workplace, equipment, vehicles and/or City property/facilities. Reports maintenance problems in a timely manner and expeditious manner.

G. INITIATIVE/MOTIVATION/ADAPTABILITY/FLEXIBILITY	RATING: Meets Expectations

Displays drive and energy in accomplishing tasks. Displays a contagious enthusiasm for the job and the City. Demonstrates a positive attitude in completing work assignments and interacting with others. Seeks opportunities for new assignments and responsibilities. Readily adapts to change in deadlines, policies, and assignments. Deals well with unexpected events and stress. Is willing to assume new assignments and try new methods. Works well with other individuals. Accepts constructive feedback and suggestions and uses them to improve.

The following are to be completed for ***MANAGERS/SUPERVISORS*** only.

H. LEADING	RATING: N/A

Brings individuals and groups together to accomplish common goals. Builds high morale and spirit among staff. Successfully deals with disputes among staff. Effectively uses delegation to enhance productivity. Gives supervised staff clear instructions and authority to accomplish delegated tasks.

I. PLANNING	RATING: N/A

Effectively controls costs. Helps the town improve productivity through appropriate organization and staffing. Works well with other individuals and departments in the development and implementation of strategic plans. Uses organizational skills to the best advantage. Proposes plans of action that are timely, realistic and positive. Translates planning into reality. Effectively plans to avoid future problems.

J. EMPLOYEE EVALUATION AND DEVELOPMENT	RATING: N/A

Anticipates potential problems before they get out of hand. Makes effective use of performance appraisals and feedback to motivate and develop employees. Maintains appropriate documentation in regard to employee performance. Encourages and supports employee development. Provides timely feedback and follow up.

K. DECISIVENESS/RISK TAKING	RATING: N/A

Carefully considers facts and circumstances before making a decision. Readily makes decisions in difficult or unusual situations and demonstrates the ability to make independent decisions within guidelines. Understands and accepts risks involved in decisions and exercises good judgment about when to take risks.

Any checks received in the "Superior", "Occasionally Below Expectations" or "Failing" categories must be specifically addressed in the below box. You may also want to address *multiple* checks received in the "Meets Expectations" box.

COMMENTS AND EXAMPLES *(please add an additional page if more space is needed)*:

COMMENTS COMPLETED BY EMPLOYEE *(optional)*

Signing below confirms you have read and acknowledge the above evaluation.*

Employee Signature	Employee -Note/Comments Cont'd)
Name: _____ Date:	

**It is not necessary for the employee to agree with the evaluation. Employee signature on the form only acknowledges that the evaluation was reviewed with the employee by the evaluator(s). If employee refuses to sign, the Department Head and/or Command Staff/Division Supervisor will write "Refused to Sign" and initial.*

Command Staff /Division Supervisor Signature	Command Staff /Division Supervisor - Note/Comments
Name: _____ Date: 09/12/2023	See above
Supervisor Signature	Supervisor - Note/Comments
Name: _____ Date: 09/12/2023	See above
Department Head Signature	Department Head - Note/Comments
Name: _____ Date:	

CITY ADMINISTRATOR SIGNATURE	CITY ADMINISTRATOR RECOMMENDATION
Courtney Soler Date:	Disapprove ☐ Approve Evaluation ☐
CITY ADMINISTRATOR NOTES AND COMMENTS	

MAYOR
CHRISTIE RAINWATER
MAYOR PRO TEM
KEVIN HEDGPETH
CITY ADMINISTRATOR
COURTNEY SOLER

CITY OF HANAHAN
BERKELEY COUNTY ESTABLISHED 1973

CITY COUNCIL
TIMOTHY CROWLEY
MIKE DYSON
MICHAEL SALLY
AMANDA COLVIN-SHEA
ADAM SPURLOCK

City Administrator Performance Evaluation

For each performance factor, please rate the City Administrator on a scale from one (1) to five (5), according to how well the expectations have been met:

----------1----------2----------3----------4----------5----------

Does Not Meet Expectations	Meets Expectations	Exceeds Expectations

There are three reference points on the scale, defined as follows:

Exceeds Expectations (5): The City Administrator's performance clearly exceeds your expectations in this area, even of someone fully qualified to do the job of City of Hanahan Administrator. The City Administrator's performance and contributions produce a positive impact on the performance of others and the operation of the City of Hanahan.

Meets Expectations (3): The City Administrator's performance meets your expectations of someone fully qualified to do the job of City of Hanahan Administrator. This does not mean a perfect job on everything. For the most part, the job was performed the way it should be done and would not need to improve for performance to be fully acceptable.

Does Not Meet Expectations (1): The City Administrator's performance does not meet your expectations of someone fully qualified to do the job of City of Hanahan Administrator and needs to improve significantly to satisfy you in this area.

MANAGEMENT OF THE ORGANIZATION: Effectively runs the operations of the organization. Creates a collaborative, team building environment for staff as a Workplace of Choice. Recognizes the accomplishments of staff and other agencies working on behalf of the city. Supports a commitment to diversity/inclusion, professional growth, succession planning, and opportunity within the organization. Accepts full accountability for staff and the outcome of City projects or decisions. Actively addresses mission critical services, identifies organizational problems, and takes remedial action.

Performance Rating:

1	**2**	**3**	**4**	**5**	**Unable to Rate**

General Comments:

Click or tap here to enter text.

Improvement Suggestions:

Click or tap here to enter text.

EXECUTION OF POLICY: Understands and complies with ordinances, policies and procedures governing the City including Federal and State legislation and directives. Implements City policy, fairly and consistently, based upon Council decisions, initiatives, and applicable laws and regulations. Presents matters in a factual, analytical way. Coordinates Council policy decisions to staff, other organizations, and the community.

Performance Rating:

1	2	3	4	5	Unable to Rate

General Comments:

Click or tap here to enter text.

Improvement Suggestions:

Click or tap here to enter text.

FINANCIAL MANAGEMENT: Properly prepares and manages the budget. Demonstrates ingenuity and creativity in approaching budgetary matters, including long-range financial needs, monitoring and adaptation for the organization. Incorporates evolving role of technology in service provision. Actively works to sustain cost-competitive government and utility services.

Performance Rating:

1	2	3	4	5	Unable to Rate

General Comments:

Click or tap here to enter text.

Improvement Suggestions:

Click or tap here to enter text.

RELATIONS WITH THE COUNCIL: Makes an effort to be accessible to Council members. Handles issues that are brought by the Council in a consistent and timely manner. Maintains an honest, truthful and professional relationship with each Council member. Keeps a positive attitude and approach to new ideas, issues and complaints raised by Council members.

Performance Rating:

1	2	3	4	5	Unable to Rate

General Comments:

Click or tap here to enter text.

Improvement Suggestions:

Click or tap here to enter text.

COMMUNITY RELATIONS AND ENGAGEMENT: Makes an effort to understand issues, concerns, and the values of the community. Meets with and listens to members of the community to discuss concerns and strives to understand their interests. Leverages public engagements and community interactions to educate and advocate on City initiatives and services. Represents the City well and in a professional and positive manner. Works proactively and maintains a nonpartisan professional approach with the media and press. Professionally leverages social media. Works effectively and synergizes collaboration with partner agencies, neighboring jurisdictions and community organizations.

Performance Rating:

1	2	3	4	5	Unable to Rate

General Comments:

Click or tap here to enter text.

Improvement Suggestions:

Click or tap here to enter text.

COMMUNICATIONS: Ensures that Council members receive important information in a timely and effective manner. Provides regular updates to the Council, keeping them informed about current and critical issues. Presents the Council and community with clear and accurate reports and correspondence. Responds to correspondence, requests and complaints, timely and appropriately. Facilitates open two-way communication and encourages mutual honesty and respect with Council, staff and the community.

Performance Rating:

1	**2**	**3**	**4**	**5**	**Unable to Rate**

General Comments:

Click or tap here to enter text.

Improvement Suggestions:

Click or tap here to enter text.

LEADERSHIP: Provides the Council and the organization with real solutions and creative alternatives to issues and problems that reflect the values of the community. Anticipates and responds to issues. Assures that Council decisions are thought out, objective, consistent with past practices and are legal and ethical. Makes use of sound administrative practices. Positively leads through collaboration, mentoring, coaching and motivational techniques. Represents the organization as a positive City ambassador.

Performance Rating:

1	**2**	**3**	**4**	**5**	**Unable to Rate**

General Comments:

Click or tap here to enter text.

Improvement Suggestions:

Click or tap here to enter text.

PROFESSIONALISM: Deals effectively and appropriately with the public and other organizations. Devotes time and energy to the job. Demonstrates high ethical standards and integrity. Works to keep "politics" and personal perspectives out of the decision-making process. Stays abreast and active in professional organizations and current issues.

Performance Rating:

1	**2**	**3**	**4**	**5**	**Unable to Rate**

General Comments:

Click or tap here to enter text.

Improvement Suggestions:

Click or tap here to enter text.

VISION, INITIATIVE, PLAN EXECUTION: Sets an example that urges the organization and the community toward innovation, problem solving and solution-oriented action. Actively works to envision a future state resisting the status quo and develops new ideas and initiatives for consideration. Adapts to evolving technological advancements and social media platforms. Offers professional recommendations and implements Council's vision to make Hanahan the Heart of the Low Country.

Performance Rating:

1	**2**	**3**	**4**	**5**	**Unable to Rate**

General Comments:

Click or tap here to enter text.

Improvement Suggestions:

Click or tap here to enter text.

NARRATIVE EVALUATION

What would you identify as the City Administrator's strengths, expressed in terms of the principal results achieved during the evaluation period?

Click or tap here to enter text.

What performance areas would you identify as most critical for improvement?

Click or tap here to enter text.

What suggestions or assistance can you offer the City Administrator?

Click or tap here to enter text.

What other comments do you have for the City Administrator (for example, about priorities, expectations, or specific objectives for the next year)?

Click or tap here to enter text.

Goose Creek

Performance Review: Andrea Kodsi
11/01/2025 - 10/31/2026

Employee Name	Andrea Kodsi	**Review Period**	11/01/2025 - 10/31/2026
Job	Human Resources Generalist	**Review Type**	Annual (First)

Jennifer Leland
100.00%

Company Competencies

Employee Annual Evaluation

Job Knowledge:

Interpersonal Skills:

Dependability:

Independence:

Initiative:

Problem Solving/Resolution:

--More--

Quality of Work Product:

Attendance:

Safety:

Employee Annual Evaluation Average

AVERAGE

By clicking the "OK" button, you acknowledge that you have read and understand the terms and conditions of this form.

X _____

Employee Date

X _____

Reviewer Date

Company Competencies

Employee Annual Evaluation

Job Knowledge:	Demonstrates job relevant knowledge and essential skills relevant to role and department, such as work practices, departmental and/or city policies, procedures, resources, laws, and technical information. Employee has demonstrated commitment to enhancing their skill; identifying relevant trends and putting them into practice where applicable. Employee demonstrates understanding of the overall impact their department's overall impact and their individual role within the City, consistently demonstrating an understanding of their fiduciary responsibility to the citizens.
Interpersonal Skills:	Effectively communicates with citizens and co-workers at all levels. Demonstrates cooperation, teamwork, respect, diplomacy, consideration, and tact in dealing with internal and external customers (supervisors, co-workers, citizens, etc.). Represents the department and City in a professional manner.
Dependability:	Consistently follows through on projects and assignments. Can be depended on to get the job done. Carries out all responsibilities and meets deadlines. Demonstrates commitment and dedication.
Independence:	Effectively discerns when to work autonomously with minimal supervisions. Follows tasks through to completion, assess needs and set priorities appropriately. Uses sound judgment making decisions for daily tasks.
Initiative:	Self starter. Seeks ways to complete assignments with minimum guidance. Strives to improve work methods/efficiency. Takes on additional responsibilities willingly and serves effectively as back-up to co-workers.
Problem Solving/Resolution:	Considers multiple sides of an issue. Is open-minded to new ideas and processes. Weighs consequences, seeks appropriate guidance before making final decision and adjusts approach as necessary. Makes informed decisions in a constructive, timely fashion. Develops appropriate solutions and recommendations and selects proper course of action; understands impact of decision and actions.
Quality of Work Product:	Work is complete, thorough, accurate, neat, and well organized. Demonstrates a personal commitment to excellence and standards

--More--

of quality. Uses time efficiently. Produces expected amount of work in a timely manner and demonstrates ability to meet schedules and/or deadlines.

Attendance: Reports to work on time and is prepared to work at scheduled time. Requests leave appropriately and provides adequate notice of leave requests. Effectively utilizes "on-duty" time to perform expected and assigned tasks.

Safety: Maintains acceptable personal and vehicle safety record. Aware of safety policies, practices, and displays a commitment to reducing unsafe situations and hazardous conditions. Recognizes the importance of safety procedures and acts appropriately. Demonstrates proper safety techniques and resolves incidents safely.

General Comments

Town of Sullivan's Island

Sullivan's Island, South Carolina

Employee Performance Evaluation & Self-Assessment Form

Employee Name:	**Date:**

Employee's Department: _____ **Position:** _____

Employee Phone#: _____ **Employee Email:** _____

Supervisor Name: _____ **Position:** _____

Supervisor Phone#: _____ **Supervisor Email:** _____

Date of Hire & Time in Position: _____

Areas of Responsibility (Brief Description): _____

This employee self-assessment and performance evaluation process is intended to give employees and their supervisors an opportunity to provide and receive input on job responsibilities, performance of daily activities and professional accomplishments over the previous 12 months. To evaluate the employee's performance, the supervisor and employee jointly review the employee's performance in terms of the criteria specified below. Following their review and discussion, the departmental supervisor completes this instrument using the following scale to gauge the employee's performance.

5	**Exemplary**: The employee excels in this ability
4	**Exceeds Expectations**: The employee demonstrates this skill or knowledge
3	**Meets Expectations**: The employee demonstrates this skill or knowledge with minimal direction required.
2	**Improvement Needed**: The employee has some ability in this area, but performance continues to require close supervision.
1	**Unacceptable**: The employee does not demonstrate this ability

Following the completion of the instrument, the employee reviews it and writes comments in the section indicated. If the employee wishes, he or she may append an additional statement to the instrument. Finally, the departmental supervisor (or Town Administrator) and the employee both sign and date the instrument. The departmental supervisor sends the instrument to the Town Administrator. Two copies of this completed form should be made so that both the departmental supervisor/ agency and the employee have one for their individual files.

Evaluation Period (Check One):

- ☐ **Introductory Period** (6 months or 12 months)
- ☐ **Annual Review**
- ☐ **Special** (Please explain): _____

_____

Town of Sullivan's Island

Sullivan's Island, South Carolina

Employee Performance Evaluation & Self-Assessment Form

Personal	*Score 5-1	Communication	*Score 5-1
Demonstrates a positive attitude	0	Uses effective verbal and nonverbal communication	0
Demonstrates Initiative	0	Uses proper grammar & vocabulary	0
Demonstrates a commitment to the organization's behavior	0	Demonstrates leadership characteristics	0
		Demonstrates effective public speaking skills	0
Exhibits responsible behavior	0	Uses effective listening skills	0
Understands importance of ethical behavior	0	Demonstrates importance of cross-cultural communication	0
Demonstrates honesty and integrity	0	Demonstrates the ability to address members of various constituent groups	0
Demonstrates a commitment to service	0		
Understands the importance of confidentiality	0	Develops positive working relationships with staff & volunteers	0
Understands the importance of accountability	0	Able to handle constituent requests	0
		Demonstrates ability to resolve conflict	0
Demonstrates the ability to be an effective team member	0	Demonstrates understanding of group dynamics	0
Employability Skills		**Risk Management**	
Exhibits appropriate personal appearance	0	Understands importance of risk management	0
Demonstrates basic computer literacy skills	0	Explains effective risk & crisis-management procedures	0
Work Effectiveness		**Working with others**	
Demonstrates problem-solving ability	0	Peers & Co-workers	0
Ability to work under pressure	0	Supervisor(s)	0
Meets performance objectives	0	Clients/constituents	0
Ability to manage time	0	Others	0
Ability to create short-term plans	0	**Total**	0
Ability to create long-term plans	0	**Score**	0.0
Implementation of plans	0		

RATING: 5= Exemplary, 4= Exceeds Expectations, 3= Meets Expectations, 2= Improvement Needed, 1 = Unacceptable

Town of Sullivan's Island

Sullivan's Island, South Carolina

Employee Performance Evaluation & Self-Assessment Form

Program Specific Criteria	Employee Comments	Supervisor Comments
Quality of Work & Job Knowledge Produces required amount of work; demonstrates accuracy and displays commitment to excellence. Work is completed and submitted in a timely fashion to meet deadlines.		
Internal Co-worker Relations Demonstrates the ability to work effectively with co-workers. Promotes a cooperative working environment being courteous, helpful and tactful.		
External Customer Service Projects a positive Town image when interacting with the public.		
Responsibility & Initiative Identifies, prioritizes and organizes workload to meet deadlines. Works independently to carry out tasks without direct supervision.		
Leadership & Teamwork Inspires teamwork, demonstrates enthusiasm in completing the daily functions of the department. Effectively communicates information orally and in writing to public and co-workers.		

TO BE COMPLETED BY DEPARTMENT HEAD OR ADMINISTRATOR

***NOTE OF DISCLAIMER**: **Exemplary scores from the performance evaluation and self-assessment form are intended to gauge aptitude and effectiveness of an existing employee and does not guarantee a salary increase beyond Council allowed annual cost of living (CPI) increase.**

DATE COMPLETED: _____ **EMPLOYEE INITIALS:** _____

SUGGESTIONS AND PERFORMANCE OBJECTIVES FOR NEXT EVALUATION PERIOD:

_____

_____

_____

DEPARTMENT HEAD/SUPERVISOR SIGNATURE: _____ APPROVAL DATE: _____

ADMINISTRATOR SIGNATURE: _____ APPROVAL DATE: _____

COLA/CPI INCREASE _____ MERIT INCREASE (TOWN ADMIN.) _____

City of Isle of Palms, South Carolina
Request for Proposals (RFP No. [TO BE ASSIGNED])
Insurance Brokerage and Risk Management Services

In accordance with the City's Procurement Ordinance, the City of Isle of Palms, South Carolina (City) requests proposals from qualified insurance brokerage firms to provide independent brokerage, insurance marketing, advisory, and risk management services. The City seeks the most economical total cost of risk consistent with adequate coverage, financially sound insurers, and protection of municipal operations.

Proposal Contents and Submittal Instructions

Consistent with Chapter 10, Purchasing Procedures, Section 1-10-5(3), Methods of Source Selection - Request for Proposals (RFP), and Section 1-10-8, Multi-term Contracts, of the City Code, the City is requesting proposals that demonstrate professional and technical qualifications, competence, and the ability to provide the integrated services described in this RFP.

Questions must be submitted in writing by 5:00 PM on **[DATE**] to dhamilton@isleofpalms.gov. Questions received after the deadline may not be answered. Responses to material questions or clarifications will be issued by written addendum.

Proposals must be received by 2:00 PM on **[DATE]** and delivered by hand, courier, or mail to:

Douglas Kerr
City Administrator
City of Isle of Palms
P.O. Box 508
1207 Palm Boulevard
Isle of Palms, SC 29451

Submit one (1) hard copy in a sealed envelope clearly marked "RFP 2026-XX – Insurance Brokerage and Risk Management Services." Proposals must arrive at the City's delivery address by the stated deadline; postmarks do not establish timely receipt. Proposers are responsible for confirming delivery, and the City is not responsible for delays, misdirection, or delivery errors. Each proposal must include a current email address.

General Terms and Public Records

Proprietary and/or Confidential Information: Proposals are subject to the South Carolina Freedom of Information Act (FOIA). Proposers must clearly identify each page containing information claimed to be confidential or proprietary by marking "CONFIDENTIAL" in bold, at least 12-point type, in the upper right corner. Such marking does not guarantee exemption from disclosure; the City will determine disclosure obligations under applicable law.

Proposers bear all costs of preparing, submitting, and negotiating proposals. The City is not liable for proposal-related costs, expenses, or anticipated profits, regardless of whether a contract is awarded.

Proposers are responsible for complete, accurate, and clear submissions. Issuance of this RFP and evaluation of proposals do not obligate the City to award a contract. Proposers must obtain any required City business license before commencing services.

A. Purpose and Objectives

The City intends to engage an experienced broker to review its existing insurance program and competitive market coverage. Recommendations must balance premium, deductibles, exclusions, limits, insurer financial strength, claims handling, and long-term cost. The broker shall act in the City's interests, provide transparent compensation disclosures, and support annual budget planning.

B. Scope of Services

1. Insurance program assessment

Review current policies, premiums, deductibles, limits, endorsements, exclusions, loss runs, claims trends, property schedules, and exposures; identify gaps, overlaps, and opportunities to consolidate or restructure coverage.

2. Competitive marketing and placement

Develop a written marketing strategy; identify suitable carriers and municipal insurance pools; obtain and evaluate competitive indications and quotations; coordinate applications and underwriting; disclose market approaches, declinations, and any exclusive market arrangements.

3. Coverage analysis

Evaluate, as applicable, property, general liability, public officials/errors and omissions, law enforcement liability, automobile, workers' compensation, cyber, crime/fidelity, umbrella/excess, equipment breakdown, flood/windstorm, and other coverages relevant to City facilities and operations. Do not assume all lines are currently purchased or available.

4. Deductible and retention alternatives

Present side-by-side comparisons of premium and total estimated cost at multiple deductible or self-insured retention levels, including $25,000 or higher where offered and appropriate; distinguish mandatory line-specific deductibles, including any law enforcement liability deductible, from elective program deductibles.

5. Municipal and coastal exposure review

Assess hurricane, wind, flood, beach and waterfront, marina, public safety, recreational facilities, vehicles, and other exposures relevant to a coastal municipality; recommend reasonable limits and risk mitigation.

6. Claims and risk management

Provide claims advocacy, loss analysis, insurer coordination, renewal support, loss control recommendations, and assistance with claims disputes and coverage questions.

7. Renewal and ongoing service
Provide a renewal calendar, annual coverage review, budget estimates sufficiently in advance of renewal, certificates and endorsements support, policy audits, coverage-change advice, and meetings with City staff or Council as requested.

8. Deliverables
Provide an initial findings report; written market strategy; carrier quotation matrix; coverage-gap analysis; deductible/retention scenarios; recommended program with total cost and rationale; annual renewal presentation; and periodic service reports.

C. Term
The proposed initial contract term is one (1) year, with the option, solely at the City's discretion, to renew for up to three (3) additional one-year terms, subject to satisfactory performance, funding, and written agreement. Proposed commencement date: [DATE].

D. Minimum Qualifications
Proposers shall hold all licenses required to transact applicable insurance business in South Carolina, maintain professional liability/errors and omissions coverage, demonstrate experience with municipal or comparable public-entity insurance programs, and identify assigned personnel and their relevant licenses.

E. Proposal Content
1. Cover letter signed by an authorized representative and firm contact details.

2. Firm history, ownership, licensing, staffing, and any material regulatory or litigation matters relevant to the engagement.

3. Experience with South Carolina municipalities, coastal public entities, and governmental risk exposures.

4. Assigned personnel, credentials, roles, availability, and service escalation contacts.

5. Detailed service plan, first 90-day transition approach, and annual renewal/marketing schedule.

6. Sample anonymized coverage comparison, deductible analysis, and renewal recommendation.

7. List of insurers, municipal pools, and markets the firm can access; explanation of market conflicts and exclusivity.

8. Complete compensation proposal using Attachment A, including all commissions, fees, contingent compensation, and third-party payments.

9. At least three recent public-sector references using Attachment B.

10. Exceptions to RFP requirements and any proposed agreement terms.

F. Compensation and Independence

The City requires full disclosure of all direct and indirect broker compensation. Using Attachment A, identify whether compensation is a fixed fee, commission, or combination; disclose commission rates, estimated compensation by coverage line, service or placement fees, carrier bonuses, contingent or profit-sharing payments, and other remuneration. Explain any commission offsets against a proposed fixed fee. No additional charges may be imposed without prior written City approval. The City may require approval before carriers are approached or broker-of-record letters are issued.

G. Evaluation and Award

Proposals may be evaluated on the criteria below. The City may interview finalists, request clarification, check references, negotiate terms, and award to the responsible proposer whose offer is most advantageous to the City, rather than the lowest broker fee alone.

Criterion	Maximum points
Relevant public-sector/coastal experience and qualifications	25
Approach to coverage adequacy, marketing, and savings	30
Broker compensation transparency and overall value	20
Claims, risk management, and ongoing service capabilities	15
References and implementation plan	10
Total	100

The City may also consider insurer access, conflicts of interest, and responsiveness. A broker selection does not constitute approval of any particular insurance policy, carrier, premium, or deductible. Final placements require separate City authorization.

H. General Conditions

• The City may reject any or all proposals, waive minor irregularities, request additional information, or cancel or amend this RFP as permitted by applicable law.

• Proposals and any resulting contract are subject to applicable South Carolina law and City procurement requirements.

• The selected broker shall avoid unauthorized binding, cancellation, or changes to coverage and shall promptly notify the City of coverage restrictions, insurer concerns, and material market changes.

• The selected broker shall provide evidence of professional liability/errors and omissions coverage and maintain required licenses throughout the contract term.

• The City retains ownership of its policies, records, loss information, and work product provided under the agreement, subject to applicable legal and third-party restrictions.

• Identify proposed exceptions to the RFP or agreement in the proposal. Final contract terms are subject to City legal review.

Attachment A – Broker Compensation Proposal

Complete all fields; attach supplemental schedules if needed.

Compensation structure	[Fixed fee / commission / hybrid]
Annual fixed fee (if any)	$_____
Estimated annual commissions	$_____
Other service / placement fees	$_____
Contingent or incentive compensation	[Describe formula and amounts, if known]
Commission credit against fee	[Describe]
Proposed annual total broker remuneration	$_____
Renewal-year pricing methodology	[Describe]

By coverage line, disclose carrier/market, estimated premium if available, commission rate, estimated commission dollars, and any applicable fees. If premiums are not yet known, state the proposed rate and assumptions.

Coverage / market	Commission rate / fee / assumptions
Property	
General liability / public officials	
Law enforcement liability	
Auto / workers' compensation	
Cyber / crime / excess / other	

Attachment B – Public-Sector References

Reference 1

Organization / municipality	
Contact name and title	
Phone and email	
Services and insurance lines	
Years served	

Reference 2

Organization / municipality	
Contact name and title	
Phone and email	
Services and insurance lines	
Years served	

Reference 3

Organization / municipality	
Contact name and title	
Phone and email	
Services and insurance lines	
Years served	

Attachment C – Proposal Certification

The undersigned certifies that the proposal is accurate to the best of their knowledge, that all material compensation and conflicts have been disclosed, and that the firm is authorized to provide the proposed services subject to applicable licensing and contracting requirements.

Firm	
Authorized representative / title	
Signature	
Date	
Address / phone / email	

STATE OF SOUTH CAROLINA)
)
COUNTY OF CHARLESTON)

AGREEMENT FOR INSURANCE BROKERAGE SERVICES

THIS AGREEMENT FOR INSURANCE BROKERAGE SERVICES ("Agreement") is made and entered into this _____ day of _____, 2026, by and between the City of Isle of Palms, South Carolina ("City") and [BROKER LEGAL NAME] ("Broker"). The City's RFP [NUMBER] and the Broker's accepted proposal, as modified by this Agreement, are incorporated by reference. In the event of conflict, this Agreement controls.

WHEREAS, the City solicited proposals for insurance brokerage and risk management services, and Broker was selected pursuant to that solicitation; and

WHEREAS, the parties wish to establish their respective rights and obligations for the services described in the RFP and Broker's accepted proposal.

THEREFORE, in consideration of the mutual covenants and promises contained herein, the City and Broker agree as follows:

1. **1. SCOPE OF SERVICES.**

   Broker shall perform the scope and deliverables described in the RFP and accepted proposal with reasonable professional care, diligence, and responsiveness. Broker has no authority to bind, change, or cancel coverage without prior written City approval.

2. TERM

The initial term shall run from [START] through [END]. The City may renew for up to three additional one-year terms by written agreement, subject to satisfactory performance and available appropriations.

3. COMPENSATION

City shall pay [APPROVED FEE STRUCTURE]. All commissions, incentives, and other compensation shall be disclosed in writing. No undisclosed or unapproved fees are permitted. Broker shall provide an annual compensation reconciliation.

4. INSURANCE AND LICENSING

Broker shall maintain all required South Carolina licenses and professional errors and omissions insurance with limits approved by the City, and provide evidence upon request.

5. CONFLICTS AND MARKET CONDUCT

Broker shall disclose material conflicts, ownership affiliations, exclusive arrangements, and carrier incentives. Broker shall obtain the City's approval before issuing broker-of-record changes or taking any action that limits market access.

6. CONFIDENTIALITY AND RECORDS

Broker shall safeguard nonpublic City information and use it only to perform this Agreement, subject to applicable public-records law. Upon termination, Broker shall reasonably cooperate in transferring City insurance records and pending matters.

7. TERMINATION

The City may terminate for convenience upon thirty (30) days' written notice or for material breach following written notice and a reasonable opportunity to cure. Compensation shall be reconciled for authorized services performed through termination; unearned fees are not payable.

8. INDEMNIFICATION

To the extent permitted by law, Broker shall indemnify and hold harmless the City and its officers and employees from third-party claims, damages, and reasonable costs arising from Broker's negligent acts, omissions, or willful misconduct in performing services, subject to final legal review.

9. COMPLIANCE AND GOVERNING LAW

Broker shall comply with applicable federal, South Carolina, and local law, including applicable employment verification requirements. South Carolina law governs; venue for disputes shall be in the appropriate court in Charleston County.

10. AMENDMENTS AND NOTICES

Changes must be in writing and signed by authorized representatives. Notices shall be sent to the City Administrator, City of Isle of Palms, 1207 Palm Boulevard, Isle of Palms, SC 29451, and to Broker at [ADDRESS].

11. FUNDING

Continuation is subject to annual appropriations. The City may terminate for nonappropriation without penalty, subject to payment for properly authorized services already rendered.

12. ENTIRE AGREEMENT

This Agreement and its incorporated documents constitute the complete agreement. Assignment or subcontracting of material services requires the City's prior written consent.

IN WITNESS WHEREOF, the City and Broker have hereunto set their hands and seals, by and through their duly authorized representatives, as of the day and year first above written.

WITNESS:

_____
(#1 as to Broker)

_____
(#2 as to Broker)

_____
(#1 as to City)

_____
(#2 as to City)

[BROKER LEGAL NAME]

By: _____

Title: _____

The City of Isle of Palms, S.C.

By: _____

Title: _____

EXHIBIT I

(Attach City of Isle of Palms Request for Proposals [RFP NUMBER], “Insurance Brokerage and Risk Management Services.”)

EXHIBIT II

(Attach Broker’s accepted proposal dated _____, including approved compensation schedule.)