



# CITY OF ALLENTOWN

No. \_\_\_\_\_

## RESOLUTION

R172 - 2022

*Introduced by the Administration on December 7, 2022*

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Authorization for Contract with Engle-Hambright & Davies, Inc., in the amount of \$115,000.00 per contract year for services related to the design, implementation, analysis, maintenance, improvement and communications of an employee and retiree benefits and wellness program, multiple bidders; the contract is for three years, upon mutual written consent the contract term may be extended for up to two (2) additional one (1) year terms.

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### ***Resolved by the Council of the City of Allentown, That***

**WHEREAS**, Article 130.16 of the City's Administrative Code requires City Council approval by Resolution for the award of contracts or engagement of professional services.

**WHEREAS**, it is the desire of the City of Allentown to enter into an agreement with the aforementioned Contractor, for the use and purpose indicated in supporting the Recommendation of Award of Bid:

1. Name of Contractor/Consultant: Engle-Hambright & Davies, Inc. (EHD)
2. Project or Contract Reference: RFP 2022-15: Benefits Brokerage and Consulting Firm
3. Description of Service(s): highly qualified and professional benefits brokerage and consulting firm to provide a full suite of services related to the design, implementation, analysis, maintenance, improvement and communications of an employee and retiree benefits and wellness program. The City of Allentown seeks a consultant and broker that is well versed in the benefits market, experienced in advising comparable public agencies and works well with various levels of staff and management.

**NOW, THEREFORE, BE IT RESOLVED**, on this the December day of 7, 2022, that the Council of the City of Allentown, hereby authorizes the Mayor and/or such other City officials as deemed appropriate by the City Solicitor, to sign and execute a Contract or Amendment and such other agreements and documents as are deemed by the City Solicitor to be necessary and/or related thereto, with the above named contractor/consultant, for the project identified.



**CITY OF ALLENTOWN**  
**Request for Approval and Recommendation of Award**

**SUBJECT:** Request for Contract Award and Approval by City Council Pursuant to City Ordinance, Article 130.16

Project or Contract Reference: RFP No. 2022-15 - Employee Benefits Broker

**TO:** City Council, City Clerk, and Council Solicitor

**FROM:** Jessica Baraket, Department Head

**DATE:** November 15, 2022

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Pursuant to City Ordinances, Article 130.16, this Recommendation of Award is before City Council for its approval and award of the contract.

- Check Type of Contract or Change:

X            The contract is for over \$40,000 and required to be competitively bid under the City Code. We have advertised the above referenced project and received qualified bids/proposals.

The engagement of professional services. We have received and reviewed a proposal or proposals for professional services in connection with above referenced project or requirement for professional services.

The contract appropriation or price increase **is** included in this year's budget. This is contract is for insurance services and therefore will be at no cost.

- List the Vendor's name, address and proposed sum, of any and all **alternate** quotes/received, if any.

**Brown & Brown**, 3001 Emrick Boulevard , Bethlehem, PA 18020

**BSI Corporate Benefits**, 79 West Market Street, Suite 400, Bethlehem, PA 18018

**Gallagher Benefits Services, Inc.**, 100 Matsonford Road, Building 3, Suite 100, Radnor, PA 19087

**Marsh McLennan Agency**, 2300 Renaissance Boulevard, King of Prussia, PA 19046

**McGriff Insurance Services, Inc.**, 645 Hamilton Street, Suite 1002m Allentown, PA 18101

**Seltzer Group Agency**, 610 Route 61, Orwigsburg, PA 17961

**The Equinox Agency LLC**, 402 State Avenue, Emmaus, PA 18049

**Univest Insurance, LLC**, 6339 Beverly Hills Road, Coopersburg, PA 18039

**USI Insurance Services, LLC**, 1215 Manor Drive, Suite 200 Mechanicsburg, PA 17055

- List the name and address of the **recommended** Contractor/Vendor, include the following:

Engle-Hambright & Davies, Inc., 1857 William Penn Way, PO Box 11600, Lancaster, PA 17605

- Description of project or scope of services to be provided:

The City advertised the solicitation on July 1, 2022, seeking to secure services for Consulting and Broker services for Employee and Retiree. On August 1, 2022, public opening was held for which the City received ten (10) proposals. The technical evaluation was held on September 7, 2022. All committee five (5) members were present. The Proposals were scored based on the RFP requirements, Knowledge and Expertise described in the description submitted (40 Points), Related Experience described in the description submitted (40 Points). Cost proposal was opened on September 7, 2022. Proposals were distributed to all committee members via Teams for evaluation after the completion of the technical evaluation. The cost evaluation committee meeting occurred on September 14, 2022, 1:00 PM. All committee members were present. The committee members discussed the Cost Proposal (20 Points). The Committee made the recommendation to proceed with Oral interviews/presentations for the top five (5) scoring firms as they did not feel confident in deciding with the information provided in the Technical and Cost Proposals. The first round of oral interview meetings occurred in person on October 4, 2022. Brown & Brown Group presented at 2:00 PM, and BSI Cooperate Benefits presented at 3:00 PM. The second round of oral interview meetings occurred in person on October 5, 2022. EHD presented at 1:00 PM, McGriff Insurance Services presented at 2:00 PM, and USI Insurance Services presented at 3:00 PM. All committee members were present. The committee members discussed the oral interviews (15 Points). The committee decided to award based on the firm's qualifications and overall score. The committee is recommending award to Engle-Hambright & Davies, Inc.

- Contract Term:

The Contract term shall commence upon full execution and shall cease three (3) years thereafter.

- List any renewal term options and duration of each renewal, if any:

Upon mutual written consent the contract can be approved for two additional one-year terms.

- Maximum dollar value of all renewals provided for beyond the original term as if all renewals were exercised:

\$115,000.00 annual fee totaling \$575,000.00, if all renewals are exercised.

\* EHD will offset any commissions that are inherently embedded in separate benefit service provider agreements via credit to annual compensation.

A vote of final approval is requested of the members of Council and by passing the accompanying resolution, this Contract will be deemed approved and awarded.

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By: Jessica Baraket, Department Head

Copies To: Mayor  
Director of Finance  
Purchasing  
Controller

Attachment: proposed resolution