



CITY OF ALLENTOWN

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

**RESOLUTION**

**R107 - 2025**

***Introduced by the Administration on August 20, 2025***

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**Authorization for Contract with USI Insurance Services, LLC in the amount of \$160,000.00 per contract year for the services related to the design, implementation, analysis, maintenance, improvement and communications of an employee and retiree benefits and wellness program. Five (5) proposals were received, contract shall be for three (3) years with two (2) additional one (1) year renewals beyond the contract expiration period.**

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

**WHEREAS**, Article 130.16 of the City's Administrative Code (recodified as §5-21) 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: USI Insurance Services, LLC
2. Project or Contract Reference: RFP 2025-15 Consulting Broker Services for Employee and Retiree Benefits
3. Description of Service(s): To hire a professional, highly qualified 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.

**NOW, THEREFORE, BE IT RESOLVED**, on this the 20<sup>th</sup> day of August, 2025, 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.

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

Project or Contract Reference: RFP 2025-15 Consulting Broker Services for Employee and Retiree Benefits

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

**FROM:** Bina Patel, Department Head

**DATE:** August 7, 2025

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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:

Awarded contracts over \$40,000.00 done through cooperative purchasing.

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

**Alera Group, Inc.:** 54 South Commerce Way, Suite 150, Bethlehem, PA 18017

(d/b/a AIA, American Insurance Administrators, LLC)

**Marsh McLennas Agency:** 161 Washington Street, Suite 1200, Conshohocken, PA 19428

**McGriff Insurance Services, LLC:** 520 Hamilton Street, Suite 110, Allentown, PA 18101

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

(d/b/a Equinox Benefits Consulting)

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

**USI Insurance Services, LLC:** 4905 West Tilghman Street, Suite 300, Allentown, PA 18104

Contract Consideration: \$160,000.00 annual fee

Funding Source: 081-02-8001-0063-50037-

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

On April 14, 2025, the City advertised to hire a professional, highly qualified 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. On May 12, 2025, a public opening was held, for which five (5) proposals were received, the proposals were distributed to all committee members via Teams for evaluation. The Technical Evaluation was held on June 26, 2025, all committee members were present. The proposals were scored based on the following: IBE Preference (10 Points), Qualifications of Entity and Key Personnel (20 Points), Approach to delivering Workscope Services (30 Points), and Innovations/Creative Approach to Service Delivery (10 Points). The Cost Proposals were opened on June 26, 2025, and distributed to all committee members via Teams for evaluation after the Technical evaluation. The Cost evaluation was held on July 1, 2025, all committee members were present. The committee discussed the Cost proposals (30 Points). The committee decided to move forward with Oral presentations with the top four (4) scoring firms: Alera Group, Inc., McGriff Insurance Services, LLC, The Equinox Agency, LLC, USI Insurance Services, LLC. The Oral presentations were held on July 28, 2025, all committee members were present. The committee discussed the Oral presentations (15 Points) The committee is recommending award to USI Insurance Services, LLC.

- Contract Term:

The contract shall commence on January 5, 2026, and shall cease three (3) years thereafter

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

Upon written agreement, this contract may be extended for up to two (2) additional one (1) year terms beyond the contract expiration period.

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

\$160,000.00 annual fee totaling \$800,000.00, if all renewals are exercised.

\* USI 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: Bina Patel, Department Head

Copies To: Mayor  
Director of Finance  
Purchasing  
Controller

Attachment: proposed resolution