

Metropolitan Transportation Commission
Administration Committee

May 14, 2025

Agenda Item 2h-25-0543

**Contract -USI Insurance Services LLC: Broker Services and Benefits Management
(\$375,000)**

Subject:

Request for authorization to negotiate and enter into a contract for the management of MTC's benefits program and consulting services related to MTC's current benefits plan, which includes the administration and management of provider relationships for MTC's ancillary benefits, with the USI Insurance Services LLC (USI) in an amount not to exceed \$375,000 for three (3) years with an option to extend for additional two (2) years.

Background:

MTC's benefits help to promote a healthy work/life balance for employees and their eligible dependents. MTC employees and eligible family members are entitled to a number of different benefits including medical, dental, vision, life insurance, Flexible Spending Accounts, Short Term Disability, and Long Term Disability.

For the past 12 years, since 2013, Keenan and Associates has been MTC's benefits broker. Human Resources identified the need to change its benefit broker after a series of events with the current vendor that occurred in 2023 and 2024. The new broker will help us to identify more cost effective plan design and strategies for our ancillary benefits that will benefit MTC and its employees. The expected termination date for Keenan & Associates' services is July 31, 2025.

Procurement:

In late 2024, MTC's Benefits Team commenced a search via an informal RFQ for management of MTC's benefits program and consulting services related to MTC's current ancillary benefits plan (e.g, vision and dental) as well as providing a benefit enrollment platform for employees to use until MTC implements the Oracle Cloud benefits module in 2026. . MTC's benefits team sent the proposal requests to three vendors and gave them approximately one month to respond to the RFQ. Two proposals were received for consideration. . An analysis of the responses and follow up interviews resulted in the identification of USI as the broker to meet MTC's needs. The reasons include:

- Experience of working with California public agencies who contract with CalPERS for medical plans.
- Existing relationships with many of MTC's vendors of ancillary benefits.
- Proactive approach to addressing industry trends and meeting client needs.
- Strong display of interpersonal skills and relationship building with their clients.
- Robust benefits platform to meet the agency's interim benefit enrollment needs if BenefitBridge is not available for 2026 Open Enrollment.

This contract will be funded with non-federal funds from the general fund.

USI is not a small businesses or disadvantaged business enterprise, and will not utilize subcontractors for their services.

Issues:

None identified.

Recommendations:

Staff recommends that the Committee authorize the Executive Director or designee to negotiate and enter into a contract in an amount not to exceed \$375,000 with USI Insurance Services, LLC for ancillary benefits brokerage services.

Attachments:

- Attachment A: Disadvantaged Business Enterprise and Small Business Enterprise Status
- Request for Committee Approval – Summary of Proposed Contract



Andrew B. Fremier

Attachment A

Disadvantaged Business Enterprise and Small Business Enterprise Status

	Firm Name	Role on Project	DBE* Yes / No	If DBE Yes, List #	SBE** Yes / No	If SBE Yes, List #
Prime Contractor	USI Insurance Services, LLC	Ancillary Benefits Broker	No		No	
Subcontractor	None					

*Denotes certification by the California Unified Certification Program (CUCP).

**Denotes certification by the State of California.

Request for Committee Approval

Summary of Proposed Contract

Work Item No.: 1158

Consultant: USI Insurance Services, LLC
San Francisco, CA

Work Project Title: Professional Services Agreement between MTC and USI for Broker Services and Benefits Management

Purpose of Project: Provide management of existing benefits program as Broker of record and consulting services related to MTC's current benefits plan, which includes the administration and management of provider relationship for MTC's ancillary benefits.

Brief Scope of Work: **Provide consulting services and serve as broker of record for ancillary benefits.**

Project Cost Not to Exceed: \$375,000 for the first 3 years

Funding Source: General Fund

Fiscal Impact: FY 24/25

Motion by Committee: That the Executive Director or designee is authorized to negotiate and enter into a contract with USI Insurance Services, LLC (USI) for Broker Services and Benefits Management described above and in the Administration Committee Summary Sheet dated May 14, 2025 and that the Chief Financial Officer is authorized to set aside \$375,000 for such contract.

Administration Committee:

Gina Papan, Chair

Approved: May 14