



# County of San Mateo

## Inter-Departmental Correspondence

---

**Department:** HUMAN RESOURCES

**File #:** 18-066

Board Meeting Date: 1/23/2018

---

**Special Notice / Hearing:** None  
**Vote Required:** Majority

**To:** Honorable Board of Supervisors

**From:** Donna Vaillancourt, Human Resources Director  
Lisa Okada, Benefits Manager

**Subject:** Agreement with Alliant Insurance Services, Inc. for Broker/Consulting Services

### **RECOMMENDATION:**

Adopt a resolution waiving the Request for Proposals process and authorizing a three-year agreement with Alliant Insurance Services, Inc. for broker/consulting services regarding the County's health and wellness benefits for the term January 1, 2018 through December 31, 2020, in an amount not to exceed \$510,000.

### **BACKGROUND:**

Benefit plans are typically managed by a broker/consultant firm that is responsible for negotiating annual insurance premiums to provide to the County each benefit year and acting as a liaison between the County and insurance carriers to resolve issues, manage transactions to new benefit providers, develop employee communication materials, and assist with administrative process enhancements.

In August 2009, as a result of a Request for Proposals (RFP) process, the County contracted with Alliant Insurance Services as its broker/consultant for its benefit plans. In February 2012 the County conducted another formal RFP process to ensure the County is maximizing the services it receives from its broker/consultant and Alliant Insurance Services was selected by a committee of Human Resources staff. Alliant specializes in representing public agencies in negotiating high quality and cost-effective benefit plans for employees and is an expert in the employee benefits market. On July 21, 2015, your Board approved extending the term of the agreement with Alliant to December 31, 2017.

### **DISCUSSION:**

Alliant continues to provide high quality services negotiating rates between providers and County, program design, compliance, communication/education services, administration, and management of benefit plan RFPs for the following benefit plans:

- Health, Dental, and Vision Insurance

- COBRA
- Employee Assistance Program
- Retiree Health, Dental, and Vision Insurance
- Flexible Spending Accounts
- Life and Short Term Disability Insurance
- Voluntary Benefits

Due to the complexities of the County's benefit plans, the extensive stakeholder engagements including the Benefits Committees with labor organizations, and Alliant's familiarity with the County, our plans and our employees/retirees' interests will be particularly important during the voluntary benefits and wellness competitive processes in 2018.

Therefore, the County believes that it is in the best interest to continue contracting with Alliant Insurance Service and is requesting your Board to approve waiving the Request for Proposals process.

County Counsel has reviewed and approved the agreement as to form.

Approval for this amendment contributes to Shared Vision 2025 outcome of Collaborative Community by developing and fostering partnerships that promote regional solutions to enhance organizational efficiencies and effectiveness.

**PERFORMANCE MEASURE:**

	2016 Actual	2017 Actual	2018 Actual
Savings generated through Alliant's negotiations with all providers during each year's renewals	\$1.2 Million	\$2.9 Million	\$2.6 Million

**FISCAL IMPACT:**

There is no net County cost associated with this agreement. The total obligation with this agreement is \$510,000, which is fully covered by the Benefits Trust Fund.