

Meeting Location:
County of Fresno
Board of Supervisors Chambers
2281 Tulare St. #301
Fresno, CA 93721

AGENDA DATE: May 1, 2026

ITEM NUMBER: Item 14

SUBJECT: Receive Final Results of the RFP for Consulting Services, Approve and Authorize President to Execute Agreement with USI Insurance Services for consulting services, effective June 1, 2026, through December 31, 2031 (\$2,300,000), and Direct Staff to Provide Thirty (30) Days Written Notice to Keenan & Associates of Intent to Terminate Agreement Without Cause Pursuant to Section 4.5 of the Agreement (A)

REQUEST(S): That the Board authorize the President to execute an agreement for consulting services with USI Insurance Services and direct staff to provide thirty day notice of intent to terminate agreement without cause to Keenan & Associates

DESCRIPTION:

At the May 30, 2025, SJVIA Board meeting, your Board directed staff to conduct an RFP for consulting services. Keenan & Associates (Keenan) has been the SJVIA's Consultant since 2017. Keenan has provided services including strategic planning, financial monitoring and reporting, renewal services, renewal underwriting and rate setting, vendor management, compliance services, member agency support services, and program marketing and promotion. Keenan currently provides these services at a fee of \$24,000 per month.

Staff released the RFP for consultant services on January 5, 2026, and received proposals from four vendors. Finalist interviews were conducted on February 19, 2026, with Keenan, USI Insurance Services, and Milliman. The finalist interview panel consisted of the SJVIA Manager and Assistant Manager, one SJVIA Board member, and three members of the SJVIA staff. All three vendors presented well and their final proposals were competitive. However, after careful consideration, the panel determined that the proposal from USI Insurance Services is the most advantageous to the SJVIA.

AGENDA: San Joaquin Valley Insurance Authority

DATE: May 1, 2026

USI Insurance Services' presentation demonstrated an understanding of the inner workings of the SJVIA, the need for transparency, and the importance of monitoring and reporting what is working nationwide. The USI Insurance Services proposal was also the lowest cost when compared to all other bids received.

It is staff's recommendation to enter into an agreement with USI Insurance Services for three years, with the option to extend the agreement for no more than two additional one-year terms, taking advantage of this agreement's lower pricing.


FISCAL IMPACT/FINANCING:

For the calendar year 2025, the total cost for services provided by Keenan was \$282,000. The proposed fee to continue with Keenan is \$390,000. To continue with Keenan Pharmacy Benefit Management Services is \$142,800. Keenan stated their proposed bid must include Keenan Pharmacy Benefit Management Services. The annual fee for both Keenan and Keenan Pharmacy Benefit Management for 2027 is \$532,800, for 2028 is \$548,784, and for 2029 is \$565,248. USI Insurance Services with Pharmacy Benefit Management Services would be \$400,000 per year for the first three years. Total cost for a three year contract would be \$1,200,000, with a three-year savings of \$446,832 when compared to the proposal received from the incumbent, Keenan.

ADMINISTRATIVE SIGN-OFF:



Hollis Magill
SJVIA Manager



Lupe Garza
SJVIA Assistant Manager