



CITY OF POMONA COUNCIL REPORT

August 3, 2026

To: Honorable Mayor and Members of the City Council

From: Anita D. Scott, City Manager

Submitted By: René Anderson, Human Resources/Risk Management Director

SUBJECT: AWARD OF CONTRACT TO ALLIANT INSURANCE SERVICES, INC. AND AUTHORIZE THE CITY MANAGER, OR DESIGNEE, TO EXECUTE THE CITY OF POMONA PROFESSIONAL SERVICES AGREEMENT, INCLUDING A PARTICIPATING ADDENDUM UNDER SOURCEWELL MASTER AGREEMENT NO. 012125; APPROVAL OF COMMISSION-BASED COMPENSATION NOT TO EXCEED \$231,000 OVER A FIVE-YEAR TERM; AND AUTHORIZATION TO PAY ASSOCIATED INSURANCE PREMIUMS

RECOMMENDATION:

It is recommended that the City Council take the following actions:

1. Award a contract to Alliant Insurance Services, Inc. for insurance broker services; and
2. Authorize the City Manager, or designee, to execute the City of Pomona Professional Services Agreement, including the Participating Addendum under Sourcewell Master Agreement No. 012125, with Alliant Insurance Services, Inc. for a five-year term; and
3. Approve commission-based compensation in the amount of \$46,200 annually, for a total contract amount not to exceed \$231,000 over the five-year term; and
4. Authorize the City Manager, or designee, to bind insurance coverage and approve payment of insurance premiums for the City's insurance programs.

EXECUTIVE SUMMARY:

The City retains an insurance broker to procure, place, and administer coverage for various insurance programs, including excess liability and workers' compensation, property, crime, underground storage tank, aircraft and airport, and cyber liability insurance. Staff recommends continuing insurance brokerage services with Alliant Insurance Services, Inc. through a cooperative purchasing agreement with Sourcewell, which was competitively procured and provides an efficient alternative to conducting a separate Request for Proposals.

The City will execute the City of Pomona Professional Services Agreement, including the Participating Addendum under Sourcewell Master Agreement No. 012125 and Exhibit A –

Scope of Services (Attachment 1). The proposed commission-based compensation is set forth in Alliant Insurance Services, Inc.'s Fee Proposal (Attachment 2).

Approval of the proposed action will designate Alliant Insurance Services, Inc. as the City's broker of record and authorize the City Manager, or designee, to bind insurance coverage and approve payment of insurance premiums and related brokerage fees for the City's insurance programs.

SB1439/GOVERNMENT CODE §84308 APPLICABILITY:

☐ When this box is checked, it indicates the agenda item is subject to the Levine Act SB1439 requirements. Councilmembers are reminded to check their campaign contributions and determine whether they have received a campaign contribution of \$500 or more that would require disclosure and/or recusal from discussing or acting on this agenda item. Campaign contributions of \$500 or more made 1) by any person or entity who is identified in the agenda report as the applicant or proposer or 2) on behalf of the applicant or participant, including a parent, subsidiary or otherwise related business entity, or 3) by any person who has a financial interest in the agenda item requires a councilmember to comply with SB1439.

FISCAL IMPACT:

Compensation for insurance brokerage services will be commission-based in the amount of \$46,200 annually, for a total contract amount not to exceed \$231,000 over the five-year term, as outlined in Alliant Insurance Services, Inc.'s fee proposal.

The broker compensation is incorporated into the premiums for the City's insurance program and is not paid as a separate fee. Funding for these costs is included in the FY 2026-27 Self-Insurance Administration Budget and is available within Fund FD668 – Self-Insurance Administration Fund | Cost Center 1351 – Insurance Services – Workers' Compensation | Insurance Premiums (GL Account 53000) and Fund FD668 – Self-Insurance Administration Fund | Cost Center 1352 – Insurance Services – Liability | Insurance Premiums (GL Account 53000) budget line items. Sufficient appropriations are available to fund the proposed agreement.

PREVIOUS RELATED ACTION:

On June 21, 2021, the City Council approved an agreement with Alliant Insurance Services, Inc. for insurance broker services, with commission-based compensation not to exceed \$220,000 over a five-year term, and authorized payment of the associated insurance premiums.

DISCUSSION:

The City requires professional insurance brokerage services to assist with the placement, renewal, and ongoing administration of its insurance programs, including coordination with insurance carriers, coverage analysis, claims support, and risk financing strategies. Alliant Insurance

Services, Inc. has served as the City's insurance broker and is familiar with the City's operations, risk exposures, and participation in risk-sharing programs.

Staff recommends utilizing a cooperative purchasing agreement through Sourcewell. Sourcewell is a public agency that conducts competitive solicitations on behalf of participating governmental agencies nationwide. Sourcewell competitively awarded Master Agreement No. 012125 to Alliant Insurance Services, Inc. in accordance with applicable public procurement requirements. The City's Purchasing Division reviewed the procurement and determined that the proposed agreement qualifies for cooperative purchasing pursuant to Pomona City Code Section 2-997 (Cooperative Purchasing).

To participate in the cooperative contract, the City will execute its standard Professional Services Agreement, including the Participating Addendum under Sourcewell Master Agreement No. 012125. The Professional Services Agreement incorporates the City's standard contractual terms and conditions, while the Participating Addendum establishes the terms under which the City will obtain insurance brokerage services through the Sourcewell cooperative contract. The scope of services is included as Exhibit A to the Professional Services Agreement and includes insurance brokerage and advisory services such as marketing and placement of insurance coverage, renewal strategy development, policy review, claims coordination and advocacy, coverage analysis, and ongoing risk management consultation.

Approval of this item will ensure the continued delivery of professional insurance brokerage services while utilizing a competitively procured cooperative purchasing agreement that is efficient, compliant with applicable procurement requirements, and cost-effective for the City.

Prepared by:

Naela Cansino
Risk Manager

ATTACHMENT(S):

- Attachment No. 1 – City of Pomona Professional Services Agreement, including Participating Addendum – Risk Management, Employee Benefits, and Insurance Consulting Services and Exhibit A – Scope of Services
- Attachment No. 2 – Alliant Insurance Services, Inc. Fee Proposal