

**CHIEF ADMINISTRATIVE OFFICE**  
**Procurement and Contracts Division**

Date Received
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**NON-COMPETITIVE PURCHASE REQUEST JUSTIFICATION**

Required for all (non-emergency) sole source acquisitions in excess of \$5,000.00 and sole source service requests in excess of \$100,000.00.

This justification document consists of three (3) pages. All information must be provided and all questions must be answered. **Department Head approval is required.**

**Requesting Department Information**

Department: 50-HHSA Administration	Org Code: 5000	
Contact Name: Kimberly McAdams	Subobject: 	User Code: 
Telephone: (530)295-6932	Fax: 	

**Required Supplier / Vendor Information**

Vendor / Supplier Name: Fiscal Experts, Inc.	Vendor / Supplier Address: 5350 Dunlay Drive, Suite 2716, Sacramento, California 95835
Contact Name: Dan Gardner	
Estimated Purchase Price/Contract Amount: \$263,000	Vendor / Supplier Email Address: dan@fiscalexperts.com
Telephone: (805)748-1460	Fax: 

Provide a brief description of the request, including all goods and/or services the vendor/supplier will provide and supporting exemption reference from Board Policy C-17 - Procurement Policy:

This request is to continue contracting with Fiscal Experts, Inc. for financial consulting and time-study services related to Social Services programs. The vendor will provide consulting to optimize funding streams from the California Department of Social Services (CDSS), ensuring accurate budgeting and claiming processes while maximizing revenue and minimizing the County's costs. Additionally, Fiscal Experts will continue to support the Time Study Buddy system, which streamlines the time study process and helps the County comply with Federal and State requirements. The services are necessary for continuity of operations, due to their unique expertise and established relationship with the County a competitive bidding process would not yield economic benefit. This exemption is supported under Board of Supervisors Policy C-17, Section 3.4.2 (f) and 3.4.3.

Department Head:	 <small>Olivia Byron-Cooper (Feb 11, 2025 16:21 PST)</small>
	Signature
Purchasing Agent:	 <small>Michele Weimer (Feb 11, 2025 10:27 PST)</small>
	Signature

Board of Supervisors:	
Date:	
Item:	

P&C Assignment:	
Assigned To:	
Date:	

**A. The good/service requested is restricted to one supplier for the reason stated below:**

1. Why is the acquisition restricted to this goods/services supplier? (Explain why the acquisition cannot be competitively sourced. Explain how the supplier is the only source for the acquisition.)

The continuity of service is crucial for the County's efficiency in managing its complex Social Services programs. The funding streams involved have diverse requirements, and maintaining consistent, specialized support from an expert consultant and time-study functions are essential for ensuring these streams are properly managed and utilized. Competitive bidding would not provide an economic benefit to the County, as the vendor is uniquely qualified to provide the specific knowledge and technical assistance necessary to optimize these programs.

2. Provide the background of events leading to this acquisition.

In 2009, the Health and Human Services Agency (HHSA) sought to improve the process for submitting administrative expense claims, which require accurate time study information for staff. The vendor, Fiscal Experts, Inc.'s, "Time Study Buddy" system, which met both Federal and State requirements, was piloted and as a result the County entered into Agreement #258-S1110 in 2010. The web-based system eliminated the need for manual data entry and improved the efficiency of the time-study process. Given Fiscal Experts' unique expertise in social services finance consulting and the successfully implemented system, the County renewed the contract to continue benefiting from the system's efficiency in meeting claims requirements.

3. Describe the uniqueness of the acquisition. (Why was the goods/services supplier chosen?)

Funding for Social Services programs consists of multiple California Department of Social Services (CDSS) allocations with diverse requirements and complex allocation mechanisms that require Health and Human Services Agency (HHSA) to maintain appropriate time studying data in order to draw down maximum available Federal and State dollars. Fiscal Experts, Inc. has contracted with several counties within California, and supported Health and Human Services Agency since 2009, for the provision of specialized financial consulting and web-based time study services to assist in maximizing revenues available associated with intricate Social Services funding streams.

4. What are the consequences of not purchasing the goods/services or contracting with the proposed supplier?

Consequences of not contracting with Fiscal Experts, Inc. are risk to diminishing the County's current level of expertise related to social services complex allocations and changing time-study codes, disrupt ongoing improvements, and potentially lead to increased costs or inefficiencies in the event of a transition to another similar product.

5. What market research was conducted to substantiate no competition, including the evaluation of other items or service providers? (Provide a narrative of your efforts to identify other similar or appropriate goods/services, including a summary of how the department concluded that such alternatives are either inappropriate or unavailable. The name and addresses of suppliers contacted and the reasons for not considering them must be included OR an explanation of why the survey or effort to identify other goods/services was not performed.)

When connecting with fellow Counties to inquire on other available vendors that could meet the needs necessary to manage CDSS funding allocation changes and produce the necessary data to properly support and claim Federal and State funding, it was identified that each used Fiscal Experts, Inc. for their time-studies. Research discovered that 38 Counties in California utilize Fiscal Experts, Inc. as their vendor in this capacity. This span of County use further justifies the necessity to continue contracting with this vendor as the number of Counties utilizing this service positively impacts El Dorado County when changes are necessary due to State directives.

**B. Price Analysis:**

1. How was the price offered determined to be fair and reasonable? (Explain what basis was used for comparison and include cost analysis as applicable.)

The rates agreed upon within the contract are secured for the term of the agreement and will not increase.

2. Describe any cost savings or avoidance realized (one-time or ongoing) by acquiring the goods/services from this supplier.

Cost savings are realized due to securing continuity of services, where the transition to a new time-study system would result in expenses for discovery and set up which incurs costs and time impact to the County's IT Department, training and implementation with HHSA staff which redirects staff time away from programmatic services and as a result Federal and State funding is not drawn down to the County.