

FIN - SOLE SOURCE

Status
MANAGER

Requesting Department: *
FINANCE

Submitted By:
Crystal Feast

Date Created
03/14/2025

Vendor Name:
FOSTER & FOSTER

Address:
13420 PARKER COMMONS BLVD, STE 104, FORT MYERS, FL

E-mail:
ERIC.CIONKA@FOSTER-FOSTER.COM

Phone:
5862158178

Price
\$15,000.00

Account String *
526-15050-531399-15-519030-000-000-

Description

RE-OPENING OF SUBMITTED RETIREE DRUG SUBSIDY CLAIMS TO THE CENTER FOR MEDICARE AND MEDICAID SERVICERS (CMS) FOR 2023 AND 2024

1.) Uniqueness of vendor's item/service. How is this vendor the only vendor uniquely qualified to provide the product or service:

Foster & Foster has created an efficient and systematized process for reopening past subsidy claims to the Center for Medicare and Medicaid Services that potentially results in the recovery of funds. Their process has served the City well in the past. Foster & Foster has already reopened claims for 2018 - 2022, resulting in the recovery of well over \$100,000.

2.) Market Research. Describe other, similar sources or products available in the market, if any, and why they are not acceptable:

There are not many firms that specialize in this specific area of expertise. Foster & Foster has created a process that is both cost efficient and lucrative to its clients.

3.) Proposed Actions. Describe the actions the department will take to overcome the present barriers to competition for any future acquisition of this product or service:

Currently, there is no action that we can take to overcome the present barrier of competition. As technology advances, we will continue to research other Vendors that gain the ability to perform a service as streamlined as Foster & Foster.

Attachments (4)

- [FIN - ATTACHMENTS - SOLE SOURCE](#)
- [FIN - ATTACHMENTS - SOLE SOURCE - 3/14/2025](#)
- [FIN - ATTACHMENTS - SOLE SOURCE - 3/14/2025](#)
- [FIN - ATTACHMENTS - SOLE SOURCE - 3/14/2025](#)
- [FIN - ATTACHMENTS - SOLE SOURCE - 3/21/2025](#)

Approval: Budget
Crystal Hand

Date
3/20/2025
10:38:21
AM

Approval: Procurement Buyer
Kim M. Swartz

Date
3/21/2025
11:23:42
AM

Approval: Director
Crystal Feast

Date:
03/24/202
5

Approval: Procurement Manager
Wanda Roop

(not to exceed
\$50,000.00)

Date
03/24/202
5

Approval: City Manager

(not to exceed
\$100,000.00) without
Council Approval

Date

Procurement Staff

**Procurement Staff
Assigned**
KSWARTZ

**Council Agenda
Date**

Council Action

Resolution #

Purchase Order #

Procurement Comments:
Signed agreement attached.

Council authorization required if exceeding \$100,000.00