



# County of San Mateo

## Inter-Departmental Correspondence

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**Department:** CONTROLLER

**File #:** 16-287

Board Meeting Date: 6/27/2017

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

**To:** Honorable Board of Supervisors  
**From:** Juan Raigoza, Controller  
**Subject:** Agreement with Rodney Craig Goodman, CPA

**RECOMMENDATION:**

Adopt a resolution authorizing an agreement with Rodney Craig Goodman Jr., CPA for the provision of financial reporting training services for the term of June 27, 2017 through June 30, 2018 in an amount not to exceed \$150,000.

**BACKGROUND:**

Each year, the County is responsible for preparing and publishing the Comprehensive Annual Financial Report (CAFR). This financial report includes financial activities of several blended and discreetly presented component units of the County such as the San Mateo County Joint Powers Financing Authority, San Mateo County Housing Authority, In-Home Supportive Services Public Authority, and numerous special districts, including County Services Areas (CSAs), sewer and sanitation, flood control, lighting, and other districts.

Preparation of these financial reports requires highly technical knowledge of government accounting standards and familiarity with the County's general operations and its specific accounting practices. Due to the complexity of these financial reports, and the need to train newly hired General Accounting division staff to perform the County's financial reporting activities effectively and efficiently, it is in the best interest of the County to obtain specialized technical financial reporting training services.

**DISCUSSION:**

A Request for Proposal (RFP) was issued to seek proposals for accounting and financial reporting training services in May 2017. Two proposals were received in response to the RFP (RFP matrix is attached to the Board transmittal as Attachment A). After reviewing the proposals and considering Rodney Craig Goodman JR., CPA's (Contractor) extensive experience in preparing financial reports for other California counties and training their staff, the County will be best served by utilizing their services. The General Accounting division staff will receive highly specialized training on financial reporting specific to our County.

Additionally, the Contractor has specific knowledge related to the County financial operations and

successfully assisted County staff with the preparation of FY 2015-16 financial reports.

The Controller's Office hereby requests that the Board of Supervisors authorize this agreement for contracted services. This is a one-time training services contract without an on-going need in the future.

The Controller's Office requests that the Board give authority to the Controller, or his designee, to execute subsequent amendments to the Agreement which do not exceed an aggregate of \$25,000.

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

Risk Management has reviewed and approved the resolution and the agreement as to form.

Approval of this agreement contributes to the Shared Vision 2025 outcome of a Collaborative Community by providing citizens access to the County's financial health through easy to read financial reports.

**PERFORMANCE MEASURE:**

Measure	FY 2015-16 Actual	FY 2016-17 Projected
CAFR issued with unqualified opinion and receive the GFOA Award of Excellence	100%	100%

**FISCAL IMPACT:**

The term of this agreement is June 27, 2017 through June 30, 2018 in an amount not to exceed \$150,000. This contract will be funded through appropriations included in the September Revisions to the Controller's Office FY 2017-18 Recommended Budget.