



CITY OF HOUSTON

HCD Purchasing Unit 3200

PO NUMBER MUST APPEAR ON ALL PAYMENT AND DELIVERY CORRESPONDENCE

POSSIBLE DUPLICATE COPY DO NOT DUPLICATE SHIPMENT OR SERVICE

PURCHASE ORDER

Vendor Address
 Vendor Address Number 142663
 JANUARY ADVISORS LLC
 2909 ARBOR ST
 HOUSTON TX 77004
 USA

Mail Invoice to
 COH HOUSING & COMMUNITY DEV
 FINANCIAL SERVICES SEC, ACCT PAY
 P.O. Box 1562
 HOUSTON TX 77251-1562

Information
 Purchase Order Number/Date 4500288686-0 / 09/12/2018
 CoH Vendor Number 142663
 Page 1 of 1
 Buyer's Name Clarence Moton 454
 Buyer's Telephone Number 832-394-6212
 Buyer's Fax Number
 Buyer's E-mail Address clarence.moton@houstontx.gov

CONFIRM RECEIPT AND ACCEPTANCE OF PURCHASE ORDER TO BUYER'S E-MAIL ADDRESS

Shipping Address HOUSING & COMMUNITY DEVELOPMENT
 PROCUREMENT SERVICES
 601 SAWYER, 4TH FLOOR
 HOUSTON TX 77007
 USA

Terms of payment : Pay net 30 w/o deduction Currency USD

Shipping Terms FOB(Free on board) /DESTINATION

Your person responsible: JEFFREY REICHMAN

Item	Quantity	UM	Material # / Description	Unit Cost	Extended Cost
10	1.00	AU	91863 HOUSING CONSULTING Disaster Recovery Consulting	49,999.00 / AU	49,999.00
	Gross Price		Please refer to the Scope of Services - 07/25/2018 49,999.00 USD	1.000	49,999.00
			Expected value of unplanned services: 49,999.00		
Delivery Date: 12/31/2018					
Total ****				USD	49,999.00

The Terms and Conditions specified on <http://purchasing.houstontx.gov> will apply.

I hereby certify a certificate of the necessity of this expenditure is on file in this department.

I hereby certify that the expenditure for the above goods has been duly authorized and appropriated and that sufficient funds are available to liquidate same.

Jeffrey Reichman *Clarence Moton* *Clarence Moton*

Mayor **Chief Procurement Officer** **Controller**

Housing and Community Development



PROCUREMENT REQUEST FORM

GRANT Blocked



Note: The Procurement Request form is to solicit quotes through an Informal (Small Purchase) bid process for purchasing transactions \$100,000 or less using Federal Funds (2 CFR 200.318) and \$3,000 to 49,000 using non-Federal funds (COH AP 5-8, Executive Order 1.14).

Signature of this document is still required.

** Required Fields (must be completed)*

Description of Purchase *	January Advisors 2018 Contract	HCDD Division: *	Director's Office
Deadline Date of Request: *	8/6/2018	Purchase Type: *	Service Under <50K
Requester Name: *	Domeracki, Kristen - HCD	Created:	
Requester Phone Number: *	832.394.6125		

Brief Description of Scope of Work for Goods/Services:

The City of Houston Housing and Community Development Department (HCDD) is seeking assistance to create a disaster recovery website and to coordinate technology and data projects related to the Harvey relief effort. The selected contractor will (1) provide disaster analytics project assistance, (2) develop data visualizations, and (3) develop a website for housing recovery. In addition to these recovery-related activities, the contractor will assist with overall data analysis and data strategy coordination; the contractor will work with current staff to evaluate technological solutions and to increase the capacity and efficacy of key data and IT positions. The work is expected to take one year and cost less than \$50,000.

Note: Please allow a minimum of three (3) days for bid responses.

FINANCE USE ONLY	PROCUREMENT USE ONLY
Fund Number: 5000	Status: Pending
Funding Source: CDBG	Purchase Order No#:
Cost Center: 3200030002	Name of Vendor:
G/L Account: 522430	Date Processed:
Business Area: 3200	Date Received:
Internal Order: AP32000001 - 19	Total Amount: \$49,999
BFY: 2019	Procurement Staff
Grant: 32000001 - 2019	Priority:
Funds Reservation:	Notify Department:
Funds Approval Mgr:	Notify Department:

Justification of Need for Goods/Services

Procurement Notes:

Reg. 10253373
P.O. 4500288086

Requestors Signature: <u>K. Domeracki</u> 8-3-18 Date: _____	Supervising Manager (Purchase under \$5,000) Manager: _____ Date: _____
Buyer's Signature: <u>Clarence Moten</u> Date: _____	Funds Approval Signature: _____ Date: 9/10/18
Procurement DPU Signature: <u>Jywana L. Rhone</u> Date: 9-7-18	(Purchase over \$5,000) CFO Signature: _____ Date: 9/10/18
(Purchase over \$5,000) Assistant or Deputy Director: _____ Date: _____	Director Signature (Only Consultant Services) Director or Designee: _____ Date: _____
Attachments	



**City of Houston
Finance-Strategic Procurement Division**

Professional Services Justification

General Information	Date:
Department: Housing and Community Development	Phone No: (832) 394-6204
Contact Name: Tywana Rhone	Email: tywana.rhone@houstontx.gov
Vendor Information	Requisition No.
Name: January Advisors (Jeff Reichman)	Purchase Order No.
Address: PO Box 728, Houston, TX 77001	Contract No.

Description. Please provide a description of the goods or services required, the duration or frequency of the requirement, and where will the services or goods be delivered. Please also identify the **annual** cost of this good or service.

The City of Houston Housing and Community Development Department (HCDD) is seeking assistance to create a disaster recovery website and to coordinate technology and data projects related to the Harvey relief effort. The selected contractor will (1) provide disaster analytics project assistance, (2) develop data visualizations, and (3) develop a website for housing recovery. In addition to these recovery-related activities, the contractor will assist with overall data analysis and data strategy coordination; the contractor will work with current staff to evaluate technological solutions and to increase the capacity and efficacy of key data and IT positions. The work is expected to take one year and cost less than \$50,000.

Explanation: Why is this product or service the only one that would satisfy the requirement(s)?

The City does not currently have sufficient staffing or expertise to meet the immediate and long-term need for data analysis, visualization and outreach created by Hurricane Harvey. Outside technical assistance is critical to a successful response to this disaster. January Associates has extensive experience working with public sector clients to create technology-based solutions to real-time problems. In HCDD's judgement, this company is extremely qualified to fulfill the scope of this contract.

Due Diligence. Describe the due diligence performed that led to the conclusion that this service provider offers the best value to the city.

January Advisors has worked with HCDD to provide data analysis and visualizations after Hurricane Harvey, and the proposed contract is a continuation of this work. HCDD is satisfied with the performance of January Advisors, and believes they are best suited to continue providing assistance at a reasonable cost.

Department Recommendation	
Requestor: Kristen Domeracki <i>K. Domeracki</i>	Date: 8/13/18
Department Director: <i>[Signature]</i>	Date: 8/3/18
Chief Procurement Officer's Approval	
Signature:	Date:

City of Houston Housing and Community Development Department

Data and technology consulting scope of work

July 25, 2018

Summary:

The City of Houston Housing and Community Development Department (HCD) is responsible for overseeing an equitable and data-driven housing recovery post Hurricane Harvey. Immediately after the storm, HCD identified technology and data as strategic areas of investment that will help the City understand Harvey's impact and coordinate the recovery effort.

Shortly after Hurricane Harvey, HCD hired January Advisors to provide data and technology consulting services. It is through this experience that we have a deep understanding of the HCD's goals, assets, capacity, and plans in these early stages of disaster recovery.

We have identified key activities and deliverables for the 2018-2019 fiscal year that include web and digital strategy, continued analysis of disaster data, assistance with data visualization, general IT strategy, and project management assistance.

Scope:

- **Continue disaster analytics project assistance.** This includes working with other HCD consultants to ensure successful and relevant data deliverables, and working with community partners to orient them on HCD's data assets. COH stakeholders: Alfred Henson, Derek Sellers, Angela Simon, Steven David, Tom McCasland.
- **Develop data visualizations** using newly acquired disaster analytics data. These visualizations and maps can compliment HCD's community engagement sessions, they can be formatted for social media, and they can be embedded into HCD's website. COH stakeholders: Sarah Labowitz, Angela Simon, Alfred Henson.
- **Develop website for Housing recovery** using Wordpress. Following a user-centered design process, we will develop and launch a site that helps HCD communicate recovery progress and comply with HUD requirements. This task includes all activities related to the design, development, and deployment of the website, as well as working with stakeholders in HCD and HITS to ensure compliance with City procedures, and training for City staff to maintain and update the site after deployment. COH stakeholders: Sarah Labowitz, Valerie Watson, Bob Nowak, Jesse Bounds, Melissa Ragsdale Darragh.
- **Assist with multifamily data analysis** to help achieve the vision in HCD's draft local action plan. HCD identified renters as a particularly vulnerable and hard to reach population. We will assist HCD

January Advisors

Page 1

jeff@januaryadvisors.com

PO Box 728 · Houston, TX 77001 · 832.477.7189

with data analysis to uncover new ideas for policy and engagement with renters, property owners, and surrounding communities. COH stakeholders: Angela Simon.

- **Capacity building for HCD GIS team.** The GIS team is very active and has deep subject matter expertise in housing and disaster recovery. We will meet with the team every 2-3 weeks and help communicate their capacity and impact. COH stakeholders: Alfred Henson, Tom McCasland.
- **Assist HCD with technology solution evaluation.** During the course of the next year, HCD will have the opportunity to evaluate and procure technology systems and devices. We will be available as subject matter experts on topics related to data, smart cities, and emerging technologies, and assist in the procurement process when needed. COH stakeholders: Tom McCasland.
- **Assist HCD with recruiting for key data and IT positions.** As needed, provide guidance on recruitment and hiring to support departmental data and IT needs.
- **Miscellaneous data strategy coordination.** This includes identifying and classifying various data sources within HCD and its vendors, assisting with legal questions about data licensing, replicating an analysis, writing data requests, and other small tasks. COH stakeholders: Tom McCasland.

Project administration:

We will provide a monthly stakeholder briefing either in person or on the phone, where we give summary of our monthly activities and progress towards defined milestones. We will also provide a written summary alongside our invoice.

Time:

This scope of work covers the twelve month period from July 2018 to June 2019. Excluding the website deliverable, the remaining work product and administrative time will be structured not to exceed an average of 20 hours per month.

Cost:

We will bill for services based on milestones, which include:

Amount	Milestone	When
\$20,000	Successful deployment of recovery website	Month 2
\$2,500	Monthly meeting with key stakeholders to discuss progress on this scope of work	Monthly for 12 months

All invoices will accompany a summary of work performed in service to the tasks identified in this scope of work.

About:

January Advisors is a data science consulting firm based in Houston. We specialize in nonprofit and public sector clients, working on projects related to technology evaluation, data infrastructure, data analysis, and data visualization. We have worked with the City of Houston since 2013, consulting on technology and data initiatives in systems, data, and policy for departments like Finance, Planning, Housing, City Council, and the Mayor's Office. We are registered as a City of Houston Hire Houston First vendor.

Our other clients include LISC Houston, Harris County, Children at Risk, Good Reason Houston, Texas Criminal Justice Coalition, Young Audiences of Houston, Air Alliance Houston, Collaborative for Children, New Mexico Legal Aid, and Houston Immigration Legal Services Collaborative, among others.

Moton, Clarence - HCD

From: Adams, Jerry - FIN
Sent: Thursday, September 06, 2018 1:15 PM
To: Shah, Ketan - FIN
Subject: FW: Updated January Advisors scope of work

Ketan,
January advisors has been approved.

ja

From: Labowitz, Sarah - HCD
Sent: Tuesday, September 4, 2018 5:58 PM
To: Benson, David - FIN <David.Benson@houstontx.gov>; Kent, Lisa - IT <Lisa.Kent@houstontx.gov>
Cc: Adams, Jerry - FIN <Jerry.Adams@houstontx.gov>; Domeracki, Kristen - HCD <Kristen.Domeracki@houstontx.gov>
Subject: RE: Updated January Advisors scope of work

Woohoo! Thanks, all!

Very excited to get started on this website build-out.

Appreciate your help.

From: Benson, David - FIN
Sent: Tuesday, September 04, 2018 5:49 PM
To: Kent, Lisa - IT <Lisa.Kent@houstontx.gov>
Cc: Adams, Jerry - FIN <Jerry.Adams@houstontx.gov>; Domeracki, Kristen - HCD <Kristen.Domeracki@houstontx.gov>; Labowitz, Sarah - HCD <Sarah.Labowitz@houstontx.gov>
Subject: Re: Updated January Advisors scope of work

Thank you both. Including a couple colleagues who I know will be happy to hear the news. :)

On Sep 4, 2018, at 4:47 PM, Kent, Lisa - IT <Lisa.Kent@houstontx.gov> wrote:

Sorry – Reenie clarified for me that she did speak with McCasland about this some time ago and we do agree that it should go forward. Pls proceed.

Lisa

From: Adams, Jerry - FIN
Sent: Tuesday, September 4, 2018 1:38 PM
To: Kent, Lisa - IT <Lisa.Kent@houstontx.gov>
Cc: Benson, David - FIN <David.Benson@houstontx.gov>
Subject: FW: Updated January Advisors scope of work

Lisa,
Housing is asking for an update....again.

From: Adams, Jerry - FIN
Sent: Friday, August 31, 2018 12:36 PM
To: Kent, Lisa - IT <Lisa.Kent@houstontx.gov>
Cc: Shah, Ketan - FIN <Ketan.Shah@houstontx.gov>
Subject: FW: Updated January Advisors scope of work

Lisa,
Did I miss a response on this?
Please advise

ja

From: Adams, Jerry - FIN
Sent: Thursday, August 16, 2018 8:14 AM
To: Kent, Lisa - IT <Lisa.Kent@houstontx.gov>
Cc: Shah, Ketan - FIN <Ketan.Shah@houstontx.gov>
Subject: FW: Updated January Advisors scope of work

Revised Scope

From: Shah, Ketan - FIN
Sent: Thursday, August 16, 2018 8:11 AM
To: Adams, Jerry - FIN <Jerry.Adams@houstontx.gov>
Subject: FW: Updated January Advisors scope of work

Jerry

I thought, you are still waiting from Lisa. Are you approving this?

Ketan

From: Adams, Jerry - FIN
Sent: Thursday, August 16, 2018 7:42 AM
To: Shah, Ketan - FIN <Ketan.Shah@houstontx.gov>
Subject: FW: Updated January Advisors scope of work

No problem with the change is scope as long as it does not impact total award of \$49,700.

From: Shah, Ketan - FIN
Sent: Wednesday, August 15, 2018 4:26 PM
To: Adams, Jerry - FIN <Jerry.Adams@houstontx.gov>
Subject: FW: Updated January Advisors scope of work

FYI

From: Moton, Clarence - HCD
Sent: Wednesday, August 15, 2018 2:55 PM
To: Shah, Ketan - FIN <Ketan.Shah@houstontx.gov>
Cc: Rhone, Tywana - HCD <Tywana.Rhone@houstontx.gov>
Subject: FW: Updated January Advisors scope of work

Hello Ketan,

The original SOW for January Advisors has been revised, feel free to review the attachment regarding the SOW.....

Thanks,
Clarence
832-394-6212

From: Domeracki, Kristen - HCD
Sent: Wednesday, August 15, 2018 12:47 PM
To: Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>
Cc: Henson, Alfred - HCD <Alfred.Henson@houstontx.gov>; Labowitz, Sarah - HCD <Sarah.Labowitz@houstontx.gov>; Jeff Reichman <jeff@januaryadvisors.com>; McCasland, Tom - HCD <Tom.McCasland@houstontx.gov>
Subject: RE: Updated January Advisors scope of work

Thanks Jeff,

Clarence, do we need to submit this to SPD? The revised scope is about \$300 less than the original cost that Jeff submitted. Please let me know when you receive any word back regarding the PO.

Thanks,

Kristen Domeracki
Senior Advisor
HCDD Director's Office
832.394.6125

From: Jeff Reichman [<mailto:jeff@januaryadvisors.com>]
Sent: Wednesday, August 15, 2018 12:02 PM
To: McCasland, Tom - HCD <Tom.McCasland@houstontx.gov>; Domeracki, Kristen - HCD <Kristen.Domeracki@houstontx.gov>
Cc: Henson, Alfred - HCD <Alfred.Henson@houstontx.gov>; Labowitz, Sarah - HCD <Sarah.Labowitz@houstontx.gov>
Subject: Updated January Advisors scope of work

Hi Tom & Kristen,

After several conversations with HCD staff, I have revised the January Advisors scope of work.

The changes include:

- Adding the development of a "disaster data playbook" which helps document all City-related disaster data, points of contact, reporting best practices, and so forth.
- Made explicit that we will be working with IA, NFIP, and SBA data as part of analysis on behalf of HCD. This is a legal requirement.
- Updated pricing schedule to reflect an 11 month timeframe (instead of 12 months)

Thank you, and please let me know if you have questions or require revisions.

jeff

Jeff Reichman
January Advisors
LinkedIn . @fileunderjeff

Moton, Clarence - HCD

From: Shah, Ketan - FIN
Sent: Thursday, September 06, 2018 1:21 PM
To: Moton, Clarence - HCD
Cc: Rhone, Tywana - HCD; Domeracki, Kristen - HCD
Subject: RE: Updated January Advisors scope of work
Attachments: FW: Updated January Advisors scope of work; HCD Scope 2018-2019.pdf; FW: January Advisors

Clarence

Please find attached approved email from CPO for your request of professional service procurement. Attach CPO approved email and professional justification form with purchase requisition (PR). After attachment, move forward with procurement process.

Ketan

From: Moton, Clarence - HCD
Sent: Wednesday, August 15, 2018 2:55 PM
To: Shah, Ketan - FIN <Ketan.Shah@houstontx.gov>
Cc: Rhone, Tywana - HCD <Tywana.Rhone@houstontx.gov>
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To: Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>
Cc: Henson, Alfred - HCD <Alfred.Henson@houstontx.gov>; Labowitz, Sarah - HCD <Sarah.Labowitz@houstontx.gov>; Jeff Reichman <jeff@januaryadvisors.com>; McCasland, Tom - HCD <Tom.McCasland@houstontx.gov>
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Kristen Domeracki
Senior Advisor
HCDD Director's Office

832.394.6125

From: Jeff Reichman [<mailto:jeff@januaryadvisors.com>]

Sent: Wednesday, August 15, 2018 12:02 PM

To: McCasland, Tom - HCD <Tom.McCasland@houstontx.gov>; Domeracki, Kristen - HCD <Kristen.Domeracki@houstontx.gov>

Cc: Henson, Alfred - HCD <Alfred.Henson@houstontx.gov>; Labowitz, Sarah - HCD <Sarah.Labowitz@houstontx.gov>

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Thank you, and please let me know if you have questions or require revisions.

jeff

Jeff Reichman
January Advisors
[LinkedIn](#) . [@fileunderjeff](#)