



CITY OF HOUSTON
HCD Purchasing Unit 3200

PO NUMBER MUST APPEAR ON ALL PAYMENT AND
DELIVERY CORRESPONDENCE

PURCHASE ORDER

Vendor Address
Vendor Address Number 151177
POSTLETHWAITE & NETTERVILLE APAC
11757 KATY FREEWAY SUITE 650
HOUSTON TX 77079
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 4500319037-0 / 02/21/2020
CoH Vendor Number 151177
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
2100 TRAVIS, 9TH FLOOR
HOUSTON TX 77002
USA

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

Shipping Terms FOB(Free on board) /DESTINATION

Your person responsible: CAITLIN LACHER

Item	Quantity	UM	Material # / Description	Unit Cost	Extended Cost
10	1.00	AU	91863 HOUSING CONSULTING Staff Augmentation Consulting Refer to Proposal from Postletwaite & Netterville to Provide Professional Services for the City of Houston, Housing and Community Development Department.	45,000.00 / AU	45,000.00
	Gross Price		45,000.00 USD 1 AU	1.000	45,000.00
			Expected value of unplanned services: 45,000.00		
Delivery Date: 12/31/2020					
Total ****					USD 45,000.00

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.

Supervisor Turner Mayor
Jimmy Adams Chief Procurement Officer
Clarence Moton Controller

From: [Adams, Jerry - FIN](#)
To: [Shah, Ketan - FIN](#)
Subject: FW: PR 10272170 - professional service
Date: Friday, February 21, 2020 8:24:06 AM
Attachments: [Postlethwaite and Netterville Professional Services Justification Form.PDF](#)
[P & N Proposal.pdf](#)

Approved

From: Shah, Ketan - FIN <Ketan.Shah@houstontx.gov>
Sent: Thursday, February 20, 2020 11:00 AM
To: Adams, Jerry - FIN <Jerry.Adams@houstontx.gov>
Subject: FW: PR 10272170 - professional service

Jerry

As On today, FY20 Citywide non-contract spending w/o council action for Vendor #151177
POSTLETHWAITE & NETTERVILLE APAC: \$0

Current Professional Service Justification requirement: NTE \$45,000.00

For your review and approval please.

Ketan

From: Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>
Sent: Wednesday, February 19, 2020 2:18 PM
To: Shah, Ketan - FIN <Ketan.Shah@houstontx.gov>
Subject: RE: PR 10272170

Sorry,

\$45,000
151177

Thank you,
Clarence Moton
832-394-6212

From: Shah, Ketan - FIN
Sent: Wednesday, February 19, 2020 1:35 PM
To: Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>
Subject: FW: PR 10272170

How much are you requesting for?
Do you have vendor number?

From: Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>
Sent: Tuesday, February 18, 2020 10:33 AM
To: Shah, Ketan - FIN <Ketan.Shah@houstontx.gov>; Rhone, Tywana - HCD <Tywana.Rhone@houstontx.gov>
Subject: RE: PR 10272170

Ketan,

I have attached the Professional Justification Form and the Proposal for approval.

Thank you,
Clarence Moton
832-394-6212

From: Shah, Ketan - FIN
Sent: Monday, February 17, 2020 9:15 AM
To: Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>; Rhone, Tywana - HCD <Tywana.Rhone@houstontx.gov>
Subject: PR 10272170

Clarence

Can you provide more information? Why did you assign to purchasing group S02?



Ketan Shah
Division Manager

Finance Department
Strategic Procurement Division
611 Walker St., Garden Level,
Houston TX 77002

Direct: 832.393.8714 Fax: 832.393.0499
Email: Ketan.shah@houstontx.gov

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PROPOSAL TO PROVIDE PROFESSIONAL SERVICES FOR THE

City of Houston, Housing and Community Development Department (HCDD)

Postlethwaite & Netterville, A Professional Accounting Corporation

11757 Katy Freeway, Suite 650
Houston, TX 77079

Tel: 800.259.2922
www.pncpa.com



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Executive Summary

Postlethwaite & Netterville, A Professional Accounting Corporation, (P&N) is pleased to submit this proposal to the City of Houston's Housing and Community Development Department ("HCDD") to provide staff augmentation services related to its disaster recovery programs.

P&N offers seasoned professionals who have experience working with city governments and other governmental agencies, providing financial management, quality assurance and quality control, project and grant administration, execution, management, and compliance monitoring, and process documentation and design with respect to federally funded programs.

Specifically, we believe we offer HCDD the following:

- **Proven experience serving as a previous subcontractor for HCDD's disaster recovery housing program in a financial management role**
- Extensive experience in leading and executing projects related to administration and monitoring of various housing programs and other federal grant programs, with a focus on the following program management activities:
 - Financial quality assurance and quality control
 - Program and policy design
 - Training and change management
 - System design and consultation
 - Financial management and disbursement management
 - Audit closeout and reporting
- Certified Public Accountants (CPA), Certified Internal Auditors (CIA), Certified Fraud Examiners (CFE), Project Management Professionals (PMP), and other credentialed personnel
- In-depth understanding of the business processes, environment and challenges within the governmental arena
- Diversified governmental client base that includes cities, counties, state agencies, and other municipalities
- Significant professional staff and management resources to draw upon, if necessary, outside of the core engagement team
- Commitment to and plan for meeting the requirements of Section 3 of the Housing and Urban Development (HUD) Act of 1968
- Commitment to high quality and responsive client service

We are confident P&N's qualifications, experience, and capacity for performance will meet HCDD's needs.

Qualifications

OVERVIEW

As one of the largest Gulf South-based accounting and consulting firm with 400 employees, we offer a deep bench of experienced accountants, financial analysts, project managers, grant managers, and other team members.

P&N has led and contributed to numerous federally-funded projects. As such, we have a large team of professionals dedicated to executing and managing various grant programs. P&N offers seasoned professionals versed in the federal regulations governing disasters and federal awards, including the Department of Housing and Urban Development (HUD), Community Development Block Grant (CDBG), Hazard Mitigation Grant Program (HMGP), FEMA Public Assistance, and Uniform Grant Guidance.

We believe our team is well-positioned to offer highly experienced Gulf South-based resources who have the ability to efficiently and effectively meet the needs of City and the residents it serves.

P&N offers highly-skilled professionals holding valuable certifications in their respective disciplines:

- Certified Public Accountant (CPA)
- Certified Internal Auditor (CIA)
- Project Management Professional (PMP)
- Certified Valuation Analyst (CVA)
- Accredited in Business Valuation (ABV)
- Certified Fraud Examiner (CFE)
- Certified in Financial Forensics (CFF)
- Juris Doctor (JD)
- Certified Information Systems Auditor (CISA)
- Certified in Risk Management Assurance (CRMA)
- Certified Information Systems Security Professional (CISSP)
- Society for Human Resources Management – Senior Certified Professional (SHRM-SCP)

CLIENTS & PROFESSIONAL EXPERIENCE

P&N has extensive experience with large-scale, multi-phase disaster recovery projects. The following is a representative list of our relevant project experience detailed in our accompanying project summaries:

- City of Houston, Master Program Management
- Louisiana Division of Administration, Office of Community Development, Restore Louisiana Homeowner Assistance Program
- Louisiana Department of Wildlife & Fisheries – Accounting Services Related to Request for Reimbursement, Hurricane Isaac and Mississippi River Flood
- Rebuild North Carolina Housing Recovery Program
- Rebuild Florida Housing Repair & Replacement Program
- Deepwater Horizon Economic Claims Center (DHECC)
- State of Louisiana, Governor’s Office of Homeland Security and Emergency Preparedness (GOHSEP), Closeout of Stafford Act and National Flood Insurance Act (NFIA) Programs



AREAS OF STRENGTH

While our broad range of resources enables us to contribute to projects across a multitude of areas, we feel that the following areas represent P&N's key strengths in areas relevant to HCDD:

Quality Assurance (QA) & Quality Control (QC)

With our roots as an accounting firm, objectivity, integrity and quality are built into the foundation of everything we do. Our teams are well-versed in the development of and adherence to stringent quality assurance and quality control standards across a variety of disciplines, including the disaster recovery process. As an example, our team currently works with multiple Damage Assessment vendors to provide a standard quality control review and reporting process for the **Restore Louisiana Program**.

Grant Management & Compliance

P&N's team includes qualified individuals with comprehensive knowledge of numerous federal grant programs, including Community Development Block Grants (CDBG), FEMA Public Assistance, and the Hazard Mitigation Grant Program (HMGP). Our team assists clients in the project application process to recover costs incurred in the event of a natural disaster.

We also help mitigate the audit risk in our clients' federally-funded projects by compiling documentation, performing reconciling audits and applying quality control procedures for each reimbursement request before submitting to grant administrators. Our extensive knowledge of the Office of Management and Budget's (OMB) Single Audit requirements helps ensure funds are expended properly.

Our capabilities include:

- Assistance with the close-out process, including auditing transactions, invoices, statements and related documents as required for project close out and prepare and submit required documentation;
- Development of management communication plan and custom status reports;
- Review of contracts, bid documents, and other records;
- Review of the City's procurement policies and procedures for compliance with federal, state, and local procurement standards, including requirements under FEMA Regulations at 44 CFR Part 13, Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments; and
- Audit preparation and management, including preparing for and responding to monitoring requests and audits for on-going and completed projects as well as preparing formal audit responses and justifications and attending meetings and hearings as needed.

Financial Management

With 140+ Certified Public Accountants (CPAs) and numerous other financial professionals on our team, financial management is at the core of what we do. We assist similar programs with design of fiscal controls, management and accounting of applicant escrow funds, grant award calculation review, requisitions of funds, claims disbursements, financial risk management and process improvement, and more.

In addition to serving as the financial leader for the **City of Houston's Master Program Management** team, P&N currently oversees the accounting and claims disbursement activities for the **Restore Louisiana Program**.

Project Management

We employ proven project management methodologies to each area of program operations to ensure the delivery of successful work products with the time, scope, and cost requirements. P&N's team members are highly experienced in not only project management principles, but also the **practical application of the project management discipline in disaster recovery programs**. Our team includes professionals holding the Project Management Professional (PMP) and Certified Associate in Project Management (CAPM) designations. We have delivered project management services across various scopes on the **Deepwater Horizon Oil Spill Settlement Program, Restore Louisiana, Rebuild North Carolina, and Rebuild Florida** programs.

Training, Communications and Change Management

Change management is a critical but often overlooked component of complex programs, such as HCDD's. As changes to the program's policies and procedures take effect, there is significant risk with failing to proactively prepare for the change impact. This can disrupt the program's overall progress, decrease productivity and output, and increase inconsistencies in work product. Timely and consistent communications and training can reduce risks associated with program-level change and build consensus and buy-in among team members and stakeholders.

P&N has provided change management support and oversight for numerous large-scale projects and trained workforces of 400 team members. Our approach to this area includes the formation and implementation of an overall change management strategy, the development and deployment of training modules to team members using state of the art technologies and strategies. Our team has managed the training and change management areas for the **Restore Louisiana, Rebuild North Carolina, and Rebuild Florida** programs.

Experience

The following pages illustrate P&N's relevant experience with federally-funded grant programs:

CITY OF HOUSTON, HOUSING AND COMMUNITY DEVELOPMENT DEPARTMENT

As a subcontractor to the Master Program Manager for the City's disaster-related projects, P&N assisted in the design and project management of the City's housing recovery program for resident homes damaged due to Hurricane Harvey.

P&N led efforts to develop and establish the program's financial management policies and guidelines, standard operating procedures, process flow diagrams, checklists and other standardized documents that were used to support the program's goals. P&N was also responsible for developing appropriate quality control and monitoring procedures used to ensure compliance throughout the lifecycle of the program.

This entailed a detailed working knowledge of the Intergovernmental Service Agreement "IGSA", GLO's Implementation Plan, the five housing program options and specific requirements, systems to store program data, as well as the roles and responsibilities of each governmental agency. The team also worked with the program's subject matter experts, construction managers, and other project managers to ensure activities and supporting documentation complied with the IGSA, the GLO's Implementation Plan, 2 CFR Part 200 as well as any other applicable regulations.

STATE OF LOUISIANA, DIVISION OF ADMINISTRATION, OFFICE OF COMMUNITY DEVELOPMENT, RESTORE LOUISIANA PROGRAM

The Department of Housing and Urban Development (HUD) has allocated funding to assist in Louisiana's long term recovery from the severe flooding that occurred throughout much of the state in March and August of 2016. The funding for The Restore Louisiana Homeowner Assistance Program is allocated out of HUD's Community Development Block Grant Disaster Recovery (CDBG-DR) Program.

As a subcontractor to the Program Manager, P&N is involved in several phases of the Program, including Financial Management, Case Management, Verification of Benefits and Eligibility Review, Training, Damage Assessment and Reporting. This engagement began in April 2017, and continues to this date.

As a subcontractor to the Program Manager, P&N is involved in the following key areas:

- **Financial Management** – P&N is responsible for the entire financial management function of the Restore Louisiana Program (the Program). Under this function, we are responsible for the design of fiscal controls, the management and accounting of applicant escrow funds, and applicant disbursements. In addition to the tasks previously listed, the financial management function works with the title and closing subcontractor on the award execution process. The financial management team provides critical feedback to Program management by

identifying areas of risk that have led to process change and quality control. As such, the scope of the team has continued to increase to include applicant grant award calculation review. Through this process, the team provides a limited quality review that assists the Program in ensuring applicants are awarded correctly according to policies and applicable regulations.

- **Case Management** - P&N works alongside other program vendors to provide case management services to those affected by the March and August 2016 floods. This scope includes in-depth, personal communication with individuals whose lives were affected by the disaster. Our case managers are assigned to an applicant through the life cycle of the Program; therefore, a deep knowledge and sense of compassion are an integral part of this scope.
- **VOB and Eligibility Review** - P&N assists with one of the most crucial aspects of the Program. The team is responsible for determining the eligibility of the homeowners who have applied to the Program. The analysis and calculations performed at this level determine the future of the applicant file.
- **Training** - P&N is responsible for developing and delivering all training modules to over 200 team members on the Program. The Training team utilizes state of the art technology and strategies to ensure the entire staff is abreast of the most current policy changes and notable events that occur within the Program.
- **Damage Assessment** - P&N provides the quality control function for the Damage Assessment scope of the Program. This includes performing reviews with a focus on award materiality, consistency, and adherence to Program guidelines. The team identifies opportunities for improvement and crafts training modules to assist in driving quality and efficiency throughout the Damage Assessment scope.
- **Reporting** - P&N has deployed a team of business intelligence professionals to assist with data analysis and reporting. The team utilizes a variety of reporting tools that provide timely and valuable information, which enables leadership to execute strategic decisions throughout the life of the Program.

STATE OF LOUISIANA, DEPARTMENT OF WILDLIFE AND FISHERIES - ACCOUNTING SERVICES RELATED TO REQUEST FOR REIMBURSEMENT THROUGH GOHSEP - MISSISSIPPI RIVER FLOOD AND HURRICANE ISAAC

P&N performed professional accounting services for management of reimbursement activities resulting from Mississippi River Flood and Hurricane Isaac for expenses incurred by the state and eligible for reimbursement from FEMA through GOHSEP. Both of these contracts were a result of declared disasters in which grants were provided to state and local governments by the FEMA PA program, authorized by the Stafford Act.

P&N performed the following activities:

- Worked with the state to formulate PWs
- Compiled expense documentation related to force account labor and equipment usage
- Provided assistance in gathering supporting documentation by way of advisement, guidance and interpretation of document requirements
- Reviewed expenditures to determine compliance with relevant statutes and regulations to ensure accuracy and completeness prior to submission

- Performed reconciling audits and quality control procedures on supporting documentation and maintained an electronic filing system to support reimbursement requests
- Prepared required FEMA forms to submit for reimbursement
- Performed internal tracking of PWs
- Provided guidance in dealing with FEMA and State personnel and policies

REBUILD FLORIDA HOUSING REPAIR & REPLACEMENT PROGRAM

P&N is working as a subcontractor with the Florida DEO Disaster Recovery Program Management to provide training and change management services to those serving homeowners impacted by Hurricane Irma.

P&N works with Project Leaders across the Program to drive consistency through a dynamic Program environment. Specifically, P&N works with the Policy Team and Functional Leads to ensure consistency and accuracy in policies and to identify, develop, and deliver Program level training on HUD, CDBG and Program policies and updates, including Program Manual developments and updates, Program forms and applications, confidentiality and document retention, customer service and empathy, conflicts of interests, security and safety, and functional area trainings (damage assessment, intake and outreach, and eligibility).

P&N also assists in the development of aids, tools, guides, and communication plans to assist all functional areas and maintains a training deliverable database to drive consistency across the program. Our team utilizes innovative training systems and techniques to deliver training to team members across Program offices.

REBUILD NORTH CAROLINA HOUSING PROGRAM (REBUILDNC)

P&N worked as a subcontractor with the Rebuild North Carolina Program Management and Policy Team to provide training and change management services to those serving homeowners impacted by Hurricanes Matthew and/or Florence.

P&N worked with the Policy Team and Functional Leads to ensure consistency and accuracy in policies and to identify, develop, and deliver Program level training on HUD - CDBG and Program policies and updates, including Program Manual developments and updates, Program forms and applications, confidentiality and document retention, customer service and empathy, conflicts of interests, security and safety, and functional area trainings (damage assessment, intake and outreach, and eligibility). System access and user training was critical to the success of the Program and included training on Salesforce, Appointment Plus, and SharePoint.

P&N also worked with Program Management to develop job aids, tools, guides, and communication plans to assist all functional areas. Our team created processes and reports to provide Program Management and State leaders visibility into the effectiveness of each training modules. P&N maintained a training deliverable database that houses all training materials and work aids and is accessible by all Program staff to drive consistency throughout the Program. P&N utilized innovative training systems and techniques to deliver training to team members across 11 Program offices.

DEEPWATER HORIZON ECONOMIC CLAIMS CENTER

The DHECC Claims Administrator Office (CAO) is responsible for overseeing the review of claims and the distribution of funds for the Deepwater Horizon class action settlement. P&N operated as a claims review vendor for the DHECC CAO for more than five years.

P&N was approved by the United States District Court for the Eastern District of Louisiana to process business economic loss and seafood harvester claims within the Deepwater Horizon Economic and Property Damages Settlement. This is the largest class action settlement in U.S. history, with over 150,000 business claims. P&N participated in determining over \$1 billion in eligible claims within the first six months of the program and approximately \$10 billion to date. P&N committed a significant multi-city team of 400+ accounting and finance professionals to the ongoing effort, providing claim eligibility review, economic damages calculations, evaluate indicators of fraud, waste and abuse and resolve when necessary, and claimant communications for over 100,000 businesses and seafood harvesters with representation from 2,000+ law and accounting firms.

The following highlights some of our key areas of experience on this project:

- **Workflow Implementation** – The firm understands the importance of effective project organization. Our approach to implementing workflows within the DHECC project began with gaining an understanding of the status of work in process. P&N operated an internal transferable infrastructure that supplemented the official project system of record to successfully manage the workflow of 150,000+ claims.
- **Process Reengineering** – Our team designed business logic for the strategic allocation of claims to include the segregation of duties, avoidance of conflicts of interest with other firm clients, utilization of institutional knowledge, and the control of production tempo. This allowed for greater control of how and where time was spent. P&N utilized a Quality Assurance Matrix (QAM) that drove the centralized tracking of claims analysis quality data in order to determine areas for improvement and training needs.
- **District Court Participation** - We provided representation at hearings and technical support for claims administration, adhering at all times to Court orders and procedures.
- **Facilities Operation** - P&N maintained three (3) operating locations to serve claimants. We secured lease agreements and managed security, facility services and procurement.
- **Systems** - Our technology teams selected and implemented all critical applications (time and billing, claims management, business intelligence), infrastructure (network, communications, servers) and equipment (computers, telecommunications, printers and other peripherals).
- **Human Resources** - To maintain a staff to serve the engagement, we recruited and trained talent, defined team structures, roles and responsibilities, and managed performance.
- **Policy and Quality Control** - Ensuring accuracy, integrity and transparency was critical. To this end, we identified and recommended policy; created quality control process steps and measures; produced consistency guidelines; and participated in internal and external audits.
- **Project Execution and Monitoring** - This was a data-intensive, communication-dependent operation. Our team accomplished the project goals through daily data management, claim file allocation and processing prioritization; throughput targets/measures and performance analytics; eligibility review and damage calculations; inbound/outbound communications;

contract negotiation, billing and forecasting; risk monitoring and control; and status reporting and executive updates.

- **Stakeholder Management** - We maintained daily communications with claimants, attorneys, claims preparers and the Claims Administrator, Pat Juneau, and his team. We interacted and corresponded with the settlement parties (BP, Plaintiffs' Steering Committee) and worked in coordination with the other claims administration vendors.

STATE OF LOUISIANA, GOVERNOR'S OFFICE OF HOMELAND SECURITY & EMERGENCY PREPAREDNESS – CLOSEOUT OF STAFFORD ACT AND NATIONAL FLOOD INSURANCE ACT

P&N was engaged as a subcontractor to the Program Manager to assist GOHSEP in closeout procedures for FEMA grant programs administered under the National Flood Insurance Act (NFIA) and the Robert T. Stafford Disaster Relief and Emergency Assistance Act ("Stafford Act") in connection with 11 federally declared open disasters, including Hurricanes Katrina, Rita, Gustav and Isaac, and any subsequent presidentially declared disasters which may occur during the term of the contract.

As a subcontractor, P&N reviewed grants for compliance with federal law, regulations, and policy; performed accounting tasks, assuring that all federal funds have been accounted for in each subrecipient's projects; upon discovering deficiencies within a subrecipient's projects, suggested and initiated corrective action within the identified timeframe, as directed by GOHSEP; conducted reviews to improve practices and promote effectiveness; and provided guidance to applicants in the reimbursement request process. P&N performed this work from January 2017 to December 2019.

Key Personnel

With 400 resources across the Gulf South—*including team members experienced in the financial management of disaster recovery housing programs*—P&N is confident in our capacity to meet and exceed HCDD's expectations.

Our team is comprised of highly trained and qualified individuals with extensive experience with federally funded grants and/or programs. Our proposed key staff were selected based on their relevant project experience, qualifications, and capacity.

We have included resumes for the team members listed below in [Appendix A](#).

Team Member	Job Title	Engagement Role
Mark Staley	Director	Engagement Director
Temika Jones	Associate Director	Project Management & Oversight
Angelo Lassey	Manager	Financial Management and Quality Assurance (QA) and Quality Control (QC)
Dana Daigle	Manager	
Corey Ward	Manager	

The key personnel will be supported by additional staff and subject matter resources. Additionally, with our breadth and depth of resources available, we are able to expand or adjust our assigned team members in response HCDD's needs.

Scope of Services & Professional Fees

It is our understanding that P&N would be engaged to perform the following:

1. Quality assurance and quality control (QA/QC) of financial management processes;
2. Documentation of current policies, procedures, and workflows, as well as QA/QC function design and roles and responsibilities; and
3. Assistance with the project plan for the implementation of software (DocuSign®) to improve efficiencies in the Program's approval process.

The following pages outline our approach to these requested services.

QA/QC OF FINANCIAL MANAGEMENT PROCESSES

Closeout Assistance and Audit

As Texas residents, we have invested in our communities where we live and work and understand the importance of accuracy, quality, and efficiency throughout the entire grant management and closeout processes. Project expenditures not in compliance with regulations could lead to the de-obligation of project funds and the City vulnerable to losing administrative funds.

P&N understands the complexities with the closeout process, specifically the policy and documentation requirements that will be heavily scrutinized during the final review. This allows P&N to incorporate internal controls and streamline the grant management process to facilitate an efficient closeout. We are familiar with the closeout documentation requirements and assist applicants throughout the process to avoid delays that slow down the approval of final expenses.

Preparation of Files for Audit Closeout

P&N will review support documents to verify compliance with federal and other governmental agencies' rules and regulations. At P&N, we understand the scrutiny which requests for federal reimbursement will undergo at both the state and federal levels for compliance, allowability and completeness of documentation. We have developed a process for preparation of requests that ensures the requests survive such scrutiny and results in timely receipt of funds with minimal disruption to operations and cash flows. Our assigned staff has extensive training and is versed in the process to ensure quality execution of the process. The process will include the following activities:

- Thoroughly reviewing and understanding project files.
- Assisting personnel in gathering supporting documentation by way of advisement, guidance and interpretation of documentation requirements.
- Communicating with appropriate local and/or State agencies to identify barriers to compliance and then applying detection techniques in our review for identifying non-compliance on the front end.
- Segregating the task of reviewing and auditing the reimbursement requests from preparation of the requests. Additionally, an evaluation process for preparers and auditors will be employed to encourage accountability for those tasks.
- Applying quality control procedures for each reimbursement request before it is submitted to grant administrators.

PROCESS DOCUMENTATION

Program Policy Management

When managing large programs subject to Federal laws and regulations, the parties often find that clarification or guidance on implementation and daily operations is necessary to supplement the regulations. Development of a policy protocol provides consistency and transparency in decision making across similar applicant scenarios. P&N has used an online portal referred to as Policy Manager to track hundreds of policies and all comments and amendments to those policies. Policy Manager's purpose is three-fold: 1) to provide an efficient platform for drafting, commenting, and approving policies; 2) to track versions of policies that may have been revised and/or superseded over time; and 3) to provide transparency into policies for key stakeholders.

When the policy need arises, P&N will draft policies to propose to the parties through the online Policy Manager. Once a draft is posted, parties may provide commentary, revisions, and ultimate approval of the policy. Once final, the approved policy will be made available publicly to allow the Program to apply internally, as well as for external parties to have awareness of policies that may impact their application. If a policy is amended after released as final, Policy Manager would automatically default to the most recent approved version of the policy. However, Policy Manager stores superseded policies to allow key leadership with access rights to reference as needed.

P&N's experience using Policy Manager has proven that it is a key resource in obtaining support from and educating all parties involved. Additionally, Policy Manager is critical to upholding the Program's promise of transparency.

SOFTWARE IMPLEMENTATION PROJECT MANAGEMENT

Using our experience in project management, system implementation, and integration, P&N will assist HCDD to optimize the housing program's approval processes through DocuSign®.

It is our understanding that HCDD currently has professional resources in place to lead these efforts; therefore, P&N can supplement your existing team to the extent requested. Specifically, we can assist with the following:

- Development of the project plan
- Needs assessments
- Requirements analysis
- System configuration, testing, and deployment
- Integration of systems and processes
- Updates to policies and procedures documentation



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PROFESSIONAL FEES

We believe that establishing and maintaining a mutually beneficial relationship with HCDD includes providing high quality services at fair and competitive fees. We sincerely want your business and to mutually agree upon a fee structure that is reasonable to both of us.

Based on our understanding of the services requested and the level of professional(s) required, we propose a blended rate of \$150 per hour, with total fees not-to-exceed \$45,000.





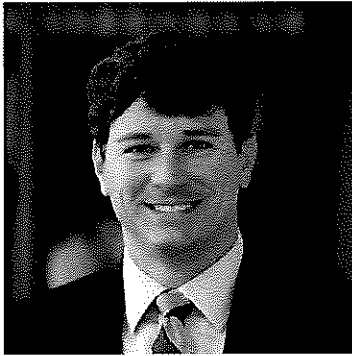
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Appendix A: Team Member Resumes



Mark Staley, PMP
Director



Mark D. Staley, PMP, is a Director with P&N and the leader of the firm's Consulting Services Group. He became a Director in 2012. Prior to joining P&N, Mark worked for a consumer packaged goods manufacturer-distributor as an IT Manager and was a Senior Consultant with a big four international consulting firm.

Mark has over 20 years of professional experience in delivering and leading large programs and projects to help organizations meet their operational goals in a broad range of business initiatives to tackle complications, improve process efficiencies, reduce overhead and increase revenue. He is a decisive business leader who works and communicates effectively with all levels, articulates complex issues simply, and combines strong business acumen with the ability to conceive profitable and efficient solutions utilizing technology.

Mark currently leads multiple disaster recovery engagements, including efforts related to the 2016 Louisiana flooding as well as previous hurricanes. He spent five years leading a team of over 300 professionals dedicated to claims administration for one of the largest class action settlements in the U.S. history. He has direct experience working with multidistrict litigation including the Deepwater Horizon Economic and Property Damages Settlement.

Mark has a deep understanding of how a disaster affects an organization from all aspects including operational, financial and human capital. He has designed an innovative process to manage and disburse funds for hundreds of thousands claims for disaster relief programs. Mark has worked with over 100,000 businesses and seafood harvesters on providing claim eligibility review, economic damages calculations and claimant communications to ensure those organizations resume normal business operations in as little time as possible.

As the director charged with leading and managing P&N's involvement in the Deepwater Horizon Economic and Property Damages Settlement, as well as other large-scale projects, Mark understands how to design processes, procedures and teams that are sustainable, scalable and flexible in adjusting to changing project requirements and constraints.

Mark has spent his career working with organizations across many industries including: legal, healthcare, higher-education, consumer packaged goods, telecom and high-tech manufacturing. He has extensive project management experience directing and participating in all phases of the project life-cycle for multi-year multi-phase engagements. He assists clients in the areas of business strategy, process reengineering, enterprise applications, reporting/analytics, data management, custom technology solutions, operational and financial data analysis, and legal settlement administration.

RELEVANT PROJECT EXPERIENCE

State of Louisiana, Division of Administration, Office of Community Development Restore Louisiana Program, Baton Rouge, Louisiana

- Project Description: The Department of Housing and Urban Development (HUD) has allocated funding to assist in Louisiana's long-term recovery from the severe flooding that occurred

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throughout much of the state in March and August of 2016. The funding for The Restore Louisiana Homeowner Assistance Program is allocated out of HUD's Community Development Block Grant Disaster Recovery (CDBGDR) Program. P&N acts as a subcontractor.

- **Role on Project:** Mark leads the P&N project team in the areas of financial management, case management, VOB and eligibility review, training, damage assessment, and reporting. He is the direct liaison with the prime contractor and works with state officials to execute the scope of work and provide relief to the impacted citizens of Louisiana.

Louisiana Governor's Office of Homeland Security and Emergency Preparedness (GOHSEP)

- **Project Description:** P&N is currently working with GCR, Inc. to provide grant management and closeout services to GOHSEP. Through this project, P&N is providing disaster recovery services as a result of 11 natural disasters in Louisiana.
- **Role on Project:** Mark works with GCR to identify and understand the evolving project needs. Additionally, he leads the disaster recovery team to through the project requirements to ensure consistent and quality deliverables.

Deepwater Horizon Economic and Property Damages Settlement

- **Project Description:** P&N was engaged to process business economic loss and seafood harvester claims within the Deepwater Horizon Economic and Property Damages Settlement, the largest class action settlement in U.S. history, with over 150,000 claims. With a robust project management methodology and open lines of communication, P&N participated in determining over \$1 billion in eligible claims within the first six months of the settlement program. P&N has committed a significant team of accounting and finance professionals to the ongoing effort, providing claim eligibility review, economic damages calculations and claimant communications for over 100,000 businesses and seafood harvesters with representation from 2,000+ law and accounting firms.
- **Role on Project:** As Project Manager, Mark was responsible for the execution of all project phases (claims intake, awards allocations, claims analysis, claims appeals, funds disbursement and accounting). Mark is also responsible for managing complex stakeholder communications, quality controls, human resources and performance, and project risk.

Notable achievements in this role include recruitment, hiring and training of over 550 professionals; management of project team of 300+ professionals located in 4 cities across 2 states; development, allocation, execution and monitoring of complex workflows, in collaboration with multiple other project vendors.

EDUCATION & PROFESSIONAL AFFILIATIONS

- Bachelor of Science, Information Systems and Decision Science, Louisiana State University
- Project Management Professional
- SAP R/3 Certified Consultant
- Siebel Certified Consultant
- Certified Sage Software Consultant
- Past President, Project Management Institute, Baton Rouge Chapter
- Member, Project Management Institute, 2008 - Present
- Real Men Wear Pink, American Cancer Society, 2017
- Former Member, United States Tennis Association, 2004 - 2013
- Past Board of Directors, Baton Rouge Green, 2010 - 2014

Temika Jones, CIA, CISA, CRMA
Associate Director



Temika B. Jones, CISA, CIA, CRMA, is an Associate Director in the P&N Consulting Services Group. Prior to joining the firm in 2016, she served in various management positions at two Fortune 500 companies.

Temika has a broad range of experience managing complex internal audit and internal controls matters within finance, business operations and information technology. Temika has worked with clients to complete risk assessments, assess and redesign business processes, and ensure successful execution of the annual audit plan. Her clients come from an array of industries, including manufacturing, oil and gas and technology.

Temika also has a depth of experience working with small to large organizations to assess existing business processes and make recommendations for improvement in efficiency and effectiveness of the control environments without increasing the burden of compliance for the organization.

RELEVANT PROJECT EXPERIENCE

Financial Management, Master Program Management Services for Disaster Related Projects, City of Houston (Subcontractor), Houston, Texas, January 2018 - July 2019

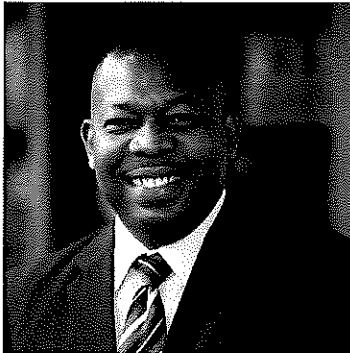
P&N assists in the design and management of the City's housing recovery program for resident homes damaged due to Hurricane Harvey. As the leader of the financial management function, Temika is responsible for working directly with HCDD's Finance department to develop guidelines and policies that align with IGSA and GLO's Implementation Plan.

Temika is also responsible for developing standardized policy guides, checklists and coordination with program managers to ensure program activities and documentation complies with the applicable regulations.

EDUCATION & PROFESSIONAL AFFILIATIONS

- Bachelor of Science, Information Systems and Decision Science, LSU Center for Internal Auditing, Louisiana State University
- Certified Information Systems Auditor
- Certified Internal Auditor
- Certified in Risk Management Assurance
- Member, Institute of Internal Auditors - Houston Chapter, 2007 - Present
- Member, Information Systems Audit and Control Association, 2004 - Present
- Member, Association of Certified Fraud Examiners, 2016 - Present
- Member, Association of Certified Fraud Examiners (ACFE), 2016 - Present
- Board of Directors - Secretary and Assistant Vice President, Sienna Plantation Levee Improvement District, 2017 - Present
- Member, Fort Bend Flood Management Association, 2017 - Present
- Member, National Association of Flood & Stormwater Management Agencies, 2017 - Present

Angelo Lassey, PMP Manager



Angelo Lassey, PMP, is a Manager in the P&N Consulting Services Group. He brings over a decade of experience from working with international banks for reconstruction and development as a Finance Officer and an Office Manager for an industry leading business journal publication.

Angelo's experience spans an array of management consulting services that include project management, risk management and start-up office processes and procedures. He spent five years in roles of effectively leading teams to evaluate and process claims in accordance with an unprecedented highly complex class action settlement agreement. His areas of focus included financial analysis, lost profit computation, process design and implementation, policy implementation, qualitative communication, change management, training as well as quality assurance. He is also well versed in the logistics, training new staff, business development and the successful management of start-up offices.

RELEVANT PROJECT EXPERIENCE

State of Louisiana, Division of Administration, Office of Community Development, Restore Louisiana, October 2018 - Present

The Department of Housing and Urban Development (HUD) has allocated funding to assist in Louisiana's long term recovery from the severe flooding that occurred throughout much of the state in March and August of 2016. The funding for The Restore Louisiana Homeowner Assistance Program is allocated out of HUD's Community Development Block Grant Disaster Recovery (CDBG-DR) Program. As a subcontractor to the Program Manager, P&N is involved in several phases of the Program, including Financial Management.

Angelo is a manager of the Financial Management Team and works daily with Project Management and the Financial Management team members to execute an effective Requisition process through establishing efficient and proper procedures as stipulated by the Restore Louisiana Program Manual and HUD guidelines. His position entails quality checks on files and disbursing checks to applicants. He also reviews, reconciles and ensures that the appropriate documentation is uploaded to the eGrant system to support requisition amounts requested by other vendors/teams. Angelo has extensive knowledge of the eGrants system and has obtained numerous FEMA certifications. Angelo assists with improving inefficiencies in processes and manages resources to properly align to tasks. To date the Financial Management team has issued almost 12,000 checks for over \$330M.

Deepwater Horizon Economic and Property Damages Settlement, 2012 - 2017

P&N is engaged to process business economic loss and seafood harvester claims within the Deepwater Horizon Economic and Property Damages Settlement, the largest class action settlement in U.S. history, with over 150,000 claims. With a robust project management methodology and open lines of communication, P&N participated in determining over \$1 billion in eligible claims within the first six months of the settlement program.



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As a Financial Analyst and a Manager, Angelo was responsible for claims intake, awards allocations, claims analysis, claims appeals, funds disbursement, accounting, and quality control, among other responsibilities.

EDUCATION & PROFESSIONAL AFFILIATIONS

- Master of Business Administration, Finance, University of Maryland
- Project Management Professional



Dana Daigle, CPA, CFE

Manager - Postlethwaite & Netterville, APAC



Dana Daigle, CPA, CFE, is a Manager in Postlethwaite & Netterville's Consulting Services Group. Dana has nine years of experience in the fields of disaster management, forensic accounting, compliance, and litigation support through managing the processes and personnel of two settlement claims programs and a HUD-funded disaster recovery program. She has led teams of up to fifty members for the Gulf Coast Claims Facility, Deepwater Horizon Economic and Property Damages Settlement, and the Restore Louisiana Program. Additionally, Dana has assisted with P&N's Controls & Risk Department by overseeing an internal audit of a CDBG-DR program. Dana has an aptitude for analytical and creative thinking and uses effective communication

and organization to achieve a quality work product and successful project management.

RELEVANT EXPERIENCE

Restore Louisiana Program, State of Louisiana, Division of Administration, Office of Community Development, Baton Rouge, LA

April 2017 - Present

The Department of Housing and Urban Development (HUD) has allocated funding to assist in Louisiana's long term recovery from the severe flooding that occurred throughout much of the state in March and August of 2016. The funding for The Restore Louisiana Homeowner Assistance Program is allocated out of HUD's Community Development Block Grant Disaster Recovery (CDBG-DR) Program. As a subcontractor to the Program Manager, P&N is involved in several phases of the Program, including Financial Management, Case Management, Verification of Benefits and Eligibility Review, Training, Damage Assessment and Reporting.

Dana is a manager of the Financial Management Team and works daily with Project Management, OCD, and the Financial Management team members to ensure proper funding of files through establishing efficient and proper processes which abide by the Restore Louisiana Program Manual and HUD guidelines. Her position entails quality checks on files, requisitioning of funds from OCD, disbursing checks to applicants, and creating/ reviewing reports to meet contract deliverables. Dana assists with improving inefficiencies in processes and manages resources to properly align to tasks. To date the Financial Management team has issued almost 29,000 checks for over \$339M.

St. Tammany Parish Community Development Block Grant- Disaster Recovery, St. Tammany Parish Government

May 2019 - Present

P&N was engaged to perform internal audit services to evaluate and identify opportunities to improve effectiveness of St. Tammany's governance, risk management and control processes over the HUD CDBG-DR Hurricane Isaac grant funds, specifically related to Procurement, Expenditures, and evaluation of general grant management procedures, processes, and functions.

Dana is responsible for overseeing the internal audit team, as well as communications with the client, scheduling, reporting, and ensuring tasks are aligned the scope of work as outlined in the contract. Specific performance of the internal audit includes requesting and reviewing documentation, client
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walk-throughs, and data analytics to ensure the Parish's procedures and processes are in compliance with HUD's CDBG-GR regulations.

***Deepwater Horizon Economic Claims Center (DHECC), United States District Court for the Eastern District of Louisiana (Claims Administrator - Pat Juneau), New Orleans, LA
June 2014 - April 2017***

P&N was engaged to process business economic loss and seafood harvester claims within the Deepwater Horizon Economic and Property Damages Settlement, the largest class action settlement in U.S. history, with over 150,000 claims. With a robust project management methodology and open lines of communication, P&N participated in determining over \$1 billion in eligible claims within the first six months of the settlement program.

Dana was an operational and project manager for the Deepwater Horizon Economic and Property Damages Settlement. Through organization, accountability, and team building, she successfully managed a team of over fifty individuals to ensure a quality work product which aligned to the specifications of the settlement established by the courts. She assisted with implementation of efficient and effective work processes to assist with positive resolution of files.

***Gulf Coast Restoration Organization, British Petroleum, DataBank IMX, Hammond, LA
June 2012 - April 2014***

Dana was contracted with British Petroleum's (BP) Gulf Coast Restoration Organization, created in response to the Deepwater Horizon oil and gas spill in the Gulf of Mexico. The organization was established to meet the company's commitment to clean up the spill and restore the Gulf Coast, including the people and businesses. Dana was a member of the Appeals Team which reviewed business economic loss, personal economic loss, and seafood harvester claims as submitted by the Deepwater Horizon Economic and Property Damages Settlement.

Dana was manager of the claims appeal team which analyzed claims to ensure compliance with the settlement agreement as set forth by the concerned parties and dictated by the Court. She was responsible for assisting with the interpretation and implementing the agreement and policies, as well as identifying and addressing inefficiencies in the process. She acted as liaison between various accounting and other professional to plan and implement process changes. Her position also entailed the preparation, review, and correction, as necessary, of detailed accounting economic loss analyses respective to complex claims used in the preparation and presentation of legal memos and proposals. She was also responsible for preparation and analysis of productivity, intake, and resourcing reports.

***Gulf Coast Claims Facility, British Petroleum, Worley, Hammond, LA
June 2010 - June 2012***

Assurance Forensic Accounting CPAs (AFA) was engaged to process business economic loss and seafood harvester claims for the Gulf Coast Claims Facility, the original claims facility established by British Petroleum in response to the Deepwater Horizon oil spill incident. AFA was contracted to provide accounting services for calculating losses as a result of the incident for people and businesses along the Gulf Coast.

Dana managed staff level accountants and internal work processes in order to comply with established guidelines. She provided a Quality Assurance function for business interruption calculations as submitted by team members and reviewed for methodology, reasonableness, and



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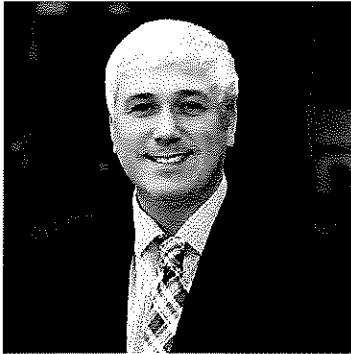
consistency. The review of claims consisted of analyzing financial documentation and preparing business interruption calculations according to historical operating patterns and research based on industries and localities. She was responsible for preparing memorandums for submission to and maintained communications with levels of authority. She also assisted with communications with business owners and representatives.

EDUCATION, CERTIFICATIONS & PROFESSIONAL INVOLVEMENT

- Certified Public Accountant
- Certified Fraud Examiner
- Masters of Science, Accounting, Louisiana State University
- Bachelor of Science, Accounting, Louisiana State University



Corey Ward, PMP
Senior



Corey Ward, PMP is a Senior in the P&N Consulting Services Group. Corey has extensive large program experience and has worked on disaster recovery projects for 4+ years, including the Deepwater Horizon Economic and Property Damages Settlement, Restore Louisiana, and Rebuild North Carolina Programs. Corey has a deep knowledge of CDBG policies and procedures and has worked in multiple areas of CDBG housing programs. Corey has lead several specialty initiatives within the Restore Louisiana Program and worked closely with Program leaders to identify and resolve obstacles for the Verification of Benefits and Case Management teams.

Corey is experienced in working with all levels of stakeholders, including Program Leadership and representatives of the State. He has created reporting tools leveraged by the Restore Louisiana Program Case Management Team to track workflows and production and create visibility into team challenges. Corey has worked across functional areas to resolve policy issues and develop and deliver specialized training modules for the Restore Louisiana Program.

Corey is a highly skilled adaptive leader with extensive experience in production management and reporting. He has a proven track record of success and ensuring deliverables meet client expectations.

RELEVANT EXPERIENCE

State of North Carolina, Division of Administration, Office of Community Development Rebuild North Carolina Program

The Rebuild North Carolina Program was created in response to the devastation of Hurricanes Mathew and Florence. The program was allocated \$236 million in CDBG-DR funds to assist homeowners in the recovery efforts of their damaged homes. As a subcontractor to the Program Manager, P&N assisted with Training and Award QA/QC for this program.

Corey serves as a team lead on the Rebuild North Carolina Award Quality Control team and assists in the review of files to ensure program policy and HUD guidelines are correctly administered. His responsibilities also include monitoring team production, identifying opportunities for process improvements, and addressing any issues that may negatively impact the team's quality or performance. Corey leverages his past Verification of Benefits experience in this position to act as a knowledge resource for the team and assists if issues arise.

State of Louisiana, Division of Administration, Office of Community Development Restore Louisiana Program, Baton Rouge, Louisiana

HUD has allocated funding to assist in Louisiana's long term recovery from the severe flooding that occurred throughout much of the state in March and August of 2016. The funding for The Restore Louisiana Homeowner Assistance Program is allocated out of HUD's CDBG-DR Program. As a subcontractor to the Program Manager, P&N is involved in several phases of the Program, including



Financial Management, Case Management, Verification of Benefits and Eligibility Review, Training, Damage Assessment and Reporting.

Corey works with the Case Management and Verification of Benefits Teams on special initiatives, including the mobile home unit and flood insurance verification efforts. He experiences on Restore Louisiana includes Verification of Benefits (VoB), Case Management, and Training. In addition to policy and procedure development and reporting in the Case Management and VoB scopes, Corey has been working with teams to develop content and delivering onboarding, WOOT, and subject matter specific training to the Restore Louisiana team members to drive consistency in a dynamic policy environment.

Deepwater Horizon Economic and Property Damages Settlement, July 2015 - April 2017

P&N is engaged to process business economic loss and seafood harvester claims within the Deepwater Horizon Economic and Property Damages Settlement. With a robust project management methodology and open lines of communication, P&N participated in determining over \$1 billion in eligible claims within the first six months of the settlement program. P&N has committed a team of accounting and finance professionals to the ongoing effort, providing claim eligibility review, economic damages calculations and claimant communications.

Corey worked with teams on claims intake, awards allocations, claims analysis, and quality assurance. Corey provided technical support to Financial Analysts daily to ensure the continuous progression of workable claims. Corey worked in various functional areas within the program to train team members as well as develop and implement applicable processes and workflows. Corey applied expert level MS Excel skills to create tools that automated the organization and analysis of large data sets producing significant efficiencies for team members.

EDUCATION, CERTIFICATIONS & PROFESSIONAL INVOLVEMENT

- Bachelor of Arts, Business Administration, Southeastern Louisiana University
- Bachelor of Science, Finance, Southeastern Louisiana University
- Project Management Professional
- Member, Project Management Institute



SAM Search Results
List of records matching your search for :

Search Term : POSTLETHWAITE & NETTERVILLE (A PROFESSIONAL ACCOUN*
Record Status: Active

No Search Results



PROCUREMENT REQUEST FORM



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 *	Staff Augmentation Service to HCDD Fi...	HCDD Division: *	Finance
Deadline Date of Request: *	2/17/2020	Purchase Type: *	Service Under <50K
Requester Name: *	Blanton, Chunichi - HCD	Created:	2/10/2020
Requester Phone Number: *	832-394-6228		

Brief Description of Scope of Work for Goods/Services:

Vendor is being procured to provide staff augmentation to the HCDD Finance staff, specifically with assistance working with the disaster recovery programs.

Total Amount: \$45,000.00

Please see attached

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

FINANCE USE ONLY	PROCUREMENT USE ONLY
Fund Number: 5030	Status: Pending
Funding Source: DR-HARVEY	Purchase Order No#:
Cost Center: 3200030002	Name of Vendor:
G/L Account: 520110	Date Processed:
Business Area: 3200	Date Received:
Internal Order: AO 3200077-19	Total Amount: \$45,000
BFY: FY2020	Procurement Staff
Grant: 3200077-2019	Priority:
Funds Reservation:	Notify Department:
Funds Approval Mgr:	Notify Department:
Justification of Need for Goods/Services	Procurement Notes: Purchase Rego 10272170

Requestors Signature: <i>Chunichi Blanton</i> Date:	Supervising Manager (Purchase under \$5,000) Manager: Date:
Buyer's Signature: <i>Debra Metz</i> Date:	Funds Approval Signature: <i>[Signature]</i> Date: 2/12/2020
Procurement DPU Signature: <i>Jywanq L. Rone</i> Date: 2/11/2020	(Purchase over \$5,000) CFO Signature: <i>[Signature]</i> Date: 2/10/2020
(Purchase over \$5,000) Assistant or Deputy Director: Date	Director Signature (Only Consultant Services) Director or Designee: <i>[Signature]</i> Date:
Attachments	



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

Professional Services Justification

General Information	Date: 02/10/2020
Department: HCD	Phone No. 832-394-6228
Contact Name: Ellen Eudy	Email Ellen.Eudy@houstontx.gov

Vendor Information	Requisition No.
Name: Postlethwaite & Netterville	Purchase Order No.
Address: 11757 Katy Freeway, Ste 650 Houston, TX 77079	Contract No.

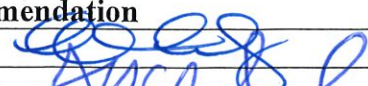
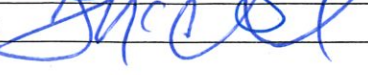
Description. Please provide a description of the goods or services required, the duration or frequency of the requirement, and where will the services or goods be delivered. Please also identify the annual cost of this good or service.
Vendor is being procured to provide staff augmentation to the HCDD Finance staff, specifically with assistance working with the disaster recovery programs. The vendor has been asked to provide assistance with the following: <ul style="list-style-type: none"> • Implementation of a quality assurance/quality control process for program-related invoices and support to ensure reimbursement requests submitted to the GLO are complete and accurate prior to payment • Documentation of processes and procedures performed by the HCDD Finance team that will be used during external monitoring visits • Assistance with implementation of an electronic approval process of invoices (DocuSign®)

Explanation: Why is this product or service the only one that would satisfy the requirement(s)?
The P&N team previously worked with HCDD Finance as a subcontractor with a former vendor. The team of professionals from P&N were able to quickly adapt to HCDD's processes and offer improvements and efficiencies without compromising compliance. The P&N team displayed working knowledge of regulations, and audit/ compliance requirements of requests submitted, and even worked with HCDD Finance to provide the GLO's compliance monitors with requested information.

Due Diligence. Describe the due diligence performed that led to the conclusion that this service provider offers the best value to the city.
The HCDD Finance team has worked with the P&N team for over 1.5 years as a subcontractor for a former vendor. The P&N team quickly adapted to HCDD's processes and provided quality services during their previous engagement. The P&N team had knowledge of the audit closeout process and requirements, which helped to ensure requests submitted to HCDD Finance were complete and accurate prior to submittal. The P&N team also worked with other HCDD departments to ensure the requests were accurate and complete, which reduced the burden and workload for HCDD Finance. The P&N team also provided assistance with the GLO monitoring visits by providing process documentation and backup support to assist the monitors during their review. Because the P&N team was comprised of auditors, they were able to provide a first-level audit of the requests prior to submittal to HCDD Finance. The team also documented the processes and implemented efficiencies were possible to ensure that all requests followed the outlined processes.

City of Houston
Finance-Strategic Procurement Division

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Department Recommendation	
Requestor: 	Date: 2/10/2020
Department Director: 	Date: 2/10/20

Chief Procurement Officer's Approval	
Signature:	Date: