



CITY OF HOUSTON
HCD Purchasing Unit 3200

PO NUMBER MUST APPEAR ON ALL PAYMENT AND
DELIVERY CORRESPONDENCE

PURCHASE ORDER

Vendor Address
Vendor Address Number 153380
WRIKE INC
70 NORTH 2ND STREET
SAN JOSE CA 95113
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 4500315020-0 / 12/10/2019
CoH Vendor Number 153380
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

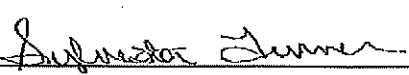
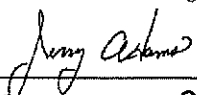
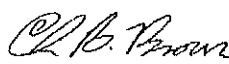
Your person responsible: TRE CALDERON

Item	Quantity	UM	Material # / Description	Unit Cost	Extended Cost
10	50.00	EA	10036444 LICENSE, SOFTWARE, APPLICATION Int. Article No. 20811490113 Make * Model LICENSE Enterprise Subscription Licenses Annually 08/31/2019 thru 08/30/2020 Invoice # INV00388997 Date: 08/31/2019 COMPUTER SOFTWARE FOR MICROCOMPUTERS (PREPROGAMMED) Application Software, Microcomputer, SERVER	432.00 / EA	21,600.00
			Gross Price	432.00 USD	1 EA 50.000 21,600.00
Delivery Date: 12/10/2019					
Total ****					USD 21,600.00

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.

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



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 200.31 and \$3,000 to 49,0000 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 *	Wrike	HCDD Division: *	Support Services
Deadline Date of Request: *	9/24/2019	Purchase Type: *	Computer
Requester Name: *	Pate, Orson - IT	Created:	9/17/2019
Requester Phone Number: *	8323930235		

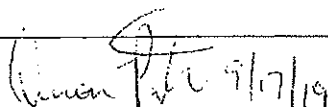
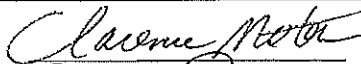
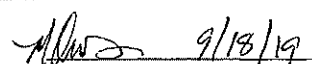
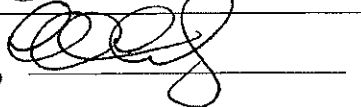
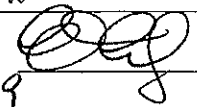
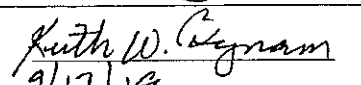
Brief Description of Scope of Work for Goods/Services:
Disaster Recovery team utilizes Wrike hosted application for project, task and case management functions. 50 Enterprise Subscription Licenses for period 08/31/2019 thru 08/30/2020 \$21,600.00.

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: 3200 3000 2	Name of Vendor:
G/L Account: 520119	Date Processed:
Business Area: 3200	Date Received:
Internal Order: B0320077-19	Total Amount: \$21,600.00
BFY: FY20	Procurement Staff
Grant: 32000077-2019	Priority:
Funds Reservation:	Notify Department:
Funds Approval Mgr:	Notify Department:

Justification of Need for Goods/Services

Procurement Notes:

Requestors Signature:  Date: 9/17/19	Supervising Manager (Purchase under \$5,000) Manager: _____ Date: _____
Buyer's Signature:  Date: 9/18/19	Funds Approval Signature:  Date: 9/18/19
Procurement DPU Signature:  Date: 9/18/19	(Purchase over \$5,000) CFO Signature:  Date: 9/18/19
(Purchase over \$5,000) Assistant or Deputy Director:  Date: 9/17/19	Director Signature (Only Consultant Services) Director or Designee: _____ Date: _____

Attachments



Wrike, Inc.
 70 North 2nd Street,
 San Jose CA 95113
 650-318-3551
 www.wrike.com
 ar@team.wrike.com

Invoice

Please include Invoice # INV00388997 on Payment

Bill to:	City Of Houston 901 Bagby St., Houston, Texas, 77002, United States
Sold to:	City Of Houston 901 Bagby St., Houston, Texas, 77002, United States
Contact Name:	Orson Pate
PO Number:	
VAT Number:	

Invoice #	INV00388997
Invoice Date	08/31/2019
Terms	Net 30
Due Date	09/30/2019

Category Description	Qty	Amount	Sales Tax/VAT	Total Amount
Enterprise Subscription Licenses Annually 08/31/2019-08/30/2020	50	\$21,600.00	\$0.00	\$21,600.00
Amount Due for Services (USD):				\$21,600.00

Net Amount Due (USD): \$21,600.00

<p>Please Remit Invoices to: Wire/ACH – HSBC Bank USA, N.A 1420 El Paseo De Saratoga San Jose, CA 95130 ABA/Routing Number: 122 240 861 Account Number: 883 007 703 SWIFT/BIC Code: MRM DU S33</p> <p>Checks – to be mailed to: P.O. Box 1180 San Jose, CA 95108</p>	<p>For any questions please reach us out at ar@team.wrike.com</p> <p>Notes:</p> <p>Please include invoice # on the Payment. If you are paying for multiple invoices, provide all invoice numbers in full and separated by a " / " with a space before and after.</p> <p>Please find our Terms here: https://www.wrike.com/terms/</p> <p>Professional Services shall be deemed delivered in accordance with the applicable Statement of Work.</p>
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Moton, Clarence - HCD

From: Pate, Orson - IT
Sent: Monday, December 9, 2019 4:27 PM
To: Moton, Clarence - HCD
Subject: FW: FW: Wrike Inc PR #10267566

Clarence,

Can you call me when you get this email message? Thanks, Orson.

From: Francisco Morales <francisco.morales@team.wrike.com>
Sent: Monday, December 9, 2019 1:21 PM
To: Pate, Orson - IT <Orson.Pate@houstontx.gov>
Cc: Jed Duso <jed.duso@team.wrike.com>
Subject: Re: FW: Wrike Inc PR #10267566

[Message Came from Outside the City of Houston Mail System]

Hey Orson,

I just called and left you a message. Unfortunately we are unable to cancel the current renewal however I think we have come up with an . option to resolve this issue.

First, we do need you to resolve the current outstanding invoice. Since this order occurred prior to the creation of the MSA we cannot easily add it under the MSA guidelines. Upon your next renewal we would add you to the MSA. In order to get you under the MSA sooner than later we can do an early renewal in January 2020, you would receive a prorated credit for the unused portion of your current contract towards the early renewal.

Would you be good moving forward with this option?

Francisco

On Mon, Dec 9, 2019 at 8:45 AM Pate, Orson - IT <Orson.Pate@houstontx.gov> wrote:

Francisco & Jed,

I need to speak with either of you regarding this matter. HCD will need to cancel the current renewal and ensure we are included in the MSA moving forward. Can we prorate the current renewal till end of this year....and ensure we are included in the new MSA starting January 2020? Please advise. Please call me at your earliest convenience at 832.393.0235 to discuss further. Thanks, Orson.

From: Francisco Morales <francisco.morales@team.wrike.com>
Sent: Monday, December 9, 2019 9:55 AM
To: Jed Duso <jed.duso@team.wrike.com>
Cc: Pate, Orson - IT <Orson.Pate@houstontx.gov>
Subject: Re: FW: Wrike Inc PR #10267566

[Message Came from Outside the City of Houston Mail System]

Hello Orson,

I hope you are well and it is a pleasure to e-meet you. I wanted to jump in and assist since I was involved in the forming of the MSA with Jane.

Everything stated below is correct in relation to the MSA however this renewal was executed prior to the MSA completion and therefore we are unable to include it under the MSA. These types of deals were discussed during the MSA conversation and the path forward is to treat them as there was not an MSA in place and resolve the outstanding invoice.

Please let me know if you have any questions.

--

Francisco Morales

Sr. Manager - Account Management | Wrike

o (408) 805-3861

On Wed, Dec 4, 2019 at 10:23 AM Jed Duso <jed.duso@team.wrike.com> wrote:

Orson

I'm roping in my manager to assist here. We'll need to run this by legal and billing on the best course of action. We will need tave something happen quickly though as the renewal was back in August.

Jed

On Wed, Dec 4, 2019 at 7:38 AM Pate, Orson - IT <Orson.Pate@houstontx.gov> wrote:

Jed,

Can you help with this....we need new order form against new agreement to cover the period for the attached renewal for HCD. Please advise. Thanks, Orson.

From: Hodge, Shannon - IT <Shannon.Hodge@houstontx.gov>
Sent: Wednesday, December 4, 2019 8:33 AM
To: Pate, Orson - IT <Orson.Pate@houstontx.gov>; Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>
Cc: Xiao, Summer - IT <Summer.Xiao@houstontx.gov>; Jed Duso <jed.duso@team.wrike.com>
Subject: RE: Wrike Inc PR #10267566
Importance: High

Orson,

Upon review of the attachment, this is not the order for negotiated by legal. The order form also can't be back dated, it must start on or after the MSA execution date which is 11/6/19. Please get with Wrike (I know Jed Duso jed.duso@team.wrike.com is familiar with the negotiated order form) and have them provide the correct order form.

Thank you,

Shannon Hodge

Houston IT Services

611 Walker, 8th Floor, Houston, TX 77002

(832) 393-0262

Shannon.Hodge@houstontx.gov

From: Pate, Orson - IT <Orson.Pate@houstontx.gov>
Sent: Tuesday, December 3, 2019 4:12 PM
To: Hodge, Shannon - IT <Shannon.Hodge@houstontx.gov>; Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>

Cc: Xiao, Summer - IT <Summer.Xiao@houstontx.gov>
Subject: RE: Wrike Inc PR #10267566

Shannon,

Per your instructions, please find attached Wrike order for HCD. Please forward to Lisa for review and approval. Thanks, Orson.

From: Hodge, Shannon - IT <Shannon.Hodge@houstontx.gov>
Sent: Monday, December 2, 2019 9:58 AM
To: Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>
Cc: Xiao, Summer - IT <Summer.Xiao@houstontx.gov>; Pate, Orson - IT <Orson.Pate@houstontx.gov>
Subject: RE: Wrike Inc PR #10267566

Good Morning Clarence,

Please request order forms from Wrike and send them so they can be reviewed and signed by Lisa.

Thank you,

Shannon Hodge

Houston IT Services

611 Walker, 8th Floor, Houston, TX 77002

(832) 393-0262

Shannon.Hodge@houstontx.gov

From: Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>
Sent: Monday, December 2, 2019 9:52 AM
To: Hodge, Shannon - IT <Shannon.Hodge@houstontx.gov>
Cc: Xiao, Summer - IT <Summer.Xiao@houstontx.gov>; Pate, Orson - IT <Orson.Pate@houstontx.gov>
Subject: RE: Wrike Inc PR #10267566

Hello Shannon,

Are we ready to move forward with the Procurement for Wrike Inc? HCDD has several outstanding invoices.

Thank you,

Clarence Moton

832-394-62123

From: Hodge, Shannon - IT
Sent: Wednesday, October 23, 2019 10:58 AM
To: Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>
Cc: Xiao, Summer - IT <Summer.Xiao@houstontx.gov>
Subject: RE: Wrike Inc PR #10267566

Clarence,

Please be advised that LGL is working on an MSA for Wrike to negotiate terms and conditions. Once the MSA is completed this will limit the purchase of Wrike software to 50k for the duration of the MSA (I believe 10 years) so next year this will have to go to council for approval. I just want to give you a heads up on what the status of utilizing Wrike is at this moment.

The attorney handling this is Jane Wu, if you have any questions about the MSA she will be the one that can explain the process going forward.

I did not release this PR because I think we should wait until this MSA has been completed.

Thank you,

Shannon Hodge

Houston IT Services

611 Walker, 8th Floor, Houston, TX 77002

(832) 393-0262

Shannon.Hodge@houstontx.gov

From: Moton, Clarence - HCD <Clarence.Moton@houstontx.gov>
Sent: Wednesday, October 23, 2019 10:00 AM
To: Hodge, Shannon - IT <Shannon.Hodge@houstontx.gov>
Subject: Wrike Inc PR #10267566

Hello Ms. Hodge,

Please approve the final release for PR # 10267566.

Thank you,

Clarence Moton

832-394-6212

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Account Executive | Wrike

- o [\(415\) 969-5129](tel:(415)969-5129)
- e Jed.duso@team.wrike.com
- w wrike.com
- [Schedule Meeting Here!](#)
-

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Francisco Morales

Sr. Manager - Account Management | Wrike

o (408) 805-3861

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Francisco Morales

Sr. Manager - Account Management | Wrike

o (408) 805-3861



Order Number Q00076102
Customer City Of Houston
Effective Date August 31, 2019
Order Expiration December 09, 2019

Prepared By Lin Yar (RENEWALS)
Email lin.yar@team.wrike.com

SUBSCRIPTION	QTY	EFFECTIVE PRICE	TOTAL AMOUNT
Enterprise Subscription Licenses Billed Annually 08/31/2019 - 08/30/2020	50	\$21,600.00	\$21,600.00

Subscription Sub Total, USD: \$21,600.00

Quote Total, USD: \$21,600.00

Payment Terms: Net 30 *

All fees are in US Dollars (USD). Fees do not include applicable state and local taxes (if any) and Customer acknowledges that applicable taxes (if any) are the responsibility of Customer. Unless Premium Support is purchased as outlined above or via separate Order Form between Parties, Customer has Standard Support. Both Support offerings are defined at <https://learn.wrike.com/enterprise-wsupport/>. If Customer has purchased Wrike Professional Services Deployment, the description of package purchased can be found at: <https://www.wrike.com/professional-services/exhibit-b/>. If Customer has purchased Wrike Integrate Professional Service Deployment, the description of package purchased can be found at: <https://www.wrike.com/professional-services/exhibit-c/>. Where Customer has purchased custom Professional Services, a separate Statement of Work attached hereto, or, a separate Statement of Work referencing this Order Form and signed by both Parties shall govern the scope of such Professional Services.

[rest of page intentionally blank / signatures follow]

Governing Terms and Conditions

This Order Form is for the Wrike products and services outlined herein and is governed by the online Terms & Conditions found at <https://learn.wrike.com/enterprise-wmsa/>, provided that in the event of a conflict between this Order Form and the Terms & Conditions take place, this Order Form will take precedence and prevail as to the conflict.

Customer

Authorized Signature:

Name:

Title:

Date:



Sole Source Justification

General Information	Date:
Unit/Department: Housing and Community Development (HCD)	Phone No. 832-393-0235
Contact Name: Orson Pate	email Orson.Pate@houstontx.gov

Vendor Information	Requisition No. <i>10260239</i>
Name: Wrike	Purchase Order No.
Address: <i>www.wrike.com</i>	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.

This project management online subscription based software will allow the Disaster Recovery team to efficiently manage several projects related to Harvey.

Type. Please select one of the options and explain below.

Single Source
 Proprietary/Copyright Restrictions
 Equipment Compatibility
 Patented Product
 Exclusive or Unique Capability
 Only economically feasible source
 Other: _____

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

The loss of product support has direct impact on administering federal funds for disaster recovery relief, home repair, finance, and community development initiatives.

Due Diligence. Describe the due diligence performed that led to the conclusion that this is a sole source.

HCD has attempted to utilize other subscription based project management software, however Wrike is the only product which allows users to access the application at no cost for Colloborator users.

Department Recommendation	
Requestor: Orson Pate <i>[Signature]</i>	Date: 2/25/2019
Department Director: <i>Keith W. Gynnam</i>	Date: 3/9/19

Chief Procurement Officer's Approval	
Signature:	Date: