

BOERNE INDEPENDENT SCHOOL DISTRICT  
PURCHASING DEPARTMENT  
235 Johns Road  
Boerne, Texas 78006

**RFP 23-009**  
**REQUEST FOR PROPOSALS FOR**  
**Child Nutrition Point of Sale Software to include 32 POS locations**  
**requiring Keypads and Scanners.**

**\*Awarded vendor must be willing to complete the Data Privacy Agreement (DPA) for Texas K-12 Institutions.**

Eddie Ashley  
BISD Purchasing Department  
Phone: (830) 357-2026  
URL: [www.boerneisd.net](http://www.boerneisd.net)  
Email: [eddie.ashley@boerneisd.net](mailto:eddie.ashley@boerneisd.net)

**Sealed Proposal Submittal Deadline**  
**Tuesday, March 5, 2024, by 10:00 AM**





# Boerne Independent School District (BISD) Solicitation

Solicitation #	<b>23-009</b>
Due Date:	<b>March 5, 2024</b>
<b>DUE NO LATER THAN 10:00 AM (CST)</b>	
<b>LATE BIDS WILL NOT BE ACCEPTED</b>	

<b>REQUEST FOR PROPOSALS (RFP):</b> <b>Child Nutrition Point of Sale Software</b>
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## DISTRICT PROFILE

Boerne Independent School District is a rural district located in the scenic Texas Hill Country 30 miles north of San Antonio. Boerne ISD has an enrollment of over 11,000 students at eight elementary schools, three middle schools, two high schools and an alternative campus. We are a fast growth district anticipating five percent growth each school year. With more than 1,600 faculty and staff, Boerne ISD is the largest employer in the community. District boundaries are in Kendall, Bexar, and Comal counties. Our teachers are dedicated professionals whose commitment to excellence is recognized consistently at regional, state, and national levels.

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Items below represent components which comprise this RFP package. Respondents are asked to review the package to be sure that all applicable parts are included.

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## PART 1.0 – Notice of Intention

The Purchasing Department of the Boerne Independent School District (“BISD” or the “School district”) is conducting this procurement to establish a contract(s) for a **Point-of-Sale Software for our Child Nutrition Department**. Contract(s) issued between Boerne ISD and the successful proposer shall be for a period of one (1) year, with BISD having the option to renew the Agreement for four (4) additional years in one (1) year increments upon mutual agreement. Consequently, the total term of the Agreement may be for a period of five (5) years. The phrase “Term” in this Agreement shall mean the then-current Term of the Agreement, whether the initial term or a renewal term. Vendors are requested to submit an online response offering their total line of available products and services that are commonly purchased by school districts and other public, not-for-profit agencies and organizations.

Product(s) considered for award shall equal or exceed the technical, environmental and performance standards and specifications as defined within this RFP and further described in the scope and specification section.

Pursuant to Government Code 2254 – Subchapter A, this Request for Proposal (RFP) is intended to solicit Proposals with the intent of the Boerne ISD to select the Respondent(s) demonstrating the **best overall value** to the District and to enter into a single contract with a qualified vendor to provide services to Boerne ISD.

Electronic proposals will be accepted through online submission at BISD Purchasing web page <https://www.boerneisd.net/Page/3074> **RFP 23-009 Child Nutrition Point of Sale Software**

**OR**

Sealed Proposals may be received at: Boerne Independent School District  
ATTN: Purchasing Dept. – **RFP 22-009**  
235 Johns Road  
Boerne, TX, 78006

Proposals will be received until **10:00 a.m. on Tuesday, March 5, 2024.**

Proposals received after closing time will be disqualified.

*During the selection process, the District will rank all statements of professional qualifications submitted. Interviews/presentations may be requested from selected vendors. The Vendor offering the Best Value will be recommended to the Board of Trustees’.*

Number of Copies:                      Submit one (1) copy of the signed proposal sheets, certifications, and supporting data.

Proposals will be opened in accordance with Texas Education Law 44.031. However, the proposals will be “under evaluation” until final awards are determined. The District will select Vendor(s) for additional information, including proposed fees and prices for fulfilling the general conditions.

## PART 2.0 – Request for Proposals Requirements

Please carefully read this entire RFP document and specifications. Complete all forms and submit your bid with all appropriate attachments.

### 2.1 Request for Proposals (RFP) Documents

BISD Purchasing Department documents are made available via the BISD webpage to anyone who wishes to submit a response. The BISD Purchasing Department website is located at <https://www.boerneisd.net/Page/3074>

### 2.2 Tentative Timetable

BISD anticipates following the timetable listed below for this solicitation:

Item	Activity	Date & Time
1	Solicitation starts to advertise (1 <sup>st</sup> run)	Wednesday, January 24, 2024
2	Solicitation advertised (2 <sup>nd</sup> run)	Wednesday, January 31, 2024
4	Deadline for Questions	Tuesday, February 6, 2024
5	District Responses to Questions	Thursday, February 8, 2024
6	Proposal Due Date	Tuesday, March 5, 2024
7	Anticipated Board Meeting Approval	Monday, April 15, 2024
8	Initial Contract Period	July 1, 2024 - June 30, 2025

The table above is only an estimate and may vary.

### 2.3 Procurement Method

BISD is utilizing the Request for Proposals (RFP) method of procurement in accordance with Texas Education Code Section 44.031 Purchasing Contracts, Request for Proposals for services. For information regarding the RFP process, contact Eddie Ashley of the Purchasing Department at 830-357-2026.

### 2.4 Requirements for Return of RFP Responses

Respondents must submit RFPs by the established deadline (day and time). Please refer to the “Instructions to Vendors” section to ensure that you submit all required information to BISD. BISD does not accept responses after the due date and time.

### 2.5 Rights Reserved by BISD and Restrictions on RFP Process

- a) BISD reserves the right to cancel this solicitation in whole or in part by issuance of a revised or amended Request for Proposals.
- b) BISD further reserves the right to award one or more contracts, in part or in whole, to a single or to multiple prospective vendors. The decision to award multiple contracts, award only one contract, or to make no awards rests solely with BISD. BISD may make multiple awards, and this fact should be taken into consideration by each vendor.
- c) BISD assumes no financial responsibility for any costs incurred by prospective vendors in developing and submitting a response or any amendments or addenda, participating in bid conferences, participating in any negotiation sessions or discussions, or any other costs incurred by vendors prior to award of a contract pursuant to this RFP.
- d) BISD reserves the right to reject any and/or all responses, to award contracts for individual products or services as may appear advantageous, and to negotiate separately in any manner necessary to serve the best interests of the School District. BISD further reserves the right to accept, reject, or negotiate modifications in any terms of a proposed vendor’s response or any parts thereof. BISD further reserves the right to waive any formalities or technicalities if deemed in the best interest of the School District. BISD also reserves the right as sole judge of

quality and equality.

## 2.6 Questions and Clarification

- a) Questions regarding the requirements specified in this solicitation must be submitted via e-mail to Eddie Ashley. In the subject line type: "Questions" followed by the solicitation number and title.
- b) BISD will not answer verbal questions; Question responses/Addendums will be posted on the district website at: <https://www.boerneisd.net/Page/3074>.

## PART 3.0 – INSTRUCTIONS TO VENDORS

This portion of the RFP includes instructions on the format vendors must follow in preparing and submitting their online responses. It further identifies how questions can be raised and will be addressed.

### 3.1 Compliance with Specifications

Vendors are required to respond to all requests identified in this RFP and indicate their acceptance or objection to the terms of the RFP and the terms of the Agreement. Any exceptions to the terms and conditions in the RFP or the Agreement must be clearly indicated in the appropriate section of the vendor's submitted response. Each vendor, by making its response, represents that the vendor has read and understands the RFP and the Agreement.

### 3.2 Required Response Format

Responders must submit one (1) complete set of the sealed RFP proposal to the Boerne ISD Purchasing Department electronically through online submission at BISD Purchasing web page <https://www.boerneisd.net/Page/3074> or submitted in a sealed envelope to BISD Central Office, prior to the response due date and time as described in the Request for Proposal. Failure to submit the necessary completed documents may result in the RFP being declared unresponsive to specification and may not be further evaluated. All submittals must be written in ink or typed. Mistakes may be crossed out, corrections inserted and initialed in ink by the person signing the RFP submission. No oral, telegraphic, telephonic, e-mailed, or facsimile RFPs will be considered. All submittals must be submitted in a sealed envelope or uploaded online. Responders must provide all documentation required with the RFP response. Failure to provide this information may result in rejection of the RFP. For additional instructions related to RFP Preparation, please see the General Conditions contained herein.

### 3.3 General Corporate and Contact Information

Vendor agrees to provide BISD with the following financial information if requested by BISD at any point during the procurement process, including before or after contract award: If public, the vendor's income statement, balance sheet, and cash flow for the past three (3) years; if private, the vendor's audited financial statements for the past two years (if available). A vendor's failure to provide this financial information may impact the BISD Administration's recommendation to the BISD Board of Trustees for the award of the contract.

### 3.4 Response Submission Web Page Link/Physical Delivery Location:

#### RFP 23-009 Child Nutrition Point of Sale Software

<https://www.boerneisd.net/Page/3074>

or

Boerne Independent School District  
ATTN: Purchasing Dept. – RFP 23-009  
235 Johns Road Boerne, TX, 78006

Any responses received after the submittal deadline date and time will be disqualified.

### 3.5 Addendum

Any interpretations, corrections, additions, or changes to this RFP will be communicated to vendors by the issuance of an addendum. Addendums will be posted on the Purchasing webpage. It is the responsibility of the vendor, prior to submitting their response, to determine whether an addendum was issued. All vendors

shall comply with the requirements specified in any addendum issued by BISD.

### **3.6 Disqualification**

A vendor may be disqualified before or after the responses are unsealed, upon evidence of collusion with the intent to defraud, or evidence of intent to perform other illegal activities for the purpose of obtaining an unfair competitive advantage.

### **3.7 Environmental Initiatives**

BISD is committed to reducing waste and promoting energy conservation. Toward that end, vendors responding to this solicitation are encouraged to provide their company's environmental policy and green initiative.

### **3.8 Interpretation**

This solicitation represents the basis for any award and supersedes all prior offers, negotiations, exceptions, and understandings (whether orally or in writing). Submitted responses should be self-explanatory and should not require any clarification or additional information.

### **3.9 No Return of Responses**

Once submitted, BISD will not return responses to vendors.

### **3.10 Non-Collusion Statement**

Vendors are required to certify a Non-Collusive Statement. Vendors are required to state the party submitting a response, that such response is genuine and not collusive or sham; that vendor has not colluded, conspired, connived or agreed, directly or indirectly, with an entity or person, to put in a sham response or to refrain from bidding, and has not in any manner, directly or indirectly, sought by agreement or collusion, or communication or conference, with any person, to fix the response price or of any other vendor, or to fix any overhead, profit or cost element of said response price, or of that of any other vendor, or to secure any advantage against BISD or any person interested in the proposed contract, and that all statements in said response are true.

### **3.11 Open Records Policy**

BISD is a governmental body subject to the Texas Public Information Act. Responses submitted to BISD as a result of this solicitation may be subject to release as public information after contracts are executed or the procurement is terminated. If a vendor believes that its response, or parts of its response, may be exempted from disclosure under Texas law, the vendor must specify page-by-page and line-by-line the parts of the response which it believes are exempt. In addition, the vendor must specify which exception(s) to the Texas Public Information Act are applicable and provide detailed reasons to substantiate the exception(s). Vague or general claims to confidentiality will not be accepted. BISD assumes no obligation or responsibility relating to the disclosure or nondisclosure of information submitted by vendors.

### **3.12 Preferences**

BISD may apply applicable preferences for Texas resident vendors in the event of a tie bid. Preferences must be explicitly claimed by vendor and may not be applicable in procurements and/or contracts involving federal funds unless the procurement and/or contract involves unprocessed locally grown or locally raised agricultural products for use by BISD in a Child Nutrition Program. *See* Texas Government Code §§ 2252.001 - .004; 2 C.F.R. § 200.319.

### **3.13 Responsible Vendor**

A responsible vendor is a vendor who has adequate financial resources (or the ability to obtain such resources), can comply with the delivery requirements, and is a qualified and established vendor regularly engaged in the type of business that provides the items listed herein.

### **3.14 Responsive Submittals**

Submissions shall be deemed responsive if they comply with all material and administrative aspects of this solicitation.

### **3.15 Similar Products**

Whenever an article or material is defined by BISD in this solicitation by describing a proprietary product or by using the name of a manufacturer or brand name, the term "or equal" if not inserted shall be implied (as applicable). The specified article or material shall be understood as indicating type, function, minimum standard of design, efficiency, and quality desired and shall not be construed as to exclude other manufactured products or comparable quality, design, and efficiency (as applicable).

### 3.16 BISD is tax-exempt

BISD is tax-exempt. Response prices should not include taxes.

### 3.17 Sole Source

In order to become a Sole Source Vendor, a vendor must meet the requirements of Texas Education Code § 44.31 (j) Sole Source, as described below.

Selected purchases may be exempt from competitive procurement if they meet the established criteria for a sole source purchase:

- Identification and confirmation that competition in providing the item or product to be purchased is precluded by the existence of a patent, copyright, secret process, or monopoly
- Identification and confirmation that the product is a film, manuscript, book, utility service (including electricity, gas, or water), or a captive replacement part or component for equipment
- Sole source does not apply to mainframe data-processing equipment and peripheral attachments with a single item purchase price in excess of \$15,000.

*It is incumbent upon the school district to obtain and retain documents from the vendor which clearly delineate the reasons that qualify the purchase to be made on a sole source basis. In order to do business with BISD as a Sole Source Vendor, BISD must receive a notarized Sole Source Affidavit along with proof of your company qualifying as a sole source.*

Please mail this information to:

Boerne Independent School District  
Attn: Purchasing Office  
235 Johns Road  
Boerne, Texas 78006

BISD reserves the right to decide if your company is a qualified Sole Source Vendor.

### 3.18 Conflict of Interest (CIQ Form – must be filled out and attached to response)

BISD is required to comply with Texas Local Government Code Chapter 176, Disclosure of Certain Relationships with Local Government Officers. House Bill 23 significantly changed Chapter 176 as well as the required disclosures and the corresponding forms. As of September 1, 2015, any vendor who does business with BISD or who seeks to do business with BISD must fill out the new Conflict of Interest Questionnaire (CIQ) whether or not a conflict of interest exists. A conflict of interest exists in the following situations:

- (a) If the vendor has an employment or other business relationship with a local government officer of BISD or a family member of the officer that results in the officer or family member receiving taxable income, other than investing income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that
  - (i) a contract between the local government entity and vendor had been executed; or
  - (ii) the local government entity is considering entering into a contract with the vendor.
- (b) If the vendor has given a local government officer of BISD, or a family member of the officer one or more gifts that have an aggregate value of \$100 in the 12-month period preceding the date the officer becomes aware that:
  - (i) A contract between the local government entity and vendor had been executed; or
  - (ii) The local government entity is considering entering into a contract with the vendor.

### 3.19 Interlocal Cooperation Act

It is the intent of BISD to allow other governmental entities, including other School Districts, to “piggyback” onto any existing contract between BISD and Vendor pursuant to this RFP. Accordingly, as permitted under the Interlocal Cooperation Act, Chapter 791 of the Texas Government Code, and Chapter 271, Subchapter F of the Texas Local Government Code, other governmental entities that have entered into an Interlocal Agreement with BISD are authorized to enter into separate and independent contracts with Vendor that employ the same negotiated terms and conditions contained in an existing contract(s) between BISD and Vendor.

## PART 4.0 – SCOPE & SPECIFICATIONS

### 4.1 Request for Proposals Defined

The intention of this Request for Proposals (RFP) is to solicit responses for a Child Nutrition Point of Sale Software to include 32 POS locations requiring Keypads and Scanners. BISD is utilizing the Request for Proposals (RFP) method for the procurement of this service in accordance with Texas Education Code Section 44.031 Purchasing of Contracts, Item (3) Request for Proposals. For information regarding the RFP process, contact Eddie Ashley of the Purchasing Department at 830-357-2026. Interested vendors should respond to this RFP and submit responses to BISD.

### 4.2 Scope of Services

Boerne ISD is seeking proposals from qualified vendors for a Child Nutrition Point of Sale System to include 32 POS locations requiring Keypads and Scanners. The contract will include all BISD cafeterias. Boerne ISD will be the sole decision maker for the determination of need. Proposers are requested to submit a proposal offering their total line of available services that are commonly purchased by governmental entities, School Districts, and other public, not-for-profit agencies or organizations. **Awarded vendor must be willing to complete the Data Privacy Agreement (DPA) for Texas K-12 Institutions.**

### 4.3 Specifications

It is the intention of BISD to establish a single contract with a highly qualified Vendor for a Child Nutrition Point of Sale Software to include 32 POS locations requiring Keypads and Scanners as identified below. Boerne ISD will be the sole decision maker for the determination of need. Vendor(s) shall, at the request of BISD, provide these products and/or covered services under the terms of this RFP and the Contract set forth in Section 6.0 Contract Terms and Conditions.

#### **System Requirements:**

- Entire solution must be 100% Cloud Based and externally hosted in a secure data center.
- All Modules must be 100% browser based and work with Chrome Web Browser.
- Provide all of the following cloud-based modules: Point of Sale, Online Free & Reduced Application Processing, and Online Lunch Account Deposit Processing.
- Entire solution must be available from any browser with connection to the internet.
- System must be compatible with Skyward Student Information and Skyward Finance.
- Must Provide Guaranteed Uptime of 99% or higher.
- CPU, RAM, Storage must be scalable to accommodate increased data transfer rates for the solution.
- Vendor must conduct regular third-party security audits to ensure the security of their cloud-based infrastructure.
- Must be PCI compliant.
- All system modules must use and reference the same integrated database with real time updating between modules.
- Solution must be modular and allow the district to add or remove modules or terminals as necessary.
- No duplicate data entry. Items entered/created in one place must be available throughout the system.
- Provide granular security permissions that can be set per user or by user group.
- Built in exports for Excel, CSV, Word, Text, and PDF.
- Must provide a log or tracking of cloud-based backups.
- Must have the capability to easily create and access database backups.

#### **Point of Sale Requirements:**

- Terminals must run completely inside browser.
- Terminals must continue to operate uninterrupted if internet connection is interrupted.
- Meal serving sessions must be able to operate beginning to end without an active internet connection to that terminal.
- Data to include student information, pictures, balances, and eligibility status must be cached within the browser.
- Automatically detects ID entry from students from other schools and processes their eligibility according to eligibility at their home campus.
- Item button name and color must be customizable.
- Must offer eligibility-based pricing for all items.



- Must support customizable discrete codes for eligibility. Ex.) Free shows as “2”.
- Ability to generate unique POS identifiers for students and staff.
- POS must be touchscreen friendly.
- Ability to accept cash and checks for each transaction at the manager terminal and cashier line.
- Ability to deposit excess collected money as an account deposit.
- Ability to give change by providing cashier with correct change.
- Provide training module that allows staff to run the POS with all current data and settings, simulating live transactions but without impacting accounts.
- POS must include a smart search to find students and staff. Smart search must automatically search with each character entered, immediately narrowing search results.
- Ability to recall last transactions.
- System must be able to detect and properly handle 2<sup>nd</sup> meals.
- Barcode labels provided for student ID.

#### **Point of Sale Reports:**

- Ability to create reports in the following formats: Excel, Word, PDF, CSV
- Ability to create and save an unlimited number of report templates.
- Ability to share report templates with individual users or user groups.
- Ability to build custom reports.
  - Build report by selecting data fields and the order of data fields.
  - Set custom sort order or data fields.
  - Group data by groupings such as school or grade level.
- System must continue to function normally while a report is being run. Report requests must be pushed to the background while processing.

#### **Point of Sale Hardware:**

- Universal keypad acceptance of combo keypad/barcode scanner for entry of PIN, ID, or Barcode.
- Support meal and a la carte sales.
- Provide all necessary hardware.
- Support electronic and manual cash drawers.

#### **Eligibility:**

- Complies with current USDA and Texas application regulations.
- Include online Free and Reduced
- Must provide online meal applications in any language needed by District.
- Allow parents the ability to complete online applications without creating an online account.
- Ability to display a customizable message when online applications are completed.
- Ability to create and track an unlimited number of online meal application statuses.
- Must enforce data entry in required fields to ensure completed applications.
- Ability to track notes on the application record.
- Eligibility letters to parents must be fully customizable.
- Ability to print or email eligibility letters from the application record.
- Keep a record of all notifications sent regarding applications.
- Each application must include a change history to track all changes made to an application.
- Ability to print paper copies of online applications.
- System must detect and track duplicate applications.
- System must support an upload of the District’s direct certification file that automatically matches the enrolled students.
- System must allow direct certification to be run as often as needed.
- Upon application being entered, the system must automatically reprocess all student meals at the correct rate based on the application’s entered received date, including crediting a student’s account back and appropriately updating all reimbursement claims and edit check reports.
- Automatic reprocessing of meals must not modify closed reporting periods.
- System must support multiple Meal Benefit Expiration Dates.

- System must support Second viewer option on applications.

**Verification:**

- Must be a streamlined process.
- Must provide the ability to manually select applications for verification.
- Must provide the ability to select a specified number of applications at random.
- Must have a status screen for verification that displays a list of all selected applications, their current status in verification, their initial eligibility status, their final eligibility status and what type of application they completed.
- Must provide a count report that displays the number of total applications and the number selected per category.
- Must allow printing and emailing of initial notification letters, warning letters, complete letters, and failure to respond letters.
- Must automatically generate and populate all necessary federal reports for verification.
- Ability to exclude a school from verification process.

**Accountability:**

- Complies with current USDA and state meal regulations.
- Supports Texas Department of Agriculture reporting.
- Government reporting claims.
- Generate USDA Edit check report based on daily attendance.
- Generate USDA approved reimbursement report.
- Reports are displayed on screen with options to save, print, or export.

**Online Parent Portal:**

- Must be accessible from computer and mobile devices.
- Available in free mobile app in Google Play and App Store.
- Online payments to student lunch accounts must be available for immediate use at point of sale.
- Student transactions at Point of Sale must immediately be available to view on the Parent Portal.
- Provide student account balance transfers between students at no cost to parent or District.
- Allow parents to link students to their account based on customizable criteria. District can choose which information parents must provide to link students to their account.
- Allow parents to set up payment reminders.
- Allow parents to unlink students from their account.
- Allow parent to set up recurring payments based on any of the following criteria: Weekly, Twice a Month, Monthly, or when a balance reaches a specified amount.
- Recurring payments can be made on one account or spread across multiple accounts.
- Must not have minimum payment amount.
- No hidden cost can be passed on to the District.
- Minimal convenience fee for parents.
- Must allow parent to add money on all attached student accounts with only one transaction fee.
- Vendor must assume all liability for transactions made on the Parent Portal.
- Provide must provide support to parents using the Parent Portal.
- Provide detailed monthly banking and financial reports.

**4.4 Estimated Annual Expenditures**

PLEASE NOTE: THERE IS NO GUARANTEED ANNUAL VOLUMES. The District makes no guarantees as to quantities and may purchase more or less than those stated in this proposal.

**4.5 General Information (Respond to ALL questions/statements)**

Provide the following business and product profile information:

- a) Company Name
- b) Company website
- c) Product Name recommended for this proposal.

- d) Number of years this product has been in production and fully operational.
- e) Number of school districts using this product.
- f) Describe your firm, date founded, ownership, and other business affiliations.
- g) Please provide tax id number
- h) Number of and location of affiliated offices
- i) Identify primary and alternate points of contact for this application product proposal.
- j) Name 1
- k) Functional / organizational role
- l) Contact telephone number(s)
- m) Business email address
- n) Name 2
- o) Functional / organizational role
- p) Contact telephone number(s)
- q) Business email address
- r) Provide the address of the office location(s) that will service the account (including account management and technical support).

#### **4.6 System Features (Respond to ALL questions/statements).**

- a) Describe the product and your firms' competitive advantage as to why you would be the best option for BISD.
- b) What method / forms of payment do you support (Visa, MasterCard, AMEX, Discover, eCheck, debit card)?
- c) Does the product allow for BISD to restrict accepted payment types?
- d) Describe how a refund is processed back to a credit card on which the payment was initiated.
- e) Provide an implementation plan with a detailed breakdown of work to be performed by BISD? Explain
- f) Provide onsite project manager, additional support resources, and technical assistance during system implementation? Explain.
- g) What services do you provide to ensure the success of the implementation?
- h) Describe your recommended approach and timeline for implementation to a pilot group.
- i) Describe your recommended approach and timeline for implementation district wide.
- j) What is the average, best case, and worse case "time to implement" – from the time the contract is signed until the system is fully operational – based on experience with your customer base? Discuss the variables BISD should be aware of.
- k) Provide samples of standard reporting by site/location and district wide, detail and summary.
- l) Describe any reporting limitations or constraints.
- m) Describe available daily and monthly reconciliation reports.
- n) Does this product require installation of software of any kind on computers and/or servers at schools or on servers in the BISD Data Center? If so, name and describe the function of each software component. Explain.
- o) Describe how updates are distributed and how support for the updates is provided.
- p) Provide information related to the frequency of new releases and the plan for system upgrades and patches. State whether software enhancements or upgrades to the system software will be provided at no extra charge beyond the annual maintenance fee or contract expectations. Describe the support available for previous versions of the program following the release of upgrades or new products.
- q) What are your current release number and the date of release? When is your next product release or update scheduled?
- r) Describe the BISD resources required to maintain the system. Include the role and responsibility for each resource.
- s) Describe the ongoing services you provide to increase use of the product by the BISD community.
- t) Will the maintenance agreement provide for modifications requested by BISD and cover all future software upgrades? Explain.
- u) What is included in the annual software and hardware maintenance?
- v) Are software and hardware upgrades and product enhancements provided at no charge as part of the annual maintenance?
- w) Is the first year of maintenance services included with software and hardware?
- x) Explain any additional costs associated with the set-up and configuration of any hardware and platform components required to support the proposed solution?
- y) Describe in detail the workstation hardware and server hardware requirements needed to run its product?
- z) Describe any communications and network equipment required by the proposed solution?

- aa) Will the vendor need any data from BISD? Explain and specify.
- bb) Does the system include dashboards? Explain.

**4.7 Fees and Pricing (Respond to all questions/statements).**

- a) Describe your fee structure.
- b) Provide a price schedule for the services described in the RFP.
- c) Describe one-time or set up fees, research fees, or any other fees that will or could be charged.
- d) For how many years is the proposed fee structure guaranteed to remain unchanged?
- e) Describe software licensing and maintenance agreements, including response time and operational guarantees.
- f) Describe services, if any, provided in the installation phase that will not be included in the annual maintenance license agreement.
- g) Describe any support services that result in a fee per incident or additional fees of any type.

**4.8 Customer Service/Technical Support (Respond to all questions/statements).**

- a) Describe the level of service you will provide BISD.
- b) What are the hours of operation (CST) for your customer service?
- c) What is your established response time for customer service contacts?
- d) Will operating manuals and reference materials be distributed to all staff that will use the product?
- e) Are manuals and reference materials in electronic format (i.e. PDF) and hard copy?
- f) Does the vendor have an incident tracking system allowing the customer to create and track system problems? If yes, identify system and process. Explain.
- g) Does the company offer local on-site support? Explain.
- h) Is support provided by the company's own employees? If not, please specify the third-party vendor. Explain.
- i) Will the vendor assist BISD with configuring the system, implementing, testing, training and roll-out? Explain.
- j) Does the vendor perform comprehensive performance and load testing of the system as part of system implementation support? Explain.

**4.9 Security and Data Protection (Respond to all questions/statements).**

- a) State your level of PCI compliance and BISD responsibility, if any, for maintaining compliance after implementation.
- b) How are forgotten passwords and usernames handled?
- c) Is any credit card information stored in the payment system? If yes, describe what is stored and how.
- d) Describe product functionality to backup and restore data.
- e) Describe user access and roles.
- f) Describe reconciling and balancing including Point of Sale (POS) system.
- g) Does the vendor provide any other secure, automated integration import options? Please explain.
- h) Does the vendor encrypt content before FTPing or publishing data via web service?
- i) Does the software support SOAP (Web Services based on SOAP)?
- j) Does the software support File Systems/FTP Servers?
- k) Does the software support Plain HTTP(s)?
- l) Does the software support JMS (Messaging systems)?
- m) Does the software support Java database connectivity (JDBC)?
- n) Does the software support WS-RM (Web Services based on WS Reliable Messaging)?
- o) Does the software support any other adapters\protocols? If Yes, what are they?
- p) Does the software support Relational Database Management Systems (RDBMS)?
- q) Has the vendor included evidence or the latest vulnerability scanning results for those systems where BISD data will be stored and evidence of any remediation of existing vulnerabilities? Explain.
- r) For hosted solutions, has the vendor included a description of the organization's policies and procedures for data protection including data retention policies, data encryption methods (in transit and stored), data destruction process, etc.? Explain.
- s) Include a detailed description of any major security incidents (disclosures, loss of data, etc.) impacting the organization? Explain.
  - t) Is there insurance coverage for business interruptions or general services interruption? Explain.
- u) Are passwords required to access systems transmitting, processing, or storing Scoped Systems and Data?

Explain.

- v) Is there an internal audit, risk management or compliance department with responsibility for identifying and tracking resolution of outstanding regulatory issues? Explain.
- w) Is there a formally documented privacy policy (or policies)? Explain.
- x) Is there formal privacy awareness training for employees, contractors, volunteers (and other parties, as appropriate)? Explain and provide frequency and scope.
- y) Is personal information collected directly from individuals as a service to the client? Explain and describe the information collected.
- z) Is personal information - provided by the client - shared with other third parties within the US only? Explain.
- aa) Is personal information - provided by the client - shared with other third parties outside of the US? Explain and list countries.
- bb) Are there appropriate contractual controls to ensure that personal information shared with other third parties is appropriately protected by the third party? Explain.
- cc) Does the information security function regularly communicate and collaborate with the privacy function (if the two functions are separate)? Explain.
- dd) Is there a process for ensuring the accuracy and currency of personal information at the direction of the client? Explain.
- ee) Is there a process to ensure that the personal information provided by an individual is limited for the purposes described in the organization's privacy notice? Explain.

#### **4.10 Respondent's Submittal:**

Each vendor shall organize the response in the order listed below and include the content as requested. This information will also be used for the Evaluation Criteria. Boerne ISD reserves the right to reject as non-responsive any responses that do not contain the information requested in this RFP. Additionally, Boerne ISD reserves the right to reject, as non-responsive, any responses that are not organized and formatted as described in this RFP.

##### **4.10.1 Required Proposal Content**

The proposal must contain the following sections in the order presented below. Proposals that do not include these sections may be considered non-responsive and as such may not be considered:

***Section 1:*** Letter of Interest

The proposal must be introduced with a letter of interest that includes a synopsis of the company's services and highlight the capacity to perform the work. The letter should be signed by the individual with contract signature authority for the company.

***Section 2:*** If you proposed product does meet all specification listed in section 4.3, address any concerns or issues in this section.

***Section 3:*** General Information- Responses to section 4.5

***Section 4:*** System Features- Responses to section 4.6

***Section 5:*** Fee Structure and Rates- Responses to section 4.7

***Section 6:*** Customer Service/Technical Support- Responses to section 4.8

***Section 7:*** Security and Data Protection- Responses to section 4.9

***Section 8:*** Three References

***Section 9:*** Required Attachments

***Section 10:*** Insurance Coverages

The proposal shall be organized as shown above, with each section separated and identified. Please be as concise as possible in providing the requested information.

## PART 5.0 – EVALUATION AND AWARD OF RESPONSES

In accordance with applicable laws, rules, and regulations for public purchasing, award(s) will be made to the responsible vendor(s) whose response(s) is/are determined, after evaluation by the BISD Procurement Department, to be the best value to BISD. To qualify for evaluation, a response must have been submitted on time and must materially satisfy all mandatory requirements identified in this document.

### 5.1 Evaluation Criteria

A committee selected by BISD will review and evaluate all responses and make a recommendation to the BISD Board of Trustees. BISD will base a recommendation for contract award on the following factors, in accordance with Texas Education Code § 44.031:

Criteria	Description and Scoring Points System	Maximum Points Attainable
1. Vendor's Qualifications and Experience	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> <li>● Qualifications and experience of proposing Vendor</li> <li>● Qualifications and experience of each individual who may be assigned to work with the District</li> <li>● Vendor's experience with servicing public school Districts (or another public sector).</li> <li>● Number of years in business.</li> <li>● Number of years offering the proposed services;</li> </ul>	25
2. Purchase Price	<p>Each Vendor's overall pricing proposal will be scored based on pricing structure and anticipated costs over the term of the contract and may include but is not limited to:</p> <ul style="list-style-type: none"> <li>● Initial and Recurring Costs.</li> <li>● Any additional fees that may be incurred by the District or end user, as applicable.</li> <li>● Overall value of vendor's rates in consideration of any value-added services that may be included in Vendor's proposal.</li> <li>● Required equipment for transactions.</li> </ul>	40
3. Ability to Meet District's Needs	<p>May include but is not limited to:</p> <ul style="list-style-type: none"> <li>● Vendor's acceptance to District's standard terms and conditions and special terms and conditions.</li> <li>● Impact on District based on any Vendor's stated exceptions or deviations from the District's standard/special terms and conditions and requirements.</li> <li>● Vendor's ability to comply with minimum requirements and monthly invoicing requirements.</li> <li>● Vendor's acceptance to vendor fixed price over a minimum of 12 months and not to exceed a 3% increase year-over-year thereafter; and Vendor's acceptance to pass down price decreases when possible.</li> <li>● Additional services offered by the Vendor and referenced in the proposal.</li> <li>● Value added services included in Vendor's proposal.</li> <li>● Vendor's ability to meet minimum insurance requirements.</li> <li>● On-Site response time to service requests.</li> </ul>	25

4. Past performance with the District.	Indicate past engagements with Boerne ISD: <ul style="list-style-type: none"> <li>• Vendors without prior experience with Boerne ISD will automatically receive a score of 3 points.</li> <li>• Vendors with prior experience with Boerne ISD may earn up to 5 points, depending on the District’s experience with the Vendor.</li> </ul>	5
5. Vendor Reputation	May include but is not limited to: <ul style="list-style-type: none"> <li>• Quality of vendor’s references (i.e., similar size and scope) and extent of work performed for each reference.</li> <li>• Vendor provided a minimum of three (3) client references, preferably Texas public school Districts, which the District can contact to verify quality of services rendered by Vendor</li> </ul>	5
<b>Maximum Score Attainable</b>		<b>100</b>

**5.2 Awards**

Awards will be made to the successful vendor(s) for the total line of products and services submitted. Awards will be based on the criteria set forth within this document. BISD reserves the right to award contracts to multiple vendors if these vendors offer items that are unique and have value to BISD. BISD shall comply with the Texas Public Information Act in the event BISD receives an open records request for information relating to responses submitted in response to this RFP.

**5.3 Competitive Range**

It may be necessary for BISD to establish a competitive range of acceptable responses as part of the evaluation process. Responses not in the competitive range are unacceptable and do not receive further award consideration.

**5.4 Estimated Quantities**

BISD makes no guarantee or commitment of any kind concerning quantities that will be purchased. BISD makes no guarantee or commitment of any kind regarding usage of any contracts resulting from this solicitation.

**5.5 Inspection & Acceptance**

Awarded vendor(s) shall deliver the goods or services procured on this contract to the BISD Department issuing a Purchase Order. If delivery is not or cannot be made within proper time period, the awarded vendor must receive authorization from the issuing BISD Department for the delayed delivery. If defective or incorrect goods are delivered, BISD may make the determination, in its sole discretion, to return the goods to the vendor at no cost to BISD. The vendor agrees to pay all shipping and handling costs for any such return shipment. The vendor also shall be responsible for arranging the return of the defective or incorrect goods.

**5.6 Minority & Women’s Business Enterprise (MWBE), Historically Underutilized Business (HUB), and Small Business Enterprise (SBE) participation**

BISD encourages the use of HUB, MWBE, and SBE both as prime and subcontractors. However, these entities must meet the same minimum standards and requirements as the prime contractor. It will be the responsibility of the prime contractor to pre-qualify any subcontractors offered as HUB, MWBE and SBE participants. Vendors shall indicate on their submitted responses whether or not they are a HUB, MWBE, or SBE vendor and with whom they are certified, e.g., State, City, Federal.

**5.7 Formation of Contract**

A response to this solicitation is an offer to contract with BISD based upon the terms, conditions, scope of work, and specifications contained in this procurement solicitation. A solicitation/response does not become a contract unless and until it is accepted by BISD after notification to the BISD Board of Trustees.

### **5.8 Non-Exclusive Contract**

Any contract resulting from this solicitation is non-exclusive and shall be awarded with the understanding and agreement that it is for the sole convenience of BISD. BISD is free to have multiple contracts for the awarded goods and services and may initiate other procurement solicitations or purchasing activity with other vendors at any time, in BISD's sole discretion.

### **5.9 Pricing**

BISD requires that the pricing submitted to be set for duration of contract. BISD may request the awarded vendor(s) to provide discounts or other adjustments to the quantity one price for larger orders, on a per-purchase order basis. If discounts or quantity prices are offered by an awarded vendor, the vendor must also offer the same reductions in pricing to be available for orders of similar size.



## **PART 6.0 – GENERAL TERMS AND CONDITIONS**

The words “bids,” “Request for Proposals,” “quotes,” “RFPs,” “solicitation,” “procurement,” and their derivatives may be used interchangeably in these terms and conditions. These terms and conditions apply to all bids, Request for Proposals, quotes, and other procurement solicitations to which they are attached. The term “Vendor” means each awarded vendor chosen by BISD.

These General Terms and Conditions are part of the final contract in each commodity and/or service contract and are part of the terms and conditions of each purchase order or other bid/response forms issued in connection with this solicitation.

Vendors are responsible for identifying any exceptions to these terms and conditions. **ANY EXCEPTIONS MUST BE CLEARLY NOTED IN THE SUPPLIER RESPONSE.** Responses that are qualified with conditional clauses, items not called for, or other irregularities may be considered non-responsive by BISD and eliminated from further consideration by BISD.

This Agreement is entered into between Boerne Independent School District (“BISD”) and Vendor, having submitted a response to a procurement solicitation issued by BISD and whose response has been accepted and awarded by BISD. In consideration of the mutual covenants and conditions contained in this Agreement and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, BISD and Vendor, intending to be legally bound, and subject to the terms, conditions, and provisions of this Agreement, agree as follows:

### **6.1 Agreement Terms; Amendment**

The terms of this Agreement shall govern all procurements conducted hereunder. No pre-published terms on the Vendor’s order acknowledgments, invoices, or other forms shall have any force or effect. Further, no amendment of this Agreement shall be permitted unless first approved in writing by BISD, and no such amendments shall have any effect unless and until a written amendment to this Agreement is executed by BISD’s Superintendent or its Chief Financial Officer (or their designees) after any necessary approvals have been obtained from the BISD Board of Trustees.

### **6.2 Assignment of Agreement**

Vendor may not assign this Agreement or any of its rights, duties, or obligations hereunder without the prior written approval of BISD. Any attempted assignment of this Agreement by Vendor shall be null and void. Any purchase or work order made as a result of this Agreement may not be transferred, assigned, subcontracted, mortgaged, pledged, or otherwise disposed of or encumbered in any way by Vendor without the prior written approval of BISD. Vendor is required to notify BISD when any material change in operations occurs, including but not limited to, changes in distribution rights for awarded products, bankruptcy, material changes in financial condition, change of ownership, and the like, within three (3) business days of such change.

### **6.3 Buy America Act**

BISD has a preference for domestic end products for supplies acquired for use in the United States when spending federal funds. Purchases that are made with non-federal funds or grants are excluded from the Buy America Act.

### **6.4 Captions**

The captions herein are for convenience and identification purposes only, are not an integral part hereof, and are not to be considered in the interpretation of any part hereof.

### **6.5 Catalog Discounts**

In the event of a catalog discount type solicitation, Vendor may be allowed to make additions and/or deletions from Vendor’s offerings on an annual basis during the Agreement renewal period, in BISD’s sole discretion, provided the item(s) substituted are of a like quality and category. These changes will be compliant with the format of Vendor’s original response (i.e. manufacturer name, product category, or entire catalog discount). BISD will send notification to Vendor(s) seeking any additions and/or deletions, and Vendor will return these proposed changes on company letterhead within the given timeframe. If BISD, in its sole discretion, accepts Vendor’s proposed changes, such changes will remain in effect for the entire year until the next

renewal period.

## **6.6 Compliance with Laws**

Vendor shall comply with all applicable federal, state, and local laws, statutes, ordinances, standards, orders, rules, and regulations, including, as applicable, workers' compensation laws, minimum and maximum salary and wage statutes and regulations, prompt payment and licensing laws and regulations, the DAVIS-BACON ACT (40 U.S.C.

§ 276a / 29 CFR Part 5), the Copeland "Anti-Kickback" Act (18 U.S.C. § 874 / 29 CFR Part 5), the Equal Opportunity Employment requirements (Executive Orders 11246 and 11375 / 41 CFR Chapter 60), the McNamara-O'Hara Service Contract Act (41 U.S.C. 351), Section 306 of the Clean Air Act (42 U.S.C. § 1857h, Section 508 of the Clean Water Act (33 U.S.C. § 1368), Executive Order 11738, Environmental Protection Agency regulations (40 CFR Part 15), the Contract Work Hours and Safety Act (40 U.S.C. § 3701-3708; 29 C.F.R. Part 5), the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (2 CFR Part 200), the Education Department General Administrative Regulations, 2 C.F.R. Parts 200 and 3474, and 34 C.F.R. Parts 75-77 and 81 ("EDGAR"), mandatory standards and policies contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (Pub. L. 94-163, 89 Stat. 871), and all applicable requirements and regulations, including those related to reporting, patent rights, copyrights, data rights and those mandated by federal agencies making awards of federal funds to BISD. Vendor understands that Vendor is ineligible to receive a contract award with BISD if Vendor is listed on the government wide exclusions in the System for Award Management (Debarment and Suspension Orders Executive Orders 12549 and 12689) or is 30 days or more delinquent in paying child support (Tex. Fam. Code § 14.52). For the entire duration of this Contract, Vendor and all subcontractors shall maintain all required licenses, certifications, permits, and any other documentation necessary to perform this Contract. Vendor must comply with all state and local building code requirements unless otherwise specifically provided in the BISD's Purchase Order, and Vendor must pay all fees and charges for connections to outside services and for use of property outside the project site. When required or requested by BISD, Vendor shall furnish BISD with satisfactory proof of Vendor's compliance with this provision.

## **6.7 Confidentiality**

Vendor and BISD agree to secure the confidentiality of all information and records in accordance with applicable federal and state laws, rules, and regulations. Vendor and BISD understand that the Family Educational Rights and Privacy Act (FERPA), 20 U.S.C. § 1232g, governs the privacy and security of educational records and information and agree to abide by FERPA rules and regulations, as applicable. Vendor also acknowledges that BISD is subject to the Texas Public Information Act, and Vendor waives any claim against and releases from liability BISD, its officers, employees, agents, and attorneys with respect to disclosure of information provided under or in this Agreement or otherwise created, assembled, maintained, or held by Vendor and determined by BISD, the Attorney General of Texas, or a court of law to be subject to disclosure under the Texas Public Information Act.

## **6.8 Contract Term**

The initial term of the Agreement is for a period of one (1) year, with BISD having the option to renew the Agreement for 4 (4) additional terms in one (1) year increments. Consequently, the total term of the Agreement may be for a period of five (5) years. The phrase "Term" in this Agreement shall mean the then-current Term of the Agreement, whether the initial term or a renewal term.

## **6.9 Criminal History Review (SB 9 Contractor Certification: Contractor Employees Form; SB 9 Contractor Certification: Subcontractor Form – must be filled out and returned, if applicable)**

Prior to commencing any work under the Agreement, if Vendor contracts with BISD to provide services, Vendor must certify, on the form provided herein, that for each covered employee of Vendor who will have direct contact with students, Vendor has obtained, as required by Texas Education Code Section 22.0834: (a) state criminal history record information from a law enforcement or criminal justice agency or a private entity that is a consumer reporting agency governed by the Fair Credit Reporting Act (15 U.S.C. Section 1681 et seq.) for each covered employee of Vendor employed before January 1, 2008; and (b) national criminal history record information for each employee of Vendor employed on or after January 1, 2008. Vendor must also obtain similar certifications of compliance with Texas Education Code Chapter 22's requirements from any subcontractors on the form provided herein. Covered employees with disqualifying criminal history are prohibited from serving at BISD; Vendor and any subcontracting entity may not permit a covered employee

to provide services at a school if the employee has been convicted of a felony or misdemeanor offense that would prevent a person from being employed under Tex. Educ. Code § 22.085(a) (i.e., Title 5 felony or an offense requiring registration as a sex offender and victim was under 18 years of age or was enrolled in a public school at the time the offense occurred). The criminal history record information review obligation applies if Vendor contracts with BISD to provide services; it does not apply to a contract for the purchase of goods or real estate.

#### **6.10 Customer Reference List**

Vendor agrees to submit a customer reference list upon request by BISD.

#### **6.11 Customer support**

Vendor shall provide timely and accurate technical advice and sales support to BISD and BISD staff. Vendor shall respond to requests for customer support within one (1) business day after receipt of the request. Vendor shall provide training to BISD staff regarding products and/or services supplied by Vendor, at no additional charge, if requested by BISD.

#### **6.12 Entire Agreement**

This Agreement, the procurement solicitation issued by BISD, and Vendor's response submitted in response to BISD's procurement solicitation, and the attached and incorporated addendum or exhibits, if any, contain the entire agreement of the parties relative to the purpose(s) of the Agreement and supersede any other representations, agreements, arrangements, negotiations, or understanding, oral or written, between the parties to this Agreement. In the event of a conflict between the procurement solicitation issued by BISD and Vendor's response submitted in response to BISD's procurement solicitation, BISD's procurement solicitation shall control. This Agreement supersedes any conflicting terms and conditions on any purchase or work orders, invoices, checks, order acknowledgements, forms, purchase orders, or similar commercial documents relating hereto and which may be issued by Vendor after the Effective Date of this Agreement.

#### **6.13 Equal Opportunity**

It is the policy of BISD not to discriminate on the basis of race, color, National origin, gender, limited English proficiency or handicapping conditions in its programs. Vendor agrees not to discriminate against any employee or applicant for employment to be employed in the performance of this Agreement, with respect to hire, tenure, terms, conditions and privileges of employment, or a matter directly or indirectly related to employment, because of age (except where based on a bona fide occupational qualification), sex (except where based on a bona fide occupational qualification) or race, color, religion, national origin, or ancestry. Vendor further agrees that every subcontract entered into for the performance of this Agreement shall contain a provision requiring non-discrimination in employment herein specified, binding upon each subcontractor. Breach of this covenant may be regarded as a material breach of the Agreement.

#### **6.14 Force Majeure**

Neither BISD or Vendor shall be deemed to have breached any provision of this Agreement as a result of any delay, failure in performance, or interruption of service resulting directly or indirectly from acts of God, network failures, acts of civil or military authorities, civil disturbances, wars, energy crises, fires, transportation contingencies, interruptions in third-party telecommunications or Internet equipment or service, other catastrophes, or any other occurrences which are reasonably beyond such party's control.

The parties to this Agreement are required to use due caution and preventive measures to protect against the effects of force majeure, and the burden of proving that a force majeure event has occurred shall rest on the party seeking relief under this provision. The party seeking relief due to force majeure is required to promptly notify the other party in writing, citing the details of the force majeure event and relief sought, and shall resume performance immediately after the obstacles to performance caused by a force majeure event have been removed, provided the Agreement has not been terminated. Delay or failure of performance, by either party to this Agreement, caused solely by a force majeure event, shall be excused for the period of delay caused solely by the force majeure event. Neither party shall have any claim for damages against the other resulting from delays caused solely by force majeure. Notwithstanding any other provision of this Agreement, in the event the Vendor's performance of its obligations under this Agreement is delayed or stopped by a force majeure event, BISD shall have the option to terminate this Agreement. This section shall not be interpreted as to limit or otherwise modify any of BISD's contractual, legal, or equitable rights.

**6.15 Governing Law and Venue**

The laws of the State of Texas, without regard to its provisions on conflicts of laws, govern this Agreement. Any dispute under this Agreement may be brought in the state and federal courts located in Boerne, Kendall County, Texas, and the parties hereby submit to the exclusive jurisdiction of said courts.

**6.16 BISD Property**

In the event of loss, damage, or destruction of any property owned by or loaned by BISD that is caused by Vendor or Vendor’s representative, agent, employee, or contractor, Vendor shall indemnify BISD and pay to BISD the full value of or the full cost of repair or replacement of such property, whichever is greater, within thirty (30) days of Vendor’s receipt of written notice of BISD’s determination of the amount due. If Vendor fails to make timely payment, BISD may obtain such money from Vendor by any means permitted by law, including, without limitation, offset or counterclaim against any money otherwise due to Vendor by BISD.

**6.17 Indemnification**

**VENDOR SHALL INDEMNIFY AND HOLD BISD HARMLESS FROM ALL CLAIMS, LIABILITIES, COSTS, SUITS OF LAW OR IN EQUITY, EXPENSES, ATTORNEYS’ FEES, FINES, PENALTIES OR DAMAGES ARISING FROM THE ACTS OR OMISSIONS OF VENDOR, VENDOR’S EMPLOYEES, AGENTS, OR SUBCONTRACTORS, IN CONNECTION WITH THIS AGREEMENT, INCLUDING, WITHOUT LIMITATION, THOSE ARISING FROM CLAIMED INFRINGEMENT OF ANY PATENTS, TRADEMARKS, COPYRIGHT OR OTHER CORRESPONDING RIGHT(S) WHICH IS RELATED TO ANY ITEM VENDOR IS REQUIRED TO DELIVER.**

Vendor’s obligations under this clause shall survive acceptance and payment by BISD.

**6.18 Insurance (if applicable)**

Successful Vendor, as a part of his/her proposal, shall provide proof of insurance showing, as a minimum, the coverage listed below. The Contractor shall not commence any portion of the work under this contract until he/she has obtained the insurance required herein and copies of certificates have been approved by the District and filed in the Purchasing Department. Approval of the insurance shall not relieve or decrease the liability of the successful vendor. The insurance certificate(s) shall become a part of the contract documents.

- Comprehensive General Liability: \$500,000 each person
- Bodily Injury Liability: \$1,000,000 each occurrence
- Property Damage Liability: \$100,000 each occurrence
- Workmen's Compensation: \* AS STATUTORY PROVISIONS REQUIRE

\* If vendors does not provide Workman’s Compensation, a letter explaining alternate benefits should be included with the proposal.

Automobile Liability Insurance:

- Comprehensive Automobile Liability: \$500,000 each person
- Bodily Injury Liability: \$1,000,000 each occurrence
- Property Damage Liability: \$100,000 each occurrence

Umbrella Liability:

- Minimum Limits: \$1,000,000 each occurrence
- Bodily Injury Liability: \$1,000,000 aggregate
- Excess: \$1,000,000

Coverage shall include:

- a. Waiver of subrogation endorsement in favor of the District and its Agents.
- b. Thirty (30) day written notice of cancellation or material change endorsement in favor of the District and its Agents.
- c. The District shall be named as additional insured on the successful vendor’s policy(ies).

**6.19 Interpretation**

Vendor agrees that the normal rules of construction that require that any ambiguities in this Agreement are to be construed against the drafter shall not be employed in the interpretation of this Agreement.

**6.20 Invoices; Payments**

Invoices shall be directed to BISD’s Accounts Payable Department. All invoices shall be itemized to include the type of good(s) and/or service(s) rendered. Vendor shall submit invoices within a timely manner during BISD’s fiscal year in which the good(s) and/or services are purchased. In accordance with Texas Government Code § 2251.021, payments are due to Vendor within forty-five (45) days after the later of the following: (1) the date BISD receives the goods under the Agreement; (2) the date the performance of the service under the Agreement is completed; or (3) the date BISD receives an invoice for the goods or service. Vendor agrees to pay any subcontractors, if any, the appropriate share of the payment received from BISD not later than the tenth (10th) day after the date Vendor receives the payment from BISD. The exceptions to payments made by BISD and/or Vendor listed in Texas Government Code § 2251.002 shall apply to this Agreement.

**Invoices are to be mailed for payment of delivery to:**

**Boerne ISD  
Accounts Payable Department  
235 Johns Road  
Boerne, Texas 78006**

**6.21 IRS W-9**

In order to receive payment under this Agreement, Vendor shall have a current I.R.S. W-9 Form on file with BISD.

**6.22 Multiple Contract Awards; Non-Exclusivity**

BISD reserves the right to award multiple contracts for each commodity category. Commodity categories are established at the sole discretion of BISD. Nothing in this Agreement may be construed to imply that Vendor has the exclusive right to provide products and/or services to BISD. During the Term of this Agreement, BISD reserves the right to use all available resources to procure other products and/or services as needed and doing so will not violate any rights of Vendor.

**6.23 New Products**

New products that meet the specifications detailed in the solicitation may be added to this Agreement, with prior written approval from BISD. Pricing of any new products shall be equivalent to the percentage discount or proposed prices for other similar products. Vendor may replace or add products to an existing contract if: the replacing products are equal to or superior to the original products offered; are discounted in a similar or to a greater degree; and the products meet the requirements of the original solicitation. No products may be added to avoid competitive procurement procedures. BISD may reject any proposed additions, without cause, in its sole discretion.

**6.24 No Substitution**

Any order issued pursuant to this Agreement shall conform to the specifications and descriptions identified in this Agreement and in the solicitation. Unless otherwise agreed to in advance by BISD, Vendor will not deliver substitutes without prior authorization from BISD.

**6.25 No Agency or Endorsements**

BISD and Vendor are independent contractors and have no power or authority to assume or create any obligation or responsibility on behalf of the other party. This Agreement shall not be construed or deemed an endorsement of a specific company or product. It is the intention of the parties that Vendor is independent of BISD and is not an employee, agent, joint venturer, or partner of BISD, and nothing in this Agreement shall be interpreted or construed as creating or establishing the relationship of employer and employee, agent, joint venturer or partner, between BISD and Vendor or BISD and any of Vendor’s agents. Vendor agrees that BISD has no responsibility for any conduct of any of Vendor’s employees, agents, representatives, contractors, or subcontractors.

### **6.26 Non-Appropriation Clause**

Renewal of this Agreement, if any, will be in accordance with Texas Local Government Code § 271.903 concerning non-appropriation of funds for multi-year contracts. Notwithstanding any other provision of this Agreement or obligation imposed on BISD by this Agreement, BISD shall have the right to terminate this Agreement without default or liability to Vendor resulting from such termination, effective as of the expiration of each budget period of BISD if it is determined by BISD, in BISD's sole discretion, that there are insufficient funds to extend this Agreement. The parties agree that this Agreement is a commitment of BISD's current revenue only.

### **6.27 Notice**

Any notice provided under the terms of this Agreement by either party to the other shall be in writing and shall be given by hand-delivery or by certified or registered mail, return receipt requested. Notice shall be sufficient if made or addressed to the address listed in the signature line of this Agreement. Notice shall be deemed effective upon receipt. Each party may change the address at which notice may be sent to that party by giving notice of such change to the other party by certified or registered mail, return receipt requested.

### **6.28 Penalties**

If Vendor is unable to provide the goods or services at the prices quoted in Vendor's response or if Vendor fails to fulfill or abide by the terms and conditions of the Agreement, BISD may take the following action(s), in BISD's sole discretion, and Vendor agrees to comply with BISD's action(s):

1. insist that Vendor honor the quoted price(s) specified in Vendor's response;
2. have Vendor pay the difference between Vendor's price and the price of the next acceptable response (as determined by BISD);
3. have Vendor pay the difference between Vendor's price and the actual purchase price of the good or service on the open market; and/or
4. recommend to BISD's Board of Trustees that Vendor no longer be given the opportunity to submit a response to BISD and/or that this Agreement be terminated.

### **6.29 Performance**

Vendor agrees to use best efforts to provide the good(s) and/or service(s) subject to this Agreement. BISD reserves the right to conduct reviews of vendor performance at any time during the contract period.

### **6.30 Performance and Payment Bonds**

Vendor agrees to provide performance bonds and/or payment bonds as required by Texas law on specified contracts and/or projects, as applicable. BISD will include the performance and payment bonds requirement in the specifications section of any solicitation if performance bonds and/or payment bonds are required.

### **6.31 Prevailing Wage Rates**

Vendor and all subcontractors of Vendor shall comply with all laws regarding wage rates including, but not limited to, Texas Government Code Chapter 2258 and any related federal requirements applicable to this Agreement and to this solicitation by BISD.

### **6.32 Prices**

All prices in Vendor's response shall be vendor for the Term of the Agreement. All price changes shall be presented to BISD for acceptance or rejection by BISD, in its sole discretion, using the same format as was accepted in Vendor's original response; all price changes for goods and/or services provided under this Agreement must be approved, in writing, by BISD prior to taking effect. The following documentation shall be provided to support a request for a price change: justification for change/increase; terms and conditions; market conditions; manufacturers/distributors' impact (if any).

### **6.33 Quantities**

Because all commodities will be provided on an "as needed" basis, BISD makes no representation either orally or in writing to the amount of commodities, services, or related items BISD will use during the Term of the Agreement.

### **6.34 Records Retention**

Vendor shall maintain its records and accounts in a manner that shall assure a full accounting for all goods and/or services provided by Vendor to BISD under this Agreement. These records and accounts shall be retained by Vendor and made available for audit by BISD for a period of not less than three (3) years from the date of completion of the services, receipt of the goods, or the date of the receipt by BISD of Vendor's final invoice or claim for payment in connection with this Agreement, whichever is later. If an audit has been announced, Vendor shall retain its records and accounts until such audit has been completed.

When federal funds are expended by BISD pursuant to this Contract, Vendor certifies that it will comply with the record retention requirements detailed in 2 CFR § 200.333. Vendor further certifies that Vendor will retain all records as required by 2 CFR § 200.333 for a period of three years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

### **6.35 Right to Audit**

BISD, upon written notice, shall have the right to audit all of Vendor's records and accounts relating to this Agreement. Records subject to audit shall include, but are not limited to, records which may have a bearing on matters of interest to BISD in connection with Vendor's work for BISD and shall be open to inspection and subject to audit and/or reproduction by BISD or its authorized representative(s) to the extent necessary to adequately permit evaluation and verification of:

- (a) Vendor's compliance with this Agreement and the requirements of the solicitation,
- (b) compliance with BISD procurement policies and procedures,
- (c) compliance with provisions for computing billings to BISD, and/or
- (d) any other matters related to this Agreement.

### **6.36 Safety**

Vendor, its subcontractors, and their respective employees shall comply fully with all applicable federal, state, and local safety and health laws, ordinances, rules, and regulations in the performance of services under this Agreement, including, without limitation, those promulgated by BISD and by the Occupational Safety and Health Administration

("OSHA"). In case of conflict, the most stringent safety requirements shall govern. Vendor shall comply with all other safety guidelines and standards as required by BISD. Vendor shall indemnify and hold BISD harmless from and against all claims, demands, suits, actions, judgments, fines, penalties, and liability of every kind arising from the breach of Vendor's obligations under this provision.

### **6.37 Severability**

In the event that any one or more of the provisions contained in this Agreement shall for any reason be held to be invalid, illegal, or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect any other provisions, and the Agreement shall be construed as if such invalid, illegal, or unenforceable provision had never been contained in it.

### **6.38 Shipments**

Vendor shall ship ordered products within seven (7) working days for available goods and within four (4) to six (6) weeks for special-order items after the receipt of the purchase order unless otherwise previously agreed to, in writing, by BISD. If a product cannot be shipped within that timeframe, Vendor shall notify BISD of the reasons why the product has not shipped and shall provide an estimated shipping date, if applicable. BISD may cancel the order if the estimated shipping time is not acceptable to BISD, in its sole discretion.

### **6.39 Software Maintenance**

Maintenance, support, hosting, and other services associated with software purchased pursuant to this procurement solicitation may be renewed on an annual basis indefinitely, in Boerne ISD's sole discretion, subject to appropriation of sufficient funding for such services in Boerne ISD's annual budget and any necessary approvals by Boerne ISD's Administration and Board of Trustees.

#### **6.40 Subcontractors**

If Vendor uses subcontractors in the performance of any part of this Agreement, Vendor shall be fully responsible to BISD for all acts and omissions of the subcontractors just as Vendor is responsible for Vendor's own acts and omissions. Nothing in this Agreement shall create for the benefit of any such subcontractor any contractual relationship between BISD and any such subcontractor, nor shall it create any obligation on the part of BISD to pay or to see to the payment of any moneys due any such subcontractor except as may otherwise be required by law.

#### **6.41 Taxes**

BISD is tax-exempt, and BISD shall not pay taxes for goods and/or services provided under this Agreement. Vendor represents and warrants that it shall pay all taxes or similar amounts resulting from this Agreement, including, without limitation, any federal, state, or local income, sales or excise taxes of Vendor or its employees. BISD shall not be liable for any taxes resulting from this Agreement. BISD is a political subdivision of the State (Tax Identification Number 1-74-6001850)

#### **6.42 Tax Responsibilities of Vendor and Indemnification for Taxes**

Vendor and all subcontractor(s) of Vendor shall pay all federal, state, and local taxes applicable to their operation and any persons employed by Vendor and all subcontractors of Vendor. Vendor shall require all subcontractors to hold BISD harmless from any responsibility for taxes, damages, and interest. If applicable, contributions required under federal, state, and/or local laws and regulations and any other costs including, but not limited to, transaction privilege taxes, unemployment compensation insurance, Social Security, and Worker's Compensation, shall be the sole responsibility of Vendor.

#### **6.43 Termination of Contract**

This Agreement shall remain in effect until (1) the Agreement expires by its terms or (2) the Agreement is terminated by mutual agreement of BISD and Vendor. In the event of a breach or default of the Agreement and/or the procurement solicitation by Vendor, BISD reserves the right to enforce the performance of the Agreement and/or the procurement solicitation in any manner prescribed by law or deemed to be in the best interest of BISD. BISD further reserves the right to terminate the Agreement immediately in the event Vendor fails to: (1) meet schedules, deadlines, and/or delivery dates within the time specified in this Agreement, the procurement solicitation, and/or a purchase or work order; (2) make any payments owed; or (3) otherwise perform in accordance with this Agreement and/or the procurement solicitation. BISD also reserves the right to terminate the Agreement immediately, with written notice to Vendor, if BISD believes, in its sole discretion that it is in the best interest of BISD to do so. Vendor agrees that BISD shall not be liable for damages in the event that BISD declares Vendor to be in default or breach of this Agreement and/or the procurement solicitation. Vendor further agrees that upon termination of the Agreement for any reason, Vendor shall, in good faith and with reasonable cooperation, aid in the transition to any new arrangement and/or vendor.

#### **6.44 Title and Risk of Loss**

Whenever BISD is purchasing (and not leasing) an item under this Agreement, title and risk of loss shall pass upon the later of BISD's acceptance of the item or payment of the applicable invoice.

All deliveries under this Agreement shall be delivered: **Freight Prepaid, F.O.B. Destination (Inside Delivery)**, Boerne Independent School District, Boerne, TX unless otherwise specified herein and shall be included in all pricing in Vendor's response unless otherwise clearly stated in writing in Vendor's response.

#### **6.45 Waiver**

No failure on the part of either party at any time to require the performance by the other party of any term hereof shall be taken or held to be a waiver of such term or in any way affect such party's right to enforce such term, and no waiver on the part of either party of any term hereof shall be taken or held to be a waiver of any other term hereof or the breach thereof. No waiver, alteration, or modification of any of the provisions of this Contract shall be binding unless in writing and signed by duly authorized representatives of the parties hereto.



#### **6.46 Warranty**

All goods and/or services provided by Vendor under this Agreement must be warranted to be free from defects in material, workmanship, and free from such defects in design for a period of one (1) year upon the later of BISD's acceptance of the product and/or service or payment of the applicable invoice. Vendor warrants that all goods and/or services furnished under this Agreement shall conform in all respects to the terms of this Agreement, including any drawings, specifications, and/or standards incorporated herein, including, without limitation, those detailed in the procurement solicitation issued by BISD. In addition, Vendor warrants that goods and/or services are suitable for and will perform in accordance with the purposes for which they are intended. Vendor shall assume all liabilities incurred within the scope of consequential damages and incidental expenses, as set forth in the vendor or manufacturer's warranty, which result from either delivery or use of product, which does not meet the specifications within this Agreement or the solicitation procurement.

#### **6.47 Workforce**

Vendor shall employ only orderly and competent workers, skilled in the performance of the services, if any, which shall be performed under this Agreement. Vendor, its employees, subcontractors, and subcontractor's employees may not use or possess any firearms, alcoholic or other intoxicating beverages, illegal drugs or controlled substances while on the job or on BISD's property, nor may such workers be intoxicated or under the influence of alcohol or drugs on BISD's property.

**PART 7.0 – ATTACHMENTS**

All the following attachments must be completed and returned along with all attachments and any other information that you feel would be of benefit to your proposal.

**PROPOSAL DOCUMENT**

Having carefully examined the RFP Notice, General Terms, and Conditions, and Specifications, the undersigned Respondent’s Agent hereby proposes and agrees to furnish goods/services in strict compliance with the terms, conditions, and specifications at the prices quoted. The Respondent affirms that, to the best of his knowledge, the proposal has been arrived at independently and is submitted without collusion with anyone to obtain information or gain any favoritism that would in any way limit competition or give them an unfair advantage over other Respondents in the award of this RFP.

**EXCEPTION FORM (If any)**

Please provide any special notes or exceptions to the terms, conditions, or specifications:

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Company Name:\_\_\_ Please print or type

Name and Title of Person Authorized to sign:\_\_\_\_\_

Name - please print or type

\_\_\_\_\_

Title - please print or type

Authorized Signature:\_\_\_\_\_ Date of Signature:\_\_\_\_\_

Address:\_\_\_\_\_

City:\_\_\_\_\_ State:\_\_\_\_\_ Zip Code:\_\_\_\_\_

Phone Number:\_\_\_\_\_ Fax Number:\_\_\_\_\_

Email Address: \_\_\_\_\_

# Request for Taxpayer Identification Number and Certification

Give Form to the  
requester. Do not  
send to the IRS.

► Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your Income tax return). Name is required on this line; do not leave this line blank.		
	2 Business name/disregarded entity name, if different from above		
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ <input type="checkbox"/> Other (see instructions) ► _____	<input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)	
	6 City, state, and ZIP code		
	7 List account number(s) here (optional)		

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number
OR
Employer identification number

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person ►	Date ►
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### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

# CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

### OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

2  Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

\_\_\_\_\_  
Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

Yes       No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

Yes       No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6  Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7 \_\_\_\_\_  
Signature of vendor doing business with the governmental entity

\_\_\_\_\_  
Date

**NOTE: FORM MUST BE COMPLETE WITH COMPANY NAME, SIGNATURE AND DATE EVEN IF COMPANY HAS NO CONFLICT OF INTEREST.**

**FELONY CONVICTION NOTIFICATION**

State of Texas Legislative Senate Bill No. 1, Section 44.034, Notification of Criminal History, Subsection (a), states “a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony”.

Subsection (b) states “a School district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The District must compensate the person or business entity for services performed before the termination of the contract”.

**This notice is not required of a Publicly Held Corporation.**

---

I, the undersigned agent for the vendor named below, certify that the information concerning notification of felony convictions has been reviewed by me and the following information furnished is true to the best of my knowledge.

Vendor’s Name: \_\_\_\_\_

Authorized Company Official’s Name (Printed): \_\_\_\_\_

Check one of the following and sign as appropriate.

My firm is a publicly held corporation; therefore, this reporting requirement is not applicable.

My firm is not owned or operated by anyone who has been convicted of a felony.

My firm is owned or operated by the following individual(s) who has/have been convicted of a felony:

Name of Felon(s): \_\_\_\_\_

Details of Conviction(s): \_\_\_\_\_

\_\_\_\_\_

**Signature of Company Official:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## VENDOR DEBARMENT STATEMENT

I have read the conditions and specifications provided in the bid document attached.

I affirm, to the best of my knowledge, the company I represent has not been debarred or suspended from conducting business with School districts in the State of Texas. This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 7 CFR Part 3017, Section 3017.510, Participants' responsibilities. The regulations were published as Part IV of the January 30, 1989, Federal Register (pages 4722-4733). Copies of the regulation may be obtained by contacting the Department of Agriculture Agency with which this transaction originated.

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Name of Company (Please Type/Print)

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Mailing Address City State Zip

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Printed Name (Please Type/Print)

---

Signature Title

---

Telephone Number Fax Number Date

**TX SENATE BILL 19 – CHAPTER 2274 VERIFICATION**

Pursuant to Section 2274.001, Texas Government Code:

Effective September 1, 2021, contracts with companies who discriminate against firearm and ammunition industries is prohibited.

I, \_\_\_\_\_, the undersigned representative of \_\_\_\_\_ (Company or Business Name) being an adult over the age of eighteen (18) years of age, pursuant to Texas Government Code, SB 19, Chapter 2274, Section 2274.001, certify that the company named does not discriminate against firearm and ammunition industries. If at any time the company named above discriminates against firearm and ammunition industries, I will immediately notify the Boerne Independent School District’s Purchasing Department.

**HOUSE BILL 89 – SECTION 2270.001 VERIFICATION**

Pursuant to Section 2270.001, Texas Government Code:

1. “Boycott Israel” means refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations specifically with Israel, or with a person or entity doing business in Israel or in an Israeli- controlled territory, but does not include an action made for ordinary business purposes; and
2. “Company” means a for-profit sole proprietorship, organization, association, corporation, partnership, joint venture, limited partnership, limited liability partnership, or any limited liability company, including a wholly owned subsidiary, majority-owned subsidiary, parent company or affiliate of those entities or business associations that exist to make a profit.

I, \_\_\_\_\_, the undersigned representative of \_\_\_\_\_ (Company or Business Name) being an adult over the age of eighteen (18) years of age, do hereby verify that the company named above, under the provisions of Subtitle F, Title 10, Government Code 2270:

Does not boycott Israel currently; and Will not boycott Israel during the term of the contract the above-named company, business or individual with Boerne Independent School District.

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**SENATE BILL 252 – CHAPTER 2252 VERIFICATION**

Effective September 1, 2017 contracts with companies engaged in business with Iran, Sudan, or foreign terrorist organization is prohibited. A governmental entity may not enter into a governmental contract with a company that is identified on a list prepared and maintained under Section 806.051, 807.051 or 2252.153. The comptroller shall prepare and maintain, and make available to each governmental entity, a list of companies known to have contracts with or provide supplies and services to a foreign terrorist organization.

I, \_\_\_\_\_, the undersigned representative of \_\_\_\_\_ (Company or Business Name) being an adult over the age of eighteen (18) years of age, pursuant to Texas Government Code, Chapter 2252, Section 2252.152 and Section 2252.153, certify that the company names above is not listed on the website of the Comptroller of the State of Texas concerning the listing of companies that are identified under Section 806.051, Section 807.051 or Section 2253.153. I further certify that should the above-named company enter into a contract that is on said listing of companies on the website of the Comptroller of the State of Texas which do business with Iran, Sudan or any Foreign Terrorist Organization, I will immediately notify the Boerne Independent School District's Purchasing Department.

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



**NON-COLLUSIVE BIDDING CERTIFICATE**

By submission of this bid or proposal, the Bidder certifies that:

1. This bid or proposal has been independently arrived at without collusion with any other Bidder or with any Competitor;
  2. This bid or proposal has not been knowingly disclosed and will not be knowingly disclosed, prior to the opening of bids, or proposals for this project, to any other Bidder, Competitor or potential competitor;
  3. No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a bid or proposal;
  4. The person signing this bid or proposal certifies that he has fully informed himself regarding the accuracy of the statements contained in this certification, and under the penalties being applicable to the Bidder as well as to the person signing in its behalf.
- 

**LEGAL COMPLIANCE**

It is the proposing company's duty and responsibility to have knowledge of and be responsible for the compliance with all applicable laws, rules and regulations as they apply to this procurement process and any subsequent award.

If awarded under this document, does the firm agree to comply, in all relevant respects, with all Federal, State, and Local laws, rules and regulations related to the performance of services or supply of goods to Boerne ISD?

YES \_\_\_\_\_ NO \_\_\_\_\_

**Signature below certifies accuracy of answers to all sections on this page.**

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Company Name and Address

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Date

## Instructions - Form 1295

Effective January 1, 2016, a governmental entity may not enter into a contract requiring board approval, unless the business entity submits a Disclosure of Interested Parties (Form 1295) at the time the business entity submits the signed contract.

The following definitions apply:

1. "Interested Party" means a person:
  - a. Who has a controlling interest in a business entity with whom a governmental entity contracts: or
  - b. Who actively participates in facilitating the contract or negotiating the terms of the contract, including a broker, intermediary, adviser, or attorney for the business entity.
2. "Intermediary" means "a person who actively participates in the facilitation of the contract or negotiating the contract, including a broker, adviser, attorney, or representative of or agent for the business entity who:
  - a. Receives compensation from the business entity for the person's participation;
  - b. Communicates directly with the governmental entity or state agency on behalf of the business entity regarding the contract; and
  - c. Is not an employee of the business entity
3. "Business Entity" means any entity recognized by law through which business is conducted, including a sole proprietorship, partnership, or corporation. "Business entity" includes a for-profit or nonprofit entity. The term does not include a governmental entity or state agency.
4. "Contract" includes an amended, extended, or renewed contract.
5. "Controlling Interest" means:
  - a. An ownership interest or participating interest in a business entity by virtue of units, percentage, shares, stock, or otherwise that exceeds 10 percent;
  - b. Membership on the board of directors or other governing body of a business entity of which the board or other governing body is composed of not more than 10 members; or
  - c. Service as an officer of a business entity that has four or fewer officers, or service as one of the four officers most highly compensated by a business entity that has more than four officers."

**A business entity must file Form 1295 electronically with the Texas Ethics Commission using the Commission's online filing application, which can be found at:**

[https://www.ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm)

The business entity must **print a copy** of the completed form, which will include a certification of filing containing a unique certification number. The Form 1295 must be **signed by an authorized agent** of the business entity, and **the form must be notarized**. The **business entity must then submit the completed, signed, notarized Form 1295 to the contracting School district**.

Again, inter-local contracts DO NOT REQUIRE a Form 1295 because governmental entities do not fall within the definition of "business entity". Notably, though, compliance with HB 1295 is required for contracts with nonprofit agencies, such as the Boerne Independent School District.

**CERTIFICATE OF INTERESTED PARTIES**

**FORM 1295**

Complete Nos. 1 - 4 and 6 if there are interested parties.  
 Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.

**OFFICE USE ONLY**

**1** Name of business entity filing form, and the city, state and country of the business entity's place of business.

**2** Name of governmental entity or state agency that is a party to the contract for which the form is being filed.

**3** Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract.

4 Name of Interested Party	City, State, Country (place of business)	Nature of Interest (check applicable)	
		Controlling	Intermediary

**5** Check only if there is NO Interested Party.

**6 UNSWORN DECLARATION**

My name is \_\_\_\_\_, and my date of birth is \_\_\_\_\_.

My address is \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_.  
(street) (city) (state) (zip code) (country)

I declare under penalty of perjury that the foregoing is true and correct.

Executed in \_\_\_\_\_ County, State of \_\_\_\_\_, on the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.  
(month) (year)

\_\_\_\_\_  
 Signature of authorized agent of contracting business entity  
 (Declarant)

**ADD ADDITIONAL PAGES AS NECESSARY**