



## **RFP 2026-019**

### **Financial Advisor Services**

Issue Date: 6/22/2026

Questions Deadline: 7/2/2026 10:00 AM (CT)

Response Deadline: 7/15/2026 03:00 PM (CT)

### **Contact Information**

Contact: Cordelia Flores Jackson

Address: Purchasing

3501 E. Saunders

Laredo, TX 78041

Phone: (956) 473-7921

Email: cflores@uisd.net

## Event Information

Number: RFP 2026-019  
Title: Financial Advisor Services  
Type: Request for Proposal  
Issue Date: 6/22/2026  
Question Deadline: 7/2/2026 10:00 AM (CT)  
Response Deadline: 7/15/2026 03:00 PM (CT)  
Notes: United ISD is requesting proposals from qualified vendors to provide Financial Advisor Services

Please review the "Specifications/Scope of Work" under the Attachments Tab.

Last Day for Questions is Thursday, July 2nd @ 10:00 AM (CST) via this portal.

## Ship To Information

Contact: Mauro Juarez  
Address: Shipping and Receiving  
Warehouse  
3501 E. Saunders  
Laredo, TX 78041  
Phone: (956) 473-7980

## Billing Information

Contact: Division of Finance  
Address: Accounting  
Central Office  
201 Lindenwood Drive  
Laredo, TX 78045  
Phone: (956) 473-6201  
Email: rcabello@uisd.net

## Bid Activities

Newspaper Advertisement 6/21/2026

Newspaper Advertisement 6/28/2026

Bid Opening 7/15/2026 3:00:00 PM (CT)  
<https://meet.google.com/ooo-trzs-bcr?hs=122&authuser=0>

## Bid Attachments

### Financial Advisor - Specifications - Scope of Work.pdf

[Download](#)

RFP 2026-019 Financial Advisor Services - Specifications - Scope of Work

### Financial Advisory Proposal Form.xlsx

[Download](#)

Proposal Form

### FORMS FOR PROPOSALS 10.08.25.pdf

[Download](#)

Forms For Proposals 10.08.25

### United ISD Insurance Requirements for Service Providers 2025.pdf

[Download](#)

United ISD Insurance Requirements for Service Providers 2025

### United ISD Insurance Requirements For Professional Service Providers 2025.pdf

[Download](#)

United ISD Insurance Requirements For Professional Service Providers 2025

## Requested Attachments

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### Proposal Form - Compensation

(Attachment required)

### Deviations

Provide any deviations or exceptions to your proposal on your company letterhead here.

### Regulatory Proceedings back up information

Please upload any relevant written reports, summaries, or official correspondence provided by the regulatory agency.

### Recommendation Letter 1

(Attachment required)

### Recommendation Letter 2

(Attachment required)

### Recommendation Letter 3

(Attachment required)

### Certification Sheet

(Attachment required)

This form must be reviewed, signed, scanned and uploaded here. This form can be found in the Forms for RFP attachment.

### Conflict of Interest Questionnaire

(Attachment required)

This form must be reviewed, signed, scanned and uploaded here. This form can be found in the Forms for RFP attachment.

BOX 1: Name of your business MUST be written down.

BOX 3: Name of employee or NA.

If answer to BOX 3 is NA go to BOX 7: Sign and Date

If a name is written down on BOX 3, please fill out BOX 4-6 accordingly.

### Certification of Criminal History Record Information

(Attachment required)

This form must be reviewed, signed, scanned and uploaded here. This form can be found in the Forms for RFP attachment.

Top Section: Fill out vendor and bid information accordingly.

Section 1: Answer "Yes" or "No" to both questions

If **either** questions is answered "No", go to Section 2: Sign and Agree

if answers to **both** questions are "Yes", go to Section 3: Sign and Agree

**ONLY SECTION 2 OR SECTION 3 SHOULD BE SIGNED, NOT BOTH.**

### Felony Conviction Notification

(Attachment required)

This form must be reviewed, signed, scanned and uploaded here. This form can be found in the Forms for RFP attachment.

### Form 1295

(Attachment required)

Vendors are to file the form electronically with the Texas Ethics Commission at <https://prd.tecprd.ethicsefile.com/File/> and upload a copy here.

Instructions for this form can be found in the Forms for RFP attachment.

### House Bill 793 Verification

(Attachment required)

This form must be reviewed, signed, scanned and uploaded here. This form can be found in the Forms for RFP attachment.

## EDGAR Certifications

(Attachment required)

This form must be reviewed, signed, scanned and uploaded here. This form can be found in the Forms for RFP attachment.

Note that the USD Solicitation# is RFP 2026-011

## W9

(Attachment required)

This form must be reviewed, signed, scanned and uploaded here. This form can be found in the Forms for RFP attachment.

## Certificate of Insurance

Upload a copy of your Certificate of Insurance here.

United ISD Insurance Requirements for "Products and Equipment" and "Service Providers" can be found under the "Attachments" tab.

**Note:** Vendors have five (5) days after award to submit an insurance certificate that fulfills all minimum requirements.

## Pre-Service Affidavit for Educational Entities

(Attachment required)

If selected as an approved vendor you will need to fill out, sign and return this document.

## Bid Attributes

### 1 All or None Proposals - Is

This is an all or none proposal. The District reserves the right to choose the option that most benefit the District.

☐ Agree

(Required: Check if applicable)

### 2 Proposal Form

All proposals must be submitted on the proposal form furnished to insure uniformity, If there is a substitute product that vendor would like to propose, in addition to the product referenced, please make a copy of the proposal form and submit it with your original bid. Please provide response on this bid even if you do not wish to participate, failure to send back proposal form may result in deleting that company's name off our vendor list records.

☐ Agree

(Required: Check if applicable)

### 3 Facsimiles/E-mails

Proposals may not be faxed or e-mailed.

☐ Agree

(Required: Check if applicable)

### 4 Submission of Bid/RFP/CSP/RFCQ/RFQ

Will you be submitting your bid via the eBid Portal? If No is selected the following applies: All bids/proposals, whether delivered by hand or mail, are due in sealed envelopes endorsed with the bid number and title no later than the date specified in bid, at the DISTRICT's Purchasing Office located in the Service Center on 3501 E. Saunders, Laredo, Texas 78041. Responses sent by overnight mail shall have Proposal number written on delivery ticket.

☐ Yes ☐ No

(Required: Check only one)

**5 Late Proposal**

If delivering Paper Bid: All bids delivered will be stamped with the time and date as proof they were received on or before the requested time and date. Bids received after the requested time and date will be considered late and returned unopened. If a return address is not provided, a late bid will be opened for identification and returned. If delivering through eBid: The system does not allow for late submissions. Once a bid has reached the established close date/time, the submission function becomes unavailable to vendors.

☐ Agree

(Required: Check if applicable)

**6 Right to Hold Proposals**

The DISTRICT reserves the right to hold proposals for 90 days before awarding the contract.

☐ Agree

(Required: Check if applicable)

**7 Right to Reject Proposals**

The DISTRICT reserves the right to accept or reject any or all proposals or any part thereof and to waive any and all minor informalities or technicalities in any part of the proposal not deemed to be in the best interest of the DISTRICT.

☐ Agree

(Required: Check if applicable)

**8 Compliance with Specifications**

By checking the box you are agreeing to the specifications as per the attachment titled "Specifications / Scope of Work" Note: Please read each point thoroughly.

☐ Agree

(Required: Check if applicable)

**9 Insurance Requirements**

Vendor shall furnish a certificate of insurance within 5 days after receipt of award notification on said proposal/proposal with United Independent School District included as an additional insured. The vendor should maintain the following type of coverage with the required minimum limits with an insurance carrier authorized to do business in the State of Texas by the State Board of Insurance. Said certificate shall include a clause obligating the Insurer to give ten days prior written notice of any material change in the insurance including cancellation. Attached and listed as Insurance Requirements, you will find the coverage and acceptable limits that shall be maintained. In the event of loss of or damage beyond reasonable repair to DISTRICT'S property due to Contractor's (including Contractor's employees, agents or subcontractors) negligence or intentional act, Contractor will, at DISTRICT'S option, either: (1) promptly replace the property, or (2) promptly reimburse DISTRICT for the replacement costs of the property. If Contractor proposes to exercise the former option, Contractor must provide to DISTRICT detailed information about the replacement property and obtain DISTRICT'S consent before replacing the property. However, DISTRICT reserves the right to replace the property at any time (and seek reimbursement from Contractor) unless DISTRICT has consented to Contractor's replacement property.

☐ Agree

(Required: Check if applicable)

**10 Deviations**

Does your bid/proposal include any deviations from the attributes (terms/conditions) and or the attached specifications? If yes, deviations must be listed on your company letterhead, uploaded as an attachment, and must be accepted in writing by the District.

☐ Yes ☐ No

(Required: Check only one)

1  
1**Deviations Explained**

Provide any deviations in attached terms, conditions, and specifications.

(Optional: Maximum 4000 characters allowed)

1  
2**Deviations Must be Accepted in Writing by United ISD**

All deviations are rejected unless accepted in writing.

☐ Agree

(Required: Check if applicable)

1  
3**Proposal Interpretation**

To ensure clarity and maintain a formal record, no oral interpretations of the **Invitation to Bid** or other relevant documentation will be provided. All requests for interpretation must be submitted in writing, directed to the Buyer, and received prior to the designated question cut-off date. It is imperative that all such requests are made exclusively through our official eBid portal; email submissions will not be acknowledged. Any and all interpretations, as well as supplemental instructions, will be formalized as written addenda to the **Invitation to Bid**. These addenda, if issued, will be disseminated solely through the eBid portal and will constitute a binding part of the contract.

☐ Agree

(Required: Check if applicable)

1  
4**Modifications or Withdrawals of Proposals****MODIFICATIONS OR WITHDRAWALS OF PROPOSALS:**

Modifications or withdrawals of proposals will be accepted if deemed in the best interest of the District. The requests must be executed in writing, by the bidder, or his/her authorized representative.

☐ Agree

(Optional: Check if applicable)

1  
5**Opening of Bids/RFPs/CSPs/RFCQs**

Bids will be publicly opened at the Purchasing Department conference room, Service Center Building, or via a virtual meeting link. Virtual Meeting links will be placed under the "Events Details" tab under the "bid notes" Request for Proposals (RFP)/Request for Competitive Quotations(RFCQ)/Competitive Sealed Proposals(CSP)- Non-Construction will only identify proposers.

☐ Agree

(Required: Check if applicable)

1  
6**Contract**

The RFP specifications set out by the DISTRICT, the response to the RFP specifications by the awarded proposer(s), the purchase order, and the written award notification will result in a binding contract without further action by either party. If proposer requires that a specific contract be signed, that contract must be submitted as part of the response to the RFP. Please note that in the event that any terms in proposer's contract conflict with the RFP terms, the RFP terms will supersede, and reference to RFP will be incorporated into the language of the executed contract.

☐ Agree

(Required: Check if applicable)

1  
7**Term of Contract - 60 Months straight with the option to extend twice in two year terms**

This solicitation will initially be for 60-months straight with the option to extend twice in two (2) year increments by mutual agreement by both parties for a maximum possible total of 9 years. There shall be no upward price changes during the contract term. Upward price changes for subsequent option years may be negotiated, however upward price changes may be cause for the DISTRICT not to exercise an extension option.

☐ Agree*(Required: Check if applicable)*1  
8**Right to Extend RFP/CSP/RFCQ**

The DISTRICT may extend the proposal upon mutual agreement if needed. The time extension is to be negotiated.

☐ Agree*(Required: Check if applicable)*1  
9**MODIFICATIONS OR WITHDRAWAL BY SUCCESSFUL PROPOSER**

Modifications or withdrawal of a bid by the successful bidder will be accepted only if the change is the best interest of the DISTRICT, not prejudicial to other bidders and executed in writing.

☐ Agree*(Required: Check if applicable)*2  
0**Availability of Funds**

All awards are subject to approval upon availability of funds. In the event funds do not become available, the contract may be terminated with a written notice.

☐ Agree*(Required: Check if applicable)*2  
1**Assignment**

No right or interest or obligation in the contract shall be assigned or delegated without the written permission of the DISTRICT. Any attempted assignment or delegation by proposer shall be wholly void and totally ineffective.

☐ Agree*(Required: Check if applicable)*2  
2**Continuation of Services**

In the event, subsequent to the execution of a service contract with UISD, there is a change in the make up of the provider's ownership and/or the person(s) substantially performing and providing services to UISD, as determined by UISD, under the service contract is no longer a member or affiliated with the provider, UISD reserves the option to continue the service contract with the new provider ownership or with the person(s) who substantially performed and provided services to UISD, and in such case, the service contract will be modified accordingly. Other provisions herein on assignment or subcontracting remain effective to the extent they do not conflict with this Continuation of Services provision.

☐ Agree*(Required: Check if applicable)*2  
3**No Purchase Order, No Pay Policy**

The District has a policy that no orders of goods and services shall be made without a VALID purchase order. In the event the vendor/contractor delivers good and services without a Purchase Order, the District has no obligation to pay. When in doubt request a purchase order document.

☐ Agree*(Required: Check if applicable)*2  
4**Email**

The email provided in this section will be used for all quotes requests and purchase orders.

*(Required: Email address)*

2  
5**Certification of Payment**

Payment by the DISTRICT will be made within 30 days after the date on which the District receives the goods under the contract or the date on which the performance of services under the contract was completed, or the date on which the District received the invoice for the goods or services, whichever is later. This procedure is in accordance with the District's policy CHF Legal "Purchasing and Acquisition – Payment Procedures". The District's preferred method of payment is, Direct Deposit (ACH). Awarded vendors are urged to register with the Accounts Payable Department at 956-473-6201.

☐ Agree

*(Required: Check if applicable)*
2  
6**Sales Tax Exemption**

The DISTRICT qualifies for exemption of the Texas limited sales, exercise and use tax; sales tax will not be charged on these purchases.

☐ Agree

*(Required: Check if applicable)*
2  
7**Express Warranties**

Implied warranty of merchantability and implied warranty of fitness for a particular purpose shall apply to all purchases initiated by this document. The bidder shall assume all liabilities incurred within the scope of consequential damages and incidental exposure as set forth in the uniform commercial code which result from either delivery or use of product which does not meet specifications within this document. The warranty conditions as stated herein shall approx. and shall not be nullified, voided or altered in any way by the inclusion of the bidder pre-printed forms with this document.

☐ Agree

*(Required: Check if applicable)*
2  
8**Domestic Preferences for Procurement**

As appropriate and to the extent consistent with law, the non-Federal entity should, to the greatest extent practicable under a Federal award, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in all subawards including all contracts and purchase orders for work or products under this award. b) For purposes of this section: 1) "Produced in the United States" means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States. 2) "Manufactured products" means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber. [See 2 CFR § 200.322](#)

☐ I will comply

*(Required: Check if applicable)*
2  
9**Historically Underutilized Business**

Is your business classified as a Historically Underutilized Business (HUB)? If so, please upload your certification.

☐ Yes

*(Optional: Check if applicable)*
3  
0**General Fraud Investigations**

Has your company ever been investigated (or currently under investigation) by a State or Federal Law Enforcement Agency?

☐ Yes ☐ No

*(Required: Check only one)*
3  
1**Have you registered and used the E-Verify system available at [www.e-verify.gov](http://www.e-verify.gov) to verify the work authorization status of all new employees?**
☐ Yes ☐ No ☐ Please select one

*(Required: Check only one)*



3  
2**Have you verified that your employees are authorized to work in the United States?**☐ Yes ☐ No

(Required: Check only one)

3  
3**Do you employ, contract with, or subcontract with an unauthorized alien?**☐ Yes ☐ No ☐ Please select one

(Required: Check only one)

3  
4**Has your firm, or anyone employed by your firm, been fined, suspended, or subject to any regulatory or administrative proceedings by the SEC, FINRA, MSRB, or any other regulatory agency?**☐ Yes☐ No

(Required: Check all that apply)

3  
5**If you answered 'Yes' to the regulatory proceedings (attribute #34), please upload any relevant written reports, summaries, or official correspondence provided by the regulatory agency.**☐ I will upload the relevant information

(Optional: Check if applicable)

3  
6**Non-Collusion Statement**

The undersigned affirms that he/she is duly authorized to execute this contract, that this company, corporation, firm, partnership or individual has not prepared this proposal in collusion with any other Proposer, and that the contents of this proposal as to prices, terms or conditions of said proposal have not been communicated by the undersigned nor by any employee or agent to any other person engaged in this type of business prior to the official opening of this proposal. I also affirm that have not given, offered to give, and do not intend to give at any time, any economic opportunity, future employment, gift, loan, gratuity, specified discount, trip, favor, or service to a private service in connection with this contract. Further, I affirm that after the opening of this proposal, I (or any representative of my company) will not discuss the contents of this proposal with any person affiliated with UNITED ISD, other than the Purchasing Director of his Designee, prior to the awarding of this proposal/proposal. I understand that failure to observe this procedure will cause my proposal to be rejected. I fully understand the terms and conditions and will fully execute them if I am awarded this proposal. I have represented the truth concerning the felony conviction notification.

☐ Agree

(Required: Check if applicable)

3  
7**Qualification of Proposer**

The DISTRICT may make such investigations as deemed necessary to determine the qualifications and / or ability of the bidder to perform in accordance with the bid terms and conditions specified herein. The bidder shall furnish to the DISTRICT all such information as the DISTRICT may request. The DISTRICT reserves the right to reject any bid if the bidder fails to satisfy the DISTRICT that such bidder is properly qualified to carry out the obligations of the contract.

☐ Agree

(Required: Check if applicable)

3  
8

### Recommendation Letters

Please provide three (3) recommendation letters from an independent school district in Texas where you serve or served as Financial Advisor; not Co-Financial Advisor.

The letter should include the following information:

- Contact Name
- Position
- School District
- Address (City, State, and Zip Code)
- Phone Number
- E-Mail Address
- Description of Services Provided

**SUBMIT AS A RESPONSE ATTACHMENT**

☐ Agree

(Optional: Check if applicable)

3  
9

### Right of Award

The DISTRICT reserves the right to award as may be in its best interest. The District may accept or reject any and all options proposed. The DISTRICT may negotiate with the top proposers.

☐ Agree

(Required: Check if applicable)

4  
0

### Evaluation of Proposals

The District may evaluate the responses submitted on the following:

- Experience
- Personnel
- Capabilities & Other
- Compensation

☐ Agree

(Required: Check if applicable)

4  
1

### Determining Awards

In conformance with Texas Education Code Section 44.031, in determining to whom to award a contract, the DISTRICT shall consider: 1. the purchase price; 2. the reputation of the vendor and of the vendor's goods or services; 3. the quality of the vendor's goods or services; 4. the extent to which the goods or services meet the DISTRICT's need; 5. the vendor's past relationship with the DISTRICT; 6. the impact on the ability of the DISTRICT to comply with laws and rules relating to historically underutilized businesses; 7. the total long-term cost to the DISTRICT to acquire the vendor's goods or services; 8. for a contract for goods and services, other than goods and services related to telecommunications and information services, building construction and maintenance, or instructional materials, whether the vendor's ultimate parent company or majority owner: (A). has its principal place of business in this state; or (B). employs at least 500 persons in this state; and 9. any other relevant factor specifically listed in these specifications.

☐ Agree

(Required: Check if applicable)

4  
2

### Indential Proposals

In the event of tie bids, the DISTRICT, shall select by the casting of lots or coin toss.

☐ Agree

(Required: Check if applicable)

4  
3**Termination for Cause**

The DISTRICT shall have the right to cancel or default all or part of the undelivered portion of the order if the contractor breaches any of the terms hereof, including warranties, if the contractor becomes insolvent or commits acts of bankruptcy. Other factors shall include service performance.

☐ Agree*(Required: Check if applicable)*4  
4**Termination Without a Cause**

The DISTRICT in accordance with this provision may terminate the performance under this order in whole or in part. Termination hereunder shall be effected by the delivery to the contractor or a "Notice of Termination" specifying the extent to which performance of work under the order is terminated and the date upon which such termination becomes effective.

☐ Agree*(Required: Check if applicable)*4  
5**Venue**

It is understood and agreed by both the successful bidder and the DISTRICT that venue for any litigation from this contract shall lie in Webb County, Texas.

☐ Agree*(Required: Check if applicable)*4  
6**Indemnification**

Vendor shall fully indemnify, save and hold harmless the District, its officers, employees, and agents (hereinafter "the Indemnities") against any and all liability, damage, loss, claims, demands, and actions of any nature whatsoever on account of personal injuries (including, without limitation on the foregoing, worker's compensation and death claims), or property loss or damage of any kind whatsoever, which arise out of or are in any manner connected with, the performance of the contract, unless such injury, loss or damage is caused by the sole negligence of indemnities. Vendor shall at its own expense investigate all such claims and demands, attend to their settlement or other disposition, defend all actions based thereon and pay all charges of attorneys and all other costs and expenses of any kind arising from any such liability, damage, loss, claims demands, and actions.

☐ Agree*(Required: Check if applicable)*4  
7**Contacting Board Members**

Pursuant to United I.S.D. Board Policy CHE (LOCAL): Vendors or Board Members shall not contact (oral/written) each other individually for the purpose of soliciting a purchase or contract or discussing an outstanding bid or proposal that the vendor has submitted or will submit a bid or proposal between the time a request for proposal or a bid is formally released and a recommendation is made by the administration to the Board. If a vendor or Board member violates this prohibition during this time frame, consideration of the vendor for award shall be invalidated. Board members shall be notified of possible violations and actions taken.

☐ Agree*(Required: Check if applicable)*4  
8**Conflict of Interest (CIQ) Form**

According to Local Government Code, Chapter 176, a person or an agent of a person who contacts or seeks contracts for the sale or purchase of property, goods, or services with United Independent School District (the District) must file a complete Conflict of Interest Questionnaire with the Purchasing Department when submitting to the District a response to a request for proposals or bids, correspondence, or another writing related to a potential agreement with the District. This Conflict of Interest Questionnaire must be completed and returned with the response to a request for proposals or bids. Failure to do so may result in disqualification of the response.

☐ Agree*(Required: Check if applicable)*

4  
9**Criminal History Background**

Senate Bill 9, passed during the 80th Legislative Session requires that all Texas public school districts receive certification from any entity with which it contracts to provide services that it has obtained a criminal history background check on all employees hired before January 1, 2008 who (1) have continuing duties related to contracted services; and (2) have direct contact with students. Therefore, all entities and individuals who contract with the District to perform services, must complete the attached UISD form "CERTIFICATION OF CRIMINAL HISTORY RECORD INFORMATION", which includes an information sheet related to the services to be performed and the duties related to those services that employees will be performing and the type of contact that those employees might have with students

☐ Agree*(Required: Check if applicable)*5  
0**Felony Conviction Notification**

A person or business entity that enters into a contract with the DISTRICT shall notify the DISTRICT if the person or an owner or operator of the business entity has been convicted of a felony. Such notice shall include a general description of the conduct resulting in the conviction. Failure to provide such information may result in termination of the contract. Vendors must complete and submit the "Felony Conviction Affidavit" included with the Bid/Proposal form. Furthermore, District Policy CH Local states that "The District shall not consider for contract approval a business whose owner or operator has a criminal record that includes a conviction, deferred adjudication, plea of guilt, or no lo contendere for any felony offense".

☐ Agree*(Required: Check if applicable)*5  
1**House Bill 1295- Certificate of Interest Parties Submittal**

Action Needed - You must submit with this RFP. Effective January 1, 2016, The District cannot enter into a contract with a business entity unless the vendor has submitted a Certificate of Interest Parties (Form 1295) to the Texas Ethics Commission. [https://ethics.state.tx.us/whatsnew/elf\\_info\\_form1295.htm](https://ethics.state.tx.us/whatsnew/elf_info_form1295.htm) By writing your initials, you are hereby acknowledging this requirement.

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*(Required: Maximum 1000 characters allowed)*

**5 SB 571: Pre-Service Affidavit for Educational Entities**

**2**

Awarded vendor(s) will need to complete the SB 571 pre-service affidavit requirement.

**Who must file:**

- Any applicant for employment or person seeking to act as a **"service provider"** for a school district, charter, ESC, or other educational entity.
  - Any individual working for a contractor or subcontractor who provides continuing services

**"Service Provider"** means a person who provides services to an educational entity, including:

- *A contractor or subcontractor for an educational entity;*
- A provider of tutoring services for an educational entity;
- An entity that has entered into a contract to operate a school district campus under Section 11.174;
- A staffing provider for an educational entity; and
- *A person employed by or under the control of a person described by any of the above*

**What the affidavit requires:**

By signing the affidavit, the individual agrees to disclose and confirm information regarding their background, including:

- Any past investigations, charges, or convictions for misconduct with students or minors
- Whether they have ever been investigated by a licensing authority for misconduct
- Whether their professional license, certificate, or permit was ever denied, suspended, or revoked
- Their employment history with educational institutions, including any instances of resignation in lieu of termination
- Whether they are listed on the Texas Education Agency's "Do Not Hire" registry

**Who signs:**

- **EACH INDIVIDUAL EMPLOYEE OF THE VENDOR** who will be working on a school campus is responsible for completing and signing their own affidavit

Failure to disclose the required information is a Class B misdemeanor and can be grounds for termination.

Vendors agree that if awarded, a form for **EVERY** person who will provide service as part of the contract will be submitted.

☐ I will comply

*(Required: Check if applicable)*

**5 Acknowledgment of Vendor's Responsibility**

**3**

Vendors agree that if awarded, they are to notify the District within 7 days if there are any company changes that would affect the validity of any of the following originally submitted required bid form(s):

- Certificate of Interested Parties (Tx. Ethics Commission) - ONLINE Form 1295
- Certification of Criminal History Record Information
- Certification Sheet
- Conflict of Interest Questionnaire (Tx. Ethics Commission) - Form CIQ
- EDGAR Certification
- Felony Conviction Notification
- House Bill 793
- SB 571: Pre-Service Affidavit for Educational Entities

Failure to do so may be subject to contract termination.

☐ I will comply

*(Required: Check if applicable)*

**Interlocal Agreement with Other School Districts through the Central Texas Purchasing Alliance**

**A. Membership.** United Independent School District is a member in good standing of the of the Central Texas Purchasing Alliance (CTPA), an alliance of over 100 school districts in Texas representing millions of students, sharing information, services and contractual opportunities. CTPA is an alliance created in accordance with Section 791.001 of the Texas Government Code through interlocal agreements.

**B. Adoption of Awarded Contracts.** In support of this collaborative effort, all awards made by United Independent School District may be adopted by other active CTPA member districts. By adopting a contract from another CTPA member district, the adopting district has met the competitive bidding requirements established by the Texas Education Code, Section 44.031(a)(4) and as required by the adopting district's policies. There is no obligation on either party to participate unless both parties agree. The goods and services provided under the contract will be at the same or better contract pricing and purchasing terms established by the originating district.

**C. Document Sharing between Members.** To assist an adopting member district in establishing their supporting documentation, the awarded vendor's response and related documents owned by the originating district may be shared without prior notification to the awarded vendor, unless the vendor at the time of their response to the original solicitation clearly annotates that such sharing of their response is to not occur without prior permission of the vendor.

**D. Adopted Contract Management.** The adopting district shall be responsible for the management of the new contract and all payments to the contracted vendor. The originating district shall have no responsibilities under the new contract agreement. Upon adoption of the contract by the adopting CTPA member district, the original term of the contract and any renewal or extension options allowed under the original contract shall then transfer to the adopted contract, and such renewals options may be executed by the adopting member district at its sole discretion and independently of the originating member district's decision to execute such renewal options on the original contract.

☐ Yes, I will participate and comply    ☐ No, I do not want to have my proposal shared

(Required: Check only one)

Supplier Information

Company Name:

Contact Name:

Address:

Phone:

Fax:

Email:

Supplier Notes

By electronic signing this bid, you agree and understand that all electronic signatures are the legal equivalent of your manual/handwritten signature, and you consent to be legally bound to this agreement.

Print Name

Signature