# REQUEST FOR PROPOSAL

*for*

*Psychological Testing, Diagnostic, and Therapeutic Student Services*

BISD
Preparing Our Next Generation

## Beaumont Independent School District

**RFP # 22.04**

**Release Date: 8/16/2021**

**DUE DATE: August 31, 2021 @ 4:00pm CST**

B E A U M O N T
Independent School District
**Purchasing Department**
Beau Carroll
3395 Harrison Avenue, Beaumont , TX 77706 (409) 617-5041 Fax (409) 617-5175

# LEGAL NOTICE
## Invitation for Bid

***8/13/21***

Notice is hereby given that the following **RFP** ***22.04 Psychological Testing, Diagnostic, and Therapeutic Student Services*** will be accepted by Beaumont Independent School District on or before 08/31/21 no later than 4:00pm. Specifications for this project may be reviewed via emailed delivery or pick up at the Beaumont ISD Administration Building Purchasing Department.

Only paper copies will be accepted. **Bids are to state the number and name of the project on the outside of the sealed envelope.** Bidders shall forward an original and one (1) copy of their bid to the address shown below. **Late bids will be rejected as non-responsive.** Bids will be publicly opened and read aloud at the time/date below. Bidders are invited to attend the sealed bid opening.

| | |
|---|---|
| **Bid NO:** | **22.04** |
| **Bid Name:** | **Psychological Testing, Diagnostic, and Therapeutic Student Services** |
| **BID OPENING:** | |
| | **Conference Room A**<br>**Beaumont ISD Administration**<br>**3395 Harrison Avenue**<br>**Beaumont, Texas 77706** |
| **MAIL OR DELIVER TO**: | **Beaumont Independent School District**<br>**Purchasing Department**<br>**3395 Harrison Avenue**<br>**Beaumont, Texas 77706** |

Any questions relating to these requirements please contact Beau Carroll at bids@bmtisd.com.

The Board of Trustees shall consider the proposal for award at the September 2021 Board Meeting in the Administration Building, 3395 Harrison Avenue, Beaumont, Texas.

**RESPONDENTS ARE STRONGLY ENCOURAGED TO CAREFULLY READ THE ENTIRE PROPOSAL.**

Sincerely,

Beau Carroll
Purchasing Department
Beaumont Independent School District

Published: Beaumont Enterprise 8/18/21 and 8/25/21

## INSTRUCTIONS TO BIDDERS

### 1. Bid Submission

Hard copy bid responses will be accepted at the address listed below until the time and date specified herein, and immediately after will be publicly opened and read aloud. One (1) original response and (1) copy response shall be submitted for a total of two (2) bid responses.

All bids shall be **plainly marked with the Request for Proposal number**, due date, and the bidder's name and address.

Beaumont Independent School District Board
Purchasing Division
Beau Carroll
3395 Harrison Avenue
Beaumont, TX 77706

**NOTE: THE BISD PURCHASING DEPARTMENT WILL NOT ACCEPT RESPONSIBILITY FOR BIDS THAT ARE INCORRECTLY ADDRESSED OR ARE HAND DELIVERED TO THE WRONG LOCATION.**

Late bids will not be accepted and will be returned unopened to the bidder as nonresponsive.

All bids submitted in response to this invitation shall become the property of Beaumont Independent School District Board of Trustees and will be a matter of public record available for review after the evaluation and board action.

### 2. Preparation of Bids

The bid shall be legibly printed in ink or typed.

If a unit price or extension already entered is to be altered, it shall be crossed out and initialed in ink by the bidder.

The bid shall be signed and shall include the complete address of the bidder.

Beaumont Independent School District is exempt from Federal and State Sales Taxes and such taxes shall not be included in bid prices.

### 3. Changes and Addenda to Bid Documents

**Each change or addendum issued in relation to this document will be mailed or emailed to the vendor and will be on file in the Office of the Purchasing Agent.** Any interpretations, corrections or changes to the specifications and plans will be made by addenda no later than forty-eight (48) hours prior to the bid opening.

**VENDORS WILL BE NOTIFIED OF ADDITIONAL INFORMATION/ADDENDA POSTINGS.** All such changes or addenda shall become part of the contract and all bidders shall be bound by such addenda. Information on all changes or addenda issued will be available at the Office of the Beaumont Independent School District Purchasing Agent.
***Bid tabulations and administrative recommendations are based on the information requested in the bid form. Vendors who do not use the bid form to provide all essential bid pricing information may be subject to disqualification.***

### 4. Signatures

All bids, notifications, claims, and statements must be signed by an individual authorized to bind the bidder. The individual signing certifies, under penalty of perjury, that he or she has the legal authorization to bind the bidder.

### 5. Rejection or Withdrawal

Submission of additional terms, conditions or agreements with the bid document are grounds for deeming a bid non-responsive and may result in bid rejection. Beaumont Independent School District Board of Trustees reserves the right to reject any and all bids and to waive any informalities and minor irregularities or defects in bids. Bids may be withdrawn in person by a bidder or authorized representative, provided their identity is made known and a receipt is signed for the bid, but only if the withdrawal is made prior to the time set for receipt of bids. Bids are an irrevocable offer and may not be withdrawn within 90 days after opening date.

### 6. Award

The bid will be awarded to the responsible, responsive bidder(s) whose bid, conforming to the solicitation, will be most advantageous to Beaumont Independent School District Board of Trustees – price and other factors considered. Unless otherwise specified in this document, Beaumont Independent School District Board of Trustees reserves the right to accept a bid in whole or in part, and to award by item or by group, whichever is deemed to be in the best interest of Beaumont Independent School District Board of Trustees. Any bidder who is in default to Beaumont Independent School District

Board of Trustees at the time of submittal of the bid shall have that bid rejected. Beaumont Independent School District Board of Trustees reserves the right to clarify any contractual terms with the concurrence of the Contractor; however, any substantial nonconformity in the offer, as determined by Beaumont Independent School District Board of Trustees, shall be deemed non-responsive and the offer rejected.

In evaluating bids, Beaumont Independent School District Board of Trustees shall consider the qualifications of the bidders, and, where applicable, operating costs, delivery time, maintenance requirements, performance data, and guarantees of materials and equipment. In addition, Beaumont Independent School District Board of Trustees may conduct such investigation, as it deems necessary to assist in the evaluation of a bid and to establish the responsibility, qualifications, and financial ability of the bidders to fulfill the contract.

Beaumont Independent School District Board of Trustees reserves the right to award this contract on the basis of **best value** in accordance with the laws of the State of Texas, to waive any formality or irregularity, to make awards, and/or to reject any or all bids.

A response to this document is an offer to contract with Beaumont Independent School District Board of Trustees based upon the terms, conditions, and specifications contained in the document. Bids do not become contracts unless and until they are executed by Beaumont Independent School District Board of Trustees, eliminating a formal signing of a separate contract. For that reason, all of the terms and conditions of the contract are contained in the document, unless any of the terms and conditions is modified by a project Amendment, a Contract Amendment, or by mutually agreed terms and conditions in the contract documents.

**7. Waiver of Subrogation**

Bidder and bidder's insurance carrier waive any and all rights whatsoever with regard to subrogation against Beaumont Independent School District Board of Trustees as an indirect party to any suit arising out of personal or property damages resulting from bidder's performance under this agreement.

**8. Fiscal Funding**

**Beaumont Independent School District Board of Trustees is operated and funded on a July 1 to June 30 fiscal year; accordingly, the Beaumont Independent School District reserves the right to terminate, without liability to the District, any contract for which funding is not available**

A multi-year contract (if requested by the specifications) continuing as a result of an extension option must include fiscal funding out. If, for any reason, funds are not appropriated to continue the contract, said contract shall become null and void.

**9. Bid Results**

Bid results are not provided in response to telephone inquiries. A final tabulation will be available following bid award and will be available for review in the Purchasing Department.

**This bid is subject to all legal requirements provided for in the Texas Education Code 21.901 and/or applicable state and federal statutes. Any bid after being opened becomes subject to the Open Records Act, Article 6252-17A VTCS.**

**10. Specifications**

Unless otherwise stated by the bidder, the bid will be considered as being in accordance with Beaumont Independent School District's applicable standard specifications, and any special specifications outlined in the bid document. References to a particular trade name, manufacturer's catalogue, or model number are made for descriptive purposes to guide the bidder in interpreting the requirements of Beaumont Independent School District, and should not be construed as excluding bids on other types of materials, equipment, and supplies. However, the bidder, if awarded a contract, will be required to furnish the particular item referred to in the specifications or description unless departure or substitution is clearly noted and described in the bid. Beaumont Independent School District reserves the right to determine if equipment/ product being bid is an acceptable alternate. All goods shall be new unless otherwise so stated in the bid. Any unsolicited alternate bid, or any changes, insertions, or omissions to the terms and conditions, specifications, or any other requirements of the bid, may be considered non-responsive.

**11. Delivery**

Bids shall include all charges for delivery, packing, crating, containers, etc. Unless otherwise stated by the bidder, prices bid will be considered as being based on F.O.B. delivered, freight included. The school district shall reserve the right to refuse and request pickup and replacement of any and all materials found to be inferior to the specifications as required in this bid. VENDORS WHO CONSISTENTLY DELIVER INFERIOR GOODS AND/OR REFUSE TO PICK UP AND REPLACE

INFERIOR GOODS WILL BE REMOVED FROM THE BIDDERS LIST AND NOT ALLOWED TO PARTICIPATE IN FUTURE BIDS.

**12. Currency**

Prices calculated by the bidder shall be stated in U.S. dollars.

**13. Non Performance**

Continuing non-performance of the bidder in terms of specifications shall be a basis for termination of the contract bid. Cancellation by BISD may be made upon thirty (30) days written notice to the successful vendor. The district shall not pay for services, equipment or supplies which are unsatisfactory. Vendors will be given reasonable opportunity (30 calendar days) before termination, to correct deficiencies. This however, shall in no way be construed as negating the basis for termination for non-performance.

**14. Non-Participating Bidders**

Non participating bidders may be eliminated from the bid list unless written notice is received by the district that such bidders wish to remain on the bid list for future bid mailings.

**15. References**

All vendors shall submit a list of at least three references for which vendor has provided like products or services. References will include contact name and telephone number. Bids submitted without three references may be disqualified from consideration.

**16.** Texas Education Code, 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. This notice must include a general description of the conduct resulting in the conviction of a felony." Bidders will be required to submit a "Felony Conviction Notice" with their bids. (A copy is included with this bid.)

**17. Pricing**

Prices shall be stated in units of quantity specified in the bid documents. In case of discrepancy in computing the amount of the bid, the unit price shall govern.

**18. Notice to Proceed/Purchase Order**

The successful bidder may not commence work under this contract until authorized to do so by the Purchasing Agent.

**19. Definitions**

"District" – Beaumont Independent School District Beaumont, Texas.

"Contractor" – The bidder whose bid is accepted by Beaumont Independent School District Board of Trustees.

## GENERAL TERMS AND CONDITIONS OF BIDDING AND TERMS OF CONTRACT

By execution of this document, the vendor accepts all general and special conditions of the contract as outlined below and in the specifications.

### 1. Bid Submission

#### 1.1 Bidding

All bids must be submitted on the bid form furnished in this package.

#### 1.2 Authorized Signatures

The bid must be executed personally by the vendor, duly authorized partner of the partnership, or duly authorized officer of the corporation. If executed by an agent, a power of attorney or other evidence of authority to act on behalf of the vendor shall accompany the bid to become a valid bid.

#### 1.3 Late Bids

Bids must be in the office of the Beaumont Independent School District Board of Trustees Purchasing Agent before or at the specified time and date bids are due. Bids received after the submission deadline shall be rejected as non-responsive and returned unopened.

#### 1.4 Withdrawal of Bids Prior to Bid Opening

A bid may be withdrawn before the opening date by submitting a written request to the Purchasing Agent. If time allows the bidder may submit a new bid. Bidder assumes full responsibility for submitting a new bid before or at the specified time and date bids are due. Beaumont Independent School District Board of Trustees reserves the right to withdraw a request for bids before the opening date.

#### 1.5 Withdrawal of Bids After Bid Opening

Bidder agrees that its offer may not be withdrawn or cancelled by the vendor for a period of ninety (90) days following the date and time designated for the receipt of bids unless otherwise stated in the bid and/or specifications.

#### 1.6 Bid Amounts

Bids shall show net prices, extensions where applicable and net total. In case of conflict between unit price and extension, the unit price will govern. Any ambiguity in the bid as a result of omission, error, unintelligible or illegible wording shall be interpreted in the favor of Beaumont Independent School District Board of Trustees.

#### 1.7 Exceptions and/or Substitutions

All bids meeting the intent of the specifications and plans will be considered for award. Vendors taking exception to the specifications and plans, or offering substitutions, shall state these exceptions in the section provided. If bid is made on an article other than the one specified, which a bidder considers comparable, the name and grade of said article must be specified in the bid and sufficient specifications and descriptive data must accompany same to permit thorough evaluation. The absence of stated exceptions and/or substitutions shall indicate that the vendor has not taken any exceptions to the specifications and shall be responsible to perform in strict accordance with the specifications. As a matter of practice, Beaumont Independent School District Board of Trustees rejects exception(s) and /or substitutions as non-responsive but reserves the right to accept any and/or all of the exception(s) and/or substitution(s) deemed to be in the best interest of Beaumont Independent School District Board of Trustees.

#### 1.8 Alternates

The Invitation for Bid and/or specifications may expressly allow bidder to submit an alternate bid. Presence of such an offer shall not be considered an indication of non-responsiveness.

#### 1.9 Descriptions

Unless otherwise specified, any reference to make, manufacturer and/or model used in the bid specifications is merely descriptive and not restrictive, and is used only to indicate type, style, or quality of material desired.

#### 1.10 Bid Alterations

Bids cannot be altered or amended after submission deadline. Any interlineations, alterations, or erasures made before opening time must be initialed by the signer of the bid, guaranteeing authenticity.

### 1.11 Tax Exempt Status

Beaumont Independent School District Board of Trustees is exempt from federal excise tax and state sales tax. Unless the bid form or specifications specifically indicate otherwise, the bid price must be net, exclusive of above-mentioned taxes and will be so construed. Therefore, the bid price shall not include taxes.

### 1.12 Quantities

Quantities indicated are estimated quantities only and are not a commitment to buy. Approximate usage does not constitute an order, but only implies the probable quantity that will be used. Commodities will be ordered on an as-needed basis. Bidder is responsible for accurate final counts.

### 1.13 Bid Award

Award of contract shall be made to the most responsible, responsive bidder, whose offer is determined to be the best value, taking into consideration the relative importance of price. Beaumont Independent School District Board of Trustees reserves the right to be the sole judge as to whether items bid will serve the purpose intended. Beaumont Independent School District Board of Trustees reserves the right to accept or reject in part or in whole any bid submitted, and to waive any technicalities or informalities for the best interest of the Beaumont Independent School District. Beaumont Independent School District Board of Trustees reserves the right to award based upon individual line items, sections or total bid.

### 1.14 Silence of Specifications for Complete Units

All materials, equipment and/or parts that will become a portion of the completed work, including items not specifically stated herein but, necessary to render the service(s) complete and operational per the specifications, are to be included in the bid price. Vendor may be required to furnish evidence that the service, as bid, will meet or exceed these requirements.

### 1.15 General Bid Bond/Surety Requirements

Failure to furnish bid bond/surety, if requested, will result in bid being declared non-responsive. Non-responsive bids will not be considered for award.

### 1.16 Responsiveness

A responsive bid shall substantially conform to the requirements of this Invitation to Bid and/or specifications contained herein. Bidders who substitute any other terms, conditions, specifications and/or requirements or who qualify their bids in such a manner as to nullify or limit their liability to the contracting entity shall have their bids deemed non-responsive. Also, bids containing any clause that would limit contracting authority shall be considered non-responsive. Examples of non-responsive bids include but shall not be limited to: a) bids that fail to conform to required delivery schedules as set forth in the bid request; b) bids with prices qualified in such a manner that the bid price cannot be determined, such as with vague wording that may include "price in effect at the time of delivery," and c) bids made contingent upon award of other bids currently under consideration.

### 1.17 Responsible Standing of Bidder

To be considered for award, bidder must at least: have the ability to obtain adequate financial resources, be able to comply with required or proposed delivery/completion schedule, have a satisfactory record of performance; have a satisfactory record of integrity and ethics, and be otherwise qualified and eligible to receive award.

### 1.18 Proprietary Data

Bidder may, by written request, indicate as confidential any portion(s) of a bid that contain proprietary information, including manufacturing and/or design processes exclusive to the vendor. Beaumont Independent School District Board of Trustees will protect from public disclosure such portions of a bid, unless directed otherwise by legal authority, including existing Open Records Acts.

### 1.19 Public Bid Opening

Bidders are invited to be present at the opening of bids. After the official opening of bids, a period of not less than one week is necessary to evaluate bids. The amount of time necessary for bid evaluation may vary and is determined solely by the Beaumont Independent School District. Following the bid evaluation, all bids submitted are available for public review.

## 2. Performance

### 2.1 Design, Strength, and Quality

Design, strength, and quality of materials and workmanship must conform to the highest standards of manufacturing and engineering practices. The apparent silence of specifications and/or plans as to any detailed description concerning any point

shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of these specifications and/or plans shall be made on the basis of this statement.

**2.2 Age and Manufacture**

All tangible goods being bid must be new and unused, unless otherwise specified, in first-class condition, of current manufacture, and furnished ready to use. All items not specifically mentioned that are required for a complete unit shall be furnished.

**2.3 Delivery Location**

All deliveries will be made to the address(es) specified on the purchase order during normal working hours of 8:00 a.m. to 4:00 p.m., Monday through Friday, unless otherwise authorized by the Purchasing Agent or designee.

**2.4 Delivery Schedule**

Delivery time may be an important consideration in the evaluation of best value. The maximum number of days necessary for delivery ARO shall be stated in the space, if provided, on the bid form.

**2.5 Delivery Charges**

All delivery and freight charges, F.O.B. destination shown on Beaumont Independent School District Board of Trustees purchase order, as necessary to perform contract are to be included in the bid price.

**2.6 Installation Charges**

All charges for assembly, installation and set-up shall be included in the bid price. Unless otherwise stated, assembly, installation and set-up will be required.

**2.7 Operating Instructions and Training**

Clear and concise operating instructions and descriptive literature will be provided in English, if requested. On-site detailed training in the safe and efficient use and general maintenance of item(s) purchased shall be provided as needed at the request of Beaumont Independent School District Board of Trustees. Instructions and training shall be at no additional cost to the Beaumont Independent School District.

**2.8 Storage**

Bidder agrees to provide storage of custom ordered materials, if requested, for up to thirty (30) calendar days.

**2.9 Compliance with Federal, State, Beaumont Independent School District, and Local Laws**

Bids must comply with all federal, state, Beaumont Independent School District and local laws, including, but not limited to, all applicable standard safety, emission, and noise control requirements. Any vehicles or equipment shall contain all standard safety, emission, and noise control requirements required for the types and sizes of equipment at the time of their manufacture. The contractor agrees, during the performance of work or service, to comply with all applicable codes and ordinances of Beaumont Independent School District Board of Trustees or the State of Texas as they may apply, as these laws may now read, or as they may hereafter be changed or amended.

**2.10 OSHA**

The bidder will certify all equipment complies with all regulations and conditions stipulated under the Williams-Steiger Occupational Safety and Health Act of 1971, as amended. The successful bidder will further certify that all items furnished under this project will confirm and comply with federal and State of Texas OSHA standards. The successful bidder will agree to indemnify and hold harmless Beaumont Independent School District Board of Trustees for any and all damages that may be assessed against the Beaumont Independent School District.

**2.11 Patents and Copyrights**

The successful vendor agrees to protect the Beaumont Independent School District from claims involving infringements of patents and/or copyrights.

**2.12 Samples, Demonstrations and Testing**

At Beaumont Independent School District Board of Manager's request and direction, bidder shall provide product samples and/or testing of items bid to ensure compliance with specifications. Samples, demonstrations and/or testing may be requested at any point prior to or following bid award. Samples, demonstrations and/or testing may be requested upon delivery and/or any point during the term of resulting contract. All samples (including return thereof), demonstrations, and/or testing shall be at the expense of the bidder/vendor.

## 2.13 Acceptability

All articles enumerated in the bid shall be subject to inspection by an officer designated for that purpose by Beaumont Independent School District Board of Trustees. If found inferior to the quality called for, or not equal in value to the specifications, deficient in workmanship or otherwise, this fact shall be certified to the Purchasing Agent, who shall have the right to reject the whole or any part of the same. Items and/or work determined to be contrary to specifications must be replaced at the vendor's expense. Inferior items not retrieved by the vendor within thirty (30) calendar days, or an otherwise agreed upon time, shall become the property of the Beaumont Independent School District. If disposal of such items warrants an expense, an amount equal to the disposal expense will be deducted from amounts payable to the vendor.

## 2.14 Maintenance

Maintenance required for equipment bid should be available in Beaumont Independent School District Board of Trustees by a manufacturer authorized maintenance facility. Cost for this service shall be shown on the bid sheet as requested or on a separate sheet, as required. If Beaumont Independent School District Board of Trustees opts to include maintenance, it shall be so stated in the purchase order and said cost will be included. Service will commence only upon expiration of applicable warranties and should be priced accordingly.

## 2.15 Liquidated Damages

For contracts involving construction, Owner and Contractor recognize that time is of the essence and the Owner will suffer financial loss if the work is not complete within the time specified, plus any extensions thereof allowed. If the Contractor fails to perform the Work within the specified time set forth in the proposal, the Owner and Contractor agree that as liquidated damages for delay in performance the Contractor shall pay the Owner in the amount stipulated below for each calendar day that expires after the proposed timeline after signing the Notice of Award where the Work is not complete and ready for Final Payment, the Owner shall have the right to deduct liquidated damages from any amount due or that may become due to the Contractor, or to collect such liquidated damages from the Contractor. The Owner has the option to enforce liquidated damages or to waive such damages. In order to recover liquidated damages, the Owner is under no obligation to prove the actual damages sustained by the Owner due to the Contractor's delay in performance. The parties agree that liquidated damages shall be computed according to the following schedule of two hundred and fifty dollars ($250) unless otherwise noted in the proposal, for each calendar day that completion of the work shall be delayed, inclusive of any applicable changes thereto.

## 2.16 Material Safety Data Sheets

Under the "Hazardous Communications Act," common known as the "Texas Right to Know Act," a bidder must provide the user department, with each delivery, material safety data sheets which are applicable to hazardous substances defined in the Act. Failure of the bidder to furnish this documentation will be cause to reject any bid applying thereto.

## 2.17 Evaluation

Evaluation shall be used as a determinant as to which services are the most efficient and/or most economical for the Beaumont Independent School District. It shall be based on all factors having a bearing on price and performance of the items in the user environment. All bids are subject to tabulation by the Beaumont Independent School District Purchasing Department and recommendation to Beaumont Independent School District Board of Trustees. Compliance with all bid requirements and needs of the using department are considered in evaluating bids. Pricing is **not** the only criteria for making a recommendation. The Beaumont Independent School District Purchasing Department reserves the right to contact any bidder, at any time, to clarify, verify, or require information with regard to this bid.

## 2.18 Scoring

The following criteria will be the base of the tabulation for this proposal

| | |
|---|---|
| Price | 35% |
| Experience | 15% |
| Ability to Meet District Needs | 15% |
| Qualifications / Stability | 15% |
| Minority or Woman Owned | 5% |
| Presentation | 5% |
| Best Value tradeoff | 10% |

## 3. Purchase Orders and Payment

### 3.1 Purchase Orders

A purchase order(s) shall be generated by the Beaumont Independent School Purchasing Agent to the successful vendor. The purchase order number must appear on all itemized invoices, packing slips, and related communication. The Beaumont Independent School District will not be held responsible for any work orders placed and/or performed without a valid current purchase order number. Payment will be made for all services rendered and accepted by the contract administrator for which a valid invoice has been received.

### 3.2 Invoices

a) All invoices shall reference the Purchase Order number. Invoices shall reference the bid item number or a detailed description for each item invoiced. Each invoice shall contain detailed itemization of each charge for products or services. If an item purchased and itemized on the invoice does not correspond to an item in any of the categories awarded to the vendor, invoice shall reference the item as "N/C" to indicate that it is a non-contract item. This requirement is to assist the Beaumont Independent School District in verifying contract pricing on all invoices. Payment will be made under terms of net thirty (30) days unless otherwise agreed upon by seller and the purchasing department.

E-mail to: invoices@bmtisd.com

Mail to:
Beaumont Independent School District
ATTN: Accounts Payable Department
P. O. Box 672
Beaumont, TX 77704

b) Payment shall not be due until the above instruments are submitted after delivery. Suppliers should keep the Accounts Payable Department advised of any changes in remittance addresses.

c) Do not include Federal Excise, State or City Sales Tax. School District shall furnish tax exemption certificate, if required.

d) Vendors that repeatedly fail to supply complete, accurate, and timely billing to the Accounts Payable office may be omitted from our vendor list.

### 3.3 Prompt Payment

In accordance with the State of Texas Prompt Payment Act, Article 601f V.T.C.S., payment will be made after receive and acceptance by the Beaumont Independent School District of the merchandise ordered and of a valid invoice. Successful bidder(s) is required to pay subcontractors within ten (10) days after the successful bidder receives payment from the Beaumont Independent School District.

**Beaumont Independent School District will pay for the requested goods and/or services as promptly as possible, but in any event, no later than thirty (30) days after 1) receipt of goods; or 2) the day the service is complete; or 3) the day the district receives the invoice for the goods and/or services, whichever is later.**

### 3.4 Force Majeure

If either District or Contractor (individually, a "Party") is delayed at any time in the performance of its obligations hereunder by economic industry-wide strikes, fire, unusual delay in deliveries, unavoidable casualties, or other causes reasonably beyond such Party's control and which could not have been reasonably anticipated by such Party, then the time for performance of such Party shall be extended by one (1) day for each day of such delay.

## 4. Contract

### 4.1 Contract Definition

The General Conditions of Bidding and Terms of Contract, Specifications, Plans, Bidding Forms, Addenda, and any other documents made a part of this bid shall constitute the complete bid. This bid, when duly accepted by Beaumont Independent School District Board of Trustees, shall constitute a contract equally binding between the successful bidder and Beaumont Independent School District Board of Trustees.

### 4.2 Contract Agreement

Once a contract is awarded, the unit prices offered by the successful bidder shall remain firm for the term of the contract. **Contract shall commence on date of award, unless otherwise specified, and continue with an option to renew for two (2) one year periods, if mutually agreed to by Beaumont Independent School District Board of Trustees and Contractor, unless otherwise specified.**

### 4.3 Change Order

No different or additional terms will become part of this contract with the exception of a change order. No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All change orders to the contract will be made in writing and at the discretion and approval of Beaumont Independent School District. No change order will be binding unless signed by an authorized representative of the Beaumont Independent School District and the vendor.

### 4.4 Price Re-determination

A price re-determination may be considered by Beaumont Independent School District Board of Trustees only at the twelve (12) month and twenty-four (24) month anniversary dates of the contract. All requests for price re-determination shall be in written form. Cause for such request, i.e., manufacturer's direct cost, postage rates, Railroad Commission rates, Federal/State minimum wage law, Federal/State unemployment taxes, F.I.C.A, Insurance Coverage Rates, etc., shall be substantiated in writing by the source of the cost increase. The bidder's past experience of honoring contracts at the bid price will be an important consideration in the evaluation of the lowest and best bid. Beaumont Independent School District Board of Trustees reserves the right to accept or reject any/all requests for price re-determination as it deems to be in the best interest of the Beaumont Independent School District.

### 4.5 Termination

Beaumont Independent School District Board of Trustees reserves the right to terminate the contract for default if the bidder breached any of the terms therein, including warranties of bidder or if the bidder becomes insolvent or commits acts of bankruptcy. Such right of termination is in addition to and not in lieu of any other remedies which Beaumont Independent School District Board of Trustees may have in law or equity. Default may be construed as, but not limited to, failure to deliver the proper goods and/or service within the proper amount of time, and/or to properly perform any and all services required to Beaumont Independent School District Board of Trustees' satisfaction and/or to meet all other obligations and requirements. Contracts may be terminated without cause upon thirty (30) days' written notice to either party unless otherwise specified. Beaumont Independent School District Board of Trustees reserves the right to award canceled contract to the next lowest bidder. Bidder, in submitting this bid, agrees that Beaumont Independent School District Board of Trustees shall not be liable to prosecution for damages in the event that the Beaumont Independent School District declares the bidder in default.

### 4.6 Conflict of Interest

Employees of the Beaumont Independent School District are not permitted to maintain financial interest in, or receive payment, directly or indirectly, borrow from, lend to, invest in, or engage in any substantial financial transaction with any individual, organization, supplier, or subcontractor who does business with the Beaumont Independent School District without disclosure.

When conflict of interest is discovered, it shall be grounds for termination of contract.

### 4.7 Injuries or Damages Resulting from Negligence

Successful vendor shall defend, indemnify and save harmless Beaumont Independent School District Board of Trustees and all its officers, agents and employees from all suits, actions, or other claims of any character, name and description brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of any negligent act or fault of the successful vendor, or of any agent, employee, subcontractor or supplier in the execution of, or performance under, any contract which may result from bid award. Successful vendor shall pay any judgment with cost which may be obtained against Beaumont Independent School District Board of Trustees growing out of such injury or damages.

### 4.8 Interest by Public Officials

No public official shall have interest in this contract, in accordance with Texas Local Government Code.

### 4.9 Warranty

The successful vendor shall warrant that all materials utilized in the performance of this contract shall conform to the proposed specifications and/or all warranties as stated in the Uniform Commercial Code and be free from all defects in material, workmanship and title.

### 4.10 INSURANCE:

**EACH BID MUST BE ACCOMPANIED BY CERTIFICATES OF COVERAGE FROM WELL REGARDED INSURANCE COMPANIES REFLECTING THE FOLLOWING COVERAGE:**
(Certificates must be issued in the name of the company submitting the bid.)

a. Worker's Compensation and Employers Liability
Covering all work contemplated in the contract by the bid. Amount of statutory requirement.

b. General Liability
Written on a Comprehensive General Liability or Commercial General Liability form to include completed operations/products and addition of the Broad Form Comprehensive General Liability Endorsement and removal of any X (explosion), C (collapse) and U (underground) exclusions. Minimum General Aggregate Limit of $300,000 with Beaumont Independent School District named as an additional insured.

c. Automobile Liability
Issued on a Comprehensive Automobile Liability form covering all owned and non-owned vehicles. Minimum Combined Single Limit of $300,000 or $100,000/$300,000/$100,000.

d. Builders Risk
Equal to contract amount with BISD named as additional insured.

**ALL CERTIFICATES SUBMITTED WITH BIDS WILL BE REVIEWED BY THE DISTRICT'S INSURANCE COMMITTEE. ANY DEVIATIONS OR DEFICIENCIES FOUND MAY BE CAUSE FOR THE REJECTION OF THE BID. ALL COVERAGE REQUIRED AT THE TIME OF THE AWARD OF CONTRACT MUST REMAIN IN FORCE DURING THE ENTIRE CONTRACT PERIOD. RENEWAL CERTIFICATES MUST BE RECEIVED PRIOR TO THE EXPIRATION DATE LISTED ON THE ORIGINAL CERTIFICATE.** These certificates must contain a provision that the Owner shall be notified thirty (30) days before the cancellation of the insurance. **FAILURE TO SUBMIT INSURANCE CERTIFICATES WITH BID WILL BE CAUSE FOR THE REJECTION OF THE BID.**

### 4.11 Uniform Commercial Code

The successful vendor and Beaumont Independent School District Board of Trustees agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code.

### 4.12 Venue

This agreement will be governed and construed according to the laws of the State of Texas. This agreement is performable in the Beaumont Independent School District of Beaumont, Texas.

### 4.13 Sale, Assignment, or Transfer of Contract

The successful vendor shall not sell, assign, transfer or convey this contract, in whole or in part, without the prior written consent of Beaumont Independent School District Board of Trustees.

### 4.14 Silence of Specifications

The apparent silence of these specifications as to any detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of these specifications shall be made on the basis of this statement.

### 4.15 Texas Education Code

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. This notice must include a general description of the conduct resulting in the conviction of a felony." Bidders will be required to submit a "Felony Conviction Notice" with their bids. (A copy is included with this bid.)

### 4.16 Utilization of Minority Business Enterprises

It is the policy of the Beaumont Independent School District that minority business enterprises and concerns shall have opportunity to participate in the performance of BISD contracts. Supplier agrees to use his best efforts to carry out this policy in the award of his sub-contracts to the fullest extent consistent with his efficient performance of contract with BISD. As used herein, the term "minority business enterprise" means (a) business at least fifty-one (51%) percent of which is owned by minority members, or in the case of a corporation, at least fifty-one (51%) percent of issued stock of any class is owned by minority shareholders and (b) the daily management functions of the entity are the responsibility of one or more minority members. A "minority member" is defined to mean a person who is Black, Hispanic, Asian American, American Indian, Alaskan Native, a woman or handicapped.

### 4.17 Gratuities

The Buyer may, by written notice to the Seller, cancel this contract without liability to seller if it is determined by Buyer that gratuities, in the form of entertainment, gifts, or otherwise, were offered or given by the Seller, or any agent, or representative of the Seller, to any officer or employee of the School District with the view toward securing a contract or any determinations with respect to the performing of such a contract. In the event this contract is cancelled by Buyer pursuant to this provision, Buyer shall be entitled in addition to any other rights and remedies, to recover or withhold the amount of the cost incurred by Seller in providing such gratuities.

### 4.18 Forms

Bidders must complete all forms contained within this bid document at the time of their bid submission.

# 1. SOLICITATION NOTICE

Notice is hereby given that the Beaumont Independent School District ("Beaumont ISD", "BISD" or "District") is soliciting competitive sealed proposals from qualified providers ("Vendor", "Proposer", "Provider", or "Contractor") for providing **Psychological Testing, Diagnostic, and Therapeutic Services**, in accordance with the terms, conditions, and specifications stipulated in this **Request for Proposals #21.04** (the "Solicitation" or "RFP").

Vendor responses ("Proposals") are to be submitted to the Purchasing Department via mail to 3395 Harrison Ave, Beaumont, Tx. Two (2) paper copies are to be submitted

All solicitation documents and any applicable addenda will be made available through the district website.

Any additions, deletions, modifications, or changes made to this Solicitation shall be processed through an Addendum, which will be posted and distributed to all participating Proposers through the District's website and/or email. It shall be the sole responsibility of each Proposer to ensure review of all Addenda issued in connection to this Solicitation prior to submitting a proposal.

**1.1. POINT OF CONTACT**: The District's point of contact for questions regarding this solicitation is listed below. Unless otherwise indicated, any communication regarding this solicitation, including requests for clarification, must be directed via **e-mail only** to:

Beau Carroll
Purchasing
Beaumont ISD
3395 Harrison Ave.
Beaumont, TX 77706
bids@bmtisd.com

**1.2. DEADLINE FOR SUBMISSION OF PROPOSALS ("BID OPENING"):** Proposals shall be submitted **prior to 4:00 p.m. (C0ST) on Tuesday, August 31, 2021**.

# 2. TIMELINE FOR SOLICITATION PROCESS

**The timeline for the solicitation process is outlined below. Beaumont Independent School District reserves the right to make any changes as may be required and will notify all participants accordingly.**

| | |
|---|---|
| **August 17, 2021 (Tuesday)** | **Solicitation posted and available for vendors to access on Beaumont ISD's website.** |
| **August 18, 2021 & August 25, 2021 (Wednesday)** | **Newspaper run dates** |

| | |
|---|---|
| **August 31, 2021 by 4:00 pm (CST) (Tuesday)** | • **Deadline for submission of RFP responses** |
| **September 2021** | • **Board Meeting (Approve/Reject District's Recommendation for Contract Award)** |
| **September 17, 2021** | • **Beginning date of contract** |

## 3. GENERAL OVERVIEW OF BEAUMONT ISD

The Beaumont Independent School District serves nearly 19,000 pre-kindergarten through twelfth-grade students in a diverse and growing district located in Jefferson County Texas. The district's 27 campuses include 2 High Schools, 1 Early College High School, 6 Middle Schools, 15 Elementary and Pre-K Schools, 1 Career and Technology Center, 1 Alternative School and 2 Discipline Alternative Education Program.

For additional information about Beaumont ISD, including demographics and other facts and figures, please refer to the District's website at www.bmtisd.com.

# 4. SCOPE OF WORK AND MINIMUM QUALIFICATIONS

**4.1. OBJECTIVE:** The primary purpose of this Solicitation is to identify a list of potential Vendors that the District deems to be qualified to provide services to the District and who will be eligible and authorized to engage with the District under a non-exclusive contract on an as-needed basis. The awarded vendors to this Solicitation will be used at the District's sole discretion when the District has unfilled vacancies for the position through its standard HR hiring process, personnel are out on leave, or other contracts fail to provide the required personnel.

**4.2. SERVICES REQUIRED:** The Beaumont Independent School District (BISD) is seeking to engage with qualified persons and/or companies to provide psychological evaluation services. The specific job title sought by BISD is Licensed Specialist in School Psychology.

Personnel must be able to meet the requested schedule availability and perform any and all tasks requested by the Special Education department as related to their job function. Failure to meet these requests may result in non-award and/or non-renewal.

**4.3. MINIMUM QUALIFICATIONS AND RESPONSIBILITIES PER JOB TITLE:**

Questions from this section may be answered in an attachment provided by the vendor.

**4.3.1. Licensed Specialist in School Psychology**

a. Must be currently licensed as a Specialist in School Psychology (LSSP) through the Texas Board of Examiners of Psychologists (TSBEP) (fully licensed without any requirements for supervision).
b. Must be in good standing with the TSBEP (the board).
c. Evaluate students using district approved evaluation instruments and complete an evaluation report following district guidelines.
d. Provide psychological services to individual students within the classroom; consult with teachers, staff and parents on classroom interventions and techniques.
e. Attend ARD/IEP meetings and complete ARD/IEP documentation in the district approved web- based ARD/IEP program as requested.
f. Maintain accurate and complete data of services provided and student progress as required by the district. Follow guidelines for documentation and reporting of services for the basis of Medicaid reimbursement through the School Health and Related Services program (SHARS).
g. Maintain the duty hours of the assignment as determined by the department.
h. Questions
   1. Does your company provide bilingual LSSP services? _____

   2. Describe your expertise and relevant experience as a Licensed Specialist in School Psychology.
   _____

3. Describe your process for meeting required timelines. _____

_____

## 5. PROPOSAL EVALUATIONS

The review and evaluation of Vendor responses will determine the Provider(s) most capable of delivering the **"best overall value"** to the District, consistent with the requirements herein and as evidenced by the respondent's experience in providing the type and scope of services required within this Solicitation.

Depending on the number and quality of vendor responses received, the District anticipates a 2-Phased evaluation process to identify either a sole vendor or multiple vendors to be considered for contract award, as described herein:

**5.1.** **Phase 1A Evaluation**: Phase 1A entails the evaluation of written proposals submitted by Providers meeting the requirements referenced in this Solicitation. In phase 1A, each vendor's response will be reviewed for completeness and adherence to the submission requirements and will be ranked based on the evaluation criteria referenced in the table below. The District will be the sole judge of the quality of proposals and reserves the right, at its own discretion, to disqualify any vendor that submits a proposal that is incomplete, does not properly adhere to the solicitation requirements, and/or clearly does not meet the needs of the District. A Vendor's response that is disqualified will not be scored not ranked.

**5.2.** **Phase 1B (If necessary) Evaluation**: The District, at its sole discretion, may select one or more Proposers to be invited to participate in an on-site (or remote) interview process to clarify various aspects of a vendor's proposal and/or to further evaluate the qualifications and experience of the Proposer prior to completing their evaluation.

Upon completion of the evaluation process, the total points earned by each vendor will be calculated to determine the final scores. The District, at its sole discretion, will determine which Vendor(s) to consider for contract award.

## 6. STANDARD TERMS AND CONDITIONS

Proposers or authorized representatives are expected to inform themselves as to all terms and conditions, requirements, and specifications contained within this solicitation and associated documents prior to submitting a proposal. Failure to do so will be at the proposer's own risk.

In the event that the District selects a Vendor to provide the products and/or services required within this solicitation, a written Independent Contractor Agreement shall be executed between both parties prior to commencement of any services. Any Vendor submitting a proposal in response to this solicitation shall thoroughly review the District's ***General Terms & Conditions*** ("**General Terms & Conditions**"). These Standard Terms & Conditions shall be binding of the parties involved and shall be incorporated by reference into the contract resulting from this solicitation process.

# 7. SPECIAL TERMS AND CONDITIONS

In addition to the Standard Terms & Conditions referenced above, the following special terms and conditions ("**Special Terms & Conditions**") shall apply to this solicitation and/or the resulting Agreement, where applicable. In the event of any conflict between provisions, the provisions referenced in the Special Terms & Conditions shall prevail.

**7.1. CONTRACT TERM:**

**7.1.1.** Unless otherwise agreed to by the District and the awarded Vendor(s), the initial contract term shall begin September 17, 2021 and shall end on August 31, 2022 (the "Initial Term"). Thereafter, unless otherwise terminated in accordance with the termination provisions referenced in the Agreement, the District reserves the right to renew the Agreement for up to two (2) additional one-year terms. A contract renewal is to be evidenced by a written agreement executed by both parties.

**7.2. CRIMINAL HISTORY AND FINGERPRINT REQUIREMENTS:** In order for the district to comply with TEC 22.0834 and 19 TAC 153.1101 the district must have each contractor certify that a criminal history background check (DPS FACT Clearinghouse) has been performed on all contracting employees and subcontractors that provide services to the district where there may be unsupervised, direct contact with students as defined in 19 TAC 153.1101(7). The district may, at its discretion, request contractor information in order to verify DPS FACT Clearinghouse checks.

**7.3. PRICING (FIRM FIXED PRICE CONTRACT):** The pricing offered by Vendor shall remain firm for the life of the initial term of the Agreement, except for price decreases, which may be offered to District at any time over the term of the Agreement. Price increases may only be considered at the renewal points, at which time such price increase requests shall be followed by proper justification. The District reserves the right to negotiate any price increase requests, but shall not be obligated to accept any price increases. Unless certain market conditions exist or industry standards change which may have a significant impact on the Vendor's costs associated with providing the products and/or services under the Agreement, any price increases shall be no greater than 3% over the previous year.

**7.4. ASSIGNMENT.** Subject to Section 7.5 (Pre-Existing Works and Third Party Materials), all works of authorship, designs, inventions, improvements, technology, developments, discoveries, and trade secrets conceived, made, or discovered by Vendor in the course of or as a result of or as proceeds of the Vendor's services provided to Beaumont ISD hereunder, whether solely or in collaboration with others (collectively, "Work Product") will be the sole property of Beaumont ISD. To the extent that ownership of the Work Product does not by operation of law vest in Beaumont ISD, Vendor will assign (or cause to be assigned) and does hereby assign to Beaumont ISD all right, title, and interest in and to the Work Product, including all related intellectual property rights, and waives all moral rights thereto.

**7.5. FURTHER ASSURANCES.** Vendor will assist Beaumont ISD and its designees in every proper way to secure Beaumont ISD's rights in the Work Product and related intellectual property rights in all countries. Vendor will disclose to Beaumont ISD all pertinent information and data with respect to Work Product and related intellectual property rights. Vendor will execute all applications, specifications, oaths, assignments, and other instruments that Beaumont ISD deems necessary in order to apply for and obtain these rights and in order to assign and convey to Beaumont ISD, its successors, assigns, and nominees the sole and exclusive right, title, and interest in and to the Work Product, and any related intellectual property rights. Vendor's obligation to provide assistance will continue after the termination or expiration of this Agreement.

**7.6. PRE-EXISTING WORKS AND THIRD PARTY MATERIALS.** If in the course of performing the Services, Vendor incorporates into any deliverable any intellectual property, including works of authorship, inventions, improvements, or proprietary information, or other materials owned by Vendor or in which Vendor has an interest (together, "Pre-Existing Works"), Vendor will grant and does now grant to Beaumont ISD a nonexclusive, royalty-free, perpetual, irrevocable, transferable, sublicensable, worldwide license to reproduce, manufacture, modify, distribute, use, import, and otherwise exploit the Pre-Existing Works as part of or in connection with the deliverable; provided that if the Pre-Existing Works are subject to an existing open source software license and if the Vendor obtains the District's prior written consent to their inclusion in a deliverable, such Pre-Existing Works shall be licensed to the District on the terms of such license.

Vendor will not, without District's prior written consent, incorporate any Pre-Existing Works or third-party owned materials or open source materials into the Work Product. Additionally, Vendor has the right to grant to District the rights to Pre-Existing Works and third-party owned materials specified in this Agreement.

**7.7. RIGHT TO MAKE FULL GRANT**. Vendor has and will have all requisite ownership, rights, and licenses to fully perform its obligations under this Agreement and to grant to Beaumont ISD all rights with respect to the Work Product and related intellectual property rights to be granted under this Agreement, free and clear of any and all agreements, liens, adverse claims, encumbrances, and interests of any person or entity, including, without limitation, Vendor's employees, agents, artists, and contractors and their contractors' employees, agents, and artists, who have provided, are providing, or will provide services with respect to the development of the Work Product.

**7.8. NONINFRINGEMENT.** Nothing contained in any deliverable provided to Beaumont ISD hereunder does or will infringe, violate, or misappropriate any intellectual property rights of any third party. Further, no characteristic of any Work Product does or will cause manufacturing, using, maintaining, or selling the Work Product to infringe, violate, or misappropriate the intellectual property rights of any third party

**7.9. VALUE ADDED SERVICES:** Special consideration may be given to Vendors who propose value added services ("Value Added Services") <u>at no additional cost to Beaumont ISD</u>. Value Added Services are considered to be services offered by the Vendor free of charge to the District and that are either (i) services offered beyond the norm and not the standard level of service offered to all clients of the Vendor and/or (ii) services offered by the Vendor that many other competitors do not offer or usually offer for an additional cost. Examples of Value-Added Services include, but are not limited to, free staff training, consulting services, extended support hours, customized reporting, etc.

**7.10. MOST FAVORED CUSTOMER STATUS:** Vendor warrants that the pricing, product/service warranties/guarantees offered in their proposal to this solicitation are equal to or better than those offered to the Vendor's most favored customer of similar size and scope of products/services as those requested by the District in this solicitation.

**7.11. PERFORMANCE STANDARDS AND REPRESENTATIONS:** Vendor warrants and represents that the services will be provided in a timely manner with professional skill and competence, and in accordance with (i) generally accepted practices of, and pursuant to a standard of care exercised by, professionals providing similar services under like circumstances; (ii) all applicable laws, rules, regulations, orders and permits of any federal, state, or local government having jurisdiction over any resulting services contract, including but not limited to those ordinances pertaining to affirmative action and the living wage; (iii) the terms and conditions of this solicitation and any resulting services contract; and (iv) any

and all directives or instructions provided or issued by Beaumont ISD. Beaumont ISD deserves the sole right to evaluate the contracted Vendor's performance pursuant to a services contract formed in connection with this solicitation, and Vendor agrees to comply with all performance evaluation determinations made by Beaumont ISD. Vendor further agrees to comply with all reasonable recommendations regarding Vendor's performance made by Beaumont ISD as a result of such evaluation; provided, however, that Beaumont ISD agrees to provide the Vendor with any and all reports and records related to such evaluation that can be provided under applicable law. Vendor hereby agrees that its failure to comply with reasonable recommendations of Beaumont ISD pursuant to any such evaluation shall be considered a breach of the services contract and may result in termination of such contract.

**7.12. INSURANCE REQUIREMENTS:** The Proposer awarded a contract may be required to provide proof of insurance for Professional Liability Insurance at limits acceptable to Beaumont ISD. Insurance coverage must remain in effect for the duration of the awarded contract, and Beaumont ISD shall be named as an additional insured on the insurance certificate. During the entire term of the Contract, Firm shall procure and maintain the following types of insurance and shall maintain the following minimum levels of coverage, which shall apply to any claims that may arise from or in connection with Firm's performance hereunder or the actions or inactions of any of Firm's officers, agents, representatives, or employees in connection with Firm's performance. The insurance requirements hereunder in no way limit the Firm's various defense and indemnification obligations, or any other obligations as set forth herein.

**7.12.1. Minimum Scope and Limits of Insurance:** Firm shall maintain in force for the term of the Contract limits no less than:

a) **Comprehensive General Liability**: One Million Dollars ($1,000,000) limit aggregate and One Million Dollars ($1,000,000) limit per occurrence for bodily injury, personal injury and property damage. Such limits can be achieved through a combination of primary and excess liability policies.

b) **Professional Liability:** One Million Dollars ($1,000,000) limit aggregate.

c) **Automobile Liability:** One Million Dollars ($1,000,000) limit per occurrence/per accident for bodily injury and property damage.

**7.12.2. Additional Insured and Waiver of Subrogation:**

a) Beaumont ISD to be named as additional insured.
b) Insurance policy to include waiver of subrogation endorsement.
c) Must notify the District of any changes, cancellation, or non-renewal 30 days in advance of any such events occurring

**7.12.3. Acceptability of Insurers:** The insurance policies required by this section shall be issued by an insurance Company or companies authorized to do business in the State of Texas and with a rating in the most recent edition of Best's Insurance Reports of A- or better.

**7.12.4. Delivery of Proof of Coverage:** Simultaneously with the execution of the Contract, Firm shall furnish District, in form and substance satisfactory to District, certificates of each policy

of insurance required hereunder, in form and substance satisfactory to District. Such certificates shall show the type and amount of coverage, effective dates, dates of expiration of policies and shall bear an original signature and shall have all required endorsements. If District requests copies of each policy, together with all endorsements, such documents, shall also be promptly delivered to District. Renewal certificates shall be furnished periodically to District to demonstrate maintenance of the required coverage throughout the term of the Contract.

**7.13. COMPENSATION/EXPENSE REIMBURSEMENT RESTRICTIONS:**

a) The District is not responsible for mileage reimbursement;

b) The District is not responsible for meals, travel, and lodging

c) The District does not pay overtime;

d) Contractor will not be paid for holidays;

e) Contractor may not work extra hours to make up for a holiday.

f) Contractor will not work extra hours beyond the instructional school day

g) The District will not pay for work outside the scope of the services described.

h) The District will not pay for costs associated with training and/or professional development.

**7.14. EXIT INTERVIEWS:** Upon completion or termination of services, Vendors and/or their representatives will be required to turn in all completed and pending documents during a scheduled exit interview, including ID badge and other District property such as testing materials and folders, if applicable.

**7.15. PROPOSALS TO BE HELD FIRM FOR 120 DAYS:** All proposals submitted in response to this Solicitation are considered an offer. All offers, including pricing, terms, and conditions must be held firm for a minimum of ninety (120) days from the date of Bid Opening. If awarded a contract, pricing proposed must remain firm for a minimum of twelve (12) months.

**7.16. RESPONDENTS FULLY RESPONSIBLE FOR COST OF PROPOSALS:** The District accepts no financial responsibility for any costs incurred by the Vendor in the course of responding to this solicitation and/or any costs (e.g. travel expenses, time and materials, etc.) the Vendor incurs as a result of participating in any of the evaluation stages that may be required of a Vendor being considered for contract award. Any costs incurred by the vendor in association with this Solicitation process are the sole responsibility of the Vendor.

**7.17. RESERVATIONS OF RIGHTS:** This Solicitation is not an offer by the District to contract with any party responding to this Solicitation and does not commit the District to award a contract to any Proposer. The District, in its sole discretion, reserves the right to reject any or all proposals received, to negotiate all elements of a proposal and/or proposed contract with any respondent, to waive any technicalities and formalities, to extend the deadline to submit a proposal, or to amend or cancel in part or in its entirety this Solicitation.

**7.18. PROVISIONS FOR CONTRACTS UNDER FEDERAL AWARDS:** Due to the fact that the District will be procuring the services referenced within this solicitation with Federal grant awards (Federal funds), the following provisions are to be complied with by the Vendors awarded a contract, as applicable:

**7.18.1.**

a. All contracts under federal awards must meet federal, state and local requirements. State requirements for all contracts under federal awards include the following:
b. The contract may be effective upon receipt by the District of the Notice of Grant Award (NOGA) from the federal/state awarding agency.
c. The contract period may be aligned to the grant period of availability as stated on the NOGA from the federal/state awarding agency (period of availability).
d. All services will be completed during the effective dates of the contract.
e. All services may be invoiced monthly after services are received (rather than paid lump sum at the beginning of the period of availability before services are rendered) and paid upon verification of receipt of services.
f. The regulations for procurement in 2 CFR §§200.318-323 are followed in issuing the contract.
g. The contract identifies and lists only reasonable, necessary, and allocable services to be provided during the period of availability of the funding sources listed in the contract.
h. The administrative costs charged to the grant in the contract must comply with any limitations for administrative costs for funding sources (if applicable).
i. The contract specifies that the invoice provided by the contractor will include the list of services provided, dates of services, and location(s) where services were provided during the billing period.
j. A Letter of Intent (LOI) will be sent to vendors upon board award and a formal contract will be executed between Beaumont ISD and contractor upon receipt of the NOGA.

**7.18.2.** In addition to other provisions required by the Federal agency or non-Federal entity, all contracts made by the non-Federal entity under the Federal award must contain provisions covering the following, as applicable.

a. Contracts for more than the simplified acquisition threshold currently set at $250,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

b. All contracts in excess of $10,000 must address termination for cause and for convenience by the non-Federal entity including the manner by which it will be affected and the basis for settlement.

c. Equal Employment Opportunity. Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of "federally assisted construction contract" in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity,"

and implementing regulations at 41 CFR part 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor."

d. Davis-Bacon Act, as amended (40 U.S.C. 3141-3148). When required by Federal program legislation, all prime construction contracts in excess of $2,000 awarded by non-Federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 CFR Part 5, "Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction"). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-Federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency. The contracts must also include a provision for compliance with the Copeland "Anti-Kickback" Act (40 U.S.C. 3145), as supplemented by Department of Labor regulations (29 CFR Part 3, "Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States"). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-Federal entity must report all suspected or reported violations to the Federal awarding agency.

e. Contract Work Hours and Safety Standards Act (40 U.S.C. 3701-3708). Where applicable, all contracts awarded by the non-Federal entity in excess of $100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence.

f. Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under

Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.

g. Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended—Contracts and subgrants of amounts in excess of $100,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251-1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).

h. Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the governmentwide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.

i. Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding $100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.

# 8. Frequently Asked Questions

8.1 How do you assign caseloads/assignments across multiple awarded vendors? Caseload assignments will be based on the individual needs of the student as well as the ability of the vendor to provide the appropriate services.

8.2 What is the process for distributing the caseload/assignment across multiple vendors? Upon receipt of a request for services, the Special Education Supervisor for the identified area (ie: speech, assessment, etc.) will review the request. Based on the student needs, availability of the provider and ability to meet requested timelines, the Supervisor will determine the most appropriate vendor.

8.3 What is the typical caseload size for providers? Total caseload is dependent upon the needs of the students in the district receiving the identified service.

8.4 How many school sites are typically on a provider's caseload? The number of school sites is dependent upon the needs of the students in the district receiving the identified service.

8.5 How many hours are in the standard work week for full-time positions? 8-hour days, 40 hours per week

8.6 What is the number of available full-time positions per discipline? How many positions do you typically contract per discipline? The number of positions is based on the needs of the students in the district receiving the service. There is no typical number of contracted positions/hours.

8.7 Is the district interested in bilingual providers? If yes, which languages? Yes. Spanish

8.8 Are you looking to contract with multiple vendors or a single vendor? Multiple

8.9 Are you currently using contractors to provide services referenced in this bid? If so, please provide the current billing rates per discipline. Yes. Billing rates per discipline must be requested via the district's Public Information Act protocol found here. https://www/bmtisd.com/Page/213

8.10 Are candidate resumes and credentialing required as a part of this bid? If so, is it permissible to submit resumes and credentialing of potential candidates after the contract is awarded? This will avoid the issue of a submitted candidate being unavailable at the time of award. If not, are representative certifications from members of our current therapy staff, who could potentially be assigned depending on the timing of a staffing request from you, be acceptable? We will award based on the current information so resumes and credentials need to be submitted as a part of the bid (see page 16, Sec. 4.3). If a new staff member is going to be providing services, then those credentials would need to be submitted prior to the individual beginning work for the district.

8.11 Are resumes required at the time of proposal submission or only upon award? At the time of proposal
Submission.

8.12 Are IEP meetings billable? Yes, attendance at the meeting is billable if required by the ARD committee meeting. If attendance is required, every effort is made to allow a contracted service provider to provide input and, with parent permission, leave the meeting.

8.13 Are orientation sessions, professional development and other district-sponsored meetings billable? Yes, if requested by the district.

8.14 Are we allowed to bill for paperwork and documentation? No, please see Page 27 section 7.13 of the RFP document.

8.15 Are we allowed to bill for mileage and travel between school sites? No, please see Page 27 section 7.13 of the RFP document.

8.16 Why is the district utilizing a solicitation for the services requested in this bid? To comply with state and federal law.

8.17 Can the district please clarify how needs for contractors will be disseminated to vendors post award? Award and nonaward notices will be sent to each vendor. Awarded vendors will complete a follow-up agreement and purchase order. The Special Education department will contact the awarded vendor for services as needed.

8.18 Are you satisfied with your current provider of services? What would you like to see with the awarded vendor and their approach to the requested services? All vendors need to be responsive to requests and sensitive to district timelines.

8.19 Will the district accept a price range depending on the candidates' level of experience or do you only want a fixed rate? Fixed Rate if possible.

8.20 Can the district please describe the supplies and materials that contracted therapists will have access to at the district? (wifi, computer access, testing material, office supplies, etc.)? District provides some testing material based on provider.

8.21 What travel between schools is expected for these providers? There are 26 campuses in the district. Travel may be required between campuses based on need.

8.22 Will the district accept new graduates or CFY's for these positions? New graduates, yes. CFY's - no

8.23 Will the district provide supervision for the new graduates? Supervision for all contracted personnel is provided by the Department of Special Education. This is NOT mentored professional supervision.

8.24 Will the district accept Clinical Fellows, PTAs and COTAs under this contract? No Clinical Fellows. PTAs and COTAs can be used if supervision by a licensed provider is through the contracted vendor.

8.25 What are the district's payment terms? Net 30

# 9. BID PROPOSAL

| Category | Hourly Rate | Daily Rate |
|---|---|---|
| 4.3.1 Licensed Specialist in School Psychology | | |

9.1 Proposal Questions

1. What is your minimum and maximum response time, from the date of contact, to be on-site for services?

_____

_____

2. Does your company currently employ staff that will provide services to the district? _____

_____

# 10. District LSSP Comments

BISD wants to provide quality content and meaningful recommendations in all FIEs. The psychological evaluations will need to include:

all sources of data and dates given,
a description of the measure used,
a score table with scaled or standard scores obtained,
a description of what the data indicates about the student for each measure,
a description of the area of eligibility with an explanation of how the student does or does not meet the criteria for the identification of a disability condition
meaningful recommendations for the student to address the concerns identified in the evaluation report

The evaluation may not include a GARS measure to establish eligibility for the condition of autism. The evaluation needs to include an observation of the student in general education, if the student attends. The evaluation needs to include interviews and behavior rating scales from the parent, teachers and student, if old enough.
For initial evaluations, multiple rating scales are recommended to help assess behavior and possible disability conditions from a broad to a narrow measure.
The evaluator will be available to review the findings with the campus.

All evaluations will be completed by the designated due date.
The evaluator will notify the district if there are any problems or concerns with completing the evaluation on time.

**NOTICE OF NO RESPONSE**

Dear Vendor:

Returning a **NOTICE OF NO RESPONSE** means that you are choosing not to participate in this proposal and Beaumont ISD will not be able to make purchases from your company during the term of this contract. If your company is submitting a proposal no further action is required. Please complete this form and return it prior to the proposal opening date if:

**(check box)**

☐ 1. I am bidding on the current proposal and would like to receive future proposals for this same category of products and/or services

☐ 2. The products/service we represent should be listed in **ANOTHER** category.
**SPECIFY:** _____

☐ 3. We wish to be removed from the Vendor list for the reason listed below.

EXPLANATION: _____

_____

BID NO: 21/04
BID NAME:

COMPANY NAME: _____

ADDRESS: _____

PHONE NUMBER: _____FAX: _____

SIGNATURE: _____

TITLE: _____ DATE: _____

Thank you for your assistance.

**THIS FORM MUST BE RETURNED WITH YOUR BID**

☒ REQUIRED FORM

## CERTIFICATIONS

**FAILURE TO COMPLETE THE FOLLOWING INFORMATION WILL RESULT IN BID DISQUALIFICATION.**

| 1. | VENDOR INFORMATION |
|---|---|

| | |
|---|---|
| **COMPANY NAME:** | |

| | |
|---|---|
| **MAINTENANCE ADDRESS:** | **PHONE:** |
| | **TOLL FREE:** |
| **REMITTANCE ADDRESS:** | **FAX:** |
| | **TOLL FREE FAX:** |

| | |
|---|---|
| **INTERNET ADDRESS:** | |
| **CUSTOMER SERVICE E-MAIL:** | |

| DO YOU ACCEPT PURCHASE ORDERS | CASH PAYMENT TERMS (Net 30 Days) | MINIMUM ORDER AMOUNT, IF ANY |
|---|---|---|
| YES ☐ NO ☐ | OR _____% Discount in Net _____ Days | |

| PRINCIPALS AND KEY PERSONNEL |
|---|
| **PRESIDENT / OWNER:** |
| **GENERAL MANAGER:** |
| **ACCOUNTING / ACCOUNTS RECEIVABLE MANAGER:** |
| **SALES MANAGER:** |

| | | | |
|---|---|---|---|
| **YEARS / MONTHS IN BUSINESS WITH PRESENT NAME:** | | **NUMBER OF EMPLOYEES:** | |

**COMPANY IS:** ☐ **MANUFACTURER OR PRODUCER,** ☐ **DISTRIBUTOR,** ☐ **WHOLESALER,**
☐ **RETAILER,** ☐ **CONSULTING,** ☐ **CONSTRUCTION,** ☐ **BROKER,** ☐ **SERVICE,**
☐ **OTHER:** _____

**THIS FORM MUST BE RETURNED WITH YOUR BID**

☒ REQUIRED FORM

**2. TAXPAYER IDENTIFICATION** downloada ble at: http://www.irs.gov/pub/irs-pdf/fw9.pdf

Form **W-9**
(Rev. December 2014)
Department of the Treasury
Internal Revenue Service

**Request for Taxpayer Identification Number and Certification**

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

Print or type
See Specific Instructions on page 2.

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; check only one of the following seven boxes:
☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate
☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____
Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.
☐ Other (see instructions) ▶

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) _____
(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.)

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 Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

**Note.** If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

**Social security number**
___ - ___ - ____

or

**Employer identification number**
__ - _____

**Part II Certification**

Under penalties of perjury, I certify that:

1. 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
2. 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
3. I am a U.S. citizen or other U.S. person (defined below); and
4. 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 on page 3.

**Sign Here** Signature of U.S. person ▶ Date ▶

## General Instructions

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

**Future developments.** Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at *www.irs.gov/fw9*.

## 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-INT (interest earned or paid)
- 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? on page 2.*

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

Cat. No. 10231X Form **W-9** (Rev. 12-2014)

**Notice to Vendors: Conflict of Interest Questionnaire Required by Chapter 176 of the Texas Local Government Code**

Effective January 1, 2006, any person or entity who contracts or seeks to contract with BISD for the sale or purchase of property, goods, or services as well as agents of such persons, (hereafter referred to as Vendors) are required to file a Conflict of Interest Questionnaire with the District. Each covered person or entity who seeks to or who contracts with BISD is responsible for complying with any applicable disclosure requirements.

The Conflict of Interest Questionnaire must be filed:

- No later than the seventh business day after the date that the Vendor begins contract discussions or negotiations with the government entity, or submits to the entity an application, response to a request for proposal or bid, correspondence, or other writing related to a potential agreement with the entity.

- The Vendor also shall file an updated questionnaire no later than September 1 of each year in which a covered transaction is pending, ***and*** the seventh business day after the date of an event that would make a statement in the questionnaire incomplete or inaccurate.

*Note:* A Vendor is not required to file an updated questionnaire if the person had filed an updated statement on or after June 1, but before September 1 of the year.

The Conflict of Interest Questionnaire may be downloaded from the Texas Ethics Commission's website at: http://www.ethics.state.tx.us/forms/CIQ.pdf

Completed forms should be sent to:

Beaumont Independent School District
Attn: Purchasing Department
3395 Harrison Avenue
Beaumont, Texas 77706
Or faxed to: (409) 617-5175

☒ REQUIRED FORM

Company Name: _____

# 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

## CONFLICT OF INTEREST QUESTIONNAIRE

## For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm. For easy reference, below are some of the sections cited on this form.

**Local Government Code § 176.001(1-a):** "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

(A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;

(B) a transaction conducted at a price and subject to terms available to the public; or

(C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

**Local Government Code § 176.003(a)(2)(A) and (B):**

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

***

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment 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 governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than $100 in the 12-month period preceding the date the officer becomes aware that:

(i) a contract between the local governmental entity and vendor has been executed; or

(ii) the local governmental entity is considering entering into a contract with the vendor.

**Local Government Code § 176.006(a) and (a-1)**

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

(1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);

(2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or

(3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

(A) begins discussions or negotiations to enter into a contract with the local governmental entity; or

(B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

(A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);

(B) that the vendor has given one or more gifts described by Subsection (a); or

(C) of a family relationship with a local government officer.

☒ REQUIRED FORM

Company Name: _____

## VENDOR COMPLIANCE TO STATE LAW

The 1985 Session of the Texas Legislature passed House Bill 620 relative to the award of contracts to nonresident bidders. This law provides that, in order to be awarded a contract as low bidder, nonresident bidders (out-of-State contractors whose corporate offices or principal place of business are outside of the State of Texas) bid projects for construction, improvements, supplies or services in Texas at an amount lower than the lowest Texas resident bidder by the same amount that a Texas resident bidder would be required to underbid a nonresident bidder in order to obtain a comparable contract in the State in which the nonresident's principal place of business is located. The appropriate blanks in Section A must be filled out by all out-of-State or nonresident bidders in order for your bid to meet specifications. The failure of out-of-State or nonresident contractors to do so will automatically disqualify that bidder. Resident bidders must check the box in Section B.

☐ A. Nonresident vendors in _____ (give State), our principal place of business, are required to be _____ percent lower than resident bidders by State law. A copy of the Statute is attached.

Nonresident vendors in _____ (give State), our principal place of business, are not required to underbid resident bidders.

☐ B. Our principal place of business or corporate offices are in the State of Texas.

BIDDER:

_____ By: _____
(Please print)

_____ Signature: _____

_____ Title: _____
City State Zip (Please print)

**THIS FORM MUST BE RETURNED WITH YOUR BID**

☒ REQUIRED FORM

**CERTIFICATE OF INTERESTED PARTIES (FORM 1295)**

In 2015, the Texas Legislature adopted House Bill 1295, which added section 2252.908 of the Government Code. The law states that a governmental entity or state agency may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental entity or state agency. The law applies only to a contract of a governmental entity or state agency that either (1) requires an action or vote by the governing body of the entity or agency before the contract may be signed or (2) has a value of at least $1 million. The disclosure requirement applies to a contract entered into on or after January 1, 2016.

The Texas Ethics Commission was required to adopt rules necessary to implement that law, prescribe the disclosure of interested parties form, and post a copy of the form on the commission's website. The commission adopted the Certificate of Interested Parties form (Form 1295) on October 5, 2015. The commission also adopted new rules (Chapter 46) on November 30, 2015, to implement the law. The commission does not have any additional authority to enforce or interpret House Bill 1295.

**Filing Process:**

By January 1, 2016, the commission will make available on its website a new filing application that must be used to file Form 1295. A business entity must use the application to enter the required information on Form 1295 and print a copy of the completed form, which will include a certification of filing that will contain a unique certification number. An authorized agent of the business entity must sign the printed copy of the form and have the form notarized. The completed Form 1295 with the certification of filing must be filed with the governmental body or state agency with which the business entity is entering into the contract.

The governmental entity or state agency must notify the commission, using the commission's filing application, of the receipt of the filed Form 1295 with the certification of filing not later than the 30th day after the date the contract binds all parties to the contract. The commission will post the completed Form 1295 to its website within seven business days after receiving notice from the governmental entity or state agency.

Information regarding how to use the filing application will be available on this site by January 1, 2016.
https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm

The Form 1295 will be completed by the awarded vendor upon notification by the District.

Please sign below agreeing that the authorized representative of your business will perform the requirements above.

_____ _____

Signature of Authorized Representative Date

Contract Identification Number: 20.03

**THIS FORM MUST BE RETURNED WITH YOUR BID**

☒ REQUIRED FORM

| 4. | **NON COLLUSIVE BIDDING CERTIFICATE & ACKNOWLEDGMENT** |
|---|---|
| | By submission of this Bid, the Vendor certifies that: (a) the Bid has been independently arrived at without collusion with any other vendor or with any competitor. (b) The Bid has not been knowingly disclosed and shall not be knowingly disclosed, prior to the opening of Bids for this project, to any other vendor, competitor or potential competitor. (c) No attempt has been or will be made to induce any other person, partnership or corporation to submit or not to submit a Bid. (d) The person signing this Bid 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 Vendor as well as to the person signing in its behalf.<br>• I certify that the above information is true and correct. ☐ **YES** |
| **5.** | ***RESIDENT / NONRESIDENT CERTIFICATION*** |
| | • **RESIDENT VENDOR** - I certify that my company is a "resident vendor." ☐ **YES** |
| | • **NON RESIDENT VENDOR** - As defined by Texas Government Code 2252.001, a "nonresident vendor" means a vendor whose principal place of business is not in Texas, but excludes a contractor whose ultimate parent company or majority owner has its principal place of business in Texas. If you qualify as a "nonresident vendor," you must furnish the following information: **Resident state address?** (The state in which your principal place of business is located.)<br>**Street, City, State, Zip**: |
| **6.** | **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.<br>**Check the appropriate box and sign the form.** |
| | ☐ 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: |
| | Details of Conviction(s) |

I (We) the undersigned, agent for the firm, named below certify that the above information is true and correct to the best of my knowledge.

Name/Title: _____ Company Name: _____

Original Signature: _____ Date _____

**THIS FORM MUST BE RETURNED WITH YOUR BID**

☒ REQUIRED FORM

| 7. | **ADDENDA ACKNOWLEDGEMENT** |
|---|---|
| | • If no amendments were received **then leave this blank or write N/A**.<br>• *If any amendments were received, Respondent acknowledges receipt of Addenda numbered _____ through _____ and has incorporated the provisions thereof into the Bid/Proposal.* |

| 8. | **RENEWAL OF CONTRACT** |
|---|---|
| | This contract will be effective, unless otherwise noted, for one (1) year with renewal options for TWO (2) additional one year periods (as stated in the terms and conditions), at the District's option and with the acceptance of the awarded vendor(s): In the event this Bid expires before another Bid is awarded, the vendor shall extend the contract on a month-to-month basis by mutual agreement. |

| 9. | ***BID VALIDITY AGREEMENT*** | | |
|---|---|---|---|
| | • Bid shall remain valid, pending award, through: | **YES** ☐<br>or | (date): |
| | • Prices & Discounts effective through | **YES** ☐<br>or | (date): |
| | • Prompt payment discount allowed: (% / Days) | **%** | **Days** |

I (We) the undersigned, agent for the firm, named below certify that the above information is true and correct to the best of my knowledge.

Name/Title: _____ Company Name: _____

Original Signature: _____ Date _____

List any and all exceptions on a separate, attached sheet titled "exceptions."

**THIS FORM MUST BE RETURNED WITH YOUR BID**

✉ REQUIRED FORM

# Debarment Statement

CERTIFICATION REGARDING DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS (Executive Order 12549, Debarment and Suspension, 34 CFR Part 85)

Consultant certifies to the best of its knowledge and belief, that it and its principals:

1) ARE NOT presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;

☐ Yes ☐ No

2) HAVE NOT within a three-year period preceding award of this consulting agreement been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or Local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

☐ Yes ☐ No

3) ARE NOT presently indicted for or otherwise criminally charged by a governmental entity (Federal, State or Local) with commission of any of the offenses enumerated in 34 CFR Part 85 Paragraph (2)(b)

☐ Yes ☐ No

4) HAVE NOT within a three-year period preceding award of this consulting agreement had one or more public transactions (Federal, State or Local) terminated for cause or default.

☐ Yes ☐ No

_____ _____

Consultant Signature Date

_____ _____

Typed or Printed Name Contractual Agreement No.

**THIS FORM MUST BE RETURNED WITH YOUR BID**

✉ REQUIRED FORM

## House Bill 89 VERIFICATION

I, _____, the undersigned representative of

_____ Company or Business name

(hereafter referred to as company) **being an adult over the age of eighteen (18) years of age, verify that the company named-above, under the provisions of Subtitle F, Title 10, Government Code Chapter 2270:**

1. **Does not boycott Israel currently; and**
2. **Will not boycott Israel during the term of the contract the above-named Company, business or individual with the Beaumont Independent School District.**

*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.*

## Senate Bill 252 Ch. 2252 Certification

*Pursuant to Texas Government Code, Chapter 2252, Section 2252.152 and Section 2252.153, certify that the company named 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 Beaumont Independent School District's Purchasing Department.*

_____ _____

**DATE** **SIGNATURE OF COMPANY REPRESENTATIVE**

**THIS FORM MUST BE RETURNED WITH YOUR BID**

✉ REQUIRED FORM

# EDGAR CERTIFICATIONS

## FOR CONTRACT FUNDED BY U.S. FEDERAL GRANT

## *(NON-CONSTRUCTION CONTRACTS)*

The EDGAR Certifications ("Certification") is made a part of a contract ("Contract") between the Beaumont Independent School District ("Beaumont ISD" or "District") and the vendor ("Vendor"), where such contract and Vendor are referenced on the last page of these certifications. The following certifications and provisions are required and apply when Beaumont ISD expends federal funds for any contract resulting from this procurement process. **Accordingly, the parties agree that the following terms and conditions are incorporated and made a part of the Contract in all situations where Vendor has been paid or will be paid with federal funds. Where there is a conflict between the terms of these Certifications and the terms of the underlying Contract, the terms of these Certifications shall prevail.**

### I. REQUIRED CONTRACT PROVISIONS FOR NON-FEDERAL ENTITY CONTRACTS UNDER FEDERAL AWARDS APPENDIX II TO 2 CFR PART 200

**(A) Contracts for more than the simplified acquisition threshold currently set at $150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 U.S.C. 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.**

Pursuant to Federal Rule (A) above, when Beaumont ISD expends federal funds, Beaumont ISD reserves all rights and privileges under the applicable laws and regulations with respect to this procurement in the event of breach of contract by either party.

_____ Initials of Authorized Representative of Vendor

**(B) Termination for cause and for convenience by the grantee or subgrantee including the manner by which it will be effected and the basis for settlement. (All contracts in excess of $10,000)**

1. **Termination for Cause:** Pursuant to Federal Rule (B) above, when Beaumont ISD expends federal funds, Beaumont ISD reserves the right to immediately terminate any contract in excess of $10,000 resulting from this procurement process in the event of a breach or default of the agreement by Vendor in the event Vendor fails to: (1) meet schedules, deadlines, and/or delivery dates within the time specified in the procurement solicitation, contract, and/or a purchase order; (2) make any payments owed; or (3) otherwise perform in accordance with the contract and/or the procurement solicitation.

2. **Termination for Non-Appropriation of Funds for Multi-year or Multiple-year Contracts:** Performance by Beaumont ISD under the Contract for years subsequent to the current budget year may be dependent upon the appropriation and allotment of funds by the Texas State Legislature (the "Legislature"), allocation of funds by the Board of Trustees (the "Board"), and/or, if the Contract is funded fully or partially by Federal grant awards, the receipt of the Notice of Grant Award ("NOGA"). If the Legislature fails to appropriate or allot the necessary funds, the Board fails to allocate the necessary funds, and/or there is a change in the NOGA, then the District may terminate this Contract without further duty or obligation under the Contract.

3. **Termination for Convenience:** Beaumont ISD also reserves the right to terminate the contract immediately upon written notice to Vendor for convenience, with or without cause, if Beaumont ISD believes in its sole discretion that it is in the best interest of Beaumont ISD to do so.

If the contract is terminated in accordance with any of the terms referenced in Section (B) above, Beaumont ISD shall compensate Vendor for any work performed and accepted and goods delivered and accepted by Beaumont ISD as of the termination date. Any award under this procurement process is not exclusive and Beaumont ISD reserves the right to purchase goods and/or services from other vendors when it is in Beaumont ISD's best interest.

_____ Initials of Authorized Representative of Vendor

**(C) Rights to Inventions Made Under a Contract or Agreement. If the Federal award meets the definition of "funding agreement" under 37 CFR §401.2 (a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that "funding agreement," the recipient or subrecipient must comply with the requirements of 37 CFR Part 401, "Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements," and any implementing regulations issued by the awarding agency.**

Pursuant to Federal Rule (F) above, when federal funds are expended by Beaumont ISD, Vendor certifies that during the term of an award for all contracts by Beaumont ISD resulting from this procurement process, Vendor agrees to comply with all applicable requirements as referenced in Federal Rule (F) above.

_____Initials of Authorized Representative of Vendor

**(D) Clean Air Act (42 U.S.C. 7401-7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251-1387), as amended— Contracts and subgrants of amounts in excess of $150,000 must contain a provision that requires the non-Federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401-7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA).**

Pursuant to Federal Rule (G) above, when federal funds are expended by Beaumont ISD, Vendor certifies that during the term of an award for all contracts by Beaumont ISD resulting from this procurement process, Vendor agrees to comply with all applicable requirements as referenced in Federal Rule (G) above.

_____ Initials of Authorized Representative of Vendor

**(E) Debarment and Suspension (Executive Orders 12549 and 12689)—A contract award (see 2 CFR 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549.**

Pursuant to Federal Rule (H) above, when federal funds are expended by Beaumont ISD, Vendor certifies that during the term of an award for all contracts by Beaumont ISD resulting from this procurement process, Vendor certifies that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

_____ Initials of Authorized Representative of Vendor

**(F) Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding $100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.**

Pursuant to Federal Rule (I) above, when federal funds are expended by Beaumont ISD, Vendor certifies that during the term and after the awarded term of an award for all contracts by Beaumont ISD resulting from this procurement process, the vendor certifies that it is in compliance with all applicable provisions of the Byrd Anti-Lobbying Amendment (31 U.S.C. 1352). The undersigned further certifies that:

(1) No Federal appropriated funds have been paid or will be paid for on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.

(2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an

officer or employee of congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.

(3) The undersigned shall require that the language of this certification be included in the award documents for all covered sub-awards exceeding $100,000 in Federal funds at all appropriate tiers and that all subrecipients shall certify and disclose accordingly.

_____ Initials of Authorized Representative of Vendor

**(G) Procurement of Recovered Materials —** Vendor agrees to comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act, where applicable. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR Part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds $10,000 or the value of the quantity acquired during the preceding fiscal year exceeded $10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery, and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

_____ Initials of Authorized Representative of Vendor

## II. RECORD RETENTION REQUIREMENTS FOR CONTRACTS INVOLVING FEDERAL FUNDS

When federal funds are expended by Beaumont ISD for any contract resulting from this procurement process, Vendor certifies that it will comply with the record retention requirements detailed in 2 CFR § 200.333. Vendor further certifies that it 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.

_____ Initials of Authorized Representative of Vendor

## III. CERTIFICATION OF COMPLIANCE WITH THE ENERGY POLICY AND CONSERVATION ACT

When Beaumont ISD expends federal funds for any contract resulting from this procurement process, Vendor certifies that it will comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 U.S.C. 6321 et seq.; 49 C.F.R. Part 18).

_____Initials of Authorized Representative of Vendor

## IV. CERTIFICATION OF EQUAL EMPLOYMENT STATEMENT

It is the policy of Beaumont ISD 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 Contract, 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 Contract 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 Contract.

_____Initials of Authorized Representative of Vendor

## V. CERTIFICATION OF COMPLIANCE WITH BUY AMERICA PROVISIONS

Beaumont ISD 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). Vendor certifies that it is in compliance with all applicable provisions of the Buy America Act.

_____Initials of Authorized Representative of Vendor

## VI. CERTIFICATION OF ACCESS TO RECORDS – 2 C.F.R. § 200.336

Vendor agrees that the District's Inspector General or any of their duly authorized representatives shall have access to any books, documents, papers and records of Vendor that are directly pertinent to Vendor's discharge of its obligations under the Contract for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Vendor's personnel for the purpose of interview and discussion relating to such documents.

_____ Initials of Authorized Representative of Vendor

## VII. CERTIFICATION OF APPLICABILITY TO SUBCONTRACTORS

Vendor agrees that all contracts it awards to any subcontractors pursuant to the Contract with Beaumont ISD shall be bound by the foregoing terms and conditions.

_____ Initials of Authorized Representative of Vendor

**BY SIGNING BELOW, THE VENDOR AGREES TO COMPLY WITH ALL APPLICABLE FEDERAL, STATE, AND LOCAL LAWS, RULES, REGULATIONS, AND ORDINANCES. IT IS FURTHER ACKNOWLEDGED THAT VENDOR CERTIFIES COMPLIANCE WITH ALL PROVISIONS, LAWS, ACTS, REGULATIONS, ETC. AS SPECIFICALLY NOTED ABOVE.**

**Vendor's Business Name:**

**Address, City, State, and Zip Code (Principal place of business):** _____

**Printed Name of Authorized Representative:** _____

**Title of Authorized Representative:** _____

**Phone Number:** _____ **Email Address:** _____

**Signature of Authorized Representative:** _____

**Date:** _____

# REFERENCES

**VENDOR REFERENCES**

The Proposer is to submit three (3) references that have contracted with their company to provide like products and/or services. It is recommended that the Proposer show school districts or other local government organizations equal to BISD in size and structure, if possible. To expedite the evaluation process, e-mail is the preferred method of contact. Note: Failure to supply complete reference information may be grounds for proposal disqualification.

| | | | | |
|---|---|---|---|---|
| 1 | ***Company Name*** | | **Contact** | |
| | **Business Address** | | **Phone #** | |
| | **Email Address** | | **Fax #** | |

| | | | | |
|---|---|---|---|---|
| 2 | ***Company Name*** | | **Contact** | |
| | **Business Address** | | **Phone #** | |
| | **Email Address** | | **Fax #** | |

| | | | | |
|---|---|---|---|---|
| 3 | ***Company Name*** | | **Contact** | |
| | **Business Address** | | **Phone #** | |
| | **Email Address** | | **Fax #** | |

**THIS FORM MUST BE RETURNED WITH YOUR BID**

# Form Checklist

| Form | Completed |
|---|---|
| Notice of No Response | |
| Certifications | |
| W-9 | |
| Conflict of Interest | |
| Vendor Compliance to State Law | |
| Certificate of Interested Parties Agreement | |
| Non-Collusive Bidding Agreement | |
| Resident/Non-resident Certification | |
| Felony Conviction Notification | |
| Addenda Acknowledgement | |
| Renewal of Contract | |
| Bid Validity Agreement | |
| Debarment Statement | |
| HB 89 & SB 252 Certifications | |
| Simplified Acquisition Threshold Agreement | |
| Termination Agreement | |
| Rights to Inventions Agreement | |
| Clean Air Act and Federal Water Pollution Control Act | |
| Byrd Anti-Lobbying Amendment | |
| Solid Waste Disposal Act | |
| Records Retention | |
| Energy Policy and Conservation Act | |
| Equal Employment Statement | |
| Buy America Act Provision | |
| Certificate of Access to Records | |
| Subcontractors Agreement | |
| References | |