Form **W-9**
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Go to *www.irs.gov/FormW9* for instructions and the latest information.

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

Before you begin. For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See ***Specific Instructions*** on page 3.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☐ LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . .

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions . . . . . ☐

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any)

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any)

(Applies to accounts maintained outside the United States.)

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

Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

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

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

Social security number

			–		–				

or

Employer identification number

		–							

Part II Certification

Under penalties of perjury, I certify that:

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 for Part II, later.

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

General Instructions

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

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

What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

Crosby Independent School District
Purchasing Department
14670 FM 2100 Rd., PO Box 2009, Crosby, TX 77532
Ph. (281) 328-9200 x 1213 ~ Fax (281) 328-9226
School Website: www.crosbyisd.org

Vendor Profile Form

The Crosby Independent School District extends its appreciation to all vendors and potential vendors with whom it conducts business and opens all opportunities to qualified vendors to compete on purchases. In order to include you in any future opportunity to compete, the following information must be submitted for your company to be included in the bid process. Please print or type the following information.

Vendor Name: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Remittance Address: _____

City: _____ State: _____ Zip: _____

Phone: _____ Fax: _____

Contact Name: _____ Email Address (for PO's): _____

Website URL: _____

Will your company accept a Crosby ISD Purchase Order? ( ) Yes ( ) No

Is your company debarred or suspended or otherwise excluded from or ineligible for participation in federal grant award programs? _____ YES _____ NO

If NO and a contract is awarded, the vendor must notify the district immediately in the event the vendor becomes debarred or suspended or otherwise excluded from or ineligible for participation in federal grant award programs during the contract period.

List any current contracts for the Texas Cooperative Purchasing Memberships that may apply:

____Region 5 ____Choice Partners ____DIR ____TIPS ____E & I ____U.S. Communities
____BuyBoard ____TCPN/NIPA ____NJPA ____PACE ____TexBuy ____TxSmartBuy _____ NCPA

Is your business considered sole source? ( ) Yes ( ) No
If yes, please contact our purchasing department for further requirements.
Is your business a ( ) corporation ( ) partnership ( ) sole proprietorship ( ) other?

_____ _____
Submitted by (Please Print) Date

_____
Signature

Please fax your completed form to (281) 328-9226 or email it to nmendez@crosbyisd.org

Revised 01/07/2026

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.

Pre-Employment and Pre-Service Affidavits

Senate Bill 571

Questions and Answers

To keep students safe, Texas law (Texas Education Code (TEC) § 22A.055) requires a pre-employment or pre-service affidavit for anyone seeking employment or a position as a service provider for an educational entity. This includes teachers, administrators, all other school employees, and all service providers employed by the educational entity.

Q: What are applicants providing when they complete a pre-employment or pre-service affidavit?

A: Anyone applying for employment in a public school or as a service provider must agree to release their employment records and submit the signed affidavit approved by the Texas Education Agency (TEA) that inquires if the applicant has:

- Previously been employed by or acted as a service provider or are currently employed by or acting as a service provider for a public or private school
- Been terminated, nonrenewed, discharged or have resigned in lieu of termination or discharge from a school
- Been investigated by a law enforcement or child protective services agency for, or charged with, adjudicated for, or convicted of, an offense involving the conduct listed in TEC § 22A.051(a)(2)(A)(B)(C)(D)
- Been investigated by a licensing agency or had a license, certificate, or permit denied, suspended, revoked, or subject to another sanction in Texas or any other state for the conduct listed in TEC § 22A.051(a)(2)(A)(B)(C)(D)
- Are currently the subject of an inquiry, disciplinary action, review, or investigation by any public or private school, by a teacher-licensing agency, by any law enforcement agency, or in the court of Texas or any other state in connection with any alleged misconduct
- Been listed in the TEA Do Not Hire Registry

Q: What is the definition of a service provider?

A: A service provider is defined by TEC § 22A.001(8) as a person who provides services to an educational entity, including the following:

- A contractor or subcontractor for an educational entity
- A provider of tutoring services for an educational entity

- An entity that has entered into a contract to operate a school district campus under TEC § 11.174
- A staffing provider for an educational entity
- A person employed by or under the control of a person listed above

Q: Is a service provider only those individuals who are in contact with students?

A: No. For purposes of the required pre-service affidavit, there is no provision to exclude individuals who do not have contact with students. Any individual who falls under the definition above will need to complete the affidavit. This may include, but is not limited to, individuals providing contracted services (e.g., custodial, food service, transportation, special education related services) or those that provide a service to the district. Anyone who is a contractor, subcontractor, vendor, provider of services, staffing provider, or anyone employed by these entities is required to complete a pre-employment or pre-service affidavit prior to working in the district.

Q: Is the educational entity responsible for obtaining the completed affidavit for individuals who work for a contracted service provider, or is it the responsibility of the service provider to provide the documentation to the educational entity?

A: While not in statute, it is implied that the educational entity is responsible for ensuring that any individual who falls under the definition of a service provider has completed a pre-employment or pre-service affidavit prior to working in the district. There are penalties for applicants or service providers failing to disclose information on the affidavit, as well as for an employing administrator who employs a person or accepts services from a service provider if the administrator was aware the person knowingly failed to disclose information on the affidavit.

Q: Do volunteers or visitors need to complete an affidavit?

A: The affidavit is designed for individuals seeking employment or a position as a service provider with an educational entity. Processes and procedures for screening volunteers and visitors are separate from this requirement. However, it is best to consult with local counsel to ensure the district is following proper procedures for screening volunteers and visitors who may be considered a service provider.

Crosby Independent School District
SB571: PRE-EMPLOYMENT OR PRE-SERVICE AFFIDAVIT

PRE-EMPLOYMENT OR PRE-SERVICE AFFIDAVIT FOR EDUCATIONAL ENTITIES

Pursuant to Texas Education Code (TEC) §22A.055, a person applying for employment with or who will act as a service provider for an educational entity (school district, district of innovation, open-enrollment charter school, other charter entity, regional education service center, or shared services arrangement) ***must*** *submit, using a form adopted by the agency, a pre-employment or pre-service affidavit.*

Section 1 - Penalties for Failure to Disclose Required Information

A person commits an offense, a Class B misdemeanor, if the person fails to disclose information required to be disclosed under TEC §22A.055. Additionally, a determination that an employee or person providing services failed to disclose information required to be disclosed by a person under TEC §22A.055 is grounds for termination of employment or service.

Section 2 – Disclosure of Work History and Consent for Release of Records

Have you previously been employed by or acted as a service provider, or are you currently employed by or currently acting as a service provider for a public or private school?	Yes ☐ No ☐
Do you consent for release of your prior employment records? *Pursuant to TEC §22A.055, a person applying for employment with or who will act as a service provider for an educational entity must consent for release of the person's employment records.*	Yes ☐ No ☐

Section 3 – Disclosure of Investigation or Placement on the Do Not Hire Registry

Have you ever been terminated, non-renewed, or discharged from a public or private school?	Yes ☐ No ☐
Have you ever resigned, in lieu of being terminated or discharged, from a public or private school?	Yes ☐ No ☐

Have you ever been investigated by a law enforcement or child protective services agency for, or charged with, adjudicated for, or convicted of, an offense involving the following conduct described by TEC §22A.051(a)(2)(A), (B), (C), or (D) ?: • abused or otherwise committed an unlawful act with a student or minor, including by engaging in conduct that involves physical mistreatment or constitutes a threat of violence to a student or minor and that is not justified under Chapter 9, Penal Code, regardless of whether the conduct resulted in bodily injury; • was involved in or solicited a romantic relationship with or solicited or engaged in sexual contact with a student or minor; • engaged in inappropriate communications with a student or minor, as defined by board rule; • failed to maintain appropriate boundaries with a student or minor, as defined by board rule; *Adjudication and conviction refer to a conviction, plea of guilty or no contest (nolo contendre), probation, suspension, or deferred adjudication.* *Charge refers to a formal criminal charge as documented by a primary charging instrument (a complaint, information, or indictment) under the Texas Code of Criminal Procedure.*	Yes ☐ No ☐
Have you ever been investigated by a licensing authority or had a license, certificate, or permit denied, suspended, revoked, or subject to another sanction in this state or another state for conduct described by TEC §22A.051(a)(2)(A), (B), (C), or (D), which is described above?	Yes ☐ No ☐
Are you now the subject of an inquiry, disciplinary action, review, or investigation, by any public or private school, by a teacher-licensing agency, by any law enforcement agency, or in the court of Texas or any other state in connection with any alleged misconduct?	Yes ☐ No ☐
Have you ever been listed on the Do Not Hire Registry under TEC §22A.151 by the Texas Education Agency.	Yes ☐ No ☐
If you answered YES to any question in this section, disclose all relevant facts known to you pertaining to the matter, including, if applicable to the action, whether the allegation was determined to be true or false.	

Section 3 – Declaration of Applicant

Name (First, Middle, Last) _____ Date of Birth _____

Address (House/Unit # and Street Name) _____

Address (City, State, Zip Code) _____ County _____

Signature _____ Date Signed _____

Crosby Independent School District Board Policies and state law require prohibition of certain activities as outlined below.

Prohibition of Diversity, Equity, and Inclusion Duties

Board Policies DF, DH, DFBB, CJ

Except as required by state or federal law, District employees and contractors are prohibited from engaging in diversity, equity, and inclusion ("DEI") duties, including assigning diversity, equity, and inclusion duties to any person. DEI duties are defined by Board Policy BT (Legal) and state law. Tex. Educ. Code § 11.005. Any employee who intentionally or knowingly engages in or assigns DEI duties to another person will be subject to appropriate discipline, including termination of employment.

A contract is subject to termination if the District contractor intentionally or knowingly engages in or assigns to another individual any DEI duties. A contractor shall be permitted to appeal this action in accordance with GF (Local).

Prohibited Classroom Instruction or Activities

Board Policies DF, DH, DFBB, CJ

District employees and contractors are prohibited from engaging in an act prohibited by Texas Education Code Section 28.0022 (Certain Instructional Requirements and Prohibitions). Any district employee who intentionally or knowingly engages in or assigns to another individual instruction, guidance, activities, or programming prohibited by law, including those defined in Board Policy EMB (Legal) and Texas Education Code Section 28.0022, is subject to disciplinary action, including termination of employment.

A District contractor is prohibited from intentionally or knowingly engaging in or assigning to another individual instruction, guidance, activities, or programming prohibited by law, including those defined in Board Policy EMB (Legal) and Texas Education Code Section 28.0022, and violations of this prohibition shall result in termination of the contract. A contractor shall be permitted to appeal this action in accordance with GF (Local).