CASTLEBERRY INDEPENDENT SCHOOL DISTRICT

REQUEST FOR PROPOSALS

FINANCIAL CONSULTING SERVICES MULTIPLE-AWARD RFP

RFP #CISD-2026-001 Financial Consulting Services Multiple-Award

NOVEMBER 23, 2026

Solicitation milestone	Information
RFP issuance / advertisement	November 23, 2026
Deadline for advertisement questions	November 30, 2026 5:00 PM
Addenda / answers issued	December 2, 2026 5:00 PM
Initial Proposal submission deadline	December 7, 2026 8:00 AM
Anticipated Board consideration, if necessary	December 14, 2026
Anticipated initial contract commencement	December 15, 2026

RFP Term – Open until closed by CISD

This solicitation will remain open until closed at the discretion of CISD for submissions after the initial submission deadline. The submission deadline is for the District's first evaluation cycle only; it is not the closing date for the solicitation. After the initial submission deadline, offerors may submit responses on a continuing basis. The District will review later submissions on an as-needed schedule. The solicitation will remain open until the District closes, withdraws, or supersedes it by written notice posted or distributed through the same channels used to announce the solicitation, including postings on the District's website. The District may revise the solicitation, change its review schedule, or close it by written notice. Offerors are responsible for checking for amendments and updated instructions. The solicitation's open period is separate from the term of any provider agreement, contract, or work order. Admission to a pool does not guarantee work, and keeping the solicitation open does not extend an existing agreement or authorize services. Each assignment must be separately approved and documented in accordance with the requirements of this RFP.

Castleberry Independent School District | Financial Services / Purchasing
5228 Ohio Garden Road • Fort Worth, Texas 76114 • (817) 252-2005
Bids and Proposals: www.castleberryisd.net/departments/financial-services/purchasing/bids-and-proposals

1. Invitation and Purpose

Castleberry Independent School District requests proposals from qualified firms or individuals for NON-EXCLUSIVE, MULTIPLE-AWARD FINANCIAL CONSULTING SERVICES on an as-needed, written-task-authorized basis. The District seeks independent, objective, data-supported analysis in school finance forecasting, budget development, financial operations, internal processes, and long-term fiscal sustainability. Respondents may offer one or more of the specialties in Section 5.

The District anticipates establishing a pool of qualified firms but reserves the right to make one award, several awards, or no awards if the documented best-value assessment so warrants. This is not an automatic vendor-registration list: each award must be justified under the published evaluation criteria. Firms receiving an award do not receive an exclusive territory, guaranteed allocation, or right of first refusal.

This solicitation is limited to financial management and school finance consulting. It does not seek a municipal financial advisor for bond issuances or refinancing, nor does it seek an auditor, underwriter, bond counsel, fiscal agent, or investment manager. Services will begin only after a properly executed Master Agreement and written task authorization. No minimum amount of business is guaranteed.

2. District Background

Castleberry ISD is a Texas public school district in western Tarrant County. The District maintains instructional campuses and a range of districtwide academic, personnel, facilities, and operational programs. Consulting assignments should help leadership align available financial resources with District priorities while maintaining accurate financial reporting and appropriate safeguards over public funds.

Respondents shall not assume particular enrollment, fund-balance, funding-allotment, compensation, tax-base, cash-balance, or expenditure amounts without verified District data. Relevant information will be provided for authorized assignments, subject to confidentiality and disclosure requirements.

3. Procurement Authority and Selection Method

CISD proposes to use the Request for Proposals method for non-construction services under Texas Education Code §44.031(a)(3), with best-value considerations under §44.031(b). This approach is consistent with the Texas Education Agency Financial Accountability System Resource Guide (FASRG), Module 5, §5.16, addressing multiple-award contracts. This is NOT a competitive sealed proposals procurement under §44.031(a)(2); the §44.0352 mandatory public-price-reading, 45-day ranking, and sequential negotiation procedures are not adopted as requirements for this RFP.

The District will publish the statutory notice in the county for two weeks before the initial submission deadline under §44.031(g), use the stated proposal receipt and opening procedures, and maintain an impartial and documented procurement record. However, this solicitation will remain open at the discretion of CISD for submissions after the initial submission deadline After this deadline, offerors may submit responses on a continuing basis. The District will review later submissions on an as-needed schedule. The solicitation will remain open until the District closes, withdraws, or supersedes it by written notice posted or distributed through the same channels used to announce the solicitation, including postings on the District's website. The District may revise the solicitation, change its review schedule, or close it by written notice. Offerors are responsible for checking for amendments and updated instructions. The solicitation's open period is separate from the term of any provider agreement, contract, or work order. In addition to state law, all purchases and contracts are subject to adopted District Board policy, delegation of authority, and any applicable federal grant conditions.

Prior to issuance, the superintendent or designee should place in the procurement file a written multiple-award justification explaining why varying project needs, specialties, schedules, or unpredictable task volume make a pool preferable to one contractor and the rationale for leaving the solicitation open until closed, withdrawn or superseded. This justification is required by District procedure for this RFP and follows FASRG §5.16.1 guidance. The District is not invoking the optional financial consultant qualifications-only selection method under TEC §44.031(f) / Government Code §2254.003 for this solicitation.

If any part of the engagement uses federal funds, the District will also follow applicable federal procurement and grant requirements, including 2 CFR Part 200 where relevant. A contract cannot override applicable Board approval requirements.

4. Multiple-Award Structure, Contract Term, and Task Authorization

4.1 Non-exclusive Master Contracts

The anticipated initial contract term is **December 15, 2026 through December 15, 2027** with up to five optional one-year renewals subject to satisfactory performance, funding, written mutual agreement, and applicable Board approval. The District may award separate, non-exclusive master agreements to multiple firms selected under Section 11. No minimum hours, projects, expenditures, or fees are promised, and the District need not issue equal volumes of work to awarded firms. An award alone does not authorize services or payment.

Awards may be limited to one or more specialty categories listed in Section 5. A firm must not perform work outside its approved categories without a lawful contract modification or separately authorized procurement. The District may determine that one vendor offers best value for a category or that multiple vendors are needed within that category.

4.2 Project-specific Work Authorizations

Every assignment requires a written task order, statement of work, Master Agreement or other approved work authorization before services begin. It must specify the category, purpose, selected vendor, selection rationale, scope, milestones, named staff, deliverables, records access, start/end dates, fee basis, maximum payment, invoice requirements, and acceptance criteria. A purchase order alone is insufficient when scope, fee cap, and deliverables are not established by another executed document. See Attachment G.

No provider may treat a written task order, statement of work, Master Agreement or other approved work authorization as an automatic assignment or proceed based solely on an informal conversation or request. Any amendments to authorized Master Agreements remain subject to District approval limits and lawful available funds.

5. Scope of Services — Financial Consulting Only

The following categories identify A, or all categories and must indicate the areas for which they seek award in Attachment A. CISD will review each specialty separately. Respondents should distinguish direct expertise from optional or subcontracted work.

Consulting specialty	Scope reference
A — Texas School Finance / Revenue	Section 5.1
B — Budget Forecasting / Financial Planning	Section 5.2
C — Staffing / Operational Efficiency	Section 5.3
D — Internal Controls / Financial Processes	Section 5.4
E — Financial Reporting / Knowledge Transfer	Section 5.5

5.1 Texas School Finance and Revenue Analysis

- Review Texas Foundation School Program funding assumptions, allotments, attendance/enrollment projections, student program counts, and relevant state and local operating revenue components.
- Evaluate revenue estimates, reconciliation practices, State aid payment schedules, and budget forecasting assumptions based on authorized District records.
- Model the financial impact of changes in enrollment, attendance, legislative provisions, funding weights, and operational assumptions.
- Identify supported opportunities to improve revenue accuracy and financial planning without guaranteeing additional funding or duplicating retained tax-recovery services.

5.2 Budget Development, Forecasting, and Cash Flow

- Develop three- to five-year operating forecasts for the General Fund and other operating funds specifically designated by the District.
- Prepare baseline, optimistic, and conservative financial scenarios, with fund balance, recurring versus one-time costs, compensation growth, and cash flow assumptions.
- Analyze budget-to-actual trends, operating expenditure drivers, and financial effects of program or organizational proposals.
- Deliver editable Excel-based financial models with transparent formulas, source references, assumption logs, and instructions for District staff.

5.3 Staffing, Expenditure, and Efficiency Studies

- Review staffing allocations, FTE projections, class-size-related cost assumptions, compensation/benefits trends, vacancies, and campus or departmental cost drivers as authorized.
- Benchmark relevant financial and operational measures against appropriately selected peer Texas school districts, clearly describing differences in enrollment and service models.
- Evaluate cost effectiveness of selected programs, administrative processes, software subscriptions, or service contracts using documented and reasonable methodologies.
- Identify alternatives and estimate possible annual savings, avoided costs, implementation costs, staffing implications, and service-level risks; label estimates separately from verified results.

5.4 Financial Processes, Internal Controls, and Operational Risk

- Conduct advisory reviews of budget, accounting, payroll, purchasing and accounts payable workflows, segregation of duties, payroll and benefit controls, grant oversight and management processes, purchasing and purchasing-card practices, and vendor-master maintenance when requested.
- Evaluate ACH vendor banking-change verification, fraud-prevention procedures, reconciliations, and approval documentation, without requesting authority to make banking changes.
- Recommend process improvements, documentation standards, risk controls, exception reporting, and staff training.
- Review the financial management implications of relevant grant and restricted-fund activities when authorized.

5.5 Financial Reporting, Compliance Support, and Knowledge Transfer

- Develop finance scorecards, multi-year planning tools, or dashboards for the Superintendent, CFO, and Board of Trustees.
- Provide assistance and support for financial reporting readiness, budget development, financial planning, and the District's management response to advisory recommendations.
- Explain material state school finance developments and potential implications for District operating budgets and overall operations.
- Prepare written recommendations and train designated District employees on how to improve district processes and procedures and to implement new practices.

6. Exclusions, Independence, and Restrictions

The following are outside this RFP unless the District separately procures and authorizes them under the appropriate laws: municipal financial advisor services for issuance, pricing, sale, restructuring, or refunding of bonds; securities underwriting or placement; bond counsel and legal opinions; discretionary investment management or securities recommendations requiring additional licensing; independent financial statement audits or attest services; tax appraisal litigation or tax recovery claims already within another firm's contract; and governmental lobbying.

The consultant may not approve District payroll, vendor payments, banking or ACH changes, purchase orders, contracts, investments, budget transfers, personnel actions, or reports. It may not hold District funds or exercise management authority. Any potential duplicated service must be disclosed before a task order is issued.

Consulting services are advisory; all final decisions remain with authorized District officials and the Board of Trustees.

7. Required Deliverables and Performance Expectations

Deliverable	Minimum requirement
Work plan	Written scope, milestones, responsible consultants, District data needs, review process, and not-to-exceed budget.
Baseline / kickoff summary	Within 30 calendar days of a substantive task authorization, unless the task order states otherwise.
Financial analysis	Editable model or workbook with formulas, verified source data, assumptions, and sensitivity analyses when appropriate.
Recommendations report	Executive summary; factual findings; alternatives; quantified impacts where feasible; implementation steps; and material risks.
Status reporting	Monthly written status and budget-to-date during active assignments, or a different approved reporting frequency.
Leadership presentation	Concise presentation of findings to District leadership or trustees only when requested by the Superintendent.
Final handoff	Editable files, supporting schedules, model instructions, and transition notes within 15 days of accepted completion.

The District may request correction, at no additional charge, of material nonconformities attributable to the consultant. All analyses must identify assumptions and distinguish fact, estimate, and professional opinion.

8. Minimum Qualifications

- Demonstrated successful experience with Texas school district finance and the Foundation School Program.
- Relevant experience in public-sector operating budgets, forecasting, resource allocation, cost studies, financial controls, or school finance data analysis.
- Named lead consultant and team members with relevant credentials and resumes; clear subcontractor disclosure.
- Three relevant references, preferably Texas school districts, with project descriptions and contacts.
- Capacity to meet deadlines, use secure data-handling methods, and deliver independently supportable analyses.

The District may verify credentials and references and request examples of anonymized deliverables or model structures. CPA licensure may be identified where relevant but is not a blanket requirement for management consulting services that do not involve regulated attest activities.

9. Proposal Content and Format

Submit one proposal identifying every specialty for which the firm seeks qualification. Include separately identifiable qualifications, project examples, personnel, methodology, and pricing for EACH selected specialty. Firms need not demonstrate expertise or quote prices for categories they do not propose. Provide the following materials in order:

1. Signed cover letter and executive summary describing the services proposed.
2. Firm profile, ownership and structure, Texas office, history, contact information, and specialty selection matrix (Attachment A).
3. Recent comparable Texas school district engagements, measurable outcomes, and three references (Attachment B).

4. Project approach addressing school finance, forecasts, staffing/cost analysis, internal controls, quality assurance, and reporting.
5. Names and resumes of personnel who would actually perform the work, their proposed roles, and availability.
6. Sample deliverable outline.
7. Completed price schedule for each offered specialty, including fixed-fee illustrations where applicable, hourly rates, project assumptions, and expenses (Attachment C).
8. Conflicts, incumbent provider relationships, fees from third parties, security practices, certifications, and contract exceptions (Attachments D–F).

Do not submit personal bank account numbers or sensitive identification records in a publicly opened response. Such details, if needed, will be collected through authorized secure channels after award.

10. Questions, Submission, and Proposal Receipt

Written questions are due November 30, 2026 5:00 PM CT to Kelli Kelsoe at kelsoek@castleberryisd.net. Material responses, changes, and clarifications will be issued only as written addenda available on the district's Bids and Proposals website. No oral interpretation is binding. Respondents shall not lobby trustees or District employees regarding selection outside the designated purchasing contact.

Proposals must be received by **Monday, December 7, 2026 at 8:00 AM CT to Kelli Kelsoe at kelsoek@castleberryisd.net.** Each submission must identify "RFP #CISD-2026-001 Financial Consulting Services/Multiple Award." The District will document timely receipt and open submissions on Monday, December 7th, 2026. The District does not require a public read-aloud of names and prices under the selected §44.031(a)(3) method. The District will retain a proposal log and evaluation record.

Responses are valid for 90 days after opening unless modified by addendum. Respondents bear all proposal preparation costs. The first submission deadline is December 7, 2026. Late proposals will be rejected. However, this solicitation will remain open at the discretion of CISD for submissions after the initial submission deadline After this deadline, offerors may submit responses on a continuing basis. The District will review later submissions on an as-needed schedule (See Paragraph 3 above). The District may issue addenda or cancel the solicitation as permitted by law.

11. Best-Value Evaluation and Multiple Awards

11.1 Category-by-category Evaluation

CISD will score respondents separately for each specialty selected on Attachment A using the rubric below. An otherwise qualified narrow-specialty firm will not be penalized for omitting unrelated services. The committee will document its assessment of applicable Texas Education Code §44.031(b) factors, including price, reputation, quality, needs fit, past District relationship, HUB-law impact, total long-term cost, and applicable Texas place-of-business/employment criteria. Comparable cost illustrations will be assessed only among firms offering similar scope.

Evaluation criterion	Maximum points
Texas school finance experience and relevant past performance	20
Understanding of District needs, methodology, and quality of proposed deliverables	20
Credentials and capacity of proposed consulting team	15
Price transparency and total long-term cost	20
Reputation, references, and quality of service	10
Independence, conflict management, data security, and project controls	10
Other statutory best-value factors, including applicable Texas/HUB factors	5
TOTAL	100

Mandatory legal requirements and responsiveness will be reviewed before scoring. The committee will document category-specific scores and ranking; the District may shortlist or conduct interviews based on the published criteria. The District will recommend only the number of firms supported by demonstrated needs, complementarity of expertise, availability, price, and best-value findings. Awards may include multiple firms in the same category, one firm in several categories, a single provider, or no award. The committee shall not automatically award a contract to every respondent.

11.2 Vendor Selection for Individual Assignments

The Superintendent or authorized designee will document each project requirement and confirm which awarded vendors are qualified for the relevant category. The District will compare responses using documented project-specific criteria such as relevant specialization, responsiveness, staffing availability, quality, and total price; best value need not mean lowest fee.

For smaller assignments, or where competition is impracticable because of objectively documented unique expertise, continuity, urgency, conflicts, or capacity, the authorized District official may select from the qualified pool using a written best-value selection memo. Any direct selection exception must not be used to evade competition or improperly divide procurements. The District may seek additional pricing at any value. Federal-funded work may require further competition and documentation under 2 CFR Part 200.

Before work starts, the responsible official shall check District approvals and aggregate spend limits, document vendor selection, confirm no duplicated contracts or conflicts, approve a not-to-exceed work authorization/Master Agreement and issue an authorized purchase order.

11.3 Pool Oversight, Renewals, and Changes

The CFO or designee will review expenditures, performance, scope coverage, and the continued need for multiple awards at least annually and before each renewal. The District may suspend task assignments to an underperforming provider consistent with its contract, or re-solicit where material new needs fall outside the approved award under the open RFP. Board approvals and authorized delegations control each award and assignment, when applicable.

12. Fees, Invoices, and Fiscal Controls

Proposers shall provide prices for EACH specialty sought, including role-specific hourly rates, fixed-fee sample assignments where available, an annual retainer only if offered, travel expense rules, all software or third-party costs, and a written not-to-exceed cap for each proposed project. The District prefers fixed or capped project fees. Any renewal-rate adjustments must be explicitly stated.

No fee is due for unauthorized work. No percentage-of-recovered-funds fee, contingency fee, commission, referral compensation, or success fee will be paid under this RFP. The consultant shall not direct District funds, change vendor banking information, procure unrelated services, or approve its own invoices. Travel and/or reimbursable costs must be included in the cost proposal to be paid. Changes in scope or fees must be pre-approved in advance.

Invoices must include the applicable task order, personnel, dates, hours and approved rates or milestone details, description of work, prior billings, current amount due, and remaining authorization. Payment requires acceptance of deliverables and compliance with applicable Texas prompt-payment requirements.

13. Contract Terms and Safeguards

13.1 Governance and Conflicts of Interest

The consultant is an independent contractor accountable to the Superintendent or designee. The District retains all statutory financial, administrative, purchasing, and policy authority. Firms must promptly disclose conflicts involving trustees, employees, financial institutions, existing professional service providers, subcontractors, or recommended vendors, and must not receive undisclosed third-party compensation.

13.2 Confidentiality, Cybersecurity, and AI

The firm shall use District information solely for authorized services, restrict access on a need-to-know basis, protect student/personnel/banking/financial records, report suspected incidents as required in the contract, and return or securely dispose of data upon completion subject to retention requirements. Confidential District records may not be uploaded to unapproved public AI systems or used for AI model training without advance written District consent and appropriate safeguards.

13.3 Ownership and Records

The District shall receive editable copies of work products created specifically for CISD, including models, datasets, reports, and documentation. Rights in a consultant's pre-existing tools shall be identified in the proposal, with sufficient licenses for District use of delivered analyses. Records and proposals remain subject to the Texas Public Information Act and lawful records-retention obligations.

13.4 Insurance and Legal Terms

The selected firm may be required to furnish evidence of professional liability/errors-and-omissions coverage and any other insurance reasonably required by the District for the awarded work. No waiver of governmental immunity is intended.

13.5 Termination and Appropriations

The executed contract shall permit termination for cause and termination for convenience on [30] days' written notice or another negotiated period. The District's obligations for continuing periods are conditioned on lawful available appropriations. Compensation on termination is limited to authorized, satisfactory work performed and approved expenses, subject to the contract.

13.6 Applicable Disclosures and Certifications

The successful proposer must complete all applicable conflict and statutory requirements, including Local Government Code Chapter 176, Texas Government Code §2252.908 (Form 1295) if applicable, relevant requirements of Government Code Chapters 2271 and 2274 when applicable, Texas Education Code §44.034 felony-history notice when applicable, and required District vendor forms. The District will determine required certifications based on current law and contract characteristics.

14. Reservation of Rights

To the extent permitted by law, the District may reject any or all proposals, award one or more firms by category, request clarifications, verify submitted information, seek presentations, cancel or reissue the solicitation, or make no award. Selection for the pool confers no guarantee of tasks, payment, or a future renewal. Neither issuance nor response creates a contract. **A signed master agreement, approved written work authorization and Purchase Order are required before services may begin.**

Attachment A — Respondent Information

Field	Respondent response
Legal name of firm / entity	_____
DBA (if applicable)	_____
Business mailing address	_____
Main phone / website	_____
Proposal contact and email	_____
Entity type and year organized	_____
Texas principal place of business	_____
Number of employees located in Texas	_____
Authorized signatory and title	_____
Subcontractors (if any)	_____

Financial Consulting Specialty Selection

Check each category for which the respondent seeks award. The respondent must provide category-specific evidence of qualifications and prices for selected categories.

Category	Apply? (Yes/No)	Direct or subcontracted?
A — School Finance / Revenue	_____	_____
B — Forecasting / Budgeting	_____	_____
C — Staffing / Efficiency	_____	_____
D — Internal Controls / Processes	_____	_____
E — Financial Reporting / Training	_____	_____

Attach a firm organization chart, identification of any subcontractors, and resumes for all key personnel. Supply confidential tax or banking data only through a secure District-provided method if requested after award.

Attachment B — School District Experience and References

Provide three references for recent Texas public education or closely comparable governmental financial consulting services. Identify project scope, dates, deliverables, measurable outcomes (with basis), principal consultant, contact person, telephone, and email. Do not include confidential client information without permission.

Reference	Client / contact / scope / dates
1	_____ _____
2	_____ _____
3	_____ _____

Attachment C — Financial Consulting Cost Proposal

Complete pricing for EACH category selected in Attachment A; mark other categories N/A. Include the named personnel/classification, hourly rates, sample fixed-fee task prices, assumptions, included hours, rate escalation, reimbursable expenses, and individual task not-to-exceed limits. Prices are ceilings unless reduced in an approved task order. No success, referral, or undisclosed third-party fees are permitted.

Service / pricing element	Fee / rate / cap
Annual consulting retainer, if proposed	Fee $_____/ yr | included hours _____

Service / pricing element	Fee / rate / cap
School finance revenue analysis	Fixed fee $_____ | scope assumptions _____
3–5-year operating budget / scenario model	Fixed fee $_____ | scope assumptions _____
Staffing and operational cost study	Fixed fee $_____ | scope assumptions _____
Financial process / internal controls review	Fixed fee $_____ | scope assumptions _____
Financial dashboard / reporting package	Fixed fee $_____ | scope assumptions _____
Lead consultant hourly rate	$_____/ hour
Senior analyst / analyst hourly rates	$_____/ $_____per hour
Travel and expenses	Included / preapproved cap: $_____
Software, subcontractor, and other fees	NONE or details: _____
Annual renewal adjustment	Fixed $_____/ _____% / NONE
Overall proposed not-to-exceed amount	$_____(state period / basis)

Comparable Price Illustration for Offered Specialties

For evaluation, complete only the representative tasks within the specialties you offer: Category A: annual school finance revenue review; B: annual refresh of a 3-to-5-year operating budget model; C: one staffing/cost-efficiency assessment; D: one documented accounts-payable and vendor-controls study; E: one finance dashboard and staff training package. Include an all-in estimate and unit rates; explain scope assumptions. Firms are compared within offered categories rather than scored as missing an unrelated service. The District guarantees no project volume.

Category / sample task	All-in fee (or N/A)
A — Annual school finance review	$_____
B — Operating forecast and annual refresh	$_____
C — One staffing/cost efficiency study	$_____
D — AP/vendor controls review	$_____
E — Dashboard and staff training package	$_____
Optional hourly support (40 hrs)	$_____
Assumptions / exclusions	_____

Attachment D — Independence and Compliance Questions

Answer YES or NO for each question, and provide a separate written explanation for every YES.

Disclosure question	Yes / No
Financial, family, employment, ownership, or consulting relationship with a current CISD trustee or employee?	_____
Currently performing paid financial, tax, audit, or consulting services for CISD, its contractors, or relevant related parties?	_____
Any potential duplication of services under another existing CISD contract?	_____
Any referral fee, commission, compensation, or incentive from a vendor the firm might recommend?	_____
Material litigation, license restriction, or regulatory findings during the preceding five years?	_____
Any subcontractor expected to access District confidential records?	_____

Conflicts and disclosures will be evaluated under applicable law and District policy. Identifying a conflict does not establish that it can be waived.

Attachment E — Technical Response Checklist

- ☐ Executive summary and signed cover letter
- ☐ Respondent Information and experience/references (A and B)
- ☐ Selected consulting categories and category-specific approach
- ☐ Named consultant team and relevant experience
- ☐ Sample financial forecast/reporting deliverable
- ☐ Category-specific cost schedule and price illustrations (C)
- ☐ Independence/Conflict responses and contract exceptions (D)
- ☐ Data security and information handling procedures
- ☐ Acknowledgment of all written addenda
- ☐ Authorized Proposal Certification (F)
- ☐ Acknowledgment of non-exclusive awards, mini-competition process, and work order requirement

Attachment F — Certification and Signature

By signing below, the authorized representative certifies that the response is accurate to the best of the representative's knowledge, prices are offered without unlawful collusion, all material conflicts and third-party compensation arrangements have been disclosed, applicable legal and District requirements will be followed, and no work will begin without an executed agreement and written District authorization.

Certification field	Authorized response
Respondent legal name	_____
Authorized name and title	_____
Signature	_____
Date	_____
Email / phone	_____
Addenda acknowledged	_____

Attachment G — Project-specific Work Authorization (Sample)

This form illustrates the minimum documentation required before an awarded consultant performs a project. The final agreement or purchase order may use an equivalent template with the same controls.

Required field	District / awarded firm to complete
RFP / master contract / task ID	_____
Awarded vendor and approved specialty	_____
Assignment description, out-of-scope items	_____
Project selection method and justification	Mini-competition / documented direct selection
Competing quotes or selection memo reference	_____
Project lead and named consultant(s)	_____
Deliverables, milestones, and acceptance	_____
Start date / completion date	_____
Pricing basis and all-in not-to-exceed fee	$_____
Travel / external costs included or approved	_____
Funding source and PO number (if required)	_____
Duplication / conflict review completed	Yes / No; notes: _____
CFO / Purchasing approval and date	_____
Other required approval / Board action	_____
Vendor acceptance / date	_____

No work or expenditure is authorized until all applicable signature, purchasing, funding, and Board requirements are satisfied. Amendments require the same approvals as the original task authorization, as applicable.

Authorities

Texas Education Code §44.031(a)(3), (b), (f), (g): https://tcss.legis.texas.gov/resources/ED/htm/ED.44.htm

TEA FASRG, Update 20, Module 5, §5.16 (multiple award guidance): https://tea.texas.gov/data-reports/financial-accountability/fasrg/fasrg20-module5.pdf

Texas Government Code §2254.003 (alternative financial consultant selection method): https://tcss.legis.texas.gov/resources/GV/htm/GV.2254.htm

CISD Financial Services: https://www.castleberryisd.net/departments/financial-services