

TEXAS



Request for Proposal

#25-MAS-0426

**FULLY INSURED AND LEVEL FUNDED MEDICAL AND
RX COVERAGE SERVICES**

Purchasing Department

2115 West Pike Blvd

Weslaco, TX 78596

solicitations@ideapublicschools.org

IDEA
Public Schools

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Assistant Director of Procurement: Mia Harris Email: solicitations@ideapublicschools.org

Purpose of Request for Proposal (RFP): IDEA Public Schools (“IDEA”) is accepting proposals from qualified and experienced firms to provide **Fully Insured or Level Funded Medical and RX Coverage services, for eligible IDEA employees and their enrolled dependents**

The purpose of this Request for Proposal (“RFP”) is to identify a reliable, experienced, and scalable vendor capable of administering comprehensive medical, pharmacy, wellness, and behavioral health benefit programs in compliance with applicable federal and state regulations, while supporting IDEA’s operational needs, compliance obligations, and employee benefit objectives.

IDEA Public Schools reserves the right to revise, clarify, or amend the specifications of this RFP at any time prior to the proposal submission deadline. Respondents are encouraged to review the solicitation carefully and submit written requests for clarification regarding any ambiguity, conflict, discrepancy, omission, or error identified within the RFP.

Any revisions or amendments will be issued in the form of a written addendum and distributed to all parties known to have received the RFP. It is the responsibility of each Respondent, prior to submitting a Proposal, to verify whether any addenda have been issued and to acknowledge receipt of all addenda as part of the Proposal submission.

To request copies of the claims reports, disruption reports, and census files, please reach out to Niki Ross at niki.ross@marshmma.com or Taylor Compton at taylor.compton@marshmma.com.

Timeline:

All dates and times are tentative and subject to change.

First Advertisement Date/Issue Date:	Sunday, February 8, 2026
Second Advertisement Date:	Sunday, February 15, 2026
Virtual Pre-Proposal Meeting:	Wednesday, February 18, 2026 @ 10:00 AM CST
Respondent Question Cut-Off Date:	Wednesday, February 25, 2026, no later than 12:00 PM CST
Questions Response from IDEA:	Wednesday, March 4, 2026
Proposals Due by Date & Time:	Wednesday, March 18, 2026, no later than 2:00 PM CST
Anticipated Evaluation Period:	Monday, March 23, 2026 – Wednesday, April 15, 2026
Anticipated Board Meeting & Approval:	April 2026
Initial Proposed Contract Term:	July 1, 2026-June 30, 2027
Renewal option #1:	July 1, 2027-June 30, 2028 (rate cap requested)
Renewal option #2:	July 1, 2028-June 30, 2029
Renewal option #3:	July 1, 2029-June 30, 2030

Pre-Proposal Conference

A virtual pre-proposal meeting will be held at **10:00 AM CST** via TEAMS video conference on **Wednesday, February 18, 2026**. Attendance is strongly encouraged. Questions regarding this RFP must be submitted in writing to solicitations@ideapublicschools.org no later than 12:00 PM CST on Wednesday, February 25, 2026. **The subject line must read “Questions-RFP #25-MAS-0426 FULLY INSURED OR LEVEL FUNDED MEDICAL AND RX COVERAGE SERVICES”.** Respondents are responsible for reviewing questions and answers prior to submitting a proposal. Oral communications regarding this RFP shall not be binding and shall in no way excuse a Respondent from the obligations set forth in this proposal. While the pre-proposal meeting is non-mandatory, it is highly encouraged that all potential respondents participate and attend.
Join TEAMS Meeting: [Microsoft Teams Meeting](#)

Meeting ID: 299 729 962 498 41

Passcode: GE3vb6wU

Proposal Submission: Proposals may be submitted using the [Public Purchase](#) or [Self-Service](#) website, or by sending one (1) clearly identified hard copy ORIGINAL of the Proposal to:

IDEA Public Schools
RFP #25-MAS-0426 FULLY INSURED AND LEVEL FUNDED MEDICAL AND RX COVERAGE SERVICES

Attn: Purchasing Department

2115 West Pike Blvd

Weslaco, TX 78596

Proposals **must** be received by IDEA by the due date and time in the timeline. Each proposal **must** be sealed and clearly labeled with the required information; failure to comply may result in disqualification.

Note: Faxed or emailed Proposals will not be accepted. Acceptance Period is 120 days from the date of the proposal submission deadline unless otherwise stated in writing.

Eligible Respondents: Respondents must not be debarred or suspended by federal or state-funded agencies and must have the legal authority to transact business in Texas. Additionally, respondents must affirmatively demonstrate responsibility and good standing, which may be considered as part of the performance evaluation criteria. Respondents may withdraw their proposals in writing at any time prior to the submission deadline, without penalty or prejudice.

PART I – CURRENT CONDITIONS/BACKGROUND

Introduction: IDEA Public Schools (“IDEA”) is a Texas non-profit corporation and a tax-exempt organization pursuant to Section 501(c)(3) of the Internal Revenue Code. Pursuant to Chapter 12, Subchapter D of the Texas Education Code and its Contract for Charter with the Texas State Board of Education, as renewed by the Commissioner of Education, IDEA is an open-enrollment charter holder, governmental entity, and public school system. IDEA transforms education by preparing graduates to succeed in college and life. IDEA is a growing network of high-performing charter schools serving students located throughout Texas in the Austin, El Paso, Houston, Permian Basin, Rio Grande Valley, San Antonio, and Tarrant County regions.

IDEA serves primarily low-income students in underserved areas of both rural and urban communities. Over 80% of IDEA students are considered low-income, and one in every three students is the first in their family to go to college. Since the first graduating class in 2007, nearly 100% of seniors have been accepted and matriculated to a college or university every year. Thanks to a rigorous path to college, IDEA students attend selective universities throughout the country, win national awards and scholarships, and complete college at a rate six times the national average for low-income students.

Note: While IDEA’s program, curriculum, and mission has been replicated to serve students in other states, this Request for Proposals and any subsequent contract is only for goods and services provided to IDEA’s Texas-based charter school and campuses.

Project Background:

IDEA provides employer-sponsored medical benefits to eligible full-time employees and their enrolled dependents. Historically, medical coverage has included multiple plan options, including Provider Preferred Organization(PPO) and high-deductible health plan (HDHP) designs, with both employer-funded and employee-contributed components.

IDEA seeks to evaluate alternative network plan options, including Exclusive Provider Organization (EPO) and Health Maintenance Organization (HMO) Network options in addition to the PPO and HDHP plan options, with an emphasis on cost efficiency, regulatory compliance, network access, employee experience, and reporting transparency.

Respondents should assume a large, geographically and multi-state distributed employee population and demonstrate experience administering benefit programs for organizations of comparable size and complexity.

PART II – SCOPE AND SPECIFICATIONS OF THE PROPOSAL

Proposal Specifications: The following describes the scope of services and performance requirements that the selected Respondent(s) will be required to meet. Failure to address or fully describe the capabilities to meet the requirements of this section may result in disqualification or reduced evaluation scores. IDEA reserves the right to make multiple awards or a single award, as determined to be in its best interest.

Funding Model Clarification

IDEA Public Schools is seeking proposals for Fully Insured or Level Funded Medical and RX Coverage Services.

Respondents must submit a proposal for only one funding arrangement:

1. Fully Insured plans, **or**
2. Level Funded plans

Do not submit proposals that include both funding arrangements.

IDEA reserves the right to evaluate and award based on the funding model(s) determined to be in IDEA's best interest and is not obligated to select both models or all proposed options.

Section 1: Overview

IDEA Public Schools is seeking qualified vendors to provide **Fully Insured and Level Funded Medical and RX Coverage Services**, which may include:

- Fully Insured Medical, Pharmacy, and Wellness Plan Administration
- Behavioral Health
- Diabetes Management
- Fertility/Pregnancy Programs
- Wellness Program / Biometric Screenings
- Musculoskeletal Programs
- Weight Management
- Mobile App
- Pharmacy Containment Solutions
- Telehealth
- Network access and provider management
- Claims processing and adjudication
- Member services and customer support
- Eligibility and enrollment administration
- Reporting, analytics, and compliance support
- Onsite/Virtual Dedicated Representative
- Wellness Funds
- Implementation Funds
- 2nd Year Rate Cap

Respondents may submit proposals for **only one (1)** of the following options:

- **Option 1:** Fully Insured Medical and RX Plans

- **Option 2:** Level Funded Medical and RX Plans

Section 2: Service Requirements

Respondents must provide comprehensive detail for each:

Fully Insured or Level Funded Medical and RX Proposals

Fully Insured or Level Funded proposals must:

- Align as closely as possible with IDEA's requested plan designs.
- Include EPO and/or HMO Plan Design options that are comparable to current PPO and HDHP Plan design options (To request copies of the claims reports, disruption reports, and census files, please reach out no later than February 25, 2026, at niki.ross@marshmma.com or Taylor Compton and taylor.compton@marshmma.com).
- Clearly identify all premiums, fees, and administrative costs (must notate which wellness and behavioral health components are included in the PEPM and which are additional costs).
- Address accumulator handling and prior authorizations across contract terms.
- Identify network coverage and geographic access within Texas, Ohio, and Florida included within the census file.
- Provide details on Wellness Credits, Implementation Credits and a Dedicated position for IDEA staff (position flexibility based on IDEA staffing needs. i.e. care coordination/navigation, bill reconciliation or behavioral health support/counseling).

Section 3: Performance Standards

Respondents must demonstrate the ability to meet performance expectations, including:

- Accurate and timely claims processing
- Responsive member and employer customer service
- Reliable eligibility and enrollment administration
- Secure handling of protected health information (PHI)
- Transparent reporting and data access

Proposals should clearly describe service guarantees, escalation procedures, and issue resolution processes.

Section 4: Implementation & Transition

Respondents **must provide** a proposed **implementation and transition plan**, including:

- Timeline for onboarding and system setup
- Data migration and testing approach
- Member communication support
- Coordination with IDEA's broker and internal teams

Services are anticipated to begin **July 1, 2026**. Any anticipated risks to this timeline must be disclosed.

Contract Term:

The agreement(s) resulting from this RFP are expected to begin on or about July 1, 2026, for an initial term of one (1) year, with the option for up to three (3) additional one-year renewals, subject to mutual agreement. **As part of the proposal, IDEA is requesting that respondents include a second-year renewal rate cap.**

IDEA may choose to renew this contract for up to an additional three (3) one-year periods. IDEA shall provide written notice to the selected Vendor(s) at least thirty (30) days in advance of expiration informing Vendor of IDEA's intent to renew, non-renew, amend the Agreement, or terminate. If the Vendor is unable to renew the contract, the Vendor shall provide IDEA with written notice according to the instructions provided in the renewal notice.

No price increases will be permitted during the initial contract term without a fully executed amendment approved by IDEA.

Respondents must be prepared to execute IDEA's contract or an IDEA-approved agreement within ten (10) business days of receiving a Notice of Intent to Award. IDEA reserves the right to reject Vendor-proposed contract terms that materially conflict with IDEA's General or Supplemental Terms and Conditions.

Insurance Requirements:

No Insurance Requirements as to IDEA. As a governmental unit as defined by Texas Civil Practice and Remedies Code § 101.001, IDEA has immunity from liability and suit except to the extent such immunity is waived by the Texas Tort Claims Act, Chapter 101, Texas Civil Practice and Remedies Code.

The insurance coverage specified in this RFP is the minimum requirement, and these requirements do not lessen or limit the liability of the Vendor. The Vendor shall maintain, at its own expense, any additional kinds or amounts of insurance that it may deem necessary to cover its obligations and liabilities under this RFP and Agreement.

Vendor shall keep in full force and effect the following minimum limits of insurance (or higher):

- i) General Liability: Vendor shall maintain Commercial General Liability Insurance, including coverage for bodily injury, property damage, and contractual liability, with the following minimum limits: \$1,000,000 per occurrence and \$2,000,000 general aggregate. The policy shall include liability arising out of premises, operations, independent contractors, personal injury, advertising injury, and liability assumed under an insured contract, and must provide coverage for all claims that may arise from the performance of the Agreement or completed operations, whether by Vendor or anyone directly or indirectly employed by Vendor. Such policy shall name IDEA as an Additional Named Insured and include a Waiver of Subrogation Clause.
- ii) Professional Liability: If the Contractor performs licensed professional services, the Contractor shall maintain professional liability insurance for licensed professionals performing work pursuant to this Agreement in an amount not less than \$1,000,000.00 per occurrence covering the licensed professionals' errors and omissions. Such policy shall name the School as an Additional Insured and include a Waiver of Subrogation Clause.
- iii) Automobile Insurance: The contractor shall maintain comprehensive automobile liability insurance to protect against claims for bodily injury and/or property damage arising out of the Contractor's use of any owned, hired, and or non/owned vehicle, with minimum limits of liability of \$1,000,000.00 combined single limit, per accident. Such policy shall name the School as an Additional Insured and include a Waiver of Subrogation Clause.
- iv) Cyber Liability and Technology Professional Liability Errors and Omissions: Vendor shall maintain coverage appropriate to Vendor's/Contractor's work under this Agreement, with limits not less than \$2,000,000 per occurrence. Coverage shall be sufficiently broad to respond to the duties and obligations undertaken by Vendor in this Agreement and shall include, but not be limited to, claims involving infringement of intellectual property, copyright, trademark, invasion of privacy violations, information theft, release of private information, extortion, and network security. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties, as well as credit monitoring expenses with limits sufficient to respond to these obligations. The policy shall include or be endorsed to include ***property damage liability coverage*** for damage to, alteration of, loss of, or destruction of electronic data and/or information "property" of IDEA in the care, custody, or control of Vendor.
- v) Workers' Compensation: Vendor shall obtain and maintain Workers' Compensation Insurance in an amount consistent with statutory benefits outlined in the Texas Workers' Compensation Act.

Each insurance policy to be furnished by the successful Vendor shall include "IDEA Public Schools" as a certificate holder, as Additional Named Insured, and include a Waiver of Subrogation Clause. Please note a certificate of insurance showing named insured is not adequate to establish this status or fulfill this requirement.

Additionally, each insurance policy shall, by endorsement to the policy, include a statement that a notice shall be given to IDEA by certified mail thirty (30) days prior to cancellation or upon any material changes to coverage.

Vendor may not commence services or work relating to the Agreement prior to placement of coverage. Vendor shall keep the required insurance coverage in effect at all times during the term of the Agreement, and any subsequent extensions.

PART III – PROPOSAL SUBMISSION & REQUIREMENTS

Proposal Response Requirements: Proposals shall be prepared in a clear, concise, and complete manner to demonstrate the Respondent's ability to meet the requirements of this RFP. To be considered for evaluation, Proposals must be received by IDEA Public Schools by the date and time specified in the RFP Timeline and must materially comply with all mandatory requirements of this solicitation. Late Proposals will not be accepted.

IDEA reserves the right to disqualify any Proposal that significantly deviates from the requirements outlined in this RFP or that fails to provide sufficient detail to permit a meaningful evaluation. **Proposals consisting solely of marketing materials or generic service descriptions may be deemed non-responsive.**

Each Respondent is responsible for ensuring IDEA has accurate contact information on file for the receipt of addenda, clarifications, or other official communications related to this RFP.

Description of Proposal

Respondents shall provide a comprehensive description of their proposed solution (s):

- Fully Insured or Level Funded Medical and RX Plan Administration

The Proposal description must include:

- An overview of the proposed service model
- Key assumptions and exclusions
- Any deviations from the requirements outlined in this RFP (**Attachment M**)
- Identification of any subcontractors or third-party partners, if applicable

Timeline

Respondents **must include** a proposed implementation timeline (Marked as Exhibit C) demonstrating the ability to transition services and be fully operational by **July 1, 2026**.

Implementation plans should address, at a minimum:

- Project governance and implementation team structure
- Data transfer and system configuration
- Eligibility and enrollment setup
- Claims system testing and validation
- Member communications and onboarding support
- Prior Authorization and accumulator loading

Any anticipated risks to implementation timelines must be clearly disclosed.

Reselling or Subcontracting

If Respondent intends to subcontract any portion of the services, Respondent **must identify all subcontractors and clearly describe their role(s).** Respondent shall remain fully responsible for the performance of all subcontracted services.

IDEA reserves the right to disapprove any subcontractor identified by the Respondent.

Required Proposal Format:

To be considered, the Proposal must be prepared according to the following instructions and should include the following information and content. Failure to include these items may result in disqualification.

1. **Cover Page**-Complete and insert **Attachment A**
2. **Executive Summary**- Maximum of two (2) pages summarizing the Respondent's qualifications and proposed services
3. **Summary of Experience & Qualifications**- Including experience administering medical benefits for large, multi-site organizations
4. **Response to Evaluation Criteria**- Provide a detailed response to each Evaluation Criterion listed in this solicitation and to PART II requirements.
5. **Cost Summary**- Respondent must specify all costs associated with providing the goods and/or services required herein. Complete and itemized pricing using **Attachment K**.
Respondents must specify **all costs** associated with providing the proposed services, including but not limited to:
 - Fully insured or level-funded premiums
 - Additional Program Fees (if applicable)
 - Wellness Credits
 - Implementation Credits
 - Bundling discounts
 - Transition credit
 - Year-2 rate cap

Each cost component must be clearly described and supported by a narrative explanation. If the Respondent does not expect IDEA to incur any cost for a particular item, the Proposal must clearly state **"No cost to IDEA."**

IDEA is tax-exempt; therefore, **no taxes shall be included** in any pricing.

6. **Medical & RX Disruption** – Must be completed with all proposals.
7. **Required Forms**- ***ALL FORMS REQUIRING SIGNATURE MUST BE SIGNED AS INDICATED***
Attachment A – Title Page. This form must be completed and included as the cover sheet for Proposals submitted in response to this RFP.
Attachment B – Vendor Acknowledgement
Attachment C – Insurance or Bonding Requirements
Attachment D – IDEA Conflict of Interest Form
Attachment E – Texas Ethics Commission Form CIQ
Attachment F – Felony Conviction Disclosure Statement
Attachment G – Certification Regarding Lobbying
Attachment H – Contract Provisions for Contracts Involving Federal Funds
Attachment I – Reference Sheet
Attachment J – Litigation, Terminations, Claims
Attachment K – Proposed Pricing
Attachment L – IRS Form W-9
Attachment M— Deviations and Exceptions
Attachment N – Certification Regarding Drug-Free Workplace
Attachment O – Child Support Certification
8. **Appendix A** – RFP Questionnaire -Respondents must complete the questionnaire in its entirety.
9. **Appendix B** – RFP Completion Checklist -Must be completed with all proposals, signed, and dated.
10. **Implementation & Transition Plan**- Marked as Exhibit C
11. **AM Best Rating or Most Recent Financial Statement**- Marked as Exhibit D
12. **Additional Documentation (Optional)** Additional documents may be submitted in instances where additional documentation is needed and not already captured.

PART IV – EVALUATION CRITERIA

In accordance with IDEA policy, award(s) of a contract(s) resulting from this RFP will be made to the responsible Vendor(s) whose Proposal(s) is/are determined to be most advantageous to IDEA. To qualify for evaluation, a Proposal must be submitted on time and must materially satisfy all mandatory requirements of this RFP.

Competitive Selection and Proposal Evaluation

This is a negotiated procurement. Award will not necessarily be made to the lowest-priced Proposal. IDEA will evaluate Proposals to determine which Respondent(s) offer the **best overall value**, considering cost, experience, service capabilities, and alignment with IDEA's benefit program needs.

IDEA reserves the right to:

- Request oral presentations or clarification
- Conduct interviews with one or more Respondents
- Award to one or multiple Respondents

Best and Final Offer Process (BAFO)

If necessary, IDEA reserves the right to enter into a BAFO process with one or more Vendors. The BAFO process allows Vendors to submit a revised Proposal based on further clarification, negotiation, or adjustment to the terms initially proposed. IDEA will provide instructions and deadlines for BAFO submissions if this process is initiated.

IDEA's Board will make the final decision on whether, and to whom, a contract is awarded.

Non-responsive or disqualified Proposals will not be eligible for award consideration. Reasons for being deemed non-responsive or disqualified include, but are not limited to, failing to meet proposal requirements, receiving the Proposal after the posted deadline, failure to sign the Proposal, and/or failure to include one or more Conditions of Service/Term Agreement.

IDEA reserves the right to reject any use of Vendor terms and conditions of any kind, including web links to any online terms and conditions, or requiring the use of the Offeror's form of agreement.

Proposals will be scored according to the following rubric:

	Evaluation Criteria
51 Points	Cost Proposal: The price of the items, to include total administrative costs & fees/fully or level-funded insured rates, network discounts, rate guarantees, wellness & implementation credits. Credits and incentives will be evaluated as part of the total cost of ownership and value to IDEA.
24 Points	Demonstrated Experience and Strength of Offeror to Provide Services Requested: Indicators of probable performance under the contract to include plan designs match what was requested (Fully Insured or Level Funded, as applicable), financial resources and ability to perform, experience or demonstrated capability and responsibility, and the vendor's ability to provide reliable maintenance agreements and support.
10 Points	Additional Services Offered: i.e., wellness program, decision supports resources, online resources for employer and members, communication materials, and employee customer service support.
5 Points	Reporting Capabilities: comprehensive reporting package, frequency of reporting, self-service capability, integration with health analytics provider if applicable, and ability to provide annual data dump to broker.
5 Points	Multi-state network strength: members will have access to the vendor's network regardless of the state they are located in.
5 Points	Workday Integration Ability: Vendors ability to integrate with Workday ERP System.
100 Points	Total Possible Score

Proposals will be evaluated based on overall value to IDEA, including funding model structure, cost, plan design alignment, administrative capabilities, and service quality.

PART V – GENERAL TERMS AND CONDITIONS ACKNOWLEDGEMENT

GENERAL TERMS AND CONDITIONS: The Vendor agrees to the General Terms and Conditions of this solicitation and in case of conflict with other documents provided by the Vendor, these General Terms and Conditions take precedence and prevail unless Vendor specifically requests a variance and IDEA Public Schools, Inc. agrees to such changes in writing. General Terms and Conditions are posted on the IDEA Public Schools Procurement and Contract Services website at [Procurement & Contract Services - IDEA Public Schools](#)

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

Compliance with Applicable Law: To the extent applicable, Vendor/Contractor shall fully comply with all provisions and reauthorizations of applicable state and federal law, including but not limited to the Texas Education Code, the Texas Administrative Code, the Elementary and Secondary Education Act (ESEA), the Individuals with Disabilities Education Act (IDEA), and the Family Educational Rights and Privacy Act (FERPA). Vendor/Contractor shall also fully comply with the policies of IDEA's Board. IDEA's Board Policies can be accessed at: <https://ideapublicschools.org/our-story/national-board-of-directors/>.

Conflict of Interest: In accordance with section 176.006 of the Texas Local Government Code, Vendor/Contractor must file, on an annual basis, a Conflict of Interest Questionnaire with IDEA. The Texas Ethics Commission Form CIQ and instructions can be found on the Texas Ethics Commission website at <https://www.ethics.state.tx.us/forms/conflict>. Vendor/Contractor shall also comply with all prohibitions on gifts or benefits, and disclosure of same, under Chapter 176 of the Texas Local Government Code, and other applicable law including federal and state "related party" law and restrictions, nepotism laws, penal code prohibitions and other applicable law and rule. Any violation or failure to disclose any conflicts of interest shall be grounds for IDEA to take action as permitted by law including termination of any Agreement, declaring any Agreement void or other action IDEA determines to be in the best interest of IDEA.

Contractual Relationship: Nothing herein shall be construed as creating the relationship of employer or employee between IDEA and the Vendor/Contractor or between IDEA and the Vendor's/Contractor's employees. IDEA shall not be subject to any obligation or liabilities of the Vendor/Contractor or its employees incurred in the performance of the contract and order unless otherwise herein authorized. Neither the Vendor/Contractor nor its employees shall be entitled to any of

the benefits established for IDEA employees, nor be covered by IDEA's Workers' Compensation Program.

Confidentiality-Name or Information Use:

Vendor/Contractor, and any person acting on its behalf or affiliated with the Vendor/Contractor, shall not use IDEA's name, trademarks, logos or other information in any public manner or media (including, but not limited to press releases, promotions, advertisements, solicitations, website, blog, video, or social media) without prior written approval of IDEA. Written authorization may be refused or granted at IDEA's sole discretion.

Debarment and Suspension: Neither Vendor/Contractor nor any of its officer, directors, owners, members, employees or agents is listed on the General Services Administration's List of Parties Excluded from Federal Procurement or Non-procurement Programs in accordance with E.O. 12549 and E.O. 12689—Debarment and Suspension. This list contains the names of parties debarred, suspended, or otherwise excluded by agencies, and Vendors/Contractors declared ineligible under statutory or regulatory authority other than E.O. 12549. If Vendor/Contractor or any of its personnel identified is Debarred or Suspended, they must provide immediate notice to IDEA and IDEA may thereafter suspend or terminate the Agreement as it deems appropriate.

Delivery of Goods/Items: When the contract is for goods, Vendor/Contractor shall deliver complete orders, unless previously informed to and accepted by IDEA. Any deliveries not made in full are subject to a delay of payment by IDEA. Items shipped to the incorrect location by the Vendor/Contractor will be the responsibility of the Vendor/Contractor to correct. The Vendor/Contractor will be required to cover shipping charges to ship the items to the correct location. IDEA will only deliver the items to the correct location if there was an incorrect shipping address listed on the contract or Purchase Order. A packing slip is required with each shipment.

Enforcement: If the Agreement is for services, it is acknowledged and agreed that Vendor's/Contractor's services to IDEA are unique, which gives Vendor/Contractor a peculiar value to IDEA and for the loss of which IDEA cannot be reasonably or adequately compensated in damages. Accordingly, Vendor/Contractor acknowledges and agrees that a breach by Vendor/Contractor of the provisions hereof will cause IDEA irreparable injury and damage. Vendor/Contractor therefore expressly agrees that IDEA shall be entitled to injunctive and/or other equitable relief in any court of competent jurisdiction to prevent or otherwise restrain a breach of this Agreement, but only if IDEA is not in breach of this Agreement.

Entire Agreement: The written Agreement resulting from this RFP as well as these standard terms and conditions (and any procurement documents from IDEA) contains the entire agreement of the Parties concerning the subject matter described therein, and there are no other promises or conditions in any other agreement, whether oral or written, concerning the subject matter described herein. These General Terms and Conditions supersede any prior, contemporaneous, or related written or oral agreements between the parties concerning the subject matter described herein or in the Agreement.

Equal Opportunity: Vendor/Contractor shall comply with E.O. 11246—Equal Employment Opportunity, as amended by E.O. 11375—Amending Executive Order 11246 Relating to Equal Employment Opportunity, and as supplemented by regulations at 41 CFR Part 60—Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.

Execution: This Agreement may be executed in multiple counterparts, each of which shall be deemed an original, and all of which, when taken together, shall constitute one and the same instrument.

Formation and Good Standing: Vendor/Contractor represents and warrants that it is legally formed, validly existing and/or registered to conduct business in Texas, and to the extent applicable, in good standing under the laws of Texas and of the state of its formation. Vendor/Contractor represents and warrants that it is duly qualified and registered to do business in Texas with the Texas Secretary of State and the Texas Comptroller of Public Accounts and understands that remaining in good standing with Texas is a condition of the Agreement.

General Warranty: Vendor/Contractor represents and warrants to IDEA that the goods and/or services shall perform at a level as intended, are fit for use for their intended purpose, and shall substantially conform in accordance with the specifications stated in the Agreement, in compliance and conformance with any applicable law or ordinance and will be performed in a good, professional, and workmanlike manner. Further, they shall be fit for ordinary use with no material defects, provided that all use of the goods and/or services is for the purposes and in the environment for which they were designed and in accordance with such specifications.

Gratuities: IDEA may, by written notice to Vendor/Contractor, cancel this Agreement without liability to IDEA if it is determined by IDEA that gratuities, in the form of entertainment, gifts, or otherwise, were offered or given by Vendor/Contractor (or any agent or representative of Vendor/Contractor) to any director, officer or employee of IDEA (or to any family member of an IDEA employee, officer or director within the third-degree by affinity or consanguinity under Texas law), unless there is an express written statutory exception for same, or the gift is a documented donation to IDEA. In the event this Agreement is cancelled by IDEA pursuant to this section, IDEA shall be entitled, in addition to any other rights and remedies, to recover or withhold the amount or the cost incurred by Vendor/Contractor in providing such impermissible gratuities.

Indemnification: vendor/contractor will indemnify, protect, defend, and hold harmless idea and its board, officers, and representatives (collectively the “idea indemnitees”) in their official and individual capacities from and against all damages, losses, liens, causes of action, suits, judgments, expenses, and other claims of any nature, kind, or description, including attorneys’ fees incurred in investigating, defending, or settling any of the foregoing by any person or entity, arising out of, caused by, or resulting from vendor’s/contractor’s performance under or breach of this agreement and that are caused in whole or in part by any act or omission, including any negligent act, negligent omission, or willful misconduct of vendor/contractor, anyone directly employed by vendor/contractor, or anyone for whose acts vendor/contractor may be liable. The provisions of

this section will not be construed to eliminate or reduce any other indemnification or right which any IDEA indemnitee has by law or equity. All parties will be entitled to be represented by counsel at their own expense. Vendor’s/contractor’s obligations contained in this section survive termination or expiration of this agreement and continue on indefinitely, and cannot be waived or varied.

Ineligibility for Nonpayment of Child Support: Pursuant to Texas Family Code § 231.006(d), regarding child support, Vendor/Contractor certifies that it is not ineligible to receive the compensation specified in this Agreement and acknowledges that this Agreement may be terminated, and payment may be withheld if this certification is inaccurate. The Texas Health and Human Services Commission Form 1903, Child Support Certification, must be completed legibly, either handwritten or typed. A duly authorized representative, preferably the duly authorized representative identified, must sign this form. Failure to complete this form pursuant to this and other instruction shall disqualify the Vendor/Contractor from providing goods and/or services to IDEA. See **Attachment I** contained herein.

Inspection: Prior to acceptance of any goods and/or services and continuing for a period of thirty (30) days after IDEA’s first use of the goods and/or services, IDEA reserves the absolute right to inspect, test, and reject all goods and/or services, in whole or in part, furnished by Vendor/Contractor, to ensure that they comply with the Agreement and/or PO. This right shall exist even if payment has already been made by IDEA to the Vendor/Contractor. Goods or services which, in the sole opinion of IDEA, fail to conform to the required specification(s) or standard(s) may be considered non-conforming. In such event that goods and/or services are considered non-conforming, IDEA may return such goods and/or services at Vendor’s/Contractor’s risk and expense for replacement or correction, in which case Vendor/Contractor shall use best efforts to replace any non-conforming goods and/or services. IDEA may also accept the non-conforming goods and/or services subject to an equitable price reduction if mutually agreed to among the parties.

Interpretation of Evidence: No course of prior dealings between the parties and no usage of the trade shall be relevant to supplement or explain any term used in a contract. Acceptance or acquiescence in a course of performance rendered under a contract shall not be relevant to determine the meaning of the contract even though the accepting or acquiescing party has knowledge of the performance and opportunity for objection. Whenever a term defined by the Uniform Commercial Code is used in the Contract, the definition contained in the Code is to control.

Law of State to Govern: This Agreement shall be governed by, and construed and enforced in accordance with, the laws of the State of Texas (without regard to the conflicts or choice of law principles). The Parties irrevocably consent to the jurisdiction of the State of Texas and agree that any court of competent jurisdiction sitting in Hidalgo County, Texas, shall be an appropriate and convenient place of venue to resolve any dispute with respect to this Agreement. In connection with IDEA’s defense of any suit against and/or IDEA’s prosecution of any claim, counterclaim or action to enforce any of its rights and/or claims under this Agreement, which IDEA prevails as to all or any portion of its defense(s), claims, counterclaims, and actions, IDEA shall be entitled to recover its actual attorneys’

fees and expenses incurred in defending such suit and/or in prosecuting such claim or action.

Limitations: the parties are aware that there are constitutional and statutory limitations on the authority of idea (a public school system and governmental entity) to enter into certain terms and conditions of the agreement, including, but not limited to, those terms and conditions relating to liens on idea's property; disclaimers and limitations of warranties; disclaimers and limitations of liability for damages; waivers, disclaimers and limitations of legal rights, remedies, requirements and processes; limitations of periods to bring legal action; granting control of litigation or settlement to another party; liability for acts or omissions of third parties; payment of attorneys' fees; dispute resolution; indemnities; and confidentiality (collectively, the "limitations"), and terms and conditions related to the limitations will not be binding on idea except to the extent authorized by the laws and constitution of the state of Texas.

Modifications: The contract may only be modified, altered, or changed by a written agreement signed by both IDEA and Vendor/Contractor and their duly authorized agents.

No Arbitration: Disputes involving this Agreement, including the breach or alleged breach thereof, may not be submitted to binding arbitration, but must, instead, be submitted to non-binding mediation or heard in a court of competent jurisdiction in the State of Texas sitting in Hidalgo County, Texas.

Non-Appropriation/Funding Out: This Agreement is conditioned upon continued funding and appropriation and allotment of funds by the Texas State Legislature and/or the Texas Education Agency pursuant to IDEA's open-enrollment charter. This Agreement is further conditioned on continued allocation of funds by IDEA's Board. If the Legislature and/or the Texas Education Agency fails to appropriate or allot the necessary funds, or the Board fails to allocate the necessary funds at the end of IDEA's fiscal year, then IDEA will issue written notice to Vendor/Contractor and IDEA may terminate this Agreement without further duty or obligation hereunder.

No Waiver of Immunity: notwithstanding anything to the contrary in this agreement, vendor/contractor acknowledges, stipulates, and agrees that nothing in this agreement shall be construed as a waiver of any defense available to idea, including but not limited to any sovereign, statutory, and/or governmental immunity available to idea under applicable law.

Payment Terms: Unless a prompt payment discount with a payment term of at least ten (10) days is offered and accepted by IDEA, payment terms shall be thirty (30) days net from date of acceptance or receipt of a properly prepared and submitted invoice, whichever is later. In accordance with the Board's accounts payable policy, to receive payment for goods provided and/or services rendered, the Vendor/Contractor must submit a separate invoice, in duplicate, for each purchase order that includes the following:

- a. Fully identifies the Vendor/Contractor, including the Vendor's/Contractor's authorized representative, and said identifying information conforms to that on the purchase order issued by IDEA to the Vendor/Contractor and/or the Agreement.
- b. Includes an invoice number and date.

c. Is addressed to IDEA Public Schools, including the proper mailing address for accounts payable and the address to which goods and/or services were delivered.

d. References the purchase order number issued.

e. Delineates in sufficient detail the goods and/or services provided to IDEA, including the quantity and unit price of the goods and/or services, and the date that the goods were delivered or the services were rendered.

Payment will not be remitted until all goods provided and/or services rendered are inspected and confirmed received by IDEA.

Prices: IDEA accepts Vendor's/Contractor's price(s) as recorded on Vendor's/Contractor's Proposal and reserves the right to cancel the Agreement if the prices are to be increased without a properly negotiated and executed amendment to the Agreement.

Product Recall: Vendor/Contractor shall notify IDEA immediately if a product recall is instituted on any good and/or service Vendor/Contractor has delivered or if Vendor/Contractor discovers or becomes aware of any defect in quality or other deficiency in the delivered goods and/or services. This requirement shall survive payment and acceptance of the goods and/or services.

Purchase Order Required: Orders/requests may be submitted by telephone, fax, email, or mail. No valid orders/requests will be submitted without an IDEA approved purchase order.

Record Keeping: It is the responsibility of Vendor/Contractor to maintain such records as are required by law, IDEA, or as are prescribed by the professional and generally accepted standards of the Texas Education Agency. The books and records related to the contract shall be maintained by Vendor/Contractor, and IDEA shall have the right to inspect and review such records at reasonable times upon request by IDEA.

Rights to Inventions Made Under a Contract or Agreement: The Vendor/Contractor acknowledges and agrees that any intellectual property, processes, procedures or product developed in furtherance of a contract between the Vendor/Contractor and IDEA belongs to IDEA as work-for-hire and all rights are reserved by IDEA and/or the federal government in accordance with applicable federal law.

Severability: In the event that any provision of this Agreement is found to be invalid, illegal, or unenforceable in any jurisdiction, then in lieu of such invalid, illegal, or unenforceable provision there shall be added automatically as a part of this Agreement a valid, legal, and enforceable substitute provision that most nearly reflects the original intent of the Parties, and all provisions hereof shall remain in full force and effect and shall be liberally construed in order to carry out the intentions of the Parties hereto as nearly as may be possible. Such invalidity, illegality, or unenforceability shall not affect any other provisions contained in this Agreement.

Tax Exempt: IDEA is tax-exempt. Vendor/Contractor shall not include taxes on any Proposal, contract, PO, or invoice. IDEA will provide a tax exemption certificate to Vendor/Contractor upon request.

Termination: IDEA reserves the right to terminate all or any part of the undelivered portion of any order resulting from the Agreement with thirty (30) days written notice upon default by

the Vendor/Contractor, for delay or nonperformance by the Vendor/Contractor, or if it is deemed in the best interest of IDEA, for convenience.

Texas Public Information Act: Vendor/Contractor acknowledges that IDEA is a public school subject to requests for information under the Texas Public Information Act ("TPIA"), Chapter 552, Texas Government Code. Under the TPIA, there are exceptions to requests for disclosure which include, but are not limited to, information confidential by law and certain commercial information and trade secrets. The Texas Attorney General's office makes the final determination whether or not requested information is to be disclosed on a case-by-case basis after reviewing the materials and assertions against disclosure. If proprietary information is requested, the TPIA requires IDEA to provide written notice to the party

whose proprietary information may be subject to the request, and that party may also submit information to the Texas Attorney General to establish that disclosure of the information would cause substantial competitive harm.

Unsatisfactory Performance by Vendor Staff: If any person employed by Vendor/Contractor fails or refuses to carry out the services detailed in this Agreement or is, in the opinion of IDEA's designated representative(s), incompetent, unfaithful, intemperate, or disorderly, or uses threatening or abusive language to an IDEA student, parent, or representative, or if otherwise unsatisfactory, he or she shall be removed from the work under this Agreement immediately and shall not again provide services to IDEA except upon consent of IDEA's representative(s).

PART VI - SUPPLEMENTAL TERMS AND CONDITIONS

Buy America Act: If the source of funds identified on **page 5 - Funding Type** for this RFP and resulting Agreement is federal funds, IDEA has a preference to procure goods, products, or materials produced in the United States (2 CFR § 200.322).

Confidential and/or Proprietary Information: The vendor acknowledges that it may have access to or create (alone or with others) confidential and/or proprietary information that is valuable to IDEA. For purposes of this Agreement, "Confidential Information" shall include but not be limited to:

1. Information relating to IDEA's financial, regulatory, personnel, or operational matters.
2. Information relating to IDEA's clients, customers, beneficiaries, suppliers, donors, employees, volunteers, sponsors, or business associates and partners.
3. Trade secrets, know-how, inventions, discoveries, techniques, processes, methods, formulae, ideas, technical data and specifications, testing, methods, research and development activities, and computer programs and designs.
4. Contracts, product plans, sales and marketing plans, and business plans.
5. All information not generally known outside of IDEA's business, regardless of whether such information is in written, oral, electronic, digital, or other form, and regardless of whether the information originates from IDEA or its agents.
6. The term "Confidential Information" does not include the following:
 - a. Information available to the public through no wrongful act of the receiving party.
 - b. Information that has been published.
 - c. Information required in response to subpoena, court order, court ruling, or by law.

Vendor agrees that it will not, at any time during or after the termination of this Agreement, use or disclose any Confidential Information or trade secrets of IDEA to any person or entity for any purpose whatsoever without the prior written consent of IDEA, unless and except as otherwise required by applicable federal or state law or

court order. Vendor agrees to release to IDEA all records and supporting documentation related to the Services provided under this Agreement upon completion of the Term hereof.

Identity Theft Protection: If Vendor will be storing employee or student data as part of the services under the Agreement, the following provisions apply:

1. Vendor agrees to maintain the confidentiality of "personal identifying information" and "sensitive personal information," as those terms are defined in Texas Business & Commerce Code § 522.002 by implementing reasonable data security procedures, controls, and safeguards to ensure that such information is protected. Vendor agrees that "personal identifying information" and "sensitive personal information" will be collected only as necessary and in conjunction with this Agreement and will be restricted in its distribution and accessibility such that only authorized representatives of Vendor who have agreed to maintain the confidentiality of the data may access it. Such information will be properly secured by the use of safeguards such as secure file storage, firewall protection, complex password protection, secure operating systems, anti-virus software, locked physical files and backups, data encryption, and other technology tools. When necessary, "personal identifying information" and "sensitive personal information" will be disposed of through secure means, such as shredding paper files and erasing electronic files.
2. Vendor will not bear responsibility for safeguarding information that is (i) publicly available; (ii) that is not "personal identifying information" or "sensitive personal information"; (iii) that is obtained by Vendor from third parties without restrictions on disclosure and is not obviously "personal identifying information" or "sensitive personal information"; or (iv) is required to be disclosed by order of a court or other governmental entity.
3. Vendor stipulates that this Agreement does not convey ownership of "personal identifying information" or "sensitive personal information" provided by IDEA under this Agreement.

4. If Vendor becomes aware of a disclosure or security breach concerning any “personal identifying information” or “sensitive personal information” covered by this Agreement, Vendor shall immediately notify IDEA and take immediate steps to limit and mitigate the damage of such security breach to the greatest extent possible. If there is a “breach of system security” where “sensitive personal information” is breached, both as defined in sections 521.002 and 521.053 of the Texas Business & Commerce Code, Vendor shall proceed with notification requirements as required therein. The Parties agree that any breach of the privacy and/or confidentiality obligations set forth in this Section may, at IDEA’s sole discretion, result in IDEA’s immediately terminating this Agreement without financial penalty.

Payment and Performance Bonds: If required pursuant to Texas Government Code Chapter 2253 related to performing public works, and prior to commencing any work pursuant to this Agreement or any Purchase Order, the Vendor shall provide Payment and Performance bonds equal to the total cost of the approved project. This shall be at the sole cost and expense of the Vendor.

Privacy of Employee or Student Data: When educational records and Student Data will be utilized under the Agreement, or Employee data may be involved, the following provisions apply, and Vendor will enter into a Data Sharing Agreement provided by IDEA:

1. **General Guidelines.** The Parties acknowledge and agree that certain federal and state laws protect the privacy interests of students and parents with regard to educational records maintained by IDEA, including, without limitation, the Family Educational Rights and Privacy Act (“FERPA”), 20 USC § 1232g. IDEA has determined that Vendor has a legitimate educational interest in the educational records, as that term is defined under FERPA, of IDEA’s students who receive the services, and that Vendor is the agent of IDEA solely for the purpose of providing services under this Agreement. Vendor and its personnel shall maintain the confidentiality of Student Data, as defined below, and comply with the requirements of FERPA and all other applicable law with respect to the privacy of Student Data. Vendor’s/Contractor’s obligations under this Section shall survive the termination or expiration of this Agreement.
2. **Definition of “Student Data”:** “Student Data” includes all Personally Identifiable Information (“PII”) and other non-public information and includes, but is not limited to, student data, metadata, and user content.
3. **Collection and Use of Student Data:** Vendor will only collect Student Data necessary to fulfill its duties as outlined in this Agreement. Vendor will use Student Data only for the purpose of fulfilling its duties and providing services under this Agreement, and for improving services under this Agreement. Vendor is prohibited from mining Student Data for any purposes other than those agreed to by the parties. Data mining or scanning of user content for

the purpose of advertising or marketing to students or their parents is prohibited.

4. If Vendor has access to Employee PII, it shall protect PII and follow the same data protection and privacy standards as applied for Student Data.
5. **Data De-Identification:** Vendor may use de-identified Student or Employee Data for product development, research, or other purposes. De-identified Student or Employee Data will have all direct and indirect personal identifiers removed. This includes, but is not limited to, name, ID numbers, date of birth, demographic information, location information, and school ID. Furthermore, Vendor agrees not to attempt to re-identify de-identified Student or Employee Data and not to transfer de-identified Student or Employee Data to any party unless that party agrees not to attempt re-identification.
6. **Marketing and Advertising:** The vendor will not use any Student Data to advertise or market to students or their parents.
7. **Modification of Terms of Service:** Vendor will not change how Student or Employee Data are collected, used, or shared under the terms of this Agreement in any way without advance notice to and consent from IDEA.
8. **Student Data Sharing:** Student Data cannot be shared with any additional parties without prior written consent of IDEA, except as required by law.
9. **Access and Transfer or Destruction:** Any Student or Employee Data held by the Vendor will be made available to IDEA upon request by IDEA. Vendor will ensure that all Student or Employee Data in its possession and in the possession of any subcontractors or agents to which Vendor may have transferred Student or Employee Data are destroyed or transferred to IDEA when the Student or Employee Data is no longer needed for its specified purpose, at the request of IDEA.
10. **Rights and License In and To Student or Employee Data:** The Parties agree that all rights, including all intellectual property rights, shall remain the exclusive property of IDEA, and that Vendor has a limited, nonexclusive license solely for the purpose of performing its obligations as outlined in this Agreement. This Agreement does not give Vendor any rights, implied or otherwise, to Student or Employee Data, content, or intellectual property, except as otherwise expressly stated in this Agreement. This includes the right to sell or trade Student or Employee Data.
11. **Security Controls:** Vendor will store and process Student or Employee Data in accordance with industry best practices. This includes appropriate administrative, physical, and technical safeguards to secure Student or Employee Data from unauthorized access, disclosure, and use. Vendor will conduct periodic risk assessments and remediate any identified security vulnerabilities in a timely manner. Vendor will also have a written incident response plan, to include prompt notification of IDEA in the event of a security or privacy incident, as well as best practices for responding to a breach of PII. The vendor agrees to share its incident response plan upon request

PART VII – REQUIRED ATTACHMENTS

Attachment A – Title Page



A Proposal Submitted in Response to
IDEA's Request for Proposals
RFP #25-MAS-0426 Texas Medical Administration Services
Submitted By:

(Full Legal Name of Vendor)

Vendor dba (if applicable): _____

Employer Identification Number: _____

Street Address: _____

City, State, and Zip Code: _____

Additional Requirements:

The proposal must include the name of each person with at least 25% ownership of the business.

Name: _____ Name: _____

Name: _____ Name: _____

On:

(Date of Proposal Submission) _____

Attachment B – Vendor Acknowledgement

The undersigned representative of the proposing organization indicated below hereby acknowledges and affirms that;

1. I am authorized to enter into a contractual relationship on behalf of the proposing organization indicated below.
2. I have carefully examined and accept the general terms and conditions located at [Procurement & Contract Services - IDEA Public Schools](#) in addition to the specifications and supplemental terms and conditions (if applicable) included in this solicitation.
3. Neither the respondent nor any of its officers, partners, owners, agents, representatives, employees, or parties of interest, has in any way collude, conspired, or agreed, directly or indirectly with any person, corporation, or other respondent or potential respondent or given any money or other valuable consideration for assistance in procuring or attempting to procure a contract or fix the prices in the attached response.
4. No attempt has been or will be made by the firm's officers, employees, or agents to lobby, directly or indirectly, IDEA Board of Directors, or any employee involved in this procurement activity.
5. If all or any part of this proposal is accepted, the vendor shall provide all products/services at the prices quoted and in strict compliance with all terms and conditions associated with this solicitation.
6. The proposing organization is in compliance with all applicable federal, state and local codes, laws and statutes.

Vendor Legal Name: _____

Address: _____

Telephone Number: _____

Fax Number: _____

Project Contact Person: _____

Contact Phone Number: _____

Contact Email Address: _____

Web Site Address: _____

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative

Attachment C – Evidence of Insurance

Evidence of insurance with the minimum coverage specified below is required upon proposal submission.

MINIMUM INSURANCE COVERAGE & LIMITS FOR VENDORS AND PROFESSIONAL SERVICE PROVIDERS			
Type of Contractor	Required Coverage	Required Coverage Limits	Other
Speakers, Presenters, Judges, DJ, Decoration and Photobooth Vendors (This is not an all-inclusive list)	NA	NA	Hold Harmless Agreement
Charter Bus Services	Commercial General Liability	Each Occurrence: \$1,000,000 General Aggregate: \$2,000,000 Medical Expenses: \$5,000	Additional Insured and Waiver of Subrogation Endorsement
	Automobile Liability	Combined Single Limit or Umbrella Liability (excess) \$5,000,000 Uninsured Motorist: \$100,000 Medical Payments or Personal Injury Protection: \$5,000	Additional Insured and Waiver of Subrogation Endorsement
Maintenance/Repair (painting, plumbing, HVAC, roofing, landscape, etc.) Service Providers (copier/fax service, computers, security, equipment vendors, etc.)	Commercial General Liability	Each Occurrence: \$1,000,000 General Aggregate: \$2,000,000 Personal and Advertising Injury: \$500,000	Additional Insured Endorsement
	Automobile Liability Including: <input type="checkbox"/> Owned Vehicles <input type="checkbox"/> Non-Owned Vehicles <input type="checkbox"/> Hired Vehicles (Required for vehicles driven on school property)	Combined Single Limit: \$1,000,000	
	Workers' Compensation* Employers' Liability	Limit: State- Statutory Each Occurrence: \$500,000	Waiver of Subrogation Endorsement

Vendor General Insurance Requirements	Commercial General Liability	Each Occurrence: \$1,000,000 General Aggregate: \$2,000,000 Personal and Advertising Injury: \$500,000	Additional Insured Endorsement
	Automobile Liability Including: <input type="checkbox"/> Owned Vehicles <input type="checkbox"/> Non-Owned Vehicles <input type="checkbox"/> Hired Vehicles (Required for vehicles driven on school property)	Combined Single Limit: \$1,000,000	
	Workers' Compensation* Employers' Liability	Limit: State- Statutory Each Occurrence: \$500,000	Waiver of Subrogation Endorsement

For the contractor categories below, the following coverages may apply in addition to the general insurance requirements listed above:

Welders, plumbers (work with open flames)	Fire Damage	Each Occurrence: \$1,000,000	Additional Insured Endorsement
Hazardous Materials, Waste Haulers, Pest Control, etc.	Pollution Liability (May require project-specific coverage)	Each Occurrence: \$1,000,000	Additional Insured Endorsement
Professional Services (accountants, architects, attorneys, education consultants, etc.)	Professional Liability	General Aggregate: \$2,000,000 Each Occurrence: \$1,000,000 Abuse of Molestation (If applicable) \$1,000,000	Additional Insured Endorsement
Nurses, therapists, medical providers	Professional Liability or Medical Malpractice (as applicable)	General Aggregate: \$3,000,000 Each Occurrence: \$1,000,000 Abuse of Molestation: \$1,000,000 (If applicable)	Additional Insured Endorsement
Payroll company, Data managers	Cyber Liability	Each Occurrence: \$1,000,000	Additional Insured Endorsement

The Additional Insured Endorsement language must name as follows: IDEA Public Schools, 2115 W. Pike Blvd, Weslaco, TX 78596.
Please [click here](#) to see a COI Example.

Attachment D – IDEA Conflict of Interest Form

By signature of this Proposal, Vendor covenants and affirms that:

- No manager, employee or paid consultant of Vendor is a member of the IDEA Board of Directors or an employee of IDEA.
- No manager or paid consultant of Vendor is married to a member of the IDEA Board of Directors, IDEA's Chief Executive Officer, or an employee of IDEA.
- No member of the IDEA Board of Directors, IDEA's Chief Executive Officer, or employee of IDEA is a manager or paid consultant of Vendor.
- Neither any member of the IDEA Board of Directors, IDEA's Chief Executive Officer, nor any employee of IDEA owns or controls more than 10% in Vendor.
- Neither any member of the IDEA Board of Directors, IDEA's Chief Executive Officer, nor any employee of IDEA receives compensation from Vendor for lobbying activities as defined in Chapter 305 of the Texas Government Code.
- Vendor has disclosed within the Proposal any interest, fact or circumstance which does or may present a potential conflict of interest.
- Should Vendor fail to abide by the foregoing covenants and affirmations regarding conflict of interest, Vendor shall not be entitled to the recovery of any costs or expenses incurred in relation to any contract with IDEA and shall further be liable for any costs incurred or damages sustained by IDEA relating to that contract.

Legal Vendor Name

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative

Attachment E – Texas Ethics Commission Form CIQ

The respondent must fill out the Conflict-of-Interest Form CIQ and submit it with their proposal. The Conflict-of-Interest Form CIQ and instructions can be found at the following link:

<https://www.ethics.state.tx.us/data/forms/conflict/CIQ.pdf>

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.

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

FORM CIQ

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

Attachment F – Felony Conviction Disclosure Statement

IDEA Public Schools (“IDEA”) requires a person or business entity that enters into a contract with IDEA for the provision of goods or services to give advance notice to IDEA 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.

IDEA may terminate a contract with a person or business entity if IDEA determines that the person or business entity failed to give such notice or misrepresented the conduct resulting in the conviction.

NOTE: This notice statement is not required of a publicly held corporation.

Please mark the appropriate choice below:

- ☐ This business entity is a publicly held corporation; therefore, this reporting requirement is not applicable.
- ☐ This business entity is not owned nor operated by anyone who has been convicted of any felony.
- ☐ My firm is owned or operated by the following individual(s) who has/have been convicted of a felony:

Name of Individual(s): _____

General description of the conduct resulting in the conviction of a felony:

Name of Individual: _____

General description of the conduct resulting in the conviction of a felony:

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

Vendor Business (DBA) Name: _____

Name of Authorized Company Official (Print): _____

Signature of Company Official

Title

Date

Attachment G – Certification Regarding Lobbying

Submission of this certification is a prerequisite for making or entering into this transaction and is imposed by section 1352, Title 31, U.S. Code. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Any person who fails to file the required certifications shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The undersigned certifies, to the best of his or her knowledge and belief, that:

- 1) No Federal appropriated funds have been paid or will be paid by or on behalf of the undersigned, to any person for influencing or attempting to influence an office or employee of any agency, a Member of Congress, or an officer or employee of Congress, an employee of a Member of Congress, or any Board Member, officer, or employee of IDEA in connection with the awarding of 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, an employee of a Member of Congress, or any Board Member, officer, or employee of IDEA 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 awarded documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and that all sub-recipients shall certify and disclose accordingly.

Legal Vendor Name

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative

Attachment H – Contract Provisions for Contracts Involving Federal Funds

With respect to the use of federal funds for the procurement of goods and services, 2 CFR 200.326 and Appendix II to 2 CFR 200 require the inclusion of the following contract provisions.

1. Remedies for Contract Breach or Violations. Contracts for more than the simplified acquisition threshold currently set at \$250,000 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.
2. Termination for Cause and Convenience. All contracts in excess of \$10,000 must address termination for cause and for convenience by IDEA including the manner by which it will be affected and the basis for settlement.
3. Equal Employment Opportunity. Except as otherwise provided under 41 CFR 60, all contracts that meet the definition of “federally assisted construction contract” in 41 CFR 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 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 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”
4. Davis-Bacon Act. When required by Federal program legislation, all prime construction contracts in excess of \$2,000 awarded by IDEA 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 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. IDEA 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. IDEA 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 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. IDEA must report all suspected or reported violations to the Federal awarding agency.
5. Contract Work Hours and Safety Standards Act. Where applicable, all contracts awarded by IDEA 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 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.

Attachment H – Contract Provisions for Contracts Involving Federal Funds (cont'd)

6. 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 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.
7. Clean Air Act and the Federal Water Pollution Control Act. Contracts and subgrants of amounts in excess of \$150,000 must contain a provision that requires the contractor 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).
8. Energy Efficiency Standards and Policies. 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. 6201).
9. Debarment and Suspension. A contract award (see 2 CFR 180.220) must not be made to parties listed on the governmentwide Excluded Parties List System 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.” The Excluded Parties List System in SAM 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.
10. Byrd Anti-Lobbying. Contractors that apply or bid for an award of \$100,000 or more 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.
11. Procurement of Recovered Materials. IDEA and its contractors must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR 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 by 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.

Attachment H – Contract Provisions for Contracts Involving Federal Funds (cont'd)

Vendor agrees to comply with all federal, state, and local laws, rules, regulations, and ordinances, as applicable. It is further acknowledged that the vendor certifies compliance with all provisions, laws, acts, regulations, etc. as specifically noted above.

Legal Vendor Name

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative

Attachment I – Reference Sheet

Please list a **minimum of three (3) verifiable references** of clients/organizations (governments, charter schools, or ISDs) that have used your services. The use of IDEA Public Schools or its affiliates as a reference is not permitted. Preferably the Respondent shall list references for any projects completed in the past **five (5) years** that are similar to the scope of work in this Solicitation. If additional space is required, attach additional pages hereto. IDEA would prefer some of the references to be new customers in the last year, and Texas clients/organizations are preferred:

1. _____
Customer/Client School or Organization/Entity Name _____ Dates of Contract _____

Street Address _____ City _____ State _____ Zip _____

Contact Person _____ Phone Number _____ Email Address _____

Project Scope _____

2. _____
Customer/Client School or Organization/Entity Name _____ Dates of Contract _____

Street Address _____ City _____ State _____ Zip _____

Contact Person _____ Phone Number _____ Email Address _____

Project Scope _____

3. _____
Customer/Client School or Organization/Entity Name _____ Dates of Contract _____

Street Address _____ City _____ State _____ Zip _____

Contact Person _____ Phone Number _____ Email Address _____

Project Scope _____

Attachment J – Litigation, Terminations, Claims

Respondent shall list any project completed in the past **five (5) years** where litigation was filed by Customer/Client or Organization/Entity against Respondent, the contract was terminated by Customer/Client or Organization/Entity before the expiration of term, or insurance claims were reported against Respondent's insurance by Customer/Client or Organization/Entity. If additional space is required, attach additional pages hereto.

1. _____
Customer/Client School or Organization/Entity Name

Contact Person Phone Number Email Address

Brief Description of Event or Issues: _____

2. _____
Customer/Client School or Organization/Entity Name

Contact Person Phone Number Email Address

Brief Description of Event or Issues: _____

3. _____
Customer/Client School or Organization/Entity Name

Contact Person Phone Number Email Address

Brief Description of Event or Issues: _____

☐ I certify that no claims, litigations, or terminations have been filed against my company in the past 5 years.

Signature of Authorized Representative

Date

Medical Attachment K – Proposed Pricing (Fully Insured or Level Insured Funded Medical & RX Coverage)

Respondent must provide pricing utilizing Attachment K: Proposed Pricing – Fully Insured or Level Funded Medical & RX Coverage Services. Pricing must be clearly separated by funding model and fully completed as instructed. Please indicate “No Bid” on items you wish not to bid on. **Pricing must be submitted utilizing IDEA’s Attachment K. Pricing submitted in an alternative format will not be reviewed or considered.**

ATTACHMENT K – COST PROPOSAL FORM (MEDICAL BENEFITS)



Respondent Name:

Plan Type Proposed (Fully Insured / Level Funded):

Network Name:

Contract Effective Date:

July 1, 2026 – June 30, 2027

Medical Fully Insured/Level Funded Premiums	
Rates	7/1/2026-6/30/2027
Employee Only	
Employee + Spouse	
Employee + Child(ren)	
Employee + Family	
Bundling Discount if available	
Wellness Credit (please list all years credit would be available if applicable)	
Implementation Credit (please list all years credit would be available if applicable)	
Transition Credit (please list all years credit would be available if applicable)	
2nd year rate cap %	
Additional Costs not included in the premiums	

Attachment L – IRS Form W-9

Respondent must fill-out the W-9 and submit with its Proposal. The W-9 form and instructions can be obtained at the following link: <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

Form W-9 (Rev. October 2018) 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.
Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> 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) _____ <small>(Applies to accounts maintained outside the U.S.)</small>	
	5 Address (number, street, and apt. or suite no.) See instructions.	
	Requester's name and address (optional)	
	6 City, state, and ZIP code	
	7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)
Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.
Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number
[][]-[][]-[][][][][][]
or
Employer identification number
[][]-[][][][][][][][]

Part II Certification
Under penalties of perjury, I certify that:
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.
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, later.

Attachment M – Deviations and Exceptions

If the undersigned Vendor intends to deviate from the specifications listed in this RFP, all such deviations must be listed on this page (and attachments as necessary), with complete and detailed conditions and information included or attached. IDEA will consider any deviation in its RFP award decisions, and IDEA reserves the right to accept or reject any Proposal based upon any deviations indicated below or in any attachments or inclusions. ***Please note that deviations and variations are strongly discouraged and may be grounds for Proposal rejection at IDEA's sole discretion.***

In the absence of any deviation entry on this form the Vendor assures IDEA of its full compliance with the terms and conditions, specifications, and all other information contained in this RFP.

☐ The Respondent, named below, hereby declares and represents that it will fully comply with the terms, conditions, specifications, and other requirements set forth in this RFP without deviation and exception.

☐ The Respondent, named below, hereby declares and represents that it will fully comply with the terms, conditions, specifications, and other requirements set forth in this RFP except as follows:

(For additional deviations and exceptions, refer to additional pages attached herewith.)

Legal Vendor Name

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative

Attachment N – Certification Regarding Drug-Free Workplace

This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701 and Pursuant to 2 CFR Part 182.

The undersigned Vendor/Contractor certifies it will provide a drug-free workplace by:

- Publishing a policy statement notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee.
- Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, Vendor's/Contractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug violations in the workplace.
- Providing each employee with a copy of Vendor's/Contractor's policy statement.
- Notifying the employees through Vendor's/Contractor's policy statement that as a condition of services to IDEA, employees shall abide by the terms of the policy statement and notifying Vendor/Contractor in writing within five days after any conviction for a violation by the employee of a criminal drug abuse statute in the workplace.
- Notifying IDEA within ten (10) days of Vendor's/Contractor's receipt of a notice of a conviction of any employee; and,
- Taking appropriate personnel action against an employee convicted of violating a criminal drug statute or requires such employee to participate in a drug abuse assistance or rehabilitation program.

Legal Vendor/Contractor Name

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative

Attachment O – Child Support Certification

The Texas Health and Human Services Commission Form 1903, Child Support Certification must be completed legibly, either handwritten or typed. A duly authorized representative, preferably the duly authorized representative identified, must sign this form. Failure to complete this form pursuant to this and other instructions shall disqualify the Proposal. The child support certification form can be found at:

<https://www.hhs.texas.gov/regulations/forms/1000-1999/form-1903-child-support-certification>.



Form 1903
May 2017-E

Child Support Certification

Section 1

Family Code, Section 231.006, Ineligibility to Receive State Grants or Loans or Receive Payment On State Contracts, prohibits the payment of state funds under a grant, contract, or loan to:

- a person who is more than 30 days delinquent in paying child support; and
- a business entity in which the obligor is a sole proprietor, partner, shareholder, or owner with an ownership interest of at least 25 percent.

Section 231.006 further provides that a person or business entity that is ineligible to receive payments for the reasons stated above shall continue to be ineligible to receive payments from the state under a contract, grant, or loan until:

- all arrearages have been paid;
- the person is in compliance with a written repayment agreement or court order as to any existing delinquency; or
- the court of continuing jurisdiction over the child support order has granted the obligor an exemption from Subsection (a) as part of a court-supervised effort to improve earnings and child support payments.

Section 231.006 further requires each bid, or application for a contract, grant, or loan to include:

- the name and Social Security number of the individual or sole proprietor and each partner, shareholder, or owner with an ownership interest of at least 25 percent of the business entity submitting the bid or application; and
- the statement in Section 3 below.

Section 231.006 authorizes a state agency to terminate a contract if it determines that the statement required below is inaccurate or false. In the event the statement is determined to be false, the vendor is liable to the state for attorney's fees, costs necessary to complete the contract (including the cost of advertising and awarding a second contract), and any other damages provided by law or contract.

Section 2

In accordance with Section 231.006, the names and Social Security numbers (SSN) of the individuals identified in the contract, bid or application, or each person with a minimum 25 percent ownership interest in the business entity identified therein are provided below:

Name:		SSN:	
Name:		SSN:	
Name:		SSN:	
Name:		SSN:	

Section 3

As required by Section 231.006, the undersigned certifies the following:

"Under Section 231.006, Family Code, the vendor or applicant certifies that the individual or business entity named in this contract, bid, or application is not ineligible to receive the specified grant, loan, or payment, and acknowledges that this contract may be terminated and payment withheld if this certification is inaccurate."

Contractor Authorized Representative Printed Name:	Title:
Contractor Authorized Representative Signature:	Date:

Part IX: APPENDICES

The appendices included in this section contain information relevant to this RFP and to the preparation of a responsive Proposal.

1. Appendix A- RFP Questionnaire (Separate Attachment)
2. Appendix B- RFP Checklist (Separate Attachment)

(The rest of this page was intentionally left blank.)

Part X: ADDENDA

Any interpretations, corrections, additions, or changes to this RFP will be communicated to Respondents by the issuance of an addendum. It is the responsibility of the Respondent prior to submitting a Proposal to determine whether an addendum was issued by checking IDEA's website: <https://ideapublicschools.org/our-story/finance-budget/>. All Respondents shall comply with the requirements specified in any addendum.

(The rest of this page was intentionally left blank.)

END OF IDEA PUBLIC SCHOOLS RFP



Appendix A: RFP Questionnaire 25-MAS-0426

Medical Benefits RFP Questionnaire Proposal Response Form

Submitting For (Check One): ☐ Fully Insured Plan ☐ Level Funded Plan

Instructions: Please complete this questionnaire in its entirety and submit it with your proposal. Incomplete forms will be deemed non-responsive. When applicable, provide narrative responses and attach supporting documentation.

Section 1 General and Member Experience

1. Will there be a dedicated customer service unit for IDEA?

☐ Yes ☐ No

If yes, please explain (location, staffing model, hours, escalation approach):

2. Please outline your online tools and resources available to members.

Is an interactive website available to staff and members? ☐ Yes ☐ No Can employees view EOBs online?

☐ Yes ☐ No

Please describe:

3. Data feeds and eligibility integrations

a. Do you have the capability to connect with an online benefits administration system? ☐ Yes ☐ No

b. Can you accept eligibility data files? ☐ Yes ☐ No

c. What is the cost and timeline needed for setting up the data feeds?



Appendix A: RFP Questionnaire 25-MAS-0426

Medical Benefits RFP Questionnaire Proposal Response Form

4. Workday experience

Do you currently work with customers who utilize Workday? ☐ Yes ☐ No

If yes, provide details:

Do you have the capability to receive Electronic Data Interchange files from Workday? ☐ Yes ☐ No

5. Open enrollment support

Detail how your organization will provide support to IDEA during open enrollments and/or health fairs.

6. ID card turnaround time

What is the average turnaround time for supplying ID cards directly to participants or live/online access to evidence of membership?

Section 2 Claims Administration and Reporting

1. Describe the appeal process of a contested claim.

2. Are reports available online? ☐ Yes ☐ No



Appendix A: RFP Questionnaire 25-MAS-0426

Medical Benefits RFP Questionnaire Proposal Response Form

3. Reporting package

What standard reports would be generated for IDEA leadership and McGriff review, and at what frequency? Please provide a sample of your standard reporting package.

4. Can you accommodate a full claims dump annually? ☐ Yes ☐ No

If no, please explain:

5. Do you currently offer online access to claims and eligibility information? ☐ Yes ☐ No

6. Provide a detailed implementation plan

Provide a detailed implementation plan outlining specific events and a timetable to ensure a smooth transition. Include expected dates for issuance of identification cards (where applicable), contracts, and Summary Plan Descriptions/Certificate booklets. If needed, attach the implementation plan as Exhibit C and note below.

7. Will you provide an implementation credit in your proposal? ☐ Yes ☐ No

If yes, describe:

8. Will you provide any wellness credits? ☐ Yes ☐ No

If yes, provide details:



Appendix A: RFP Questionnaire 25-MAS-0426

Medical Benefits RFP Questionnaire Proposal Response Form

9. Does your proposal include a dedicated position for IDEA's team? ☐ Yes ☐ No

If yes, what are the available options (Behavioral Health/Counseling Navigation/Support, Care Navigation, Bill Reconciliation Support, etc.)?

10. Subcontracted services

What services proposed will be subcontracted with outside vendors (network, Rx, mental health, disease management, etc.)?

11. Please provide AM Best Rating and/or most recent published financial statement.

Attach as Exhibit: D

12. Does your proposal include a second-year rate cap? ☐ Yes ☐ No

If yes, outline details:

13. Do you have a mobile app? ☐ Yes ☐ No



Appendix A: RFP Questionnaire 25-MAS-0426

Medical Benefits RFP Questionnaire Proposal Response Form

Section 3 Medical Strategy and Cost Management

1. How does your proposed medical plan design support affordability and sustainability while maintaining access to quality care?

2. What innovative plan design options (HMO, EPO, alternative plans) do you offer to reduce premiums and out-of-pocket costs?

3. Network optimization and high-performance networks

Describe your approach to network optimization and high-performance networks. How do you ensure cost savings without compromising quality?

4. Medical loan programs

Do you offer or partner with medical loan programs to assist employees with out-of-pocket medical expenses? ☐ Yes ☐ No

If yes, provide details:

5. Copay strategy and ER diversion

How do you collaborate with local providers and urgent care facilities to negotiate lower copays and reduce avoidable ER utilization?



Appendix A: RFP Questionnaire 25-MAS-0426

Medical Benefits RFP Questionnaire Proposal Response Form

6. Premium trend management

Provide examples of how your solutions have successfully managed upward premium pressures in similar client environments.

7. Nurse line

Is a nurse advisory toll-free number available? ☐ Yes ☐ No

Provide hours of operation and key advantages to members and the client.

8. Fertility coverage

Does your proposal include fertility coverage? ☐ Yes ☐ No

If yes, what is covered and are there any upcharges?

9. Bariatric surgery coverage

Does your proposal include coverage for bariatric surgery? ☐ Yes ☐ No

If yes, list parameters and limits.

10. Telemedicine benefit

Does your proposal include a telemedicine benefit? ☐ Yes ☐ No



Appendix A: RFP Questionnaire 25-MAS-0426

Medical Benefits RFP Questionnaire Proposal Response Form

11. Point solutions

Does your proposal include the following point solutions? If yes, provide details on each program. Indicate which are included in premium and which are additional cost.

- a. Behavioral Health ☐ Yes ☐ No ☐ Included ☐ Additional Cost
- b. Diabetes Management ☐ Yes ☐ No ☐ Included ☐ Additional Cost
- c. Fertility/Pregnancy Programs ☐ Yes ☐ No ☐ Included ☐ Additional Cost
- d. Wellness/Biometric Screenings ☐ Yes ☐ No ☐ Included ☐ Additional Cost
- e. Musculoskeletal Programs ☐ Yes ☐ No ☐ Included ☐ Additional Cost
- f. Weight Management ☐ Yes ☐ No ☐ Included ☐ Additional Cost

Program details and additional point solutions available:

12. Transition of care

Outline the process for transition of care if a member is in treatment and the provider is out of network.



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Medical Benefits RFP Questionnaire Proposal Response Form

Section 4 Pharmacy Strategy and GLP-1 Management

1. Retail pharmacy network

Describe your retail pharmacy network including its relationship to you (owned or leased).

2. Pharmacy access and network structure

Which nationally recognized pharmacies are in your network and what is the contracting arrangement?

Do you offer smaller/performance networks to lower costs? ☐ Yes ☐ No

If yes, describe:

3. List chain pharmacies excluded from your network.

4. How often do you update your formulary?

5. Formulary change communications

Describe how you notify affected members of formulary changes and assist members with alternate medications.

6. Implementation of new formulary

Describe your process for implementing a new formulary with a new client. Can you grandfather drugs? If so, how long?



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Medical Benefits RFP Questionnaire Proposal Response Form

7. Drug utilization and fraud management

Describe your programs to manage utilization, identify abuse, assess over-prescribing, and detect fraud.

8. Performance guarantees

Outline performance guarantees and financial costs at risk.

9. Specialty pharmacy programs

What disease states has your specialty pharmacy-built care programs around?

10. Pharmacy carve-out options

What carve-out or alternative pharmacy management solutions do you offer within a fully insured/level-funded environment?

11. Transparency

How do you ensure enterprise-level revenue transparency across pharmacy services including rebates and admin fees?

12. Modular pharmacy approach

Describe your modular pharmacy approach and how it increases flexibility and cost control.



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13. GLP-1 controls

What controls and prior authorization protocols manage GLP-1 utilization and other high-cost medications?

14. Formulary strategy

How do you balance formulary changes between cost savings, efficacy, and member access?

15. Provide case studies/examples showing cost reductions and improved outcomes.

Section 5 Mental and Behavioral Health

1. Behavioral health ecosystem

Describe your behavioral health ecosystem compared to IDEA's current offerings including Calm, Crisis Incident Stress Management, and EAP.

2. Embedded counseling model

How do you support embedding licensed counselors within the medical carrier model? What are the benefits and challenges?



Appendix A: RFP Questionnaire 25-MAS-0426

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3. Crisis support counseling services

What on-site or virtual counseling services do you provide and how do you ensure rapid response during crises?

4. Outcomes and engagement

Provide examples of how mental health solutions improved engagement and outcomes.

5. Effectiveness and utilization measurement

How do you measure effectiveness and utilization of behavioral health programs?

Section 6 Well-Being and Utilization Management

1. Wellness program support

Will you work with IDEA on wellness programs and initiatives? ☐ Yes ☐ No

Are additional services available for an additional cost? ☐ Yes ☐ No

If yes, describe and provide sample plan.

2. Case management approach

How do you handle case management?



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Medical Benefits RFP Questionnaire Proposal Response Form

3. Disease management programs

Describe your disease management programs.

4. Claims-informed campaigns

How do you design and deploy claims-informed wellness campaigns that drive engagement at the moment of need?

5. Incentive plan options

Describe wellness incentive plan options. How do you propose repurposing savings into future incentives?

6. Virtual fitness programs

What virtual fitness programs do you offer including no out-of-pocket cost options and how do they integrate?

7. Personalization

How do you personalize wellness programs to meet diverse employee needs and reduce downstream claims?

8. Metrics/case studies

Share metrics or case studies demonstrating impact.



Appendix A: RFP Questionnaire 25-MAS-0426

Medical Benefits RFP Questionnaire Proposal Response Form

9. Non-plan participation

Does your wellness program allow non-plan participants to participate? ☐ Yes ☐ No

Is there an additional charge? ☐ Yes ☐ No

If yes, explain:

Section 7 Family Support and High-Risk Pregnancy

1. Engagement in high-risk pregnancy programs

Strategies to increase engagement, especially during the transition of carriers/programs.

2. Fertility program offerings

Describe fertility program offerings and how they support employee needs.

3. Childcare and eldercare benefits

What childcare and eldercare benefits do you provide/support, including financial assistance options?

4. Navigation tools

How do your navigation tools assist access to family support services and what enhancements do you propose?



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5. Evidence of outcomes/cost savings

Provide evidence of improved outcomes or cost savings from family support programs.

Section 8 Crisis Response and Open Enrollment Enablement

1. Crisis response capabilities

Describe crisis response capabilities including natural disasters and extreme climate events.

2. Localized resource guides

How do you deploy localized resource guides and coordinate with EAP and external partners during crises?

3. AI-enabled open enrollment enhancements

What innovations do you offer for AI-enabled enhancements to open enrollment processes?

4. Workday AI integration

How do you plan to integrate or support future Workday AI capabilities in enrollment platform transitions?



Appendix A: RFP Questionnaire 25-MAS-0426

Medical Benefits RFP Questionnaire Proposal Response Form

5. Examples and results

Provide examples where crisis response and enrollment enablement solutions improved employee experience and operational efficiency.

END OF QUESTIONNAIRE



Appendix B: RFP 25-MAS-0426 Completion Checklist

The documents and information below are required for proposal submission to be considered complete. Failure to submit the required documents and information may result in a proposal being deemed non-responsive.

- ☐ Ability to meet the anticipated beginning date of **July 1, 2026**. Any anticipated risks to this timeline must be disclosed.
- ☐ Executive Summary
- ☐ Summary of Experience & Qualifications
- ☐ Response to Evaluation Criteria
- ☐ Attachment A – Title Page
- ☐ Attachment B – Vendor Acknowledgement
- ☐ Attachment C – Insurance or Bonding Requirements
- ☐ Attachment D – IDEA Conflict of Interest Form
- ☐ Attachment E – Texas Ethics Commission Form CIQ
- ☐ Attachment F – Felony Conviction Disclosure Statement
- ☐ Attachment G – Certification Regarding Lobbying
- ☐ Attachment H – Contract Provisions for Contracts Involving Federal Funds
- ☐ Attachment I – Reference Sheet
- ☐ Attachment J – Litigation, Terminations, Claims
- ☐ Attachment K – Proposed Pricing (all tabs completed following *Price Sheet Response Instructions*)
- ☐ Attachment L – IRS Form W-9
- ☐ Attachment M— Deviations and Exceptions
- ☐ Attachment N – Certification Regarding Drug-Free Workplace
- ☐ Attachment O – Child Support Certification
- ☐ Appendix A – RFP Questionnaire
- ☐ Appendix B – RFP Completion Checklist
- ☐ Description of Proposal
- ☐ Implementation & Transition Plan-Marked as Exhibit C (Includes: Timeline for onboarding and system setup, Data migration and testing approach, Member communication support, and Coordination with IDEA’s broker and internal teams)
- ☐ AM Best Rating and/or most recent published financial statement- Marked as Exhibit D
- ☐ Sample Standard Reporting Package.
- ☐ Respondent has read, understands, and agrees to the RFP requirements, including, but not limited to, the scope of work, vendor requirements, contract requirements, pricing requirements, timeline requirements, and documentation requirements as outlined in this RFP.
- ☐ **By selecting this checkbox, the vendor acknowledges and agrees to the terms and conditions outlined in this solicitation document.**

Signature of Authorized Representative

Date

Printed Name and Title of Authorized Representative