

**SOUTHWEST INDEPENDENT SCHOOL DISTRICT  
CONTRACT REVIEW/APPROVAL**

Contractor's Name: Performance Fact, Inc Service Provided: Consultant

Contract Period: 02/23/2017 - 08/31/2107 Annual Contract Amount: \$ 20,000.00/\$3,175.00 per day

Dept. Requesting Service: Superintendents Office Budget Code#/\$: 161-41-6219-00-750-799000

CIP/DIP#: \_\_\_\_\_ Budget Code#/\$: \_\_\_\_\_

Procured: ☐ Bid ☐ RFP ☐ Sole Source ☐ Co-Op ☒ Other: \_\_\_\_\_  
Quotes provided: Yes ☐ No ☒

Needs Board Approval: ☐ Yes ☒ No School Board Approved: \_\_\_\_\_ (attach Board Background)  
(over \$50,000)

W9 received: ☒ Yes ☐ No  
TX#:

CIQ form received: ☒ Yes ☐ No CIS form received: ☐ Yes ☒ No  
(Conflict of Interest Questionnaire-Vendor) (Conflict of Interest Statement-SWISD)

Felony conviction form received: ☒ Yes ☐ No

Federal Debarment form: ☒ Yes ☐ No  
Received:

Non-Collusive Bidding form received: ☐ Yes ☐ No ☒ N/A

Senate Bill 9 Compliance ☐ Yes ☐ No ☒ N/A  
(Fingerprinting: Section # 8 Compliance)

SWISD Dept.: \_\_\_\_\_  
(initial above)

**RECEIVED**  
FEB 27 2017  
BUSINESS &  
FINANCE

FEB24 17 3:34PM

Approved / Disapproved (select an option)

☐ ☐

Principal/Director/Coordinator \_\_\_\_\_ Date: \_\_\_\_\_  
(Person requesting service)

Director/Executive Director \_\_\_\_\_ Date: \_\_\_\_\_

Assistant Superintendent \_\_\_\_\_ Date: \_\_\_\_\_

Mr. Mark Figueroa \_\_\_\_\_ Date: 2/22/17  
Director of Operations

Mr. Brandon Crisp \_\_\_\_\_ Date: 3/9/17  
Assistant Superintendent of Business & Finance Division

Dr. Lloyd Verstuyft \_\_\_\_\_ Date: 3/6/17  
Superintendent of Schools

# **SOUTHWEST INDEPENDENT SCHOOL DISTRICT**

11914 DRAGON LANE, SAN ANTONIO, TEXAS 78252

## **CONTRACTOR SERVICES AGREEMENT**

This contract is entered into by and between Performance Fact, Inc  
(Name and Address)

Hereinafter referred to as "Contractor" and the Southwest Independent School District, a Texas political subdivision, hereinafter referred to as "District" on this the 23 day of February, 2017.

1. District agrees to engage Contractor, and Contractor agrees to perform and/or provide the following services:  
**Consultation and implementing of District Strategic Plan, consultation with Superintendent and Staff.**
2. Contractor will perform the services set forth herein in a timely and professional manner and to the District's satisfaction.
3. In exchange for the Contractor's services, District will pay Contractor a fee of \$ 3,175 per day. The total fee is not to exceed \$20,000. Invoices must be addressed to the Accounts Payable Department, 11914 Dragon Lane, San Antonio, TX 78252. Payment on a properly submitted invoice will usually be made on the seventh business day of the month for items/services received prior to or on the last business day of the previous month. If an invoice is not properly submitted, no late and/or finance charges will be paid by the District.
4. The contract will be effective on the day of February 23, 2017, and will expire on August 31, 2017 unless sooner terminated as provided herein. This contract may be renewed for a period of up to 0 additional years on a yearly basis contingent upon the availability of funds.
5. Either District or contractor may terminate this contract for convenience after giving the other party thirty (30) days advance written notice. Either District or Contractor may terminate this contract effective immediately for breach of any provision herein provided the non-breaching party gives the breaching party written notice of the breach and thirty (30) days to cure such breach. District may terminate this contract effective at the end of its fiscal year if funds are not appropriated for this contract for the ensuing fiscal year.
6. Contractor is not an employee of the District and is not entitled to fringe benefits. Furthermore, District will not deduct federal income taxes, FICA or any other funds required to be deducted by an employer as this is the responsibility of the Contractor. Contractor is an independent contractor, and District and Contractor have not entered into a joint venture or partnership in providing the services herein.
7. In entering into this contract, Contractor agrees to abide by all District policies and regulations. Accordingly, Contractor agrees to provide such other information and execute other documents as may be required by District policies or regulations. The Contractor certifies compliance with Senate Bill 9 codified in Chapter 22 of the Texas Education Code.
8. Contractor may not subcontract or assign this contract or any of its rights hereunder to another person or entity.
9. All notices hereunder by either party to the other will be delivered personally or by certified mail, return receipt requested, and will be duly given when delivered personally or three business days after postmarked. If to District, notice will be sent to the Superintendent of

# SOUTHWEST INDEPENDENT SCHOOL DISTRICT

11914 DRAGON LANE, SAN ANTONIO, TEXAS 78252

Schools at 11914 Dragon Lane, San Antonio, Texas 78252. If to Contractor, notice will be sent to the signatory and at the address set forth herein.

10. This contract and the following attachments contain the entire agreement between District and contractor for the services set forth herein and supersedes all prior or contemporaneous agreements, whether oral or written. This contract and its attachments cannot be modified without the advance written consent of each party.

Attachments: \_\_\_\_\_

11. This contract will be governed by the laws of the State of Texas is performable in San Antonio Texas.

IN WITNESS WHEREOF, the parties hereto have caused this contract to be executed as of the date and year first above written.

CONTRACTOR:

BY: [Signature]

TITLE: MUTIU FAGBAYI  
President / CEO  
PERFORMANCE  
FACT, INC.

DISTRICT:

SOUTHWEST ISD

BY: \_\_\_\_\_  
Principal/Director/Coordinator Date

\_\_\_\_\_  
Executive Director Date

\_\_\_\_\_  
Asst. Superintendent Curriculum & Instruction Date

B. Crip 3/7/17  
\_\_\_\_\_  
Asst. Superintendent Business & Finance Date

[Signature] 3/6/17  
\_\_\_\_\_  
Superintendent Date

Received By: [Signature] 2/24/17  
Purchasing Date

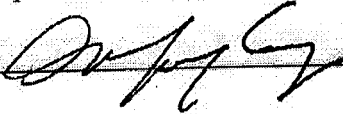
EXHIBIT A - SCOPE OF WORK

# **SOUTHWEST INDEPENDENT SCHOOL DISTRICT**

11914 DRAGON LANE, SAN ANTONIO, TEXAS 78252

Instructions: Describe: (1) the exact nature of the services that will be performed under this contract; (2) any deliverables to be produced by the contractor and any delivery schedule; and, (3) the goals of this contract. Be specific in the description so that all parties have a clear understanding of the expectations of work to be completed. Check the box at the bottom of the Services paragraph in the Contract to indicate an "Exhibit A" is attached.

Contractor Name: \_\_\_\_\_



1. (a) Facilitation, coaching and technical assistance to the Superintendent and Cabinet regarding development and implementation of the district's strategic plan. (b) Leadership capacity-building for principals and selected central office and school administrators, with emphasis on developing and implementing the campus improvement plan (CIP).
2. (Collaboratively with Dr. Velma Villegas) Finalized the district strategic plan; provide ongoing coaching to Cabinet-level managers (between January-June 2017)
3. Goals of this contract are essentially: (1) system-wide strategic plan; (2) streamlined, results-focus campus improvement plan; (c) capacity-building for school and central office leaders.

Vendor Name: Performance Fact, Inc.

**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

TX#:

New ☐

Update ☐

FEB 24 17 3:36PM

1 Name of vendor who has a business relationship with local governmental entity.

Performance Fact, Inc.

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 in this section is being disclosed.

N/A

Name of Officer

This section (item 3 including subparts A, B, C, & D) must be completed for each officer with whom the vendor has an employment or other business relationship as defined by Section 176.001(1-a), Local Government Code. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section 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 named in this section AND the taxable income is not received from the local governmental entity?

☐ Yes

☒ No

C. Is the filer of this questionnaire employed by 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?

☐ Yes

☒ No

D. Describe each employment or business and family relationship with the local government officer named in this section.

4

Signature of vendor doing business with the governmental entity

Date

# Request for Taxpayer Identification Number and Certification

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

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

**PERFORMANCE FACT, INC.**

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

3 Check appropriate box for federal tax classification; check only one of the following seven boxes:

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

4 Exemptions (codes apply only to certain entities; not individuals; see instructions on page 3):  
Exempt payee code (if any) \_\_\_\_\_

Exemption from FATCA reporting code (if any) \_\_\_\_\_  
(Applies to accounts maintained outside the U.S.)

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

**333 HEGENBERGER RD STE 204**

6 City, state, and ZIP code

**OAKLAND, CALIFORNIA 94621**

7 List account number(s) here (optional)

Requester's name and address (optional)

Print or type  
See Specific instructions on page 3.

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

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

Social security number

			-			-			
--	--	--	---	--	--	---	--	--	--

OR

Employer identification number

1	6	-	1	5	3	8	3	2	1
---	---	---	---	---	---	---	---	---	---

## Part II Certification

Under penalties of perjury, I certify that:

- 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
- 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
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign  
Here

Signature of  
U.S. person

Date

2/15/2017

## General Instructions

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

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

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN), which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

• Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)

• Form 1099-C (canceled debt)

• Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding?* on page 2.

By signing the filled-out form, you:

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

# SOUTHWEST INDEPENDENT SCHOOL DISTRICT

**BILL TO:** *Attention: Accounting*  
*11914 Dragon Lane*  
*San Antonio, Texas 78252-2647*  
*(210) 622-4300 Fax (210) 622-4301*  
**FEDERAL TAX No. 74-1461322**

For vendor or department use only: "Purchase Order Number"

DELIVERY TICKETS, AND/OR INVOICES, FREIGHT BILLS, AND  
 STATEMENTS MUST BEAR ABOVE PURCHASE ORDER NUMBER  
 OR DELIVERY WILL NOT BE ACCEPTED OR PAYMENT MADE.

## PURCHASE ORDER/REQUISITION

PURCHASE ~~Method~~ Payable to:

Performance Fact, Inc  
 333 Hegengerger RD - Suite 204  
 Oakland, CA 94821

SHIP TO:

### DELIVERY ADDRESS:

**SOUTHWEST ISD**  
*Attn: Distribution Center*  
 7314 Old Pearsall Rd. • San Antonio, TX 78252  
 Office (210) 622-4746 • Fax (210) 623-6247

Page <u>1</u> of <u>1</u>	P.O. Date	School Name / Program	Date of Requisition	School Requisition No.
		<i>Superintendent's Office</i>		<i>B. Crisp</i>
QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	EXTENSION
1		Professional Services 1-day onsite consultation January 26, 2017 with Superintendent and Cabinet re District Strategic Plan and implementation	3,175.00	3,175.00
<i>Contract # 1617-123</i>			Shipping/Handling	
			Sub-Total	
			GRAND TOTAL	<i>3175.00</i>
PLEASE SEE IMPORTANT CONDITIONS ON REVERSE SIDE				

AUTHORIZED BY: *Michelle Bernal 2/24/17*  
 Requester \_\_\_\_\_ Date \_\_\_\_\_

Technology \_\_\_\_\_ Date \_\_\_\_\_

Program Compliance \_\_\_\_\_ Date \_\_\_\_\_

Staff Development \_\_\_\_\_ Date \_\_\_\_\_ Superintendent \_\_\_\_\_ Date \_\_\_\_\_

APPROVED BY: *MJ 2/24/17*

THE SOUTHWEST INDEPENDENT SCHOOL DISTRICT IS EXEMPTED FROM PAYMENT OF SALES,  
 EXCISE, OR USE TAXES UNDER CHAPTER 20, TITLE 122A, REVISED CIVIL STATUTES OF TEXAS.  
 (ARTICLE 20.04 (F) (4).)

THIS PURCHASE ORDER IS NOT BINDING ON  
 THE SOUTHWEST ISD UNLESS IT HAS BEEN SIGNED BY  
 THE ASSISTANT SUPERINTENDENT OF FINANCE OR  
 BUSINESS MANAGER/PURCHASING AGENT.

### VENDOR'S COPY

STATUS: \_\_\_\_\_ DATE: \_\_\_\_\_ NO. \_\_\_\_\_

PURCHASE ORDER MUST BE REPEATEDLY  
 WITH VENDOR, CURRENT PRICES, PROPER APPROVAL,  
 AND BUDGET CODE OR IT WILL NOT BE ACCEPTED.

### YOUR SCHOOL BUDGET CODE (S) BELOW.

161-41-6219-00-750-799000	FE824 17 3:34PM



1718-104  
SWISD CONTRACT #

**SOUTHWEST INDEPENDENT SCHOOL DISTRICT**  
**CONTRACT REVIEW/APPROVAL**

Contractor's Name: Performance Fact, Inc.

Service Provided: Consultant

Contract Period: December 15, 2017 To August 31, 2018

Daily Rate: on-site \$3,000.00  
off-site \$1,200.00  
Not to exceed:  
Contract Amount: \$30,000

Dept. Requesting Service: Central Office

Budget Code: 161-41-6291-00-750-899000

Quotes provided: Yes ☐ No ☐

Procured: ☐ Bid ☐ RFP ☐ Sole Source ☐ Co-Op ☒ Other: Quotes

Needs Board Approval: ☐ Yes ☒ No School Board Approved:

W9 received: ☒ Yes ☐ No  
TX#: 02157 98861

CIQ form received: ☒ Yes ☐ No CIS form received: ☐ Yes ☒ No  
(Conflict of Interest Questionnaire-Vendor) (Conflict of Interest Statement-SWISD)

Felony conviction form received: ☒ Yes ☐ No

Federal Debarment form: ☒ Yes ☐ No  
Received:

Non-Collusive Bidding form received: ☐ Yes ☐ No ☒ N/A

Senate Bill 9 Compliance (Fingerprinting) ☐ Yes ☐ No ☒ N/A SWISD Dept.: \_\_\_\_\_  
(initial above)

Approved / Disapproved (select an option)

☒

Principal/Director/Exec. Director B. Crisp Date: 12/15/17  
(Person requesting service)

Mr. Mark Figueroa M Figueroa by M Bernae Date: 12/19/17  
Director of Purchasing Operations

Mr. Brandon Crisp B. Crisp Date: 12/19/17  
Assistant Superintendent of Business & Finance Division

Dr. Lloyd Verstuyft [Signature] Date: 12/19/17  
Superintendent of Schools

12-20-17A09:05 RCVD



# **SOUTHWEST INDEPENDENT SCHOOL DISTRICT**

11914 DRAGON LANE, SAN ANTONIO, TEXAS 78252

## **CONTRACTOR SERVICES AGREEMENT**

This contract is entered into by and between Performance Fact, Inc.,  
333 Hegebbberger Rd. Ste. 204, Oakland CA  
(Name and Address)

Hereinafter referred to as "Contractor" and the Southwest Independent School District, a Texas political subdivision, hereinafter referred to as "District" on this the 15th day of December, 2017.

1. District agrees to engage Contractor, and Contractor agrees to perform and/or provide the following services:  
Consultation and implementing of District Strategic Plan, consultation with Superintendent and Staff.
2. Contractor will perform the services set forth herein in a timely and professional manner and to the District's satisfaction.
3. In exchange for the Contractor's services, District will pay Contractor a fee of \$ 3,000 daily rate on site/ \$1,200 per day off site . The total fee is not to exceed \$30,000. Invoices must be addressed to the Accounts Payable Department, 11914 Dragon Lane, San Antonio, TX 78252. Payment on a properly submitted invoice will usually be made on the seventh (7<sup>th</sup>) business day of the month for items/services received prior to or on the last business day of the previous month. If an invoice is not properly submitted, no late and/or finance charges will be paid by the District.
4. The contract will be effective on the 15<sup>th</sup> day of December, 2017, and will expire on the 31st day of August, 2018, unless sooner terminated as provided herein. This contract may be renewed for a period of up to 0 additional years on a yearly basis contingent upon the availability of funds.
5. Either District or contractor may terminate this contract for convenience after giving the other party thirty (30) days advance written notice. Either District or Contractor may terminate this contract effective immediately for breach of any provision herein provided the non-breaching party gives the breaching party written notice of the breach and thirty (30) days to cure such breach. District may terminate this contract effective at the end of its fiscal year if funds are not appropriated for this contract for the ensuing fiscal year.
6. Contractor is not an employee of the District and is not entitled to fringe benefits. Furthermore, District will not deduct federal income taxes, FICA or any other funds required to be deducted by an employer as this is the responsibility of the Contractor. Contractor is an independent contractor, and District and Contractor have not entered into a joint venture or partnership in providing the services herein.
7. In entering into this contract, Contractor agrees to abide by all District policies and regulations. Accordingly, Contractor agrees to provide such other information and execute other documents as may be required by District policies or regulations. The

# SOUTHWEST INDEPENDENT SCHOOL DISTRICT

11914 DRAGON LANE, SAN ANTONIO, TEXAS 78252

Contractor certifies compliance with Senate Bill 9 codified in Chapter 22 of the Texas Education Code.

8. Contractor may not subcontract or assign this contract or any of its rights hereunder to another person or entity.
9. All notices hereunder by either party to the other will be delivered personally or by certified mail, return receipt requested, and will be duly given when delivered personally or three business days after postmarked. If to District, notice will be sent to the Superintendent of Schools at 11914 Dragon Lane, San Antonio, Texas 78252. If to Contractor, notice will be sent to the signatory and at the address set forth herein.
10. This contract and the following attachments contain the entire agreement between District and contractor for the services set forth herein and supersedes all prior or contemporaneous agreements, whether oral or written. This contract and its attachments cannot be modified without the advance written consent of each party.

Attachments: NONE

11. This contract will be governed by the laws of the State of Texas is performable in San Antonio Texas.

IN WITNESS WHEREOF, the parties hereto have caused this contract to be executed as of the date and year first above written.

CONTRACTOR:  
PERFORMANCE FACT, INC.

DISTRICT:  
SOUTHWEST ISD

BY: [Signature]  
MULTIFACTORY

BY: \_\_\_\_\_  
Principal/Director/Coordinator Date

\_\_\_\_\_  
Director/Executive Director Date

TITLE: PRESIDENT, CEO

12/18/2017

Asst. Superintendent Date

B. Crisp 12/19/17  
Mr. Brandon Crisp Date  
Assistant Superintendent of Business & Finance

[Signature] 12/19/17  
Dr. Lloyd Verstuyft Ed. D Date  
Superintendent of Schools

Received By: Michelle Bernal 12/19/17  
Purchasing Date

## **SOUTHWEST INDEPENDENT SCHOOL DISTRICT**

11914 DRAGON LANE, SAN ANTONIO, TEXAS 78252

### **EXHIBIT A – SCOPE OF WORK**

Instructions: Describe: (1) the exact nature of the services that will be performed under this contract; (2) any deliverables to be produced by the contractor and any delivery schedule; and, (3) the goals of this contract. Be specific in the description so that all parties have a clear understanding of the expectations of work to be completed. Check the box at the bottom of the Services paragraph in the Contract to indicate an "Exhibit A" is attached.

Contractor Name: PERFORMANCE FACT, INC.

*Identified in Item #1 of agreement.*



**SOUTHWEST INDEPENDENT SCHOOL DISTRICT**  
BILL TO: Attention: Accounting  
11914 Dragon Lane  
San Antonio, Texas 78252-2647  
(210) 622-4300 Fax (210) 622-4301  
FEDERAL TAX No. 74-1461322

**PURCHASE ORDER/REQUISITION**

PURCHASED FROM:

Performance Fact, Inc.  
333 Hegengerger Rd, Ste. 204  
Oakland, CA 94621  
Phone

SHIP TO:

For vendor or department use only: "Purchase Order Number"

180632

DELIVERY TICKETS, AND/OR INVOICES, FREIGHT BILLS, AND  
STATEMENTS MUST BEAR ABOVE PURCHASE ORDER NUMBER  
OR DELIVERY WILL NOT BE ACCEPTED OR PAYMENT MADE.

**DELIVERY ADDRESS:**

SOUTHWEST ISD  
Attn: Distribution Center  
7314 Old Pearsall Rd. • San Antonio, TX 78252  
Office (210) 622-4746 • Fax (210) 623-6247

Page <u>1</u> of <u>1</u>	P.O. Date	School Name / Program <b>Business Office</b>	Date of Requisition <b>12/15/2017</b>	School Requisition No. <b>mq</b>
QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	EXTENSION
		Professional Services: Consultation and implementing of District Statigic Plan and consultation with Superintendent and Staff  <i>Contract # 1718-104</i>	not to exceed	\$30,000.00
PLEASE SEE IMPORTANT CONDITIONS ON REVERSE SIDE			Shipping/Handling	
			Sub-Total	
			GRAND TOTAL	\$30,000.00

AUTHORIZED BY:

*Mary Marting* 12/15/17  
Requester Date

Technology Date  
*[Signature]* 12/15/17  
Superintendent Date

Staff Development Date

THE SOUTHWEST INDEPENDENT SCHOOL DISTRICT IS EXEMPTED FROM PAYMENT OF SALES,  
EXCISE, OR USE TAXES UNDER CHAPTER 20, TITLE 122A, REVISED CIVIL STATUTES OF TEXAS.  
ARTICLE 20.04 (F) (4).)

**VENDOR'S COPY**

STATUS: C/O  
DATE: 12/19/17 VENDOR NO. 98861

**YOUR SCHOOL BUDGET CODE (S) BELOW.**

161-41-6219-00-750-899000

Commodity: Professional Services

**RECEIVED**

DEC 19 2017

**BUSINESS &  
FINANCE**

Program Compliance Date

APPROVED BY: *B. Crisp* 12/15/17

THIS PURCHASE ORDER IS NOT BINDING ON  
THE SOUTHWEST ISD UNLESS IT HAS BEEN SIGNED BY  
THE ASSISTANT SUPERINTENDENT OF FINANCE OR  
BUSINESS MANAGER/PURCHASING AGENT.

PURCHASE ORDER MUST BE TYPED, COMPLETE  
WITH VENDOR, CURRENT PRICES, PROPER APPROVAL,  
AND BUDGET CODE OR IT WILL NOT BE ACCEPTED.





# SOUTHWEST INDEPENDENT SCHOOL DISTRICT

## PURCHASING DEPARTMENT PRICE QUOTE TABULATION

Date: 12-18-2017 Campus/Department: Central Office Requisition#: \_\_\_\_\_

Description of item(s) for bid request: Consultation and implementation of District Strategic Plan, CPR Card with divisions.

*\*Quote is only needed for orders less than \$1,000. If total order is over \$1,000, 2 additional quotes from different vendors are required. If no additional quotes are required, process your request with Purchasing. Send the 3 quotes and tabulation sheet to the purchasing office for processing.*

### QUOTE #1

<b>Vendor Name:</b> Performance Fact	<b>Contact Person:</b> Mutiu	<b>Quote for Items:</b> Daily Rate/ 3,000 onsite	<b>Shipping Cost:</b>	<b>Total Quote:</b> Not exceed \$30,000
<b>Vendor ID# (TX):</b>	<b>Phone Number:</b>	Daily Rate/ 1,200 offsite		

### QUOTE #2

<b>Vendor Name:</b> Velma Villegas	<b>Contact Person:</b> Phone Number:	<b>Quote for Items:</b> Daily Rate/750 Half Rate/450	<b>Shipping Cost:</b>	<b>Total Quote:</b> Not to Exceed \$18,000
<b>Vendor ID# (TX):</b>	<b>Fax Number:</b> <b>Email:</b>			

### QUOTE #3

<b>Vendor Name:</b>	<b>Contact Person:</b> Phone Number:	<b>Quote for Items:</b>	<b>Shipping Cost:</b>	<b>Total Quote:</b>
<b>Vendor ID# (TX):</b>	<b>Fax Number:</b> <b>Email:</b>			

**\*\*If recommended vendor is other than lowest price, provide a narrative justifying the purchase. The district has invested resources in previous year to implement the strategic plan. The districts initial Investment in Performance Fact needs to continue in order to finalize the product. Changing vendors would be too costly to the district.**

\*\*\*Circle awarded vendor

Quote provided by Dept  
Campus/Department Signature for Quote Verification

12/19/17  
Date

\*All office supplies are purchased from Approved office supply vendors.  
\*All technology requests need to go through Technology for approved quotes.

REV: 7/16/2014