



# Collin County Purchasing

**2022-296**

## **Tax Statement Preparation and Mailing Services**

Issue Date: 6/28/2022

Questions Deadline: 7/12/2022 05:00 PM (CT)

Response Deadline: 7/28/2022 02:00 PM (CT)

Collin County Purchasing

### **Contact Information**

Contact: Susan Hayes Buyer II

Address: Purchasing  
Admin. Building  
Ste. 3160  
2300 Bloomdale Rd.  
Ste. 3160  
McKinney, TX 75071

Phone: (972) 548-4122

Fax: (972) 548-4694

Email: shayes@co.collin.tx.us

## Event Information

Number: 2022-296  
Title: Tax Statement Preparation and Mailing Services  
Type: Request for Proposal - Other  
Issue Date: 6/28/2022  
Question Deadline: 7/12/2022 05:00 PM (CT)  
Response Deadline: 7/28/2022 02:00 PM (CT)  
Notes: Please login to view documents.

Collin County's intent of this Request for Proposal and resulting contract is to obtain proposals for Tax Statement Preparation & Mailing Service for the Tax Assessor/Collector. The proposal covers the printing of all items (statements, carrier envelopes and reply envelopes), data processing, inserting, first class postage and delivery to U.S. Postal Service for mailing tax statements. Any questions related to this RFP shall be directed to Susan Hayes, shayes@co.collin.tx.us.

## Ship To Information

Address: Tax Office  
Admin. Building  
Ste. 2366  
2300 Bloomdale Rd.  
Ste. 2366  
McKinney, TX 75071

## Billing Information

Contact: Accounts Payable  
Address: Auditor  
Jack Hatchell Admin. Building  
Ste. 3100  
2300 Bloomdale Rd.  
Ste. 3100  
McKinney, TX 75071  
Phone: (972) 5484122  
Email: accountspayable@co.collin.tx.us

## Bid Attachments

### LEGAL NOTICE -RFP 2022-296.doc

Legal Notice

[View Online](#)

### General\_Instructions\_Proposals 09.03.21.docx

General Instructions - Proposal - updated 09.03.21

[View Online](#)

### Terms\_of\_Contract\_Proposals\_-\_2.10.21.docx

Terms of Contract - Proposals

[View Online](#)

### Insurance updated 1-26-2015.doc

Minimum Insurance Requirements

[View Online](#)

### RFP\_2022-296\_-Tax\_Statement\_Preparation\_and\_Mailing\_Specs.pdf

Specifications

[View Online](#)

### Attachment A, Line 1 Property\_Redacted.pdf

Attachment A, Line 1 Property Tax Statement

[View Online](#)

### Attachment B, Line 1 Property\_Homeowner\_Redacted.pdf

Attachment B, Line 1 Property Tax Statement Homeowner

[View Online](#)

### Attachment C, Line 1 Property P2 Homeowner\_Redacted.pdf

Attachment C, Line 1 Property Tax Statement Page 2

[View Online](#)

**Attachment D, Line 1 Property\_Mortgage\_Redacted.pdf**

Attachment D, Line 1 Property Tax Statement Mortgage

[View Online](#)

**Attachment E, Line 1 Property P2 Mortgage\_Redacted.pdf**

Attachment E, Line 1 Property Tax Statement Mortgage Page 2

[View Online](#)

**Attachment F, Line 2 February\_Blue\_Redacted.pdf**

Attachment F, Line 2 February Blue

[View Online](#)

**Attachment G, Line 3 May\_Pink\_Redacted.pdf**

Attachment G, Line 3 May Pink

[View Online](#)

**Attachment H, Line 3 May\_Statement.pdf**

Attachment H, Line 3 May Statement

[View Online](#)

**Attachment I, Line 4 July\_Atty\_Mint Green.pdf**

Attachment I, Line 4 July Attorney Statement Mint Green

[View Online](#)

**Attachment J, #9 Return Envelope\_non-standard.pdf**

Attachment J, #9 Return Envelope

[View Online](#)

**Attachment K, #10 Window Mailing Envelopes blue (front).pdf**

Attachment K, #10 Window Mailing Envelope Front Blue Print

[View Online](#)

**Attachment L, #10 Window\_Blue Back.pdf**

Attachment L, #10 Window Mailing Envelope Back Blue Print

[View Online](#)

**Information Regarding Conflict of Interest Questionnaire.docx**

Information Regarding Conflict of Interest Questionnaire

[View Online](#)

**CIQ\_113015.pdf**

Conflict of Interest Questionnaire

[View Online](#)

**W-9 rev 2018.pdf**

W-9 Form

[View Online](#)

**Requested Attachments**

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**Proposal/Response to Section 6.0**

*(Attachment required)*

**W-9**

*(Attachment required)*

**Conflict of Interest Questionnaire**

**Bid Attributes**

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**1 eBid Notice**

Collin County exclusively uses IonWave Technologies, Inc. (Collin County eBid) for the notification and dissemination of all solicitations. The receipt of solicitations through any other means may result in your receipt of incomplete specifications and/or addendums which could ultimately render your bid/proposal non-compliant. Collin County accepts no responsibility for the receipt and/or notification of solicitations through any other means. Please initial.

*(Required: Maximum 1000 characters allowed)*

**2 Contact Information**

List the contact name, email address and phone number of the main person(s) Collin County should contact in reference to this solicitation. Contact(s) shall be duly authorized by the company, corporation, firm, partnership or individual to respond to any questions, clarification, and or offers in response to this solicitation.

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*(Required: Maximum 4000 characters allowed)*

**3 Delivery**

Delivery will be F.O.B. inside delivery at Collin County designated locations and all transportation charges are to be paid by the supplier to destination. Please state delivery in calendar days from date of order.

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*(Required: Maximum 1000 characters allowed)*

**4 Exceptions**

Do you take exception to the specifications? If so, by separate attachment, please state your exceptions.

Yes  No

*(Required: Check only one)*

**5 Insurance Acknowledgement**

I understand that the insurance requirements of this solicitation are required and are included in the submitted pricing. A certificate of insurance shall be submitted to the Purchasing department if I am awarded all or a portion of the resulting contract. Please initial.

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*(Required: Maximum 1000 characters allowed)*

**6 Subcontractors**

State the business name of all subcontractors and the type of work they will be performing under this contract. If you are fully qualified to self-perform the entire contract, please respond with "Not Applicable-Self Perform".

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*(Required: Maximum 4000 characters allowed)*

**7 Reference No. 1**

List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references are preferred. Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail. It is the responsibility of the Bidder/Proposer to ensure submitted references will be responsive to the County's requests. The County reserves the right to contact references other than those listed, and to consider any information acquired from all references during the evaluation process.

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*(Required: Maximum 4000 characters allowed)*

**8 Reference No. 2**

List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references are preferred. Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail. It is the responsibility of the Bidder/Proposer to ensure submitted references will be responsive to the County's requests. The County reserves the right to contact references other than those listed, and to consider any information acquired from all references during the evaluation process.

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*(Required: Maximum 4000 characters allowed)*

**9 Reference No. 3**

List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references are preferred. Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail. It is the responsibility of the Bidder/Proposer to ensure submitted references will be responsive to the County's requests. The County reserves the right to contact references other than those listed, and to consider any information acquired from all references during the evaluation process.

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*(Required: Maximum 4000 characters allowed)*

**1  
0** **Cooperative Contracts**

As permitted under Title 8, Chapter 271, Subchapter F, Section 271.101 and 271.102 V.T.C.A. and Title 7, Chapter 791, Subchapter C, Section 791.025, V.T.C.A., other local governmental entities may wish to also participate under the same terms and conditions contained in this contract. Each entity wishing to participate must enter into an inter-local agreement with Collin County and have prior authorization from vendor. If such participation is authorized, all purchase orders will be issued directly from and shipped directly to the local governmental entity requiring supplies/services. Collin County shall not be held responsible for any orders placed, deliveries made or payment for supplies/services ordered by these entities. Each entity reserves the right to determine their participation in this contract. Would bidder be willing to allow other local governmental entities to participate in this contract, if awarded, under the same terms and conditions?

Yes  No

*(Required: Check only one)*

**1  
1** **Preferential Treatment**

The County of Collin, as a governmental agency of the State of Texas, may not award a contract to a nonresident bidder unless the nonresident's bid is lower than the lowest bid submitted by a responsible Texas resident bidder by the same amount that a Texas resident bidder would be required to underbid a nonresident bidder to obtain a comparable contract in the state in which the nonresident's principal place of business is located (Government Code, Title 10, V.T.C.A., Chapter 2252, Subchapter A).

1. Is your principal place of business in the State of Texas?
2. If your principal place of business is not in Texas, in which State is your principal place of business?
3. If your principal place of business is not in Texas, does your state favor resident bidders (bidders in your state) by some dollar increment or percentage?
4. If your state favors resident bidders, state by what dollar amount or percentage.

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*(Required: Maximum 4000 characters allowed)*

**1  
2** **Debarment Certification**

I certify that neither my company nor an owner or principal of my company has been debarred, suspended or otherwise made ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension," as described in the Federal Register and Rules and Regulations. Please initial.

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*(Required: Maximum 1000 characters allowed)*

**1  
3** **Immigration and Reform Act**

I declare and affirm that my company is in compliance with the Immigration and Reform Act of 1986 and all employees are legally eligible to work in the United States of America. I further understand and acknowledge that any non-compliance with the Immigration and Reform Act of 1986 at any time during the term of this contract will render the contract voidable by Collin County. Please initial.

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*(Required: Maximum 1000 characters allowed)*

**1  
4 Disclosure of Certain Relationships**

Chapter 176 of the Texas Local Government Code requires that any vendor considering doing business with a local government entity disclose the vendor's affiliation or business relationship that might cause a conflict of interest with a local government entity. Subchapter 6 of the code requires a vendor to file a conflict of interest questionnaire (CIQ) if a conflict exists. By law this questionnaire must be filed with the records administrator of Collin County no later than the 7th business day after the date the vendor becomes aware of an event that requires the statement to be filed. A vendor commits an offense if the vendor knowingly violates the code. An offense under this section is a misdemeanor. By submitting a response to this request, the vendor represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code. Please send completed forms to the Collin County County Clerk's Office located at 2300 Bloomdale Rd., Suite 2104, McKinney, TX 75071. Please initial.

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\_\_\_\_\_  
\_\_\_\_\_  
*(Required: Maximum 1000 characters allowed)*

**1  
5 Anti-Collusion Statement**

Bidder certifies that its Bid/Proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a Bid/Proposal for the same materials, services, supplies, or equipment and is in all respects fair and without collusion or fraud. No premiums, rebates or gratuities permitted; either with, prior to, or after any delivery of material or provision of services. Any such violation may result in Agreement cancellation, return of materials or discontinuation of services and the possible removal from bidders list. Please initial.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
*(Required: Maximum 1000 characters allowed)*

**1  
6 Disclosure of Interested Parties**

Section 2252.908 of the Texas Government Code requires a business entity entering into certain contracts with a governmental entity to file with the governmental entity a disclosure of interested parties at the time the business entity submits the signed contract to the governmental entity. Section 2252.908 requires the disclosure form (Form 1295) to be signed by the authorized agent of the contracting business entity, acknowledging that the disclosure is made under oath and under penalty of perjury. Section 2252.908 applies only to a contract that requires an action or vote by the governing body of the governmental entity before the contract may be signed or has a value of at least \$1 million. Section 2252.908 provides definitions of certain terms occurring in the section. Section 2252.908 applies only to a contract entered into on or after January 1, 2016. Please initial.

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\_\_\_\_\_  
\_\_\_\_\_  
*(Required: Maximum 1000 characters allowed)*

**1  
7 Notification Survey**

In order to better serve our offerors, the Collin County Purchasing Department is conducting the following survey. We appreciate your time and effort expended to submit your bid. Should you have any questions or require more information please call (972) 548-4165. How did you receive notice of this request?

- Plano Star Courier     Plan Room     Collin County eBid Notification     Collin County Website
- Other

*(Required: Check only one)*

**1  
8** **Proposer Acknowledgement**

Proposer acknowledges, understands the specifications, any and all addenda, and agrees to the proposal terms and conditions and can provide the minimum requirements stated herein. Offeror acknowledges they have read the document in its entirety, visited the site, performed investigations and verifications as deemed necessary, is familiar with local conditions under which work is to be performed and will be responsible for any and all errors in Proposal submittal resulting from Proposer's failure to do so. Proposer acknowledges the prices submitted in this Proposal have been carefully reviewed and are submitted as correct and final. If Proposal is accepted, vendor further certifies and agrees to furnish any and all products/services upon which prices are extended at the price submitted, and upon conditions in the specifications of the Request for Proposal. Please initial.

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\_\_\_\_\_  
\_\_\_\_\_  
*(Required: Maximum 1000 characters allowed)*

**1  
9** **Critical Infrastructure Affirmation**

Pursuant to section 2274.0102 of the Texas Government Code, Respondent certifies that neither it nor its parent company, nor any affiliate of Respondent or its parent company, is: (1) majority owned or controlled by citizens or governmental entities of China, Iran, North Korea, Russia, or any other country designated by the Governor under Government Code Section 2274.0103, or (2) headquartered in any of those countries. Please initial.

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\_\_\_\_\_  
*(Required: Maximum 1000 characters allowed)*

**2  
0** **Energy Company Boycotts**

Pursuant to Section 2274.002 of the Texas Government Code, should the contract have a value of \$100,000 or more and the company employs 10 or more full-time employees, Respondent represents and warrants that: (1) it does not, and will not for the duration of the contract, boycott energy companies, and (2) will not boycott energy companies during the term of the contract. If circumstances relevant to this provision change during the course of the contract, Respondent shall promptly notify Agency. Please initial.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
*(Required: Maximum 1000 characters allowed)*

**2  
1** **Firearm Entities and Trade Associations Discrimination**

Pursuant to section 2274.002 of the Texas Government Code, should the contract have a value of \$100,000 or more and the company employs 10 or more full-time employees, Respondent verifies that: (1) it does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association and (2) will not discriminate during the term of the contract against a firearm entity or firearm trade association. If circumstances relevant to this provision change during the course of the contract, Respondent shall promptly notify Agency. Please initial.

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*(Required: Maximum 1000 characters allowed)*

**Bid Lines**



**1** Line item #1 - Original October Mailing: Cost per statement shall include 8.5" x 11" one page perforated printed front and back form, color printing on 24 lb. white paper (ink/paper color to be determined). Account History insert shall be included with the statement. The insert shall be 8.5" x 11" printed on both sides on white paper in black ink with information provided by the County. Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall also be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. E-mail first samples in PDF form within two (2) days of receiving file. For final proofing purposes Collin County requires the first 500 statements of residents whose last name start with the letters "M" and "B". Specific accounts may be requested for evaluation. Original samples for final proofing shall be received at tax office within four (4) days of contractor receiving data file. There will be three (3) envelopes: One (1) for sending statements and account history insert, #10 window envelope with printing on both sides, One (1) for return, 9 non-standard envelope, and On an as needed basis, larger envelopes for mailing multiple statements. TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing. Please note quantities are approximate, vendor to invoice on actual number of statements.

*(Response required)*

Quantity: 450000 UOM: each Unit Price: \$  Total: \$

Supplier Notes: \_\_\_\_\_  
 \_\_\_\_\_

No bid  
 Additional notes  
*(Attach separate sheet)*

**2** Line Item #2 - February Delinquent Mailing: Cost per statement shall include 8.5" x 11" perforated on page one printing on front only, second page without perforation printing on front only, blue color printing on 20 lb. white paper (ink/paper color to be determined). Insert letter shall be included with the statement. The insert letter shall be 8.5" x 11" print one sided on white paper in black ink with information provided by the County. Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 41,000 late notices. There will be three (3) envelopes: One (1) for sending statements and letter insert, #10 window envelopes with printing on both sides, One (1) for return, #9 non-standard envelope, and On an as needed basis, larger envelopes for mailing multiple statements. TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing. Please note quantities are approximate, vendor to invoice on actual number of statements.

*(Response required)*

Quantity: 41000 UOM: each Unit Price: \$  Total: \$

Supplier Notes: \_\_\_\_\_  
 \_\_\_\_\_

No bid  
 Additional notes  
*(Attach separate sheet)*

**3** Line Item #3 – May Delinquent Mailing: Cost per statement shall include 8.5" x 11" perforated on page one printing on front only, second page without perforation printing on front only, pink color printing on 20 lb. white paper (ink/paper color to be determined). Insert letter shall be included with the statement. The insert letter shall be 8.5" x 11" print one sided on white paper in black ink with information provided by the County. Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 25,000 late notices. There will be three (3) envelopes: One (1) for sending statements and letter insert, #10 window envelopes with printing on both sides, One (1) for return, #9 non-standard envelope, and On an as needed basis, larger envelopes for mailing multiple statements. TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing. Please note quantities are approximate, vendor to invoice on actual number of statements.

*(Response required)*

Quantity: 25000 UOM: each Unit Price: \$  Total: \$

Supplier Notes: \_\_\_\_\_  
 \_\_\_\_\_

No bid  
 Additional notes  
*(Attach separate sheet)*

**4** Line Item #4 – July Attorney Letter: Cost per statement shall include 8.5" x 11" perforated on page one printing on front only, second page without perforation printing on front only, mint green color printing on 20 lb. white paper (ink/paper color to be determined). Letters will be printed and sent to County attorneys on an as needed basis (to be determined at a later date). No postage, envelopes or mailing of the letters are necessary for this line-item. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portions of the statement. All letters are to be submitted to the County attorneys.; There will be approximately 14,000 notices. TYPES OF MAILINGS: All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing. Please note quantities are approximate, vendor to invoice on actual number of statements.

*(Response required)*

Quantity: 14000 UOM: each Unit Price: \$  Total: \$

Item Notes:  
 Supplier Notes: \_\_\_\_\_  
 \_\_\_\_\_

No bid  
 Additional notes  
*(Attach separate sheet)*

**Supplier Information**

Company Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

**Supplier Notes**

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The undersigned hereby certifies the foregoing proposal submitted by the company listed below hereinafter called "offeror" is the duly authorized agent of said company and the person signing said proposal has been duly authorized to execute same. Offeror affirms that they are duly authorized to execute this contract; this company; corporation, firm, partnership or individual has not prepared this proposal in collusion with any other offeror or other person or persons engaged in the same line of business; and that the contents of this proposal as to prices, terms and conditions of said proposal have not been communicated by the undersigned nor by any employee or agent to any other person engaged in this type of business prior to the official opening of this proposal.

\_\_\_\_\_  
*Print Name*

\_\_\_\_\_  
*Signature*

## 1.0 GENERAL INSTRUCTIONS

### 1.0.1 Definitions

1.0.1.1 Offeror: refers to submitter.

1.0.1.2 Vendor/Contractor/Provider: refers to a Successful Vendor/Contractor/Service Provider.

1.0.1.3 Submittal: refers to those documents required to be submitted to Collin County, by an Offeror.

1.0.1.4 RFP: refers to Request for Proposal.

1.0.1.5 CSP: refers to Competitive Sealed Proposal

1.1 If Offeror does not wish to submit an offer at this time, please submit a No Bid.

1.2 Awards shall be made not more than ninety (90) days after the time set for opening of Submittals.

1.3 Collin County is always conscious and extremely appreciative of your time and effort in preparing your Submittal.

1.4 Collin County exclusively uses ionWave Technologies, Inc. (Collin County eBid) for the notification and dissemination of all solicitations. The receipt of solicitations through any other company may result in your receipt of incomplete specifications and/or addenda which could ultimately render your Submittal non-compliant. Collin County accepts no responsibility for the receipt and/or notification of solicitations through any other company.

1.5 A Submittal may not be withdrawn or canceled by the Offeror prior to the ninety-first (91<sup>st</sup>) day following public opening of Submittals and only prior to award.

1.6 It is understood that Collin County, Texas reserves the right to accept or reject any and/or all Proposals/Submittals for any or all products and/or services covered in a Request For Proposal (RFP) and Competitive Sealed Proposal (CSP), and to waive informalities or defects in Submittals or to accept such Submittals as it shall deem to be in the best interest of Collin County.

1.7 All RFPs and CSPs submitted in hard copy paper form shall be submitted in a sealed envelope, plainly marked on the outside with the RFP/CSP number and name. A hard copy paper form Submittal shall be manually signed in ink by a person having the authority to bind the firm in a contract. Submittals shall be mailed or hand delivered to the Collin County Purchasing Department.

1.8 No oral, telegraphic or telephonic Submittals will be accepted. RFPs and CSPs may be submitted in electronic format via Collin County eBid.

1.9 All RFPs and CSPs submitted electronically via Collin County eBid shall remain locked until official date and time of opening as stated in the Special Terms and Conditions of the RFP and/or CSP.

1.10 Time/date stamp clock in Collin County Purchasing Department shall be the official time of receipt for all RFPs and CSPs submitted in hard copy paper form. RFPs, and CSPs received in the Collin County Purchasing Department after submission deadline shall be considered void and unacceptable. Absolutely no late Submittals will be considered. Collin County accepts no responsibility for technical difficulties related to electronic Submittals.

1.11 For hard copy paper form Submittals, any alterations made prior to opening date and time must be initialed by the signer of the RFP/CSP, guaranteeing authenticity. Submittals cannot be altered or amended after submission deadline.

1.12 Collin County is by statute exempt from the State Sales Tax and Federal Excise Tax; therefore, the prices submitted shall not include taxes.

1.13 Any interpretations, corrections and/or changes to a RFP or CSP and related Specifications or extensions to the opening/receipt date will be made by addenda to the respective document by the Collin County Purchasing Department. Questions and/or clarification requests must be submitted no later than the date specified in the solicitation. Those received at a later date may not be addressed prior to the public opening. Sole authority to authorize addenda shall be vested in Collin County Purchasing Agent as entrusted by the Collin County Commissioners Court. Addenda may be transmitted electronically via Collin County eBid.

1.13.1 Addenda will be transmitted to all that are known to have received a copy of the RFP/CSP and related Specifications. However, it shall be the sole responsibility of the Bidder/Quoter/Offeror to verify issuance/non-issuance of addenda and to check all avenues of document availability (i.e. **Collin County eBid** <https://collincountytx.ionwave.net/>, telephoning Purchasing Department directly, etc.) prior to opening/receipt date and time to insure Offeror's receipt of any addenda issued. Offeror shall acknowledge receipt of all addenda.

1.14 All materials and services shall be subject to Collin County approval.

1.15 Collin County reserves the right to make award in whole or in part as it deems to be in the best interest of the County.

1.16 Any reference to model/make and/or manufacturer used in specifications is for descriptive purposes only. Products/materials of like quality will be considered.

1.17 Offerors taking exception to the specifications shall do so at their own risk. By offering substitutions, Offeror shall state these exceptions in the section provided in the RFP/CSP or by attachment. Exception/substitution, if accepted, must meet or exceed specifications stated therein. Collin County reserves the right to accept or reject any and/or all of the exception(s)/substitution(s) deemed to be in the best interest of the County.

1.18 Minimum Standards for Responsible Prospective Offerors: A prospective Offeror must meet the following minimum requirements:

1.18.1 have adequate financial resources, or the ability to obtain such resources as required;

1.18.2 be able to comply with the required or proposed delivery/completion schedule;

1.18.3 have a satisfactory record of performance;

1.18.4 have a satisfactory record of integrity and ethics;

1.18.5 be otherwise qualified and eligible to receive an award.

Collin County may request documentation and other information sufficient to determine Offeror's ability to meet these minimum standards listed above.

1.20 Vendor shall bear any/all costs associated with its preparation of a RFP/CSP Submittal.

1.21 Public Information Act: Collin County is governed by the Texas Public Information Act, Chapter 552 of the Texas Government Code. All information submitted by prospective Offerors during the solicitation process is subject to release under the Act.

1.22 The Offeror shall comply with Commissioners Court Order No. 2004-167-03-11, County Logo Policy.

1.23 Interlocal Agreement: Successful Offeror agrees to extend prices and terms to all entities that has entered into or will enter into joint purchasing interlocal cooperation agreements with Collin County. Delivery to governmental entities located within Collin County will be at no additional charge or as otherwise provided for in the award document. Delivery charges, if any, for governmental entities located outside of Collin County shall be negotiated between the Vendor and each governmental entity.

1.24 Bid Openings: All bids submitted will be read at the county's regularly scheduled bid opening for the designated project. However, the reading of a bid at bid opening should be not construed as a comment on the responsiveness of such bid or as any indication that the county accepts such bid as responsive.

The county will make a determination as to the responsiveness of bids submitted based upon compliance with all applicable laws, Collin County Purchasing Guidelines, and project documents, including but not limited to the project specifications and contract documents. The county will notify the successful Offeror upon award of the contract and, according to state law; all bids received will be available for inspection at that time.

1.25 Offeror shall comply with all local, state and federal employment and discrimination laws and shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin or any other class protected by law.

## 2.0 TERMS OF CONTRACT

2.1 A proposal, when properly accepted by Collin County, shall constitute a contract equally binding between the Vendor/Contractor/Provider and Collin County. No different or additional terms will become part of this contract with the exception of an Amendment.

2.2 No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All Amendments to the contract will be made in writing by Collin County Purchasing Agent.

2.3 No public official shall have interest in the contract, in accordance with Vernon's Texas Codes Annotated, Local Government Code Title 5, Subtitle C, Chapter 171.

2.4 The Vendor/Contractor/Provider shall comply with Commissioners' Court Order No. 96-680-10-28, Establishment of Guidelines & Restrictions Regarding the Acceptance of Gifts by County Officials & County Employees.

2.5 Design, strength, quality of materials and workmanship must conform to the highest standards of manufacturing and engineering practice.

2.6 Proposals must comply with all federal, state, county and local laws concerning the type(s) of product(s)/service(s)/equipment/project(s) contracted for, and the fulfillment of all ADA (Americans with Disabilities Act) requirements.

2.7 All products must be new and unused, unless otherwise specified, in first-class condition and of current manufacture. Obsolete products, including products or any parts not compatible with existing hardware/software configurations will not be accepted.

2.8 Vendor/Contractor/Provider shall provide any and all notices as may be required under the Drug-Free Work Place Act of 1988, 28 CFR Part 67, Subpart F, to its employees and all sub-contractors to insure that Collin County maintains a drug-free work place.

2.9 Vendor/Contractor/Provider shall defend, indemnify and save harmless Collin County and all its officers, agents and employees and all entities, their officers, agents and employees who are participating in this contract from all suits, claims, actions, damages (including personal injury and or property damages), or demands of any character, name and description, (including attorneys' fees, expenses and other defense costs of any nature) brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of Vendor/Contractor/Provider's breach of the contract arising from an award, and/or any negligent act, error, omission or fault of the Vendor/Contractor/Provider, or of any agent, employee, subcontractor or supplier of Vendor/Contractor/Provider in the execution of, or performance under, any contract which may result from an award. Vendor/Contractor/Provider shall pay in full any judgment with costs, including attorneys' fees and expenses which are rendered against Collin County and/or participating entities arising out of such breach, act, error, omission and/or fault.

2.10 Expenses for Enforcement. In the event either Party hereto is required to employ an attorney to enforce the provisions of this Agreement or is required to commence legal proceedings to enforce the provisions hereof, the prevailing Party shall be entitled to recover from the other, reasonable attorney's fees and court costs incurred in connection with such enforcement, including collection.

2.11 If a contract, resulting from a Collin County RFP/CSP is for the execution of a public work, the following shall apply:

2.11.1 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Payment Bond if the contract is in excess of

\$25,000.00. Such bond shall be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56<sup>th</sup> Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.11.2 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Performance Bond if the contract is in excess of \$100,000.00. Such bond shall be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56<sup>th</sup> Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.12 Purchase Order(s) shall be generated by Collin County to the vendor. Collin County will not be responsible for any orders placed/delivered without a valid purchase order number.

2.13 The contract shall remain in effect until any of the following occurs: delivery of product(s) and/or completion and acceptance by Collin County of product(s) and/or service(s), contract expires or is terminated by either party with thirty (30) days written notice prior to cancellation and notice must state therein the reasons for such cancellation. Collin County reserves the right to terminate the contract immediately in the event the Vendor/Contractor/Provider fails to meet delivery or completion schedules, or otherwise perform in accordance with the specifications. Breach of contract or default authorizes the County to purchase elsewhere and charge the full increase in cost and handling to the defaulting Vendor/Contractor/Provider.

2.14 Collin County Purchasing Department shall serve as Contract Administrator or shall supervise agents designated by Collin County.

2.15 All delivery and freight charges (FOB Inside delivery at Collin County designated locations) are to be included as part of the proposal price. All components required to render the item complete, installed and operational shall be included in the total proposal price. Collin County will pay no additional freight/delivery/installation/setup fees.

2.16 Vendor/Contractor/Provider shall notify the Purchasing Department immediately if delivery/completion schedule cannot be met. If delay is foreseen, the Vendor/Contractor/Provider shall give written notice to the Purchasing Agent. The County has the right to extend delivery/completion time if reason appears valid.

2.17 The title and risk of loss of the product(s) shall not pass to Collin County until Collin County actually receives and takes possession of the product(s) at the point or points of delivery. Collin County shall generate a purchase order(s) to the Vendor/Contractor/Provider and the purchase order number must appear on all itemized invoices.

2.18 Invoices shall be mailed directly to the Collin County Auditor's Office, 2300 Bloomdale Road, Suite 3100, McKinney, Texas 75071. All invoices shall show:

2.18.1 Collin County Purchase Order Number;

2.18.2 Vendor's/Contractor's/Provider's Name, Address and Tax Identification Number;

2.18.3 Detailed breakdown of all charges for the product(s) and/or service(s) including applicable time frames.

2.19 Payment will be made in accordance with V.T.C.A., Government Code, Title 10, Subtitle F, Chapter 2251.



- 2.20 All warranties shall be stated as required in the Uniform Commercial Code.
- 2.21 The Vendor/Contractor/Provider and Collin County agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code.
- 2.22 The Vendor/Contractor/Provider agree to protect Collin County from any claims involving infringements of patents and/or copyrights.
- 2.23 The contract will be governed by the laws of the State of Texas. Should any portion of the contract be in conflict with the laws of the State of Texas, the State laws shall invalidate only that portion. The remaining portion of the contract shall remain in effect. The contract is performable in Collin County, Texas.
- 2.24 The Vendor/Contractor/Provider shall not sell, assign, transfer or convey the contract, in whole or in part, without the prior written approval from Collin County.
- 2.25 The apparent silence of any part of the specification as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the specification shall be made on the basis of this statement.
- 2.26 Vendor/Contractor/Provider shall not fraudulently advertise, publish or otherwise make reference to the existence of a contract between Collin County and Vendor/Contractor/Provider for purposes of solicitation. As exception, Vendor/Contractor/Provider may refer to Collin County as an evaluating reference for purposes of establishing a contract with other entities.
- 2.27 The Vendor/Contractor/Provider understands, acknowledges and agrees that if the Vendor/Contractor/Provider subcontracts with a third party for services and/or material, the primary Vendor/Contractor/Provider (awardee) accepts responsibility for full and prompt payment to the third party. Any dispute between the primary Vendor/Contractor/Provider and the third party, including any payment dispute, will be promptly remedied by the primary vendor. Failure to promptly render a remedy or to make prompt payment to the third party (subcontractor) may result in the withholding of funds from the primary Vendor/Contractor/Provider by Collin County for any payments owed to the third party.
- 2.28 Vendor/Contractor/Provider shall provide Collin County with diagnostic access tools at no additional cost to Collin County, for all Electrical and Mechanical systems, components, etc., procured through this contract.
- 2.29 Criminal History Background Check: If required, ALL individuals may be subject to a criminal history background check performed by Collin County prior to access being granted to Collin County facilities. Upon request, Vendor/Contractor/Provider shall provide list of individuals to the Collin County Purchasing Department within five (5) working days.
- 2.30 Non-Disclosure Agreement: Where applicable, vendor shall be required to sign a non-disclosure agreement acknowledging that all information to be furnished is in all respects confidential in nature, other than information which is in the public domain through other means and that any disclosure or use of same by vendor, except as provided in the contract/agreement, may cause serious harm or damage to Collin County. Therefore, Vendor agrees that Vendor will not use the information furnished for any purpose other than that stated in contract/agreement, and agrees that Vendor will not either directly or indirectly by agent, employee, or representative disclose this information, either in whole or in part, to any third party, except on a need to know basis for the purpose of evaluating any possible transaction. This agreement shall be binding upon Collin County and Vendor, and upon the directors, officers, employees and agents of each.

2.31 Vendors/Contractors/Providers must be in compliance with the Immigration and Reform Act of 1986 and all employees specific to this solicitation must be legally eligible to work in the United States of America.

2.32 Certification of Eligibility: This provision applies if the anticipated Contract exceeds \$100,000.00 and as it relates to the expenditure of federal grant funds. By submitting a bid or proposal in response to this solicitation, the Offeror certifies that at the time of submission, he/she is not on the Federal Government's list of suspended, ineligible, or debarred contractors. In the event of placement on the list between the time of proposal submission and time of award, the Offeror will notify the Collin County Purchasing Agent. Failure to do so may result in terminating this contract for default.

2.33 Notice to Vendors/Contractors/Providers delivering goods or performing services within the Collin County Detention Facility: The Collin County Detention Facility houses persons who have been charged with and/or convicted of serious criminal offenses. When entering the Detention Facility, you could: (1) hear obscene or graphic language; (2) view partially clothed male inmates; (3) be subjected to verbal abuse or taunting; (4) risk physical altercations or physical contact, which could be minimal or possibly serious; (5) be exposed to communicable or infectious diseases; (6) be temporarily detained or prevented from immediately leaving the Detention Facility in the case of an emergency or "lockdown"; and (7) subjected to a search of your person or property. While the Collin County Sheriff's Office takes every reasonable precaution to protect the safety of visitors to the Detention Facility, because of the inherently dangerous nature of a Detention Facility and the type of the persons incarcerated therein, please be advised of the possibility of such situations exist and you should carefully consider such risks when entering the Detention Facility. By entering the Collin County Detention Facility, you acknowledge that you are aware of such potential risks and willingly and knowingly choose to enter the Collin County Detention Facility.

2.34 Delays and Extensions of Time when applicable:

2.34.1 If the Vendor/Contractor/Provider is delayed at any time in the commence or progress of the Work by an act or neglect of the Owner or Architect/Engineer, or of an employee of either, or of a separate contractor employed by the Owner, or by changes ordered in the Work, or by labor disputes, fire, unusual delay in deliveries, unavoidable casualties or other causes beyond the Vendor/Contractor/Provider's control, or by delay authorized by the Owner pending mediation and arbitration, or by other causes which the Owner or Architect/Engineer determines may justify delay, then the Contract Time shall be extended by Change Order for such reasonable time as the Owner/Architect/Engineer may determine.

2.34.2 If adverse weather conditions are the basis for a Claim for additional time, such Claim shall be documented by data substantiating that weather conditions were abnormal for the period of time and could not have been reasonably anticipated, and that the weather conditions had an adverse effect on the scheduled construction.

2.35 Disclosure of Certain Relationships: Chapter 176 of the Texas Local Government Code requires that any vendor considering doing business with a local government entity disclose the vendor's affiliation or business relationship that might cause a conflict of interest with a local government entity. Subchapter 6 of the code requires a vendor to file a conflict of interest questionnaire (CIQ) if a conflict exists. By law this questionnaire must be filed with the records administrator of Collin County no later than the 7th business day after the date the vendor becomes aware of an event that requires the statement to be filed. A vendor commits an offense if the vendor knowingly violates the code. An offense under this section is a misdemeanor. By submitting a response to this request, the vendor represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code. Please send completed forms to the Collin County County Clerk's Office located at 2300 Bloomdale Rd., Suite 2104, McKinney, TX 75071.

2.36 Disclosure of Interested Parties: Section 2252.908 of the Texas Government Code requires a business entity entering into certain contracts with a governmental entity to file with the governmental entity a disclosure of interested parties at the time the business entity submits the signed contract to the governmental entity. Section 2252.908 requires the disclosure form (Form 1295) to be signed by the authorized agent of the contracting business entity, acknowledging that the disclosure is made under oath and under penalty of perjury. Section 2252.908 applies only to a contract that requires an action or vote by the governing body of the governmental entity before the contract may be signed or has a value of at least \$1 million. Section 2252.908 provides definitions of certain terms occurring in the section. Section 2252.908 applies only to a contract entered into on or after January 1, 2016.

2.37 Vendors/Contractors/Providers must be in compliance with the provisions of Section 2252.152 and Section 2252.153 of the Texas Government Code which states, in part, contracts with companies engaged in business with Iran, Sudan, or Foreign Terrorist Organizations are prohibited. A governmental entity may not enter into a contract with a company that is listed on the Comptroller of the State of Texas website identified under Section 806.051, Section 807.051 or Section 2253.253 which do business with Iran, Sudan or any Foreign Terrorist Organization. This Act is effective September 1, 2017.

2.38 Force Majeure: No party shall be liable or responsible to the other party, nor be deemed to have defaulted under or breached this Agreement, for any failure or delay in fulfilling or performing any term of this Agreement, when and to the extent such failure or delay is caused by or results from acts beyond the affected party's reasonable control, including, without limitation: acts of God; flood, fire or explosion; war, invasion, riot or other civil unrest; actions, embargoes or blockades in effect on or after the date of this Agreement; or national or regional emergency (each of the foregoing, a "Force Majeure Event"). A party whose performance is affected by a Force Majeure Event shall give notice to the other party, stating the period of time the occurrence is expected to continue and shall use diligent efforts to end the failure or delay and minimize the effects of such Force Majeure Event.

**NOTE:** All other terms and conditions (i.e. Insurance Requirements, Bond Requirements, etc.) shall be stated in the individual RFP/CSP Solicitation documents as Special Terms, Conditions and Specifications.

**3.0 INSURANCE REQUIREMENTS**

3.1 Before commencing work, the vendor shall be required, at its own expense, to furnish the Collin County Purchasing Agent with certified copies of all insurance certificate(s) indicating the coverage to remain in force throughout the term of this contract.

3.1.1 **Commercial General Liability** insurance including but not limited to the coverage indicated below. Coverage shall not exclude or limit Products/Completed Operations, Contractual Liability, or Cross Liability. Coverage must be written on occurrence form.

- Each Occurrence: \$1,000,000
- Personal Injury & Adv. Injury: \$1,000,000
- Products/Completed Operation Aggregate: \$2,000,000
- General Aggregate: \$2,000,000

3.1.2 **Workers Compensation** insurance as required by the laws of Texas, and Employers' Liability.

Employers' Liability

- Liability, Each Accident: \$500,000
- Disease-Each Employee: \$500,000
- Disease – Policy Limit: \$500,000

3.1.3 **Commercial Automobile Liability** insurance which includes any automobile (owned, non-owned, and hired vehicles) used in connection with the contract.

- Combined Single Limit – Each Accident: \$1,000,000

3.1.4 **Professional/Errors & Omissions Liability** insurance with a two (2) year extended reporting period. If you choose to have project coverage endorsed onto your base policy, this would be acceptable.

- Each Occurrence/Aggregate: \$1,000,000

3.1.5 **Umbrella/Excess Liability** insurance.

- Each Occurrence/Aggregate: \$1,000,000

3.2 With reference to the foregoing insurance requirement, the vendor shall endorse applicable insurance policies as follows:

3.2.1 A waiver of subrogation in favor of Collin County, its officials, employees, volunteers and officers shall be provided for General Liability, Commercial Automobile Liability, and Workers' Compensation.

3.2.2 The vendor's insurance coverage shall name Collin County as additional insured under the General Liability policy.

3.2.3 All insurance policies shall be endorsed to require the insurer to immediately notify Collin County of any decrease in the insurance coverage limits.

3.2.4 All insurance policies shall be endorsed to the effect that Collin County will receive at least thirty (30) days notice prior to cancellation, non-renewal or termination of the policy.

3.2.5 All copies of Certificates of Insurance shall reference the project/contract number.

3.3 All insurance shall be purchased from an insurance company that meets the following requirements:

3.3.1 A financial rating of A-VII or higher as assigned by the BEST Rating Company or equivalent.

3.4 Certificates of Insurance shall be prepared and executed by the insurance company or its authorized agent, and shall contain provisions representing and warranting the following:

3.4.1 Sets forth all endorsements and insurance coverages according to requirements and instructions contained herein.

3.4.2 Sets forth the notice of cancellation or termination to Collin County.

**4.0 EVALUATION CRITERIA AND FACTORS**

4.1 The award of the contract shall be made to the responsible offeror, whose proposal is determined to be the best evaluated offer resulting from negotiation, taking into consideration the relative importance of price and other factors set forth in the Request for Proposals in accordance with Vernon’s Texas Code Annotated, Local Government 262.030.

The Evaluation Committee will review all proposals received by the Opening date and time as part of a documented evaluation process. For each decision point in the process, the County will evaluate contractors according to specific criteria and will elevate a certain number of contractors to compete against each other. The proposals will be evaluated on the following criteria.

The County will use a competitive process based upon “selection levels.” The County recognizes that if a contractor fails to meet expectations during any part of the process, it reserves the right to proceed with the remaining contractors or to elevate a contractor that was not elevated before. The selection levels are described in the following sections.

The first part of the elevation process is to validate the completeness of the proposal and ensure that all the RFP guidelines and submittal requirements are met. Offerors may, at the discretion of the County, be contacted to submit clarifications or additional information within two business days. Incomplete or noncompliant RFPs may be disqualified.

**LEVEL 1 - CONFORMANCE WITH MANDATORY REQUIREMENTS**

4.1.1 Conformance with RFP guidelines and submittal requirements as outlined in Section 6.0.

4.1.1.1 Submit response to Section 6.0

Contractors elevated to Level 2 may be asked to respond in writing to issues and questions raised by the County, as well as any other cost and implementation planning for considerations in the proposal. Failure to provide these documents shall deem Contractor as non-responsive.

**LEVEL 2 – DETAILED PROPOSAL ASSESSMENT**

4.1.2 The Evaluation Committee will conduct a detailed assessment of all proposals elevated to this Level. Proposals may earn up to 100 points based on evaluated criteria. Criteria evaluated in Level 2 include:

<b>Points</b>	<b>Evaluation Criteria</b>
25	Fit to General Requirements (Proposal Format Item 6.4)
30	Qualifications of the Firm/Experience/Credentials with Similar Assignments, Proposal Formatting and a strong track record for on-time delivery for organizations comparable in size to Collin County, Texas will be a significant factor in the award process (Proposal Format Item 6.2; 6.3)
45	Cost (Proposal Format Item 6.6)

It is anticipated that Collin County will elevate proposals scoring at least 70 points (70%) to Level 3.

### **LEVEL 3 - DEMONSTRATION AND INTERVIEWS**

Contractors elevated to Level 3 will have their points combined from Level 2 for a maximum of 150 points total.

The Evaluation Committee may hear oral presentations (if required). Contractors are cautioned, however, that oral presentations are at the sole discretion of the Committee and the Committee is not obligated to request it. The oral presentation is an opportunity for the County Evaluation Committee to ask questions and seek clarification of the proposal submitted. The presentation is not meant as an opportunity for the contractor to simply provide generic background information about the corporation or its experience. Thus, the time will be structured with a minimum time for the contractor to present and the majority of time dedicated to addressing questions from the Evaluation Committee. The oral presentations, if held, will be scheduled accordingly and all presenting contractors will be notified of time and date.

<b>Points</b>	<b>Evaluation Criteria</b>
25	Demonstration / Interview (Optional)
25	References (Proposal Format Item 6.5)

As part of the references, the County may choose to visit sites where the proposed printing is in live production.

Proposals may be re-evaluated based upon Criteria in Level 2 and 3.

The County reserves the right to bypass Level 3 in the evaluation process, or only evaluate a portion of Level 3, such as only References, and move directly to Level 4.

### **LEVEL 4 – BEST AND FINAL OFFER**

Contractors who are susceptible of receiving award will be elevated to Level 4 for Best and Final Offer. Contractor will be asked to respond in writing to issues and questions raised by the County as well as any other cost and implementation planning considerations in the proposal, and may be invited to present their responses on-site. Proposals may be re-evaluated based upon Criteria in level 2 through 3.

Based on the result of the Best and Final Offer evaluation, a single contractor will be identified as the finalist for contract negotiations. If a contract cannot be reached after a period of time deemed reasonable by the County, it reserves the right to contact any of the other contractors that have submitted proposals and enter into negotiations with them.

## **5.0 SPECIAL CONDITIONS AND SCOPE OF SERVICES**

5.1 Authorization: By order of the Commissioners Court of Collin County, Texas sealed proposals will be received for specialized printing for Tax Assessor/Collector.

- 5.2 Purpose: The intended use/purpose for this Request for Proposal is for various printing jobs required by the Tax Assessor/Collector.
- 5.3 Term: Successful Contractor (s) will be awarded a contract effective from date of award through July 31, 2023. At Collin County's option and approval by the Contractor, the contract may be renewed for four (4) additional one (1) year periods.
- 5.3.1 Transitional Period: Upon normal completion of this contract, not to include termination for default, and in the event that no new contract has been awarded by the original expiration date of the existing contract including any extension thereof, it shall be incumbent upon the Vendor to continue the contract under the same terms and conditions until a new contract can be completely operational. At no time shall this transition period extend more than ninety (90) days beyond the original expiration date of the existing contract and any extension thereof.
- 5.4 Point of Contact: Information regarding the purchasing process and the contents of this RFP may be obtained from the Collin County Purchasing Department or email shayes@co.collin.tx.us, Susan Hayes, Buyer II.
- 5.5 Funding: Funds for payment have been provided through the Collin County budget approved by the Commissioners' Court for this fiscal year only. State of Texas statutes prohibit the County from any obligation of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that may arise past the end of the current Collin County fiscal year shall be subject to budget approval.
- 5.6 Price Reduction: If during the life of the contract, the Contractor's net prices to its customers for the same product(s) and/or services shall be reduced below the contracted price, it is understood and agreed that the County shall receive such price reduction.
- 5.7 Price Re-determination: A price re-determination may be considered by Collin County only at the anniversary date of the contract. For purpose of this contract the anniversary date will be July 31<sup>st</sup> of each year. All requests for price re-determination shall be in written form, shall be submitted a minimum of sixty (60) days prior to anniversary date and shall include documents supporting price re-determination such as Manufacturer's direct cost, postage rates, Railroad Commission rates, Federal/State minimum wage law, Federal/State unemployment taxes, F.I.C.A, Insurance Coverage Rates, etc. The proposer's past experience of honoring contracts at the bid price will be an important consideration in the evaluation of the lowest and best bid. Collin County reserves the right to accept or reject any/all of the price re-determination as it deems to be in the best interest of the County.
- 5.8 Delivery/Completion/Response Time: Contractor shall place product(s) and/or complete services at the County's designated location(s) and time(s) as stated herein.
- 5.9 Testing: Testing may be performed at the request of Collin County, by an agent so designated by the County, without expense to Collin County.
- 5.10 Samples/Demos: When requested, samples/demos shall be furnished to the County at no expense.
- 5.11 Approximate Value: The estimated value of this contract is \$95,000. Approximate value does not constitute an order.
- 5.12 Approximate Usage: Estimated annual quantities are given for each commodity. Approximate usage does not constitute an order, but only implies the probable quantity the County will use. Commodities will be ordered on an as-needed basis.



### 5.13 PROPOSAL SCHEDULE

RFP released:	June 28, 2022
Deadline for submission of Contractor questions:	Thursday, July 12, 2022 at 5:00pm CST
Proposals due:	Thursday, July 28, 2022 at 2:00pm CST
Award of Solicitation:	August 2022

Collin County reserves the right to change the schedule of events as it deems necessary.

### 5.14 PURPOSE AND INTENT

Collin County's intent of this Request for Proposal and resulting contract is to obtain proposals for Tax Statement Preparation & Mailing Service for the Tax Assessor/Collector. The proposal covers the printing of all items (statements, carrier envelopes and reply envelopes), data processing, inserting, first class postage and delivery to U.S. Postal Service for mailing tax statements.

### 5.15 SAMPLE REVIEW

This proposal includes various items and forms, Attachments A-L. Proposer shall assume sole responsibility for viewing these samples in order to submit a proposal consistent with the requirements of the County. Failure to do so may result in rejection of proposal. When a discrepancy occurs between specifications or the on-line PDF sample, the hard copy samples shall prevail. Samples will be made available to prospective proposers for viewing during the hours of 9:00am-4:00pm Monday through Friday (excluding County Holidays) in the Purchasing Department, Jack Hatchell Administration Building, and 2300 Bloomdale Road, Suite 3160 McKinney, TX 75071. PDF copies attached, Refer to Attachments A-L.

### 5.16 GENERAL REQUIREMENTS

**Contractor's proposal shall indicate how the Contractor proposes to meet the following requirements and business needs of the Tax Assessor/Collector's Office.**

Listed below are the minimum requirements and are intended to govern the general printing services, including all material necessary for a finished product, which Collin County uses during the course of routine County business.

5.16.1 **TYPES OF MAILINGS:** All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing.

5.16.1.1 Line item #1 - Original October Mailing: Cost per statement shall include 8.5" x 11" one page perforated printed front and back form, color printing on

24 lb. white paper (ink/paper color to be determined). Refer to Attachments A, B, & D for samples.

Account History insert shall be included with the statement. The insert shall be 8.5” x 11” printed on both sides on white paper in black ink with information provided by the County. Refer to Attachments C & E for samples.

Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall also be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. E-mail first samples in PDF form within two (2) days of receiving file. For final proofing purposes Collin County requires the first 500 statements of residents whose last name start with the letters “M” and “B”. Specific accounts may be requested for evaluation. Original samples for final proofing shall be received at tax office within four (4) days of contractor receiving data file.

There will be three (3) envelopes:

- One (1) for sending statements and account history insert, #10 window envelope with printing on both sides, Refer to Attachment K-L for samples.
- One (1) for return, 9 non-standard envelope, Refer to Attachment J for sample.
- On an as needed basis, larger envelopes for mailing multiple statements.

5.16.1.1.1 There are three different types of statements for the original mailing:

5.16.1.1.1.1 Original owner statement - approximately 261,000.

5.16.1.1.1.2 Mortgage Company statement - approximately 19,000.

5.16.1.1.1.3 Notification statement to owner - approximately 170,000. Mortgage Company receives either a mortgage company statement or taped version at their request.

5.16.1.2 Line Item #2 - February Delinquent Mailing: Cost per statement shall include 8.5” x 11” perforated on page one printing on front only, second page without perforation printing on front only, blue color printing on 20 lb. white paper (ink/paper color to be determined). Refer to Attachment F for sample.

Insert letter shall be included with the statement. The insert letter shall be 8.5” x 11” print one sided on white paper in black ink with information provided by the County. Refer to Attachment H for sample.

Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 41,000 late notices.

There will be three (3) envelopes:

- One (1) for sending statements and letter insert, #10 window envelopes with printing on both sides, Refer to Attachment K-L for samples.
- One (1) for return, #9 non-standard envelope, Refer to Attachment J for sample.
- On an as needed basis, larger envelopes for mailing multiple statements.

5.16.1.3 Line Item #3 – May Delinquent Mailing: Cost per statement shall include 8.5” x 11” perforated on page one printing on front only, second page without perforation printing on front only, pink color printing on 20 lb. white paper (ink/paper color to be determined). Refer to Attachment G for sample.

Insert letter shall be included with the statement. The insert letter shall be 8.5” x 11” print one sided on white paper in black ink with information provided by the County. Refer to Attachment H for sample.

Contractor shall convert a flat file, reformatting the file for a production file. All costs of programming shall be included in the per statement price quoted. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portion of the statement. There will be approximately 25,000 late notices.

There will be three (3) envelopes:

- One (1) for sending statements and letter insert, #10 window envelopes with printing on both sides, Refer to Attachment K-L for samples.
- One (1) for return, #9 non-standard envelope, Refer to Attachment J for sample.
- On an as needed basis, larger envelopes for mailing multiple statements.

5.16.1.4 Line Item #4 – July Attorney Letter: Cost per statement shall include 8.5” x 11” perforated on page one printing on front only, second page without perforation printing on front only, mint green color printing on 20 lb. white paper (ink/paper color to be determined). Letters will be printed and sent to County attorneys on an as needed basis (to be determined at a later date). No postage, envelopes or mailing of the letters are necessary for this line-item. The statement number shall be converted to bar code and Optical Character Recognition (OCR) on the bottom portions of the statement. All letters are to be submitted to the County attorneys. There will be approximately 14,000

notices. Refer to Attachment I for line item 4 July statement, July statements shall be in mint green.

- 5.16.2 All artwork, layouts, plate negatives, proofs and all CD's (data and image) shall become the property of Collin County.
- 5.16.3 Contractor shall adhere to all current postal regulations as they become in effect during the term of this contract.
- 5.16.4 All work shall be completed in a secure location.
- 5.16.5 Contractor shall have redundant capability (able to complete project, on time, in case of local emergency).
- 5.16.6 The information on the data file is not to be released or used for any purpose other than preparation and mailing of the Collin County Tax Statements for the current tax year.
- 5.16.7 All pieces are to be mailed with the address from the supplied data file. All statements missing the city, state and/or Zip Code as well as any statements with foreign addresses are to be delivered to the Collin County Tax Office in bulk.
- 5.16.8 Contractor shall be able to read and prepare flat file in ascii format for printing within (2) calendar days for October mailing and within (1) calendar day for February and May mailing of obtaining a correct file. Verify via e-mail immediately upon receipt of file.
- 5.16.9 October statements are to be mailed completely within 7 days from the date that the Tax Assessor/Collect delivers the file. February, May & July statements mailing date shall be 2 days from the date that the Tax Assessor/Collect delivers the file.
- 5.16.10 Proposer shall pre-sort statements by ZIP Code and address. When the address does not have the +4 ZIP Code information, (additional 4-digit add-on code) at the end of the original 5 digit ZIP Code, zeros are not to be added in place of the +4 code, it is to be left blank, use only the original 5-digit ZIP Code.
- 5.16.11 Multiple statements which are mailed to the same name and address shall be mailed in a single parcel or the most cost effective way.
- 5.16.12 A verification process to determine how many statements have been printed, processed, and mailed shall be required.
- 5.16.13 Collin County will pay actual postage costs.
  - 5.16.13.1 October Mailing- Collin County will provide Contractor a check for one hundred percent (100%) of the estimated postage prior to the October mailing. Contractor will reimburse Collin County for any outstanding balance. Contractor shall invoice Collin County for any additional postage, not included in the original estimate.

- 5.16.13.2 Contractor shall provide form indicating total pieces mailed, amount of postage, date mailed and stamped by U.S. Postal Service. The information shall be submitted to the Tax Assessor/Collector's Office within seventy-two (72) hours of completing.
- 5.16.13.3 February, May and July mailings will be reimbursed actual postage.
- 5.16.14 Microfiche is to be provided to Collin County by December 15<sup>th</sup> of each year.
- 5.16.15 No overruns allowed.
- 5.16.16 The tax roll is to be provided on microfiche.
- 5.16.17 October and delinquent tax statements are to be provided on CD or USB drive within two (2) weeks of mailing statements.
- 5.16.18 The Successful Contractor shall start on form and data mapping immediately upon award in order to be prepared to begin printing samples after arrival of data to meet mailing deadline. Tax Office will provide prior years' data file by September 5<sup>th</sup>.
- 5.16.19 Contractor shall have access to FTP site.
- 5.16.20 Tax Assessor/Collector's Office shall be notified by email at each of the following stages:
  - 5.16.20.1 Tax Statement Template is completed and accepted;
  - 5.16.20.2 File is received and workable;
  - 5.16.20.3 File is being processed;
  - 5.16.20.4 Printing process begins,
  - 5.16.20.5 Printing process ends,
  - 5.16.20.6 Statements are delivered to the Postal Service;
  - 5.16.20.7 Delays inhibiting processing or mailing of statements.
- 5.16.21 The Tax Assessor/Collector shall be notified by phone or email within 2 hours of any delays in the process from the time the statement file is delivered through the completion of the mailing.
- 5.16.22 All statements without a complete address, ie: number, street & name or P.O. Box number, city, state, and ZIP Code are to delivered to the Tax Assessor/Collector in bulk without attempting to mail to the incomplete address.

5.16.23 Tax Assessor/Collector reserves right to makes changes in tax statement template annually to be provided no less than 30 days prior to the statement file being delivered.

## **6.0 PROPOSAL FORMAT**

In accordance with the directions below, offeror shall provide a response for each item in Sections 5.16 and Sections 6.2-6.6 in order and include item numbers in response. Answer all questions fully, clearly, and concisely, giving complete information. Do not skip items. Do not refer to other parts of your proposal for the answers. You may not modify either the order or language of the question. Responses shall include a statement of “agree”, “confirmed”, “will provide”, “not applicable”, or “exception taken” along with any additional information. If an item is “not applicable” or “exception taken”, offeror shall state that and refer to Section 7.0 Exceptions, with explanation.

Offeror shall adhere to the instructions in this request for proposals on preparing and submitting the proposal. If offeror does not follow instructions regarding proposal format, points will be deducted during the evaluation process.

**6.1 PROPOSAL DOCUMENTS:** To achieve a uniform review process and to obtain a maximum degree of comparability, the proposal shall, at a minimum include a Table of Contents detailing sections and corresponding page numbers.

6.1.1 Proposals may be submitted online via <http://collincountytx.ionwave.net> or submitted via CD-ROM or Flash Drive. Electronic submissions are preferred.

6.1.2 If submitting manually, proposal shall be submitted in a sealed envelope or box with RFP name, number, and name of firm printed on the outside of the envelope or box. Manual submittals shall be sent/delivered to the following address and shall be received prior to the date/time for opening:

Collin County Purchasing  
2300 Bloomdale, Suite 3160  
McKinney, TX 75071

Paper copies shall be printed on letter size (8 ½ x 11) paper and assembled using spiral type bindings, staples, or binder clips. Do not use metal-ring hard cover binders. Manual submittals shall include an electronic copy in a searchable format.

It shall be the responsibility of the offeror to insure that their proposal reaches Collin County Purchasing prior to the date/time for the opening no matter which submission method is used.

## **6.2 FIRM OVERVIEW**

Offeror shall define the overall structure of the Firm to include the following:

6.2.1 A descriptive background of your company’s history.

6.2.2 State your principal business location and any other service locations.

6.2.3 What is your primary line of business?

6.2.4 How long have you been selling product(s) and/or providing service(s)?

**6.3 STAFF QUALIFICATIONS/EXPERIENCE/CREDENTIALS & ADDITIONAL INFORMATION**

6.3.1 Offeror is requested to provide qualifications as well as experience information on Offeror’s key personnel that will be assigned to this project.

**6.4 GENERAL REQUIREMENTS**

6.4.1 Offeror shall provide a response for each of the requirements in Section 5.16 in order and include item numbers in response.

6.4.2 Offeror shall follow format outlined in Section 6.0 when submitting responses.

**6.5 REFERENCES**

6.5.1 Offeror is requested to include at least three (3) references with names, addresses, email addresses, and telephone numbers and description of the project. References with similar projects and users are preferred.

6.5.2 Offeror shall provide detailed listing of all County and Appraisal District current and prior clients within the last five (5) years.

**6.6 PRICING/FEES**

All line-item pricing shall include the printing of: statements (front & back), carrier envelopes, reply envelopes and letter inserts (print one sided) or account history inserts (front & back). It shall also include: data processing, image capturing on CD and microfiche, inserting letters, and delivery to U.S. Postal Service for one mailing.

Statement pricing shall include costs for all materials, labor, typesetting, set up, forms, test samples, proofs, overprinting of data information and all other **costs** associated with the job (see 5.16.1 for expanded information). Please note quantities are approximate, vendor to invoice on actual number of statements.

6.6.1 Line Item 1 State Unit Cost. (See Section 5.16.1.1 for complete details)

6.6.2 Line Item 2 State Unit Cost. (See Section 5.16.1.2 for complete details)

6.6.3 Line Item 3 State Unit Cost. (See Section 5.16.1.3 for complete details)

6.6.4 Line Item 4 State Unit Cost. (See Section 5.16.1.4 for complete details)

**7.0 EXCEPTIONS**

Instructions for completing section:

The exception table shall be completed for any exception from requirements identified in this RFP. Please complete the following worksheet listing any and all exceptions from the information requested in the Request for Proposal. Attach additional pages as needed. If no exceptions are listed in Section 7.0 it is understood that the offeror has agreed to all RFP requirements, the response will be considered as confirmed even if it is listed elsewhere as an exception.

Section Number/ Question Number	Required Service You are Unable to Perform	Steps Taken to Meet Requirement

**Attachment A-**  
**Line Item 1**  
**Property Tax Notification**  
**Statement**



**2021  
PROPERTY TAX  
NOTIFICATION/STATEMENT**

**KENNETH L. MAUN  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY**

**OFFICE LOCATIONS**

2300 BLOOMDALE RD. STE. 2324  
MCKINNEY, TX 75071  
900 E. PARK BLVD. STE. 100  
PLANO, TX 75074  
6101 FRISCO SQUARE BLVD. STE. 2000  
FRISCO, TX 75034

**ACCOUNT NUMBER**

[REDACTED]

P.O. BOX 8046  
MCKINNEY, TEXAS 75070-8046  
972-547-5020  
METRO 972-424-1460 EXT. 5020

YOUR ORIGINAL TAX STATEMENT HAS BEEN REQUESTED BY, AND MAILED TO, THE PARTY LISTED AT THE BOTTOM OF THIS STATEMENT. IF YOU DO NOT HAVE AN ESCROW ACCOUNT WITH YOUR MORTGAGE COMPANY AND ARE RESPONSIBLE FOR PAYING YOUR OWN TAXES, YOU MAY USE THIS NOTIFICATION AS A STATEMENT.

TO CORRECT AN ERROR IN OWNERSHIP, EXEMPTIONS OR JURISDICTIONS, YOU MUST CONTACT THE CENTRAL APPRAISAL DISTRICT

**OWNER NAME AND ADDRESS**

97977 1 AB 0.461\*\*\*AUTO\*\*ALL FOR AADC 752 AADC 2 PT 333



[REDACTED]

**PROPERTY DESCRIPTION**

[REDACTED]

SITUS: [REDACTED]

EXEMPTIONS: [REDACTED]



Property Class	Land Value	Agricultural Exclusion	Improvement Value	Personal Property	Appraised Value (Market)	Homestead Cap	Assessed Value
Qualifying	147,000	0	474,946	0	621,946	0	621,946
Non-Qualifying	0	0	0	0	0	0	0
Agricultural	0	0	0	0	0	0	0
<b>Total</b>	<b>147,000</b>	<b>0</b>	<b>474,946</b>	<b>0</b>	<b>621,946</b>	<b>0</b>	<b>621,946</b>

TAXING ENTITY	ASSESSED VALUE	EXEMPTION AMOUNT	TAXABLE VALUE	TAX RATE	YEAR	CEILING AMOUNT	TAXES BY ENTITY
COLLIN COUNTY	621,946	31,097	590,849	0.168087			993.14
ALLEN CITY	621,946	0	621,946	0.470000			2,923.15
ALLEN ISD	621,946	25,000	596,946	1.406800			8,397.84
COLLIN COLLEGE	621,946	6,219	615,727	0.081222			500.11

Visit [www.certifiedpayments.net](http://www.certifiedpayments.net) to pay by electronic check or credit card  
Bureau Code # 5475020



Convenience fee charged.  
or call Certified Payments at 1-877-264-7539  
credit card only—no electronic checks by phone

Only persons already receiving an over 65, disabled veteran or disabled person exemption may pay current taxes on their resident homestead in four installments without penalty or interest if their first payment is made by **January 31st**.  
Remaining three installments due dates are **March 31st**, **May 31st**, and **July 31st**.

**1st INSTALLMENT**

[REDACTED]

**TOTAL TAXES**

**12,814.24**

**TAXES DELINQUENT AFTER 1/31/2022**

**12,814.24**

**CURRENT TAXES DUE NOW**

YOUR CHECK WILL BE CONVERTED INTO AN ELECTRONIC FUND TRANSFER.

DETACH HERE AND RETURN BOTTOM PORTION WITH YOUR PAYMENT.

THE PARTY LISTED BELOW HAS REQUESTED YOUR PROPERTY TAX STATEMENT

IF YOU ARE RESPONSIBLE FOR PAYING YOUR OWN TAXES, PLEASE USE THIS NOTIFICATION AS A STATEMENT.

TAXES WILL BE DELINQUENT FEB. 1, 2022. UNPAID TAXES WILL INCUR THE FOLLOWING PENALTY & INTEREST, IF PAID IN:

FEBRUARY +7%	13,711.24
MARCH +9%	13,967.52

PARTIAL PAYMENTS ARE ACCEPTED BUT ANY UNPAID TAXES WILL INCUR PENALTIES & INTEREST ON FEB. 1ST.

**ACCOUNT NUMBER**

[REDACTED]

**TAXES DELINQUENT AFTER 1/31/2022**

**12,814.24**

**CURRENT TAXES DUE NOW**

**STATEMENT REQUESTED BY:**

[REDACTED]

**REFERENCE NUMBER**

[REDACTED]

DO NOT PAY THIS STATEMENT IF THE PARTY NAMED ABOVE IS YOUR MORTGAGE COMPANY. THEY WILL BE PAYING YOUR TAXES IF YOU HAVE AN ESCROW ACCOUNT WITH THEM.

PLEASE MAKE ADDRESS CORRECTIONS HERE.

[REDACTED]

IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND YOU OCCUPY THE PROPERTY DESCRIBED IN THIS DOCUMENT AS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.



20210R847600F005010001281424000137112400013967520000000000C01



## INFORMATION ON TAXES

Assessment Ratio 100%

Property taxes are the primary sources of local government revenue in Texas. Your Tax Assessor Collector in Collin County will be collecting Ad Valorem, or property taxes, for the following entities: Collin County, Collin County Community College District, the Cities of Allen, Anna, Blue Ridge, Celina, Fairview, Farmersville, Frisco, Josephine, Lavon, Lowry Crossing, Lucas, McKinney, Melissa, Murphy, Nevada, New Hope, Parker, Plano, Princeton, Prosper, Richardson, Sachse, St. Paul, Weston, and Wylie, Seis Lagos Utility District, the Allen, Anna, Blue Ridge, Celina, Community, Farmersville, Frisco, Lovejoy, McKinney, Melissa, Plano, Princeton, Prosper and Wylie Independent School Districts, and possibly others.

YOUR CAREFUL REVIEW OF TAXPAYER INFORMATION CONTAINED IN THIS STATEMENT COULD HELP TO ELIMINATE MANY TAX PROBLEMS IN THE FUTURE.

You have from October to January 31 of the next year to pay your taxes without penalty or interest. You will be charged penalty and interest on February 1.

**ANY ERRORS OR DISCREPANCIES IN LEGAL DESCRIPTION, NAME, ADDRESS OR QUESTIONS CONCERNING VALUE SHOULD BE REFERRED TO THE CENTRAL APPRAISAL DISTRICT.**

If your taxes should be paid by a mortgage company, your copy of the statement should indicate "Property Tax Notification". If your statement is an original copy, please forward this statement to your mortgage company with your loan number.

If you bought other property and did not receive a tax statement, or sold this property and should not have received the statement, please contact this office immediately. If you own multiple properties and have not received all your statements... NOW is the time to INQUIRE about your OTHER STATEMENTS.

Penalty and interest are imposed at the statutory rate of 12% penalty and 12% per year interest on unpaid taxes. WHETHER OR NOT THE TAXPAYER RECEIVED THE TAX BILL. By July 1st, a delinquent taxpayer will have incurred 18% penalty and interest and up to 20% for attorney fees and runs a risk of being sued or having his/her property seized after that time.

**THE TAX COLLECTOR DOES NOT HAVE ANY LEGAL AUTHORITY TO FORGIVE ANY PENALTY OR INTEREST CHARGED ON AN UNPAID TAX, NO MATTER HOW GOOD YOUR REASON IS FOR NOT PAYING.**

On real property (land and buildings), the current owner can be held liable for any unpaid taxes on the land, even for years before he/she bought the property. The new owner is liable for the entire year's tax to the Tax Collector, even if that person bought the property during the year and had their tax prorated with the seller at the time of closing.

On personal property (business inventory, mobile homes, equipment, airplanes, etc) the person who owned the property on January 1 of the tax year is personally liable for the entire year's tax, even if he/she sold the property during the year.

THE CENTRAL APPRAISAL DISTRICT is a **SEPARATE** local agency and is not part of County government or the Collin County Tax Office. The CAD decides what property is to be taxed, its appraised value, whether to grant exemptions, who the taxable owner is, his/her address, and what taxing jurisdictions tax the property.

**HOMESTEAD CAP VALUE:** In November 1997, Texas voters approved a constitutional amendment to limit increases in the appraised value of residence homestead to 10 percent annually. The new law, Property Tax Code Section 23.23, provides that the appraised value of a residence homestead beginning in the 1998 tax year may not exceed the lesser of: (1) the market value of the property; or (2) the sum: (A) 10 percent of the appraised value of the property for the last year in which the property was appraised for taxation times the number of years since the property was last appraised; (B) the appraised value of the property for the last year in which the property was appraised; and (C) the market value of all new improvements to the property.

### **OVER AGE 65/DISABILITY INSTALLMENT PAYMENT OF HOMESTEAD TAXES OPTION**

To take advantage of this option a qualified individual who occupies a residence homestead must pay at least one fourth of his taxes by Jan. 31. The remaining taxes must be paid in three equal installments due by March 31<sup>st</sup>, May 31<sup>st</sup>, and July 31<sup>st</sup>. If the individual fails to make a payment before the installment date listed above, the unpaid amount is delinquent and incurs a penalty of 6 percent and interest as provided in Section 31.031 S.P.T.C.

If you have a mortgage company you will need to make them aware of your intent to participate in the OA65/Disabled person installment payment option.

### **EXEMPTIONS:**

CAREFULLY REVIEW YOUR EXEMPTIONS ON FACE OF STATEMENT. IF THE EXEMPTIONS SHOWN ARE NOT ACCURATE, OR IF YOU HAVE ANY QUESTIONS ABOUT YOUR EXEMPTIONS, **CALL THE CENTRAL APPRAISAL DISTRICT IMMEDIATELY.** MARKET VALUE WILL BE REDUCED BY EXEMPTIONS WHERE APPROPRIATE AND APPROVED TO OBTAIN TAXABLE VALUE.

POSSIBLE EXEMPTIONS (AS THEY MAY APPEAR ON STATEMENT):

1. **HS001 - HOMESTEAD.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY. NOTE: THE COLLIN COUNTY COMMUNITY COLLEGE DISTRICT DOES NOT OFFER THIS EXEMPTION AT THIS TIME.
2. **OV003 - OVER AGE 65.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY.
3. **DP005 - DISABLED.** THIS EXEMPTION WILL BE RECOGNIZED AS AUTHORIZED BY ANY TAXING ENTITY.
4. **DV001-DV004 - VETERAN.** THIS IS A STATE MANDATED EXEMPTION. THE EXEMPTION ALLOWED IS BASED UPON THE PERCENTAGE OF DISABILITY CERTIFIED BY THE VETERANS ADMINISTRATION, TO A MAXIMUM OF \$12,000.

WHEN YOU PROVIDE A CHECK AS PAYMENT, YOU AUTHORIZE US EITHER TO USE INFORMATION FROM YOUR CHECK TO MAKE A ONE-TIME ELECTRONIC FUND TRANSFER FROM YOUR ACCOUNT OR TO PROCESS THE PAYMENT AS A CHECK TRANSACTION. WHEN WE USE INFORMATION FROM YOUR CHECK TO MAKE AN ELECTRONIC FUND TRANSFER, FUNDS MAY BE WITHDRAWN FROM YOUR ACCOUNT AS SOON AS THE SAME DAY WE RECEIVE YOUR PAYMENTS, AND YOU WILL NOT RECEIVE YOUR CHECK BACK FROM YOUR FINANCIAL INSTITUTION.

BE SURE TO ENCLOSE THE STUB PORTION OF YOUR TAX STATEMENT WHEN YOU PAY BY MAIL. SEND CHECK OR MONEY ORDER. CREDIT CARDS MAY BE PROCESSED THROUGH CERTIFIED PAYMENTS, INC. THERE WILL BE A NOMINAL FEE FOR THIS SERVICE. SEE FRONT OF THIS STATEMENT. DO NOT SEND CASH THROUGH THE MAIL. IF YOU WISH TO PAY IN PERSON, YOU MAY PAY AT THE TAX OFFICE (ADDRESSES LISTED ON THE FRONT PAGE). **BE SURE TO WRITE YOUR ACCOUNT NUMBER ON YOUR CHECK TO INSURE PROPER CREDIT.**

**Attachment B-**  
**Line Item 1**  
**Property Tax Statement**  
**(Homeowner)**  
**Page 1-front and back**



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**Attachment C-**  
**Line Item 1**  
**Property Tax Statement**  
**(Homeowner)**  
**Page 2-front and back**

**Information about Property Values and Taxes**  
From the files of Kenneth L. Maun, Tax Assessor Collector Collin County

The following information show what values, exemptions, tax rates and tax levies have been on this property for the last six years by each entity by whom taxed, and the percentage change from the prior year. A five year comparison is just below that.

Account Number: [REDACTED]		ACCOUNT HISTORY									
TAXING ENTITIES	TAX YEAR	APRAISED VALUE	APPRAISAL %CHG	EXEMPTION AMOUNT	TAXABLE VALUE	VALUE %CHG	TAX RATE PER \$100	RATE %CHG	TAX	TAX %CHG	
ALLEN CITY	2016	522,266	0.00%	0	522,266	0.00%	0.520000	0.00%	\$2,715.78	0.00%	
ALLEN CITY	2017	526,660	0.84%	0	526,660	0.84%	0.510000	-1.92%	\$2,685.97	-1.10%	
ALLEN CITY	2018	582,156	10.54%	2,830	579,326	10.00%	0.498000	-2.35%	\$2,885.04	7.41%	
ALLEN CITY	2019	594,153	2.06%	0	594,153	2.56%	0.489000	-1.81%	\$2,905.41	0.71%	
ALLEN CITY	2020	606,749	2.12%	0	606,749	2.12%	0.485000	-0.82%	\$2,942.73	1.28%	
ALLEN CITY	2021	621,946	2.50%	0	621,946	2.50%	0.470000	-3.09%	\$2,923.15	-0.67%	
ALLEN ISD	2016	522,266	0.00%	25,000	497,266	0.00%	1.590000	0.00%	\$7,906.53	0.00%	
ALLEN ISD	2017	526,660	0.84%	25,000	501,660	0.88%	1.570000	-1.26%	\$7,876.06	-0.39%	
ALLEN ISD	2018	582,156	10.54%	27,830	554,326	10.50%	1.550000	-1.27%	\$8,592.05	9.09%	
ALLEN ISD	2019	594,153	2.06%	25,000	569,153	2.67%	1.458900	-5.88%	\$8,303.37	-3.36%	
ALLEN ISD	2020	606,749	2.12%	25,000	581,749	2.21%	1.432500	-1.81%	\$8,333.55	0.36%	
ALLEN ISD	2021	621,946	2.50%	25,000	596,946	2.61%	1.406800	-1.79%	\$8,397.84	0.77%	
COLLIN COLLEGE	2016	522,266	0.00%	0	522,266	0.00%	0.081222	0.00%	\$424.19	0.00%	
COLLIN COLLEGE	2017	526,660	0.84%	0	526,660	0.84%	0.079810	-1.74%	\$420.33	-0.91%	
COLLIN COLLEGE	2018	582,156	10.54%	8,652	573,504	8.89%	0.081222	1.77%	\$465.81	10.82%	
COLLIN COLLEGE	2019	594,153	2.06%	5,942	588,211	2.56%	0.081222	0.00%	\$477.76	2.57%	
COLLIN COLLEGE	2020	606,749	2.12%	6,067	600,682	2.12%	0.081222	0.00%	\$487.89	2.12%	
COLLIN COLLEGE	2021	621,946	2.50%	6,219	615,727	2.50%	0.081222	0.00%	\$500.11	2.50%	
COLLIN COUNTY	2016	522,266	0.00%	26,113	496,153	0.00%	0.208395	0.00%	\$1,033.96	0.00%	
COLLIN COUNTY	2017	526,660	0.84%	26,333	500,327	0.84%	0.192246	-7.75%	\$961.86	-6.97%	
COLLIN COUNTY	2018	582,156	10.54%	31,938	550,218	9.97%	0.180785	-5.95%	\$994.71	3.42%	
COLLIN COUNTY	2019	594,153	2.06%	29,708	564,445	2.59%	0.174951	-3.23%	\$987.50	-0.72%	
COLLIN COUNTY	2020	606,749	2.12%	30,337	576,412	2.12%	0.172531	-1.38%	\$994.49	0.71%	
COLLIN COUNTY	2021	621,946	2.50%	31,097	590,849	2.50%	0.168087	-2.58%	\$993.14	-0.14%	
ALLEN CITY	2016	522,266	0.00%	0	522,266	0.00%	0.520000	0.00%	\$2,715.78	0.00%	
ALLEN CITY	2021	621,946	19.09%	0	621,946	19.09%	0.470000	-9.62%	\$2,923.15	7.64%	
ALLEN ISD	2016	522,266	0.00%	25,000	497,266	0.00%	1.590000	0.00%	\$7,906.53	0.00%	
ALLEN ISD	2021	621,946	19.09%	25,000	596,946	20.05%	1.406800	-11.52%	\$8,397.84	6.21%	
COLLIN COLLEGE	2016	522,266	0.00%	0	522,266	0.00%	0.081222	0.00%	\$424.19	0.00%	
COLLIN COLLEGE	2021	621,946	19.09%	6,219	615,727	17.90%	0.081222	0.00%	\$500.11	17.90%	
COLLIN COUNTY	2016	522,266	0.00%	26,113	496,153	0.00%	0.208395	0.00%	\$1,033.96	0.00%	
COLLIN COUNTY	2021	621,946	19.09%	31,097	590,849	19.09%	0.168087	-19.34%	\$993.14	-3.95%	

01-00577200057905 2/2 19e08

**MAINTENANCE AND DEBT RATE INFORMATION**

TAX YEAR	MAINT RATE	DEBT RATE
2021	\$1.00	\$0.41
2020	\$1.02	\$0.41

ALLEN ISD

NOTE: Maint Rate = Maintenance and Operations Tax rate and Debt = Interest and Sinking Tax  
Changes in rates, exemptions or ceilings can make a big change in the percentage calculations. Data is not shown where information was not available. The most common reason the information was not available is that the County Tax Office was not collecting for the entity for those years or the tax record did not exist in the prior years.



## APPRAISAL DISTRICT INFORMATION

### COLLIN CENTRAL APPRAISAL DISTRICT

250 Eldorado Parkway  
McKinney, TX 75069-8023  
Phone: 469-742-9200  
Fax: 469-742-9207  
Web site: [www.collincad.org](http://www.collincad.org)

### DENTON CENTRAL APPRAISAL DISTRICT

3911 Morse Street  
P O Box 2816  
Denton, TX 76208-2816  
Phone: 940-349-3800  
Fax: 940-349-3801  
Web site: [www.dentoncad.com](http://www.dentoncad.com)

### FANNIN CENTRAL APPRAISAL DISTRICT

831 W. State Hwy. 56  
Bonham, TX 75418-8604  
Phone: 903-583-8701  
Fax: 903-583-8015  
Web site: [www.fannincad.org](http://www.fannincad.org)

### HUNT CENTRAL APPRAISAL DISTRICT

4801 King St.  
P O Box 1339  
Greenville, TX 75403-1339  
Phone: 903-454-3510  
Fax: 903-454-4160  
Web site: [www.hunt-cad.org](http://www.hunt-cad.org)

### GRAYSON CENTRAL APPRAISAL DISTRICT

512 N. Travis Street  
Sherman, TX 75090-5922  
Phone: 903-893-9673  
Fax: 903-892-3835  
Web site: [www.graysonappraisal.org](http://www.graysonappraisal.org)

### DALLAS CENTRAL APPRAISAL DISTRICT

2949 N. Stemmons Frwy.  
Dallas, TX 75247-6195  
Phone: 214-631-0910  
Web site: [www.dallascad.org](http://www.dallascad.org)

### ROCKWALL CENTRAL APPRAISAL DISTRICT

841 Justin Rd.  
Rockwall, TX 75087-4842  
Phone: 972-771-2034  
Fax: 972-771-6871  
Web site: [www.rockwallcad.com](http://www.rockwallcad.com)



**Attachment D-**

**Line Item 1**

**Property Tax Statement**

**(Mortgage Company)**

**Page 1-front and back**



## INFORMATION ON TAXES

Assessment Ratio 100%

Property taxes are the primary sources of local government revenue in Texas. Your Tax Assessor Collector in Collin County will be collecting Ad Valorem, or property taxes, for the following entities: Collin County, Collin County Community College District, the Cities of Allen, Anna, Blue Ridge, Celina, Fairview, Farmersville, Frisco, Josephine, Lavon, Lowry Crossing, Lucas, McKinney, Melissa, Murphy, Nevada, New Hope, Parker, Plano, Princeton, Prosper, Richardson, Sachse, St. Paul, Weston, and Wylie, Seis Lagos Utility District, the Allen, Anna, Blue Ridge, Celina, Community, Farmersville, Frisco, Lovejoy, McKinney, Melissa, Plano, Princeton, Prosper and Wylie Independent School Districts, and possibly others.

YOUR CAREFUL REVIEW OF TAXPAYER INFORMATION CONTAINED IN THIS STATEMENT COULD HELP TO ELIMINATE MANY TAX PROBLEMS IN THE FUTURE.

You have from October to January 31 of the next year to pay your taxes without penalty or interest. You will be charged penalty and interest on February 1.

**ANY ERRORS OR DISCREPANCIES IN LEGAL DESCRIPTION, NAME, ADDRESS OR QUESTIONS CONCERNING VALUE SHOULD BE REFERRED TO THE CENTRAL APPRAISAL DISTRICT.**

If your taxes should be paid by a mortgage company, your copy of the statement should indicate "Property Tax Notification". If your statement is an original copy, please forward this statement to your mortgage company with your loan number.

If you bought other property and did not receive a tax statement, or sold this property and should not have received the statement, please contact this office immediately. If you own multiple properties and have not received all your statements... NOW is the time to INQUIRE about your OTHER STATEMENTS.

Penalty and interest are imposed at the statutory rate of 12% penalty and 12% per year interest on unpaid taxes. WHETHER OR NOT THE TAXPAYER RECEIVED THE TAX BILL. By July 1st, a delinquent taxpayer will have incurred 18% penalty and interest and up to 20% for attorney fees and runs a risk of being sued or having his/her property seized after that time.

**THE TAX COLLECTOR DOES NOT HAVE ANY LEGAL AUTHORITY TO FORGIVE ANY PENALTY OR INTEREST CHARGED ON AN UNPAID TAX, NO MATTER HOW GOOD YOUR REASON IS FOR NOT PAYING.**

On real property (land and buildings), the current owner can be held liable for any unpaid taxes on the land, even for years before he/she bought the property. The new owner is liable for the entire year's tax to the Tax Collector, even if that person bought the property during the year and had their tax prorated with the seller at the time of closing.

On personal property (business inventory, mobile homes, equipment, airplanes, etc) the person who owned the property on January 1 of the tax year is personally liable for the entire year's tax, even if he/she sold the property during the year.

THE CENTRAL APPRAISAL DISTRICT is a **SEPARATE** local agency and is not part of County government or the Collin County Tax Office. The CAD decides what property is to be taxed, its appraised value, whether to grant exemptions, who the taxable owner is, his/her address, and what taxing jurisdictions tax the property.

**HOMESTEAD CAP VALUE:** In November 1997, Texas voters approved a constitutional amendment to limit increases in the appraised value of residence homestead to 10 percent annually. The new law, Property Tax Code Section 23.23, provides that the appraised value of a residence homestead beginning in the 1998 tax year may not exceed the lesser of: (1) the market value of the property; or (2) the sum: (A) 10 percent of the appraised value of the property for the last year in which the property was appraised for taxation times the number of years since the property was last appraised; (B) the appraised value of the property for the last year in which the property was appraised; and (C) the market value of all new improvements to the property.

### **OVER AGE 65/DISABILITY INSTALLMENT PAYMENT OF HOMESTEAD TAXES OPTION**

**To take advantage of this option a qualified individual who occupies a residence homestead must pay at least one fourth of his taxes by Jan. 31. The remaining taxes must be paid in three equal installments due by March 31<sup>st</sup>, May 31<sup>st</sup>, and July 31<sup>st</sup>. If the individual fails to make a payment before the installment date listed above, the unpaid amount is delinquent and incurs a penalty of 6 percent and interest as provided in Section 31.031 S.P.T.C.**

**If you have a mortgage company you will need to make them aware of your intent to participate in the OA65/Disabled person installment payment option.**

### **EXEMPTIONS:**

CAREFULLY REVIEW YOUR EXEMPTIONS ON FACE OF STATEMENT. IF THE EXEMPTIONS SHOWN ARE NOT ACCURATE, OR IF YOU HAVE ANY QUESTIONS ABOUT YOUR EXEMPTIONS, **CALL THE CENTRAL APPRAISAL DISTRICT IMMEDIATELY.** MARKET VALUE WILL BE REDUCED BY EXEMPTIONS WHERE APPROPRIATE AND APPROVED TO OBTAIN TAXABLE VALUE.

POSSIBLE EXEMPTIONS (AS THEY MAY APPEAR ON STATEMENT):

1. **HS001 - HOMESTEAD.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY. NOTE: THE COLLIN COUNTY COMMUNITY COLLEGE DISTRICT DOES NOT OFFER THIS EXEMPTION AT THIS TIME.
2. **OV003 - OVER AGE 65.** THIS EXEMPTION IS STATE MANDATED FOR SCHOOL DISTRICTS ONLY AND **MAY** BE AUTHORIZED BY ANY TAXING ENTITY.
3. **DP005 - DISABLED.** THIS EXEMPTION WILL BE RECOGNIZED AS AUTHORIZED BY ANY TAXING ENTITY.
4. **DV001-DV004 - VETERAN.** THIS IS A STATE MANDATED EXEMPTION. THE EXEMPTION ALLOWED IS BASED UPON THE PERCENTAGE OF DISABILITY CERTIFIED BY THE VETERANS ADMINISTRATION, TO A MAXIMUM OF \$12,000.

**WHEN YOU PROVIDE A CHECK AS PAYMENT, YOU AUTHORIZE US EITHER TO USE INFORMATION FROM YOUR CHECK TO MAKE A ONE-TIME ELECTRONIC FUND TRANSFER FROM YOUR ACCOUNT OR TO PROCESS THE PAYMENT AS A CHECK TRANSACTION. WHEN WE USE INFORMATION FROM YOUR CHECK TO MAKE AN ELECTRONIC FUND TRANSFER, FUNDS MAY BE WITHDRAWN FROM YOUR ACCOUNT AS SOON AS THE SAME DAY WE RECEIVE YOUR PAYMENTS, AND YOU WILL NOT RECEIVE YOUR CHECK BACK FROM YOUR FINANCIAL INSTITUTION.**

**BE SURE TO ENCLOSE THE STUB PORTION OF YOUR TAX STATEMENT WHEN YOU PAY BY MAIL. SEND CHECK OR MONEY ORDER. CREDIT CARDS MAY BE PROCESSED THROUGH CERTIFIED PAYMENTS, INC. THERE WILL BE A NOMINAL FEE FOR THIS SERVICE. SEE FRONT OF THIS STATEMENT. DO NOT SEND CASH THROUGH THE MAIL. IF YOU WISH TO PAY IN PERSON, YOU MAY PAY AT THE TAX OFFICE (ADDRESSES LISTED ON THE FRONT PAGE). BE SURE TO WRITE YOUR ACCOUNT NUMBER ON YOUR CHECK TO INSURE PROPER CREDIT.**

**Attachment E-**

**Line Item 1**

**Property Tax Statement**

**(Mortgage Company)**

**Page 2-front and back**

**Information about Property Values and Taxes**  
From the files of Kenneth L. Maun, Tax Assessor Collector Collin County

The following information show what values, exemptions, tax rates and tax levies have been on this property for the last six years by each entity by whom taxed, and the percentage change from the prior year. A five year comparison is just below that.

Account Number: [REDACTED]		ACCOUNT HISTORY									
TAXING ENTITIES	TAX YEAR	APPRAISED VALUE	APPRAISAL %CHG	EXEMPTION AMOUNT	TAXABLE VALUE	VALUE %CHG	TAX RATE PER \$100	RATE %CHG	TAX	TAX %CHG	
COLLIN COLLEGE	2016	19,895	0.00%	0	19,895	0.00%	0.081222	0.00%	\$16.16	0.00%	
COLLIN COLLEGE	2017	19,898	0.02%	0	19,898	0.02%	0.079810	-1.74%	\$15.88	-1.73%	
COLLIN COLLEGE	2018	50,000	151.28%	0	50,000	151.28%	0.081222	1.77%	\$40.61	155.73%	
COLLIN COLLEGE	2019	85,875	71.75%	0	85,875	71.75%	0.081222	0.00%	\$69.75	71.76%	
COLLIN COLLEGE	2020	74,465	-13.29%	0	74,465	-13.29%	0.081222	0.00%	\$60.48	-13.29%	
COLLIN COLLEGE	2021	130,251	74.92%	0	130,251	74.92%	0.081222	0.00%	\$105.79	74.92%	
COLLIN COUNTY	2016	19,895	0.00%	0	19,895	0.00%	0.208395	0.00%	\$41.46	0.00%	
COLLIN COUNTY	2017	19,898	0.02%	0	19,898	0.02%	0.192246	-7.75%	\$38.25	-7.74%	
COLLIN COUNTY	2018	50,000	151.28%	0	50,000	151.28%	0.180785	-5.96%	\$90.39	136.31%	
COLLIN COUNTY	2019	85,875	71.75%	0	85,875	71.75%	0.174951	-3.23%	\$150.24	66.21%	
COLLIN COUNTY	2020	74,465	-13.29%	0	74,465	-13.29%	0.172531	-1.36%	\$128.48	-14.48%	
COLLIN COUNTY	2021	130,251	74.92%	0	130,251	74.92%	0.168087	-2.58%	\$218.93	70.40%	
MCKINNEY ISD	2016	19,895	0.00%	0	19,895	0.00%	1.620000	0.00%	\$322.30	0.00%	
MCKINNEY ISD	2017	19,898	0.02%	0	19,898	0.02%	1.620000	0.00%	\$322.35	0.02%	
MCKINNEY ISD	2018	50,000	151.28%	0	50,000	151.28%	1.590000	-1.85%	\$795.00	146.63%	
MCKINNEY ISD	2019	85,875	71.75%	0	85,875	71.75%	1.488350	-6.39%	\$1,278.12	60.77%	
MCKINNEY ISD	2020	74,465	-13.29%	0	74,465	-13.29%	1.474700	-0.92%	\$1,098.14	-14.08%	
MCKINNEY ISD	2021	130,251	74.92%	0	130,251	74.92%	1.376700	-6.65%	\$1,793.17	63.29%	
WESTON CITY	2016	19,895	0.00%	0	19,895	0.00%	0.360000	0.00%	\$71.62	0.00%	
WESTON CITY	2017	19,898	0.02%	0	19,898	0.02%	0.360000	0.00%	\$71.63	0.01%	
WESTON CITY	2018	50,000	151.28%	0	50,000	151.28%	0.360000	0.00%	\$180.00	151.29%	
WESTON CITY	2019	85,875	71.75%	0	85,875	71.75%	0.360000	0.00%	\$309.15	71.75%	
WESTON CITY	2020	74,465	-13.29%	0	74,465	-13.29%	0.360000	0.00%	\$268.07	-13.29%	
WESTON CITY	2021	130,251	74.92%	0	130,251	74.92%	0.295000	-18.06%	\$384.24	43.34%	
COLLIN COLLEGE	2016	19,895	0.00%	0	19,895	0.00%	0.081222	0.00%	\$16.16	0.00%	
COLLIN COLLEGE	2021	130,251	554.69%	0	130,251	554.69%	0.081222	0.00%	\$105.79	554.64%	
COLLIN COUNTY	2016	19,895	0.00%	0	19,895	0.00%	0.208395	0.00%	\$41.46	0.00%	
COLLIN COUNTY	2021	130,251	554.69%	0	130,251	554.69%	0.168087	-19.34%	\$218.93	428.05%	
MCKINNEY ISD	2016	19,895	0.00%	0	19,895	0.00%	1.620000	0.00%	\$322.30	0.00%	
MCKINNEY ISD	2021	130,251	554.69%	0	130,251	554.69%	1.376700	-15.02%	\$1,793.17	456.37%	
WESTON CITY	2016	19,895	0.00%	0	19,895	0.00%	0.360000	0.00%	\$71.62	0.00%	
WESTON CITY	2021	130,251	554.69%	0	130,251	554.69%	0.295000	-18.06%	\$384.24	436.50%	

**MAINTENANCE AND DEBT RATE INFORMATION**

TAX YEAR	MAINT RATE	DEBT RATE
2021	\$1.01	\$0.37
2020	\$1.05	\$0.42

MCKINNEY ISD

NOTE: Maint Rate = Maintenance and Operations Tax rate and Debt = Interest and Sinking Tax  
Changes in rates, exemptions or ceilings can make a big change in the percentage calculations. Data is not shown where information was not available. The most common reason the information was not available is that the County Tax Office was not collecting for the entity for those years or the tax record did not exist in the prior years.



## APPRAISAL DISTRICT INFORMATION

### COLLIN CENTRAL APPRAISAL DISTRICT

250 Eldorado Parkway  
McKinney, TX 75069-8023  
Phone: 469-742-9200  
Fax: 469-742-9207  
Web site: [www.collincad.org](http://www.collincad.org)

### DENTON CENTRAL APPRAISAL DISTRICT

3911 Morse Street  
P O Box 2816  
Denton, TX 76208-2816  
Phone: 940-349-3800  
Fax: 940-349-3801  
Web site: [www.dentoncad.com](http://www.dentoncad.com)

### FANNIN CENTRAL APPRAISAL DISTRICT

831 W. State Hwy. 56  
Bonham, TX 75418-8604  
Phone: 903-583-8701  
Fax: 903-583-8015  
Web site: [www.fannincad.org](http://www.fannincad.org)

### HUNT CENTRAL APPRAISAL DISTRICT

4801 King St.  
P O Box 1339  
Greenville, TX 75403-1339  
Phone: 903-454-3510  
Fax: 903-454-4160  
Web site: [www.hunt-cad.org](http://www.hunt-cad.org)

### GRAYSON CENTRAL APPRAISAL DISTRICT

512 N. Travis Street  
Sherman, TX 75090-5922  
Phone: 903-893-9673  
Fax: 903-892-3835  
Web site: [www.graysonappraisal.org](http://www.graysonappraisal.org)

### DALLAS CENTRAL APPRAISAL DISTRICT

2949 N. Stemmons Frwy.  
Dallas, TX 75247-6195  
Phone: 214-631-0910  
Web site: [www.dallascad.org](http://www.dallascad.org)

### ROCKWALL CENTRAL APPRAISAL DISTRICT

841 Justin Rd.  
Rockwall, TX 75087-4842  
Phone: 972-771-2034  
Fax: 972-771-6871  
Web site: [www.rockwallcad.com](http://www.rockwallcad.com)

**Attachment F-**  
**Line Item 2**  
**February Statement**  
**(Blue)**

# DELINQUENT TAX STATEMENT

KENNETH L. MAUN  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY

2300 BLOOMDALE RD, STE 2324  
PO BOX 8046  
MCKINNEY, TEXAS 75070-8046  
(972) 547-5020  
METRO (972) 424-1460 EXT 5020

Date: 2022-02-16

Account#: [REDACTED]

Legal Desc: [REDACTED]

Parcel: [REDACTED]

Address: [REDACTED]

YEAR	TAX UNIT	TAX LEVY REMAINING	IF PAID IN FEBRUARY		IF PAID IN MARCH		IF PAID IN APRIL	
			PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL
2021	COLLIN COUNTY	42.02	9.68	51.70	10.65	52.67	13.95	55.97
2021	COLLIN COLLEGE	20.31	4.68	24.99	5.15	25.46	6.74	27.05
2021	COMMUNITY ISD	365.08	84.14	449.22	92.55	457.63	121.21	486.29
2020	COLLIN COLLEGE	10.56	5.28	15.84	5.41	15.97	5.53	16.09
2020	COLLIN COUNTY	22.43	11.22	33.65	11.48	33.91	11.75	34.18
2020	COMMUNITY ISD	193.21	96.61	289.82	98.93	292.14	101.25	294.46
2019	COLLIN COLLEGE	10.56	6.80	17.36	6.94	17.50	7.06	17.62
2019	COLLIN COUNTY	22.74	14.65	37.39	14.92	37.66	15.19	37.93
2019	COMMUNITY ISD	203.89	131.31	335.20	133.75	337.64	136.20	340.09
2018	COLLIN COLLEGE	10.56	8.33	18.89	8.45	19.01	8.58	19.14
2018	COLLIN COUNTY	23.50	18.52	42.02	18.80	42.30	19.09	42.59
2018	COMMUNITY ISD	217.10	171.08	388.18	173.68	390.78	176.28	393.38
2017	COLLIN COLLEGE	10.38	9.68	20.06	9.80	20.18	9.92	20.30
2017	COMMUNITY ISD	211.25	196.88	408.13	199.43	410.68	201.96	413.21
2017	COLLIN COUNTY	24.99	23.30	48.29	23.60	48.59	23.89	48.88
<b>TOTAL AMOUNT DUE</b>				<b>\$7,939.94</b>		<b>\$7,986.05</b>		<b>\$8,055.99</b>

IF THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE COLLIN COUNTY TAX OFFICE REGARDING A RIGHT YOU MAY HAVE TO ENTER INTO AN INSTALLMENT AGREEMENT DIRECTLY WITH THE COLLIN COUNTY TAX OFFICE FOR THE PAYMENT OF THESE TAXES.

IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

PLEASE RETURN BOTTOM PORTION WITH YOUR PAYMENT

Visit [www.certifiedpayments.net](http://www.certifiedpayments.net) to pay by electronic check or credit card  
Bureau Code # 5475020

Convenience fee charged,  
or call Certified Payments at 1-877-264-7533  
(credit card only -- no electronic checks by phone)

Account Number	Month Paid	Amount Paid
[REDACTED]	FEBRUARY	7,939.94
	MARCH	7,986.05
	APRIL	8,055.99
	<b>Amount of your check</b>	<b>\$</b>

Per 33.11 of the TX Prop Tax Code, a collection penalty will be added on April 1 to personal prop accounts

1521 1 AB 0.461\*\*\*AUTO\*\*ALL FOR AADC 752 AADC 2 FT 9



**Make Check Payable to:**  
KENNETH L. MAUN  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY  
PO BOX 8046  
MCKINNEY, TEXAS 75070-8046



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YEAR	TAX UNIT	TAX LEVY REMAINING	IF PAID IN FEBRUARY		IF PAID IN MARCH		IF PAID IN APRIL	
			PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL
2016	COLLIN COUNTY	20.84	22.42	43.26	22.67	43.51	22.92	43.76
2016	COMMUNITY ISD	162.50	174.86	337.36	176.80	339.30	178.76	341.26
2016	COLLIN COLLEGE	8.12	8.73	16.85	8.82	16.94	8.93	17.05
2015	COLLIN COUNTY	22.50	27.46	49.96	27.72	50.22	28.00	50.50
2015	COLLIN COLLEGE	8.20	10.00	18.20	10.10	18.30	10.20	18.40
2015	COMMUNITY ISD	162.50	198.26	360.76	200.20	362.70	202.16	364.66
2014	COLLIN COLLEGE	8.20	11.18	19.38	11.28	19.48	11.37	19.57
2014	COLLIN COUNTY	23.50	32.06	55.56	32.34	55.84	32.62	56.12
2014	COMMUNITY ISD	161.50	220.29	381.79	222.22	383.72	224.17	385.67
2013	COMMUNITY ISD	162.50	245.06	407.56	247.00	409.50	248.96	411.46
2013	COLLIN COUNTY	23.75	35.82	59.57	36.11	59.86	36.38	60.13
2013	COLLIN COLLEGE	8.36	12.60	20.96	12.70	21.06	12.81	21.17
2012	COMMUNITY ISD	162.50	268.46	430.96	270.40	432.90	272.36	434.86
2012	COLLIN COLLEGE	8.63	14.27	22.90	14.36	22.99	14.47	23.10
2012	COLLIN COUNTY	24.00	39.65	63.65	39.94	63.94	40.22	64.22
2011	COLLIN COLLEGE	8.63	15.50	24.13	15.61	24.24	15.71	24.34
2011	COLLIN COUNTY	24.00	43.10	67.10	43.39	67.39	43.68	67.68
2011	COMMUNITY ISD	149.50	268.51	418.01	270.30	419.80	272.10	421.60
2010	COLLIN COLLEGE	8.63	16.75	25.38	16.85	25.48	16.95	25.58
2010	COLLIN COUNTY	24.00	46.56	70.56	46.85	70.85	47.14	71.14
2010	COMMUNITY ISD	149.50	290.04	439.54	291.82	441.32	293.62	443.12
2009	COLLIN COLLEGE	8.63	17.99	26.62	18.09	26.72	18.20	26.83
2009	COLLIN COUNTY	24.25	50.53	74.78	50.83	75.08	51.12	75.37
2009	COMMUNITY ISD	149.50	311.56	461.06	313.35	462.85	315.15	464.65
2008	COMMUNITY ISD	149.50	333.09	482.59	334.88	484.38	336.68	486.18
2008	COLLIN COUNTY	24.25	54.03	78.28	54.33	78.58	54.61	78.86
2008	COLLIN COLLEGE	8.65	19.27	27.92	19.38	28.03	19.48	28.13
2007	COLLIN COLLEGE	8.70	20.63	29.33	20.74	29.44	20.84	29.54
2007	COLLIN COUNTY	24.50	58.12	82.62	58.41	82.91	58.71	83.21
2007	COMMUNITY ISD	149.50	354.62	504.12	356.41	505.91	358.21	507.71
2006	COLLIN COLLEGE	8.77	22.06	30.83	22.17	30.94	22.27	31.04
2006	COMMUNITY ISD	154.00	387.46	541.46	389.31	543.31	391.16	545.16
2006	COLLIN COUNTY	24.50	61.65	86.15	61.94	86.44	62.24	86.74
<b>TOTAL AMOUNT DUE</b>				<b>\$7,939.94</b>		<b>\$7,986.05</b>		<b>\$8,055.99</b>

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**Attachment G-**  
**Line Item 3**  
**May Statement**  
**(Pink) Page 1**

**DELINQUENT TAX STATEMENT**

**KENNETH L. MAUN  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY  
2300 BLOOMDALE RD, STE 2324  
PO BOX 8046  
MCKINNEY, TEXAS 75070-8046  
(972) 547-5020  
METRO (972) 424-1460 EXT 5020**

Date: 2021-05-07

Account#: [REDACTED]

Legal Desc: [REDACTED]

Address: [REDACTED]

Parcel: [REDACTED]

YEAR	TAX UNIT	TAX LEVY REMAINING	IF PAID IN MAY		IF PAID IN JUNE		IF PAID IN JULY	
			PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL	PENALTY & INTEREST	TOTAL
2020	COLLIN COUNTY	11.96	1.56	13.52	1.80	13.76	4.98	16.94
2020	COLLIN COLLEGE	5.63	0.74	6.37	0.84	6.47	2.35	7.98
<b>TOTAL AMOUNT DUE</b>				<b>\$19.89</b>		<b>\$20.23</b>		<b>\$24.92</b>

**THE TAXES ON THIS PROPERTY ARE DELINQUENT. THE PROPERTY IS SUBJECT TO A LIEN FOR THE DELINQUENT TAXES, THE LIEN MAY BE FORECLOSED.**

IF YOU ARE 65 YEARS OF AGE OR OLDER OR ARE DISABLED AND YOU OCCUPY THE PROPERTY DESCRIBED IN THIS DOCUMENT AS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE APPRAISAL DISTRICT REGARDING ANY ENTITLEMENT YOU MAY HAVE TO A POSTPONEMENT IN THE PAYMENT OF THESE TAXES.

IF THE PROPERTY DESCRIBED IN THIS DOCUMENT IS YOUR RESIDENCE HOMESTEAD, YOU SHOULD CONTACT THE COLLIN COUNTY TAX OFFICE REGARDING A RIGHT YOU MAY HAVE TO ENTER INTO AN INSTALLMENT AGREEMENT DIRECTLY WITH THE COLLIN COUNTY TAX OFFICE FOR THE PAYMENT OF THESE TAXES.

This is a notice of tax deficiency provided by a governmental unit pursuant to the provisions of 11 U.S.C. §362(b)(9). If you are currently a debtor in a bankruptcy proceeding, or have received a discharge in a bankruptcy proceeding, this communication is not an attempt to collect a debt but is being provided for informational purposes only. If you contend that you are protected by the automatic stay imposed by an ongoing bankruptcy proceeding, or by the discharge injunction stemming from a bankruptcy proceeding, please advise us immediately and contact your attorney to discuss your rights.

*PLEASE RETURN BOTTOM PORTION WITH YOUR PAYMENT*

Visit [www.certifiedpayments.net](http://www.certifiedpayments.net) to pay by electronic check or credit card  
Bureau Code # 5475020  
Convenience fee charged,  
or call Certified Payments at 1-877-264-7533  
(credit card only -- no electronic checks by phone)

Account Number	Month Paid	Amount Paid
[REDACTED]	MAY	19.89
	JUNE	20.23
	JULY	24.92
	<b>Amount of your check</b>	<b>\$</b>

Per Sec. 33.07 of the Texas Property Tax Code, an additional 15-20% collection penalty may be added on July 1st

652 1 AV 0.398\*\*\*\*\*AUTO\*\*5-DIGIT 75252 5DGS 1 FT 4



**Make Check Payable to:**  
KENNETH L. MAUN  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY  
PO BOX 8046  
MCKINNEY, TEXAS 75070-8046



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**Attachment H-**  
**Line Item 3**  
**May Statement**  
**Page 2**



**KENNETH L. MAUN**  
Tax Assessor Collector  
Collin County  
P. O. Box 8046  
McKinney, Texas 75070-8046  
972-547-5020  
FAX 1-972-547-5053  
Metro 1-972-424-1460 Ext. 5020

Collin County Property Owner:

May 11, 2021

The enclosed delinquent tax statement indicates these taxes were not paid by April 30, 2021. If payment was made prior to April 30th, please call our office so we may review our records.

Should your mortgage company pay your taxes, please contact them. If they are at fault for late payment, I'm sure they would want to assist in the payment of any necessary penalty and interest.

Taxpayers participating in the Over-Age 65/Disabled Person Quarter Installment Payment Option with outstanding balances will not incur a delinquency if their payments are made in a timely manner. Their next installment will be due on or before May 31, 2021.

After January 31, 2021, all 2020 taxes remaining unpaid are considered delinquent. Delinquent taxes require penalty and interest totaling 13% if paid in May, and 15% if paid in June. The penalty and interest percentage continues to increase until delinquent taxes are paid.

Should the 2020 taxes still be due on July 1, 2021, an additional 15% - 20% will be charged (resulting in a total additional charge of 33% - 38%). For business personal property accounts this can happen as early as April 1st. This additional 15% - 20% collection penalty will help pay the attorney fees for assisting in the collection of delinquent taxes. These penalties and interest are specified in the Texas Property Tax Code and cannot be waived.

I would appreciate your help in the collection of these taxes. Uncollected taxes cause owners of Collin County property to carry an extra burden.

If you are 65 years of age or older or are disabled, and you occupy the property described in this document as your residence homestead, you should contact the appraisal district regarding any entitlement you may have to a postponement in the payment of these taxes.

Thank you for your help,

Kenneth L. Maun  
Tax Assessor Collector



**Attachment I-**  
**Line Item 4**  
**July Statement**  
**(Mint Green)**  
**Attorney**



**Attachment J-  
#9 Non-Standard  
Return Envelope**



Name

Address

City

State

Zip



Postage  
Required  
Post Office will  
not deliver  
without proper  
postage.

MAIL EARLY  
AVOID PENALTIES  
PAYMENTS ARE  
TIMELY  
BY POSTMARK

KENNETH L MAUN  
TAX ASSESSOR COLLECTOR  
COLLIN COUNTY  
P.O. BOX 8046  
MCKINNEY TX 75070 8046

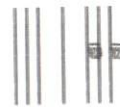


**Attachment K-**  
**#10 Window Mailing**  
**Envelopes**  
**(blue) front**

**Tax Assessor Collector  
Collin County  
2300 Bloomdale Rd., Suite 2324  
P.O. Box 8046  
McKinney, Texas 75070-8046**

**ADDRESS SERVICE REQUESTED**

75070-8046  
R 11 11

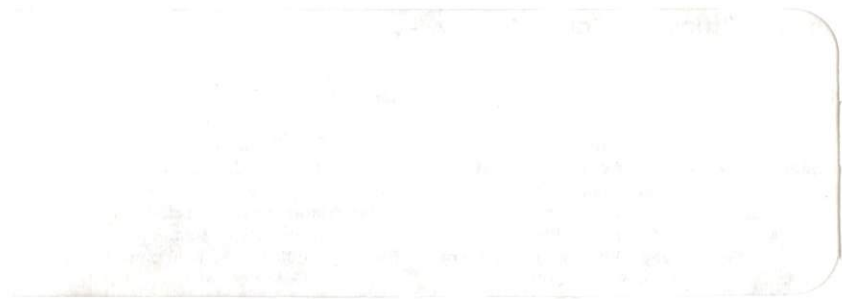


PRESORTED  
FIRST CLASS



**FITNEY BOWES**  
**US POSTAGE**  
**\$00.42<sup>3</sup>**  
OCT 20 2021  
ZIP 75247  
02 1T  
3010138

**IMPORTANT • PROPERTY TAX STATEMENT ENCLOSED**



**Attachment L-**  
**#10 Window Mailing**  
**Envelopes**  
**(blue) back**



## **Tax Assessor Collector Offices of Collin County**

### **PROPERTY TAX ONLY**

**McKinney**  
2300 Bloomdale Rd., Ste. 2324  
P.O. Box 8046  
McKinney, Texas 75070-8046  
Open Monday Thru Friday  
8:00 a.m. to 5:00 p.m.  
Thursdays 8:00 a.m. to 7:00 p.m.  
972-547-5020  
Metro 1-972-424-1460 ext. 5020

### **MOTOR VEHICLE ONLY**

**McKinney**  
2300 Bloomdale Rd., Ste. 2302  
P.O. Box 8006  
McKinney, Texas 75070-8006  
Open Monday Thru Friday  
8:00 a.m. to 5:00 p.m.  
Thursdays 8:00 a.m. to 7:00 p.m.  
972-547-5014  
Metro 1-972-424-1460 ext. 5014

### **SUB-OFFICES**

**Frisco**  
6101 Frisco Sq. Blvd., Ste. 2000  
Frisco, Texas 75034  
Open Monday Thru Friday  
8:00 a.m. to 5:00 p.m.  
Wednesdays 8:00 a.m. to 7:00 p.m.  
469-362-5800

**Plano**  
900 E. Park Blvd., Ste. 100  
Plano, Texas 75074  
Open Monday Thru Friday  
8:00 a.m. to 5:00 p.m.  
Tuesdays 8:00 a.m. to 7:00 p.m.  
972-881-3014

## **INFORMATION REGARDING CONFLICT OF INTEREST QUESTIONNAIRE**

During the 79<sup>th</sup> Legislative Session, House Bill 914 was signed into law effective September 1, 2015, which added Chapter 176 to the Texas Local Government Code. Recent changes have been made to Chapter 176 pursuant to HB23, which passed the 84<sup>th</sup> Legislative Session. Chapter 176 mandates the public disclosure of certain information concerning persons doing business or seeking to do business with Collin County, including family, business, and financial relationships such persons may have with Collin County officers or employees involved in the planning, recommending, selecting and contracting of a vendor for this procurement.

For a copy of Form CIQ and CIS:

[http://www.ethics.state.tx.us/filinginfo/conflict\\_forms.htm](http://www.ethics.state.tx.us/filinginfo/conflict_forms.htm)

The vendor acknowledges by doing business or seeking to do business with Collin County that he/she has been notified of the requirements under Chapter 176 of the Texas Local Government Code and that he/she is solely responsible for complying with the terms and conditions therein. Furthermore, any individual or business entity seeking to do business with Collin County who does not comply with this practice may risk award consideration of any County contract.

For a listing of current Collin County Officers:

<http://www.collincountytx.gov/government/Pages/officials.aspx>

At the time of this solicitation being released, the following are known to be involved in the planning, recommending, selecting, and/or contracting for the attached procurement:

Department:

Kenneth Maun – Tax Assessor  
Karen Their – Chief Deputy Clerk  
Sandy Cline – Senior Administrator

Purchasing:

Michelle Charnoski, NIGP-CPP, CPPB – Purchasing Agent  
Marci Chrismon – Assistant Purchasing Agent  
Susan Hayes – Buyer II

Commissioners Court:

Chris Hill – County Judge  
Susan Fletcher – Commissioner Precinct No. 1  
Cheryl Williams – Commissioner Precinct No. 2  
Darrell Hale – Commissioner Precinct No. 3  
Duncan Webb – Commissioner Precinct No. 4

# 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

## **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.



