



Mayor: Mario Garza
Mayor Pro-Tem: Leonardo “Lenny” Sanchez
Commissioners: Jesus “Jesse” Ramirez
Ernesto “Neto” Guajardo
Marco “Markie” Villegas

The City of San Juan does not discriminate on the basis of disability in the admission of, access to, treatment of, or employment in its programs, activities, or public meetings. Any individual with a disability in need of an accommodation is encouraged to contact the Office of the City Secretary at 956-223-2200 at least 24 hours prior to the scheduled meeting to make proper arrangements.

SAN JUAN CITY COMMISSION

Location: San Juan Memorial Library
Multipurpose Meeting Room
1010 S. Standard
San Juan, Texas 78589
Tuesday, August 13, 2019

REGULAR MEETING AGENDA
6:00 PM

I. CALL TO ORDER

II. INVOCATION

III. PLEDGE OF ALLEGIANCE

IV. PUBLIC COMMENTS

V. PRESENTATIONS

A. Presentation recognizing All Star teams 9u Boys, 10u Boys, 10u Girls.

B. Presentation of Departmental Reports: Department of Planning and Zoning, Department of Parks and Recreation, San Juan Memorial Library and Department of Sanitation.

1. Department of Planning and Zoning Monthly Report.

2. Department Parks and Recreation Monthly Report.

3. San Juan Memorial Library Monthly Report.

4. Department of Sanitation Monthly Report

C. 4th of July Festival Expense Report.

D. Presentation by Utility Service Partners, Inc. on the National League of Cities Service Line Program.

VI. PUBLIC HEARING/ORDINANCES

A. Hold a Public Hearing and Consider an Ordinance in First Reading for a Rezoning Request from Expressway Corridor District (EC) to Single-Family Residence District (R-S) of 15.932 acre tract of land out of Lot 3, Block 35, Alamo Land and Sugar Company Subdivision, located approximately a quarter of a mile West of Cesar Chavez Road, along the South side of Sgt. Leonel Trevino Road, as Requested by Estefania Rios. ***Tabled***

VII. APPOINTMENTS

A. Consider Removal and Appointment of Board Members Related to the Parks and Recreation Advisory Board.

VIII. DISCUSSION AND POSSIBLE ACTION ON ALL THE FOLLOWING MATTERS:

A. Discussion and Possible Action on Accepting and Awarding Bid #5018-75-0311-5000-7500-UCP-GVG for the 2018 Urban County Street Improvements Project.

B. Discussion and Possible Action Regarding Request for Qualifications Concerning Agent of Record for Health, Dental, Life, AD&D and Supplemental Insurance.

C. Consider Authorizing the City Manager to Declare Nine City Vehicles and Twenty Gambling Machines Awarded to the San Juan Police Department on February 5, 2019 in Case # 14-02253 by San Juan Municipal Court Judge Eloy Hernandez as Salvage and Surplus Property.

D. Discussion and Consider Proposed Tax Rate for the City of San Juan for Fiscal Year Beginning October 1, 2019 through September 30, 2020 and Setting Public Hearings.

E. Consider Selecting a Bidder and Awarding Bid # 19-08-08-06 - Rental of Mobile Trailer Mounted 2 Meter Belt Filter Press and Ancillary Equipment.

IX. CONTRACTUALS/RESOLUTIONS

- A. Consider Authorizing the Chief of Police to Enter into a Renewal Agreement Between the United States Department of Justice, Drug Enforcement Administration (DEA) and the San Juan Police Department.

X. CONSENT AGENDA

- A. Meeting Minutes

- March 12, 2019

XI. EXECUTIVE SESSION

- A. The San Juan City Commission will Convene in Executive Session, in Accordance with the Texas Open Meeting Act, Vernon's Texas Statutes and Codes Annotated, Government Code Chapter 551.
 - 1. Pursuant to Section §551.087 ECONOMIC DEVELOPMENT NEGOTIATIONS; Deliberation Regarding Financial Incentives to Business Prospects (Project Square) and §551.071 Consultation with Attorney.
 - 2. Pursuant to Section 551.074 PERSONNEL MATTERS; Discuss the Appointment, Employment, Evaluation, Reassignment, Duties, Discipline or Dismissal of a Public Officer or Employee (Municipal Judge, Joe Ramirez).

XII. RECONVENE

- A. The City Commission will Reconvene in Open Session to take Necessary Action if any, in Accordance with Chapter 551, Open Meeting, Subchapter E, Procedures Relating to Closed Meeting 551, Requirements to Vote or Take Final Action in Open Meeting.

XIII. ADJOURNMENT

CERTIFICATION

I certify that the above notice of the Regular Called Meeting of the City of San Juan is true and correct; and that I posted such notice on the bulletin board. A place convenient and readily

CITY COMMISSION MEETING AGENDA

AUGUST 13, 2019

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accessible to the public on the in accordance with the Texas Open Meetings Act (Tex. Gov't. Code §551-041 - §551.050).

DIANA CAVAZOS
CITY SECRETARY
CITY OF SAN JUAN, TEXAS

CERTIFICATION OF REMOVAL

I certify that the agenda of items to be considered by the City Commission was removed by the City Secretary's Office from the San Juan City Hall bulletin area on the the _____ of _____, 2019.

OFFICE OF THE CITY SECRETARY



Mayor: Mario Garza
Mayor Pro-Tem: Leonardo “Lenny” Sanchez
Commissioners: Jesus “Jesse” Ramirez
Ernesto “Neto” Guajardo
Marco “Markie” Villegas

MEMORANDUM

TO: Benjamin Arjona, City Manager

FROM: Roberto Escobar, Planning Director

DATE: 7/24/2019

SUBJECT: Department of Planning and Zoning Monthly Report.

The City of San Juan Planning Department is busy processing subdivision plats, rezoning applications, applications for special/conditional use permits, applications for variances and undertaking other duties as listed below.

- 73 building permits were issued with a \$4,198,252.00 in total valuation.
- 348 garage sale permits were issued (\$3,480.00 in revenues).
- Provided customer service and support to 1,038 people and handled approximately 1,985 calls.
- The building inspectors made approximately 525 inspections.
- Eleven (11) permits were issued for new houses \$1,021,387.00 in total valuation.

HEALTH DEPARTMENT

City Inspectors started visiting all the businesses to check if the occupational licenses and health permits were up to date. Business owners are renewing their business permits with the city. A total of nineteen (19) business permits were renewed with a \$760.00 in total valuation and six (6) health inspections were issued during the month of July with a \$675.00 in total valuation. Eleven (11) temporary health permits were issued for food vendors at the 4th of July Event with a \$275.00 in total valuation. Health inspector assisted during the event by checking that all the vendors had their health permits and complied with the health regulations.

CODE ENFORCEMENT

Code Enforcement Inspectors issued a total of forty-seven (47) work orders for weedy lots, sent fifty one (51) certified mail, one (1) violation notice for illegal dumping, six (6) junk vehicles, three (3) garage sales without a permit, two (2) foul odor complaints, four (4) building without a permit and six (6) street vendors.

709 S. Nebraska Ave. • San Juan, Texas 78589-2649
Phone: (956)223-2200 • Fax: (956) 787-5978

SUBDIVISIONS IN PROCESS

- The Trump Subdivision
- The Shops at HEB
- Black Hills Estates Subdivision
- Hacienda San Fernando Subdivision
- County Park Phase 1
- Perez-Garza Subdivision
- Kings Apartments
- Las Misiones de San Juan
- Arguello Subdivision
- Garco Subdivision

NEW BUSINESSES OPENING IN THE CITY DURING THIS MONTH

- Bambino's Nieve Mexicana -2207 N. Raul Longoria Road
- Cabrera Meat Market – 2211 S. Veterans Boulevard
- Marisol's Restaurant – 2100 N. Raul Longoria Road
- Taqueria La Herradura #4 – 205 W. Nolana Avenue
- Tropical Nutrition – 901 W. FM 495

SUBSTANTIAL BUILDING PERMITS ISSUED OR PROCESSED IN THE PAST MONTH

- Oil Lube at FM 495
- Swimming Pool for PSJA High School

CONDITIONAL AND SPECIAL USE PERMITS IN PROCESS

- Conditional Use Permit for "Cavazos Drive-Thru" at 4202 N. Raul Longoria Road

REZONING REQUEST

- Rezoning Request for Estefania Rios

METROPOLITAN PLANNING ORGANIZATION

The Department represents the City of San Juan in the Metropolitan Planning Organization (MPO) Technical Advisory Committee for County-wide transportation planning. Meetings are attended monthly.

AMERICAN PLANNING ASSOCIATION

Staff and Planning and Zoning Commissioners attended to their annual American Planning Association Workshop on July 26 at the Edinburg City Hall.

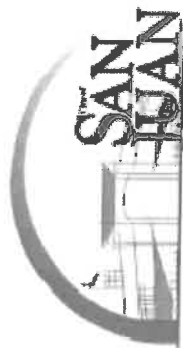
HIDALGO COUNTY URBAN COUNTY PROGRAM

During the month of July, the City Commission had a public hearing in compliance with the Community Development Block Grant (CDBG) requirements to received input from interested parties on the City's proposed program amendment to its Urban County Program Year 30 (2017).

The remaining budget for the Street Improvements Project is \$ 44,701.98. The proposed amendment will include the 2018 Street Improvements in order to expend surplus available. The proposed project to be incorporated is the already environmentally cleared San Juan 2018 Street Improvements Project.

COMPREHENSIVE PLAN

During the month of July, the San Juan City Commission approved Ordinance 2019-20 to adopt the Comprehensive Plan, Envisioning Our Future, providing a vision, goals, actions, policies and map developed for the purpose of guiding future development and redevelopment within the city.



Planning and Zoning Meeting

Monday, July 1, 2019

San Juan Memorial Library

6:00 p.m.

Name	Company	Phone Number	Address
Elena Thomson	STAR Properties	(956) 802-2838	322 W NOLANA MO ALLEN
Juan Rios		308-380-0443	1202 E 27th
Rafael Gutierrez Jr		(956) 802-0302	1610 Hooper San Juan
Alexis Cavarzas		(956) 309-7417	4202 N. Royal LONGORIA, TX
Once Rios		(956) 343-3344	2216 Cedra Dr. San Juan, TX
Jose Rodriguez	Pelcon	956-655-3681	204 Stonegate Mission
Francisca Ramos		956-402-0144	1601 Hooper St
Belen Alaniz		512-745-3263	1001 Hooper St
DANIELIS BARRIOS		956-437-4995	126 S. STEWART RD

**The City of San Juan Planning & Zoning
July 1, 2019 Meeting Minutes
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Commissioners Present: Fernando Guajardo
Eddie Alaniz
Adan Magallan
Valerie Cardenas
Joshua Benavides
Irma Castillo

Commissioners Absent: Juan Alvarado

Staff Present: Roberto Escobar, Director of Planning
Monica Gomez, Planner II

Guest Present:

Ryan James	Jose Rodriguez
Elena Thompson	Francisca Ramos
Ramon Guajardo Jr.	Belen Alaniz
Alexis Cavazos	Damaris Barrios
Omar Rios	

THERE BEING A QUORUM, CHAIRWOMAN CASTILLO CALLED THE MEETING TO ORDER AT 6:15 P.M.

1. CALL TO ORDER

2. APPROVAL OF MINUTES: June 6, 2019 Regular Meeting.

Approval: Commissioner Alaniz made a motion to approve the minutes as presented by staff. Commissioner Magallan seconded the motion, the motion passed unanimously with a (6-0) vote.

3. PUBLIC HEARINGS

Chairwoman Castillo opened the public hearing at 6:16 p.m. Commissioner Guajardo made a motion to approve it. Commissioner Benavides seconded the motion.

- A. *Hold a Public Hearing for a Conditional Use Permit for the Sale of Alcoholic Beverages for On-Premise Consumption at “Taqueria El Infiernito” located at 205 W. Nolana Avenue, Suites 1-2, legally described as Lot 1, San Juan Plaza Subdivision, as Requested by Little Hell Taco, LLC.***

Mr. Escobar said Mr. Luis Valencia was applying for a conditional use permit to sell wine and beer for on-premise consumption at Taqueria El Infiernito, located at the new commercial plaza, just South of Delia’s Tamales. The current zoning of the property is General Business District (C-2) and operation hours are from 12:00 p.m. to 12:00 a.m. He read the conditions to open the business: TABC license, occupational license with the city, parking area, complies with noise ordinance and security cameras.

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July 1, 2019 Meeting Minutes
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Commissioner Alaniz said that he is worried about the parking area since the commercial plaza is getting full and parking is a common area for all the businesses.

- B. Hold a Public Hearing for a Conditional Use Permit for the Sale of Alcoholic Beverages for Off-Premise Consumption at the proposed “Cavazos Drive-Thru” located at 4202 N. Raul Longoria Road, legally described as Lot 11, Plazita Piedra Grande Subdivision, as Requested by Antonio Cavazos.***

Mr. Escobar said that the proposed drive-thru is located South of Aylyn’s Event Center. He said that the board had recently processed a conditional use permit for the same property but property was sold to new owners. The property is in a General Business District (C-2) and sale of alcohol is from 12:00 p.m. to 12:00 a.m. on Fridays and 12:00 p.m. to 1:00 a.m. on Saturday.

Alexis Cavazos, representing Antonio Cavazos, said that his Father purchased the property a couple of weeks ago and the business is going to be different from the previous drive-thru. He said that they have a drive-thru in Edinburg and are looking to relocate the business to San Juan.

- C. Hold a Public Hearing for a Conditional Use Permit to allow Multi-family Residence District (R-MF) uses in a Neighborhood Commercial District (C-1) in a property legally described as the West 130 feet of the East 374 feet of the North 300 feet of Lot 9, Block 39, Alamo Land and Sugar Company Subdivision, located at the Southwest corner of FM 495 and Hooper Avenue, as Requested by Ramon Guajardo.***

Mr. Escobar explained that the zoning ordinance allows multi-family uses in a commercial area thru a conditional use permit. The proposed area is located at the Southwest corner of FM 495 and Hooper Avenue and Mr. Guajardo, the applicant, is proposing to build an apartment complex. He went over the list of conditions that are included in the packet: plat the property, apply for building permits, comply with parking regulations, drainage, a buffer fence along the residential area, TxDOT permits and comply with City’s rules and regulations.

Ramon Guajardo, the applicant, said that he wants to build an apartment complex on his property. Mr. Escobar said that he would rather to have the apartment complex in a Multi-Family Residence District but in this case the Neighborhood District (C-1) allows apartments through a conditional use permit.

Commissioner Magallan asked Mr. Guajardo about the traffic on FM 495. Mr. Guajardo said that they are going to use Hooper Avenue as an entrance/exit instead of FM 495.

- D. Hold a Public Hearing for a Rezoning Request from Multi-Family Residence District (R-MF) to General Business District (C-2) for a property legally described as the West 60 feet of the East 262.73 feet of the North 100 feet of the South 145 feet of Lot 8, Block 35, Alamo Land and Sugar Company Subdivision, located at 512 E. 2nd Street, as Requested by Enrique Escalante.***

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Mr. Escobar said the property is located at Northwest corner of Stewart and 2nd Street. He said there is an existing car lot in the corner property and applicant is looking to expand the business to the empty lot on the West side.

Commissioner Alaniz said that the car lot does not have enough parking area and they are using the city's right-of-way for parking cars. Mr. Escobar said that if the city approves the rezoning, the applicant will need to apply for the conditional use permit to have the mechanic shop. He said they are just applying for the rezoning of the property and when they apply for the permit they will need to comply with the off-street parking regulations.

Damaris Barrios, representing Enrique Escalante, said that she agreed with Commissioner Alaniz regarding the parking issues and that was why they purchased the property next door, to expand the business and park the cars. She said they relocated the business from a previous location because business is growing and they needed more space. She also said they are planning to have the car lot at the corner lot, the mechanic shop and parking on the vacant property.

Chairwoman Castillo closed the public hearing at 6:30 p.m. Commissioner Cardenas made a motion to approve it. Commissioner Benavides seconded the motion.

4. DISCUSSION AND ACTION

- A. Conditional Use Permit for the Sale of Alcoholic Beverages for On-Premise Consumption at "Taqueria El Infiernito" located at 205 W. Nolana Avenue, Suites 1-2, legally described as Lot 1, San Juan Plaza Subdivision, as Requested by Little Hell Taco, LLC.***

Commissioner Guajardo made a motion to approve the conditional use permit. Commissioner Alaniz seconded the motion. The motion passed unanimously with 6-0 vote.

- B. Conditional Use Permit for the Sale of Alcoholic Beverages for Off-Premise Consumption at the proposed "Cavazos Drive-Thru" located at 4202 N. Raul Longoria Road, legally described as Lot 11, Plazita Piedra Grande Subdivision, as Requested by Antonio Cavazos.***

Commissioner Cardenas made a motion to approve the conditional use permit. Commissioner Benavides seconded the motion. The motion passed unanimously with 6-0 vote.

- C. Conditional Use Permit to allow Multi-family Residence District (R-MF) uses in a Neighborhood Commercial District (C-1) in a property legally described as the West 130 feet of the East 374 feet of the North 300 feet of Lot 9, Block 39, Alamo Land and Sugar Company Subdivision, located at the Southwest corner of FM 495 and Hooper Avenue, as Requested by Ramon Guajardo.***

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Commissioner Cardenas made a motion to approve the conditional use permit. Commissioner Guajardo seconded the motion. The motion passed unanimously with 6-0 vote.

- D. Rezoning Request from Multi-Family Residence District (R-MF) to General Business District (C-2) for a property legally described as the West 60 feet of the East 262.73 feet of the North 100 feet of the South 145 feet of Lot 8, Block 35, Alamo Land and Sugar Company Subdivision, located at 512 E. 2nd Street, as Requested by Enrique Escalante.***

Commissioner Cardenas made a motion to approve the conditional use permit. Commissioner Guajardo seconded the motion. The motion passed unanimously with 6-0 vote.

5. SUBDIVISIONS

- A. Preliminary and Final Plat Approval of the Shops at HEB being a Re-Plat of Lot 3, HEB San Juan-Unit 2 Subdivision, located approximately 600 feet East of Veterans Boulevard, along the South side of Frontage Road, as Requested by Melden and Hunt, Inc.***

Mr. Escobar said it was a re-plat for HEB San Juan-Unit 2 Subdivision and they are proposing three commercial lots in the Expressway Corridor District. A 12-inch water line is going to be looped and they will extend the 8-inch sewer line. Fire hydrants will be added as requested by the Fire Department. Easements are dedicated and a shared access agreement will be dedicated so Lot 3 can have access to the Expressway. Sidewalks shall be constructed at the building permit stage. Property owner is willing to comply with the 50 year drainage detention as per Hidalgo County Drainage District #1.

Commissioner Alaniz made a motion to approve the Preliminary and Final Plat of the Shops at HEB and Commissioner Magallan seconded the motion. The motion passed unanimously with a 6-0 vote.

- B. Preliminary and Final Plat Approval of the Black Hills Estates Subdivision being a 20.00 acre tract out of Lot 3, Block 39, Alamo Land and Sugar Subdivision, located approximately a quarter of a mile West of Cesar Chavez Road, along the South side of Sioux Road, as Requested by Delcon Logistics.***

Mr. Escobar said that the property was recently zoned back to Single-Family Residence District. The applicant is proposing to plat a 20 acre tract into a 91 lot residential subdivision. An existing 8-inch water needs to be looped around the subdivision, an existing 18-inch sewer line is available along Sioux Road and a total of six fire hydrants were requested by the Fire Department to serve the subdivision. Easements were dedicated to the city and lighting will be installed along the subdivision. Sidewalks will be required at the building permit stage and drainage detention will be located at the South side of the subdivision.

Mr. Escobar said that the Project Engineer is requesting two variances, they are asking for 50-foot width lots instead of 60-feet for interior lots and 65-feet for corner lots as requested by city ordinance and to not comply with the block length, that every 800 feet an interior street is required by subdivision ordinance.

The City of San Jun Planning & Zoning
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Jose Rodriguez, Delcon Logistics, explained that they are looking at 50 feet lots because the property owner wants to fit as many lots as possible. He said one of the most important things on residential development is to populate lots as fast as possible to recuperate the investments. They are looking to start building homes and they feel they can fit those houses in a 50 feet lot. If they increase the lot size, they will need to increase the price.

Commissioner Cardenas asked how many lots they will have if they comply with the 60 foot lot required by the city. Mr. Rodriguez said they will have 70 to 75 lots. Chairwoman Castillo said that she would not like property owners coming back requesting variances to build on those properties.

Omar Rios, owner, showed pictures to the board and said that he has built houses in San Juan and he understands the demand for properties this size. He said his target homes are between \$120,000.00 and \$150,000.00 and if the variances are not granted, he will not be able to continue with the project since they will need to increase the home prices.

Commissioner Cardenas said the board's responsibility is to beautify San Juan and have subdivisions that attract people to the city. Mr. Rios said that he has built approximately twenty houses in the past years in a 50 feet lot size within the city. Chairwoman Castillo asked if they had applied for any variances to build in a 50 feet lot. Mr. Rios said that all the houses were built in older subdivisions.

Mr. Rios said when he initially started the project, he was proposing four-plexus subdivision but the project could not go through since the Fire Department was requesting to loop the water system and have a second access to the subdivision. He said that he is willing to comply with those requirements now that he owns the 20.0 acre tract. He is asking for these two variances so he can target clients that are looking for this type of development.

Mr. Rios asked Commissioner Benavides to inform the Board how the demand for smaller lots has gone up as he is helping Mr. Rios sell some houses. Commissioner Benavides said that homes between \$120,000 - \$150,000 are in demand in different cities.

Commissioner Alaniz said that he understands what Mr. Rios is saying but that he, Mr. Rios, also needs to understand that the times are changing, including in San Juan. He said that he lives in an old subdivision where families are growing and there is not enough space for even the fire truck to get into the subdivision.

Mr. Rios said that he researched the neighboring cities of Edinburg, McAllen, Pharr, Alamo, Weslaco and Mercedes and all have a 50-foot lot minimum requirement. He said that he will compensate the properties by making the lots longer than required by code; he will also comply with the 6,000 square feet.

Mr. Escobar said the he looked into the City of Edinburg, where they have three different residential zonings and some required 50-feet, others 60-feet. He also said that the city has 50-feet lots for mobile homes only.

The City of San Jun Planning & Zoning
July 1, 2019 Meeting Minutes
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Commissioner Cardenas said that the board needs to maintain the standards. She recalled a subdivision located North of San Juan where they were requesting 50 foot lots and the board denied the request.

Mr. Rios mentioned the existing subdivision located just west of his property (Loma Linda Estates) and they have 50-feet lots. Mr. Escobar said that the subdivision was recorded in the 1990's.

Commissioner Alaniz recalled that the Board would hold workshops to update the city ordinances. He said that maybe they need to revisit the ordinances again, but as of now they need to comply with what the city requires.

Commissioner Guajardo made a motion to deny the Preliminary and Final Plat Approval along with the variances. Commissioner Alaniz seconded the motion. The motion passed unanimously with a 6-0 vote.

Mr. Rodriguez added that some subdivisions were approved in the city without complying with the block length. Commissioner Cardenas said that they can go back and look for those subdivisions, but every subdivision is reviewed on a case by case.

6. NEXT MEETING – July 18, 2019 (if necessary)

7. ADJOURNMENT

There being no further items to discuss, Commissioner Cardenas made a motion to adjourn; Commissioner Guajardo seconded the motion. The motion passed unanimously with a (6-0) vote and the meeting was adjourned at 7:01 p.m.

City of San Juan, Texas

Irma Castillo, Chairwoman
Planning and Zoning Commission

Attest:

Planning Director



Mayor: Mario Garza
Mayor Pro-Tem: Leonardo “Lenny” Sanchez
Commissioners: Jesus “Jesse” Ramirez
Ernesto “Neto” Guajardo
Marco “Markie” Villegas

MEMORANDUM

TO: Benjamin Arjona, City Manager
FROM: Patrick Willingham, Director of Parks and Recreation
DATE: 7/30/2019
SUBJECT: Department Parks and Recreation Monthly Report.

Parks Division, staff continues to maintain our city parks and landscape areas as needed. This past month staff worked on the following areas.

1. Setting up for events; Church in Lopezville, Kids Camp at the Wetlands.
2. Continue to maintain the San Juan Wetlands.
3. Doing basic upkeep at our baseball/softball fields.
4. Painting and cleaning the graffiti at parks.
5. Assisted PSJA ISD with the tent for the Operation Lone Star.
6. Removed fencing at Municipal Park in preparation for the replacement.
7. Re-painting and striping at The San Juan Library.
8. Working on some of the utility trailers for the parks department.

Events Division, Event Coordinator Ruben Rodriguez and staff having been working the following areas.

1. Staff assisted with the annual 4th of July event that took place on Wednesday July 3rd, 2019.
2. Kids Camp, event staff offered support during our 1st kids camp at the wetlands on

Saturday July 13, 2019.

3. Meeting for the preparation for National Night Out which is to take place on Saturday August 17, 2019.

4. Working on quotes for the Municipal baseball fields.

(fence guards, windscreen, scoreboards)

5. Working on fixing the Ford Expeditions which the department obtained from San Juan PD.

Recreation Division, this past month staff has been coordinating and organizing upcoming spring/summer events and leagues

PONY ALL STARS: The City of San Juan had two baseball teams, 9U & 10U, advance to the South Region Baseball Tournament in Deer Park, Texas the week of July 15 and the week of July 22 respectively and one softball team, 10U, advance to the South Region Softball World Series Tournament in Lafayette, Louisiana the week of July 15. All three teams did well with the softball and the 9u team placing in the top 4.

2019 SUMMER RECITAL: On Tuesday, July 16, the 2019 at 6 pm the Summer Recital was held at the PSJA HS Auditorium. Performances were done by the participants in Theatre Arts, Cheerleading, Dance and Ballet Classes. Participants received a certificate of participation.

TAAF REGION 2 TRACK & FIELD MEET: The TAAF Region 2 Track & Field Meet was held on July 10-11, 2019 in Pharr PSJA ISD Stadium. The City of San Juan Parks & Recreation athletes competed very well. During the two days the total number of medals won by the San Juan Track & Field athletes were: Gold-41, Silver-22, Bronze-28. These individuals advanced to College Station, TX for the 2019 State Games of Texas.

TAAF GAMES OF TEXAS: The 2019 TAAF Games of Texas were held in College Station, TX from July 25-29. The San Juan Track & Field athletes competed very well bringing home 4-Gold, 9-Silver and 1-Bronze medals.

Tennis athletes also competed at the 2019 TAAF Games of Texas in College Station, TX. The tennis participants also competed very well garnishing 1-Gold, 4-Bronze and 3-Consolations.

FALL PROGRAM: Preparations are underway for the 2019 Fall Flag Football, Volleyball and Tackle Football programs with registration starting on August 5, 2019.

Breakdown of Expenses for our Baseball/Softball teams who traveled out of town

9u Boys- South Zone Championships, Deer Park, Tx. July 18-21, 2019

Coaches: Martin Gamboa, Travis Mcalpine, Rolando Pena

City contributed \$3,100 for rooms and meal money.

3rd Place Finish South Zone

10u Boys- South Zone Championships Deer Park, Tx. July 25-28, 2019

Coaches: Andrew Garza, Jason Saucedo, and Lucio Gonzalez.

City contributed \$3007.20 for rooms and meals

10u Girls- South Zone World Series, Youngsville, La. July 18-21, 2019

Coaches: Eric Martinez, Ramiro Herrera, Eric Martinez

City contributed, \$2900 for rooms and meals

3rd Place Finish South Zone World Series

Maintenance Division, staff continues to provide professional maintenance and custodial service throughout the city. The following areas were addressed this past month.

1. We worked at the library with AEP, with the power outage, replaced some breakers and lights. As well, we replaced several outlets in the computer room that were out.
2. Prepared the generators for the 4th of July event as well as our power supply box, replaced some outlets that were not working.
3. Worked on the A/C unit at old P.D., was not cooling. In addition worked on the A/C unit at the Parks & Rec. office as well.
4. Replaced the condenser and air handler at City Hall, outside unit.
5. At City Hall we worked on the outside generator.

UPCOMING EVENTS:

- National Night Out, August 17, 2019.



Mayor: Mario Garza
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Commissioners: Jesus “Jesse” Ramirez
Ernesto “Neto” Guajardo
Marco “Markie” Villegas

MEMORANDUM

TO: Benjamin Arjona, City Manager

FROM: Armandina Sesin, Director of Library

DATE: 8/1/2019

SUBJECT: San Juan Memorial Library Monthly Report.

Enclosed is the July monthly report including statistics and programs:

For the month of July we had, 4,175 visitors. Out of those visitors, 1,184 were here for computer use only. The library checked out a total of 2,228 items both adult and children's. We had 190 in-house circulation items. We requested and received thirty three (33) Interlibrary Loans (ILL). We had 84 new patrons added to our circulation system. We helped the public with an estimated 594 reference/informational questions. We had 51 fax transactions. The monthly amount deposited was \$1,502.41 both fines and fees.

Please see the attached statistical report.

During the month of July

- Attended the Directors' meeting.
- Attended the City Commission meeting.
- Went to City Hall to make the weekly money deposits for the library.
- Attended the Special Called meeting for the Proclamation of Jesus Donava on his retirement.
- Attended the City Budget for Fiscal Year 2019-2020 Work Session.
- Managed the day to day operations of the San Juan Memorial Library.

Meetings to be held in August, 2019

Multipurpose Room

709 S. Nebraska Ave. • San Juan, Texas 78589-2649
Phone: (956)223-2200 • Fax: (956) 787-5978

EDC Meetings, August 6th & 20th

Civil Service Exam, August 7th

City Commission Meetings, August 13th & 27th

Directors' Meetings, August 14th & 28th

Planning and Zoning, August 15th

Utilities Department Training, August 17th

Doedyns Elementary Library Visit, August 20th & August 22nd

Training Room:

Computer Classes, August 1st thru August 29th

San Juan Fire Department Web Training, August 8th

US Census, August 9th & 16th

San Juan Memorial Library
July 2019 Statistics

Statistics	
Total Visitors	4,175
Computer Users	1,184
Total Checkouts	2,228
In-House Use	190
Inter-Library Loans	33
New Patrons	84
Reference\ Informational Questions	594
FAX transactions	51
Children's Programs	*
Attendance	*

Multipurpose Room Reservations	Attendance
1st Planning & Zoning	20
2nd EDC Meeting	15
5th Documentary Event	48
8th Human Resources - Executive Room	8
8th Summer Reading Program	13
8th Summer Reading Program - lunch	23
9th Summer Reading Program	9
9th Summer Reading Program - lunch	24
9th City Commission	48
10th Directors Meeting	15
10th Summer Reading Program	9
10th Summer Reading Program - lunch	12
11th Summer Reading Program	4
11th Summer Reading Program - lunch	11
12th Summer Reading Program	9
12th Summer Reading Program - lunch	17
15th Summer Reading Program	5
15th Summer Reading Program - lunch	10
16th Summer Reading Program	12
16th Summer Reading Program - lunch	28
17th Summer Reading Program	7
17th Summer Reading Program - lunch	15
17th EDC Meeting	10
18th Summer Reading Program	7
18th Summer Reading Program - lunch	19
18th Budget Meeting	20
19th Summer Reading Program	8
19th Summer Reading Program - lunch	12
22nd Summer Reading Program	13
22nd Summer Reading Program - lunch	21
23rd Summer Reading Program	8
23rd Summer Reading Program - lunch	20
23rd City Commission	38
24th Directors Meeting	14
24th Summer Reading Program	12

Checkouts	
DVDs	566
Books Juvenile	1,413
Books Adult	249
Total	2,228

WiFi Usage	
LibGuest	*
LibStaff	*
Total	0

Study Room Attendance	
Study Rooms	62

Facebook Page	
Likes	18
Visitors	14

SJML Homepage	
Visitors	47,785

Deposits	
Fines	\$ 533.30
Copies	\$ 969.11
Total	\$ 1,502.41

M.P. Room Res. (cont.)	Attendance
24th Keep San Juan Beautiful	11
25th Summer Reading Program	15
25th Summer R. Prgm - lunch	25
26th Summer Reading Program	24
26th Summer R. Prgm - lunch	30
31st SRP Pizza Party	49
Total	740

Training Room Reservations	Attendance
2nd Computer Class	3
5th Computer Class	3
9th Computer Class	2
16th Computer Class	2
18th Computer Class	2
Total	12

Computer Classes	
Attendance	12

San Juan Memorial Library
July 2019 Statistics

24th Summer Reading Program - lunch	22
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* = *information not available*



Mayor: Mario Garza
Mayor Pro-Tem: Leonardo “Lenny” Sanchez
Commissioners: Jesus “Jesse” Ramirez
Ernesto “Neto” Guajardo
Marco “Markie” Villegas

MEMORANDUM

TO: Benjamin Arjona, City Manager
FROM: Roel Garza, Sanitation Director
DATE: 8/6/2019
SUBJECT: Department of Sanitation Monthly Report

Sanitation Department

- Solid Waste Collection ran on schedule all month
- Brush Pickup ran on schedule all month
- Drop off Site – 769 residents
- Residential – 726.41 Tons
- Commercial – 941.44 Tons
- Roll-Off – 112.85 Tons 25 loads (commercial rental)
- Brush – 725.51 & 173 loads of brush

Central Garage

- Open 11
- Closed 130
- 5 Residential Side Loaders operating, 1 Residential Side Loaders down
- 1 Commercial Side Loaders operating

709 S. Nebraska Ave. • San Juan, Texas 78589-2649
Phone: (956)223-2200 • Fax: (956) 787-5978

- 2 Commercial Front Loaders operating, 1 Commercial Front Loader down
- 3 Brush truck operating, 1 Brush Truck down
- 1 Brush tractor (grapple) operating
- 3 Brush Grapple Truck operating, 1 Brush Grapple Truck down
- 3 Roll-Off Trucks operating

Sanitation Code Enforcement

- | | |
|------------------------------|----|
| ●Citizen contacts | 9 |
| ●Violation Notices | 11 |
| ●Report on weedy lots | 32 |
| ●Tagged illegal parked | 6 |
| ●Court cases filed "pending" | 4 |

Recycling

- | | |
|----------------|----------------------|
| ●Cardboard: | 4.87 tons / \$227.02 |
| ●Office Paper: | 0.64 tons/ \$70.40 |
| ●Curbside: | 2.00 tons/ \$0.00 |
| ●Jose Aguilar: | 12 pieces/ \$112.00 |

- | | |
|---------------------|----------------------|
| ●Total Tons/Revenue | 7.51 tons / \$409.42 |
| ●Walk-Ins | 695 |

Streets Department

•ROW-

7/1/2019 City crew mowed and trimmed on Nebraska from Ridge to Sam Houston, 1st St from I Rd to Nebraska, Cougar up to West Chaparral St, picked up trash, trimmed

Branches along 1st St from Nebraska to I Rd (Tomas, Pablo, Mando, Daniel)

7/1/2019 City crew mowed grass and pick up trash on W. 1st St, assisted Richard (Recycling) load a trash bin on to the utility trailer, and also took care of the traffic control on Stewart Rd with assistance of San Juan Fire and cleaned out storm drain from Lucero subdivision (Isaias Gonzalez, David Garcia)

7/2/2019 City crew mowed and trimmed Nebraska up to Ridge Rd, San Antonio Rd, and picked up trailer with 4 signs (Isaias Gonzalez, David Garcia)

7/5/2019 City crew mowed, trimmed, at the following locations: Nebraska, Rio Grande, North Raul Longoria on both sides Entrance to North & South Gate Manors (Tomas, Pablo, Daniel)

7/8/2019 City crew mowed, trimmed Nebraska St from North Gate Manor to Nolana (both sides) also mowed Firemen Park. (Pablo, Daniel)

7/9/2019 City crew mowed, trimmed at the following locations: Sgt Trevino from Raul Longoria to Caesar Chavez. Need 2 poles the ditch close to Caesar Chavez and used the blower to finish. (Tomas, Pablo, Daniel)

7/10/2019 City crew mowed and trimmed the Right of ways at the following locations: Bus. 83, Caesar Chavez, from Caesar Chavez to Stewart Rd (Isaias Gonzalez, Armando Cordova, David A Garcia)

7/11/2019 City crew mowed the Right of ways at the following locations: Hall Acres from Stewart to I Rd, from Conway all the way to Hall Acres (Isaias Gonzalez, Armando Cordova, David A Garcia)

7/11/2019 City crew scraped, mowed, trimmed at the following locations: Sgt Trevino, Sioux Rd, El Dora from Raul Longoria to Retama, Fireman's Park (Tomas, Pablo, Daniel)

7/12/2019 City crew mowed the Right of Way on Sioux Rd, Retama, El Dora (Isaias

Gonzalez, Armando Cordova, David A Garcia)

7/12/2019 City crew mowed and trimmed at the following locations: Retama from Sioux Rd to North El Dora Rd all the way to Cesar Chavez. (Tomas, Pablo, Daniel)

7/15/2019 City crew mowed and trimmed at the following locations: Nolana from Raul Longoria to Cesar Chavez on both sides and repaired two street signs, (Tomas, Pablo, Daniel)

7/16/2019 City crew mowed and trimmed at the following locations: Minnesota Rd, Raul Longoria. ,13th St & Nebraska, 11th St & Nebraska (Mendez, Roque, Saucedo)

7/17/2019 City crew mowed and trimmed the Right of Way at the following locations: El Dora Rd (West) to Raul Longoria. (Mendez, Roque, Saucedo)

7/18/2019 City crew mowed and trimmed at the following location: Hall Acres Rd, (Armando Cordova, Isaias, Gonzalez, David A Garcia)

7/18/2019 City crew mowed and trimmed at the following locations: West Sioux from Raul Longoria to I Rd, mowed Easement on 14th St and Nebraska, also applied roundup around water drain pipes on West Sioux East Nolana (Mendez, Roque, Saucedo)

7/19/2019 City crew mowed, trimmed and scraped curb at the following location: 1st St from Stewart Rd to Ceasar Chavez and applied round - up and mowed at Fireman's Park Mendez, Roque, Saucedo)

7/22/2019 City crew mowed and trimmed at the following locations: Stewart from Sam Houston to Old Hwy 83 East Side, Stewart from Old Hwy 83 to 1st St West side, Old Hwy 83 from Nebraska to Stewart to Stewart, Kansas, 7th St and Old Hwy 83, mowed, scraped curb (East Side) , 6th St bet Kansas & Iowa both sides. (Mendez, Roque, Saucedo)

7/23/2019 City crew mowed, scraped, picked up debris on Oblate St, North of 495, also mowed and trimmed the vacant lot on North of Oblate Rd, and collected brush so it can. (Mendez, Roque, Saucedo)

7/24/2019 City crew mowed and trimmed at the following locations: Amy St behind Post Office (Alley), Rail Rd St from Nebraska to Standard, Nebraska from Rail Rd, East Side of Standard St from Rail Rd to Rail Rd trimmed the corner of Nebraska and old Hwy 83, two vacant lots on West Raul Longoria to Caesar Chavez. Need 2 poles the ditch close to Caesar Hwy 83 from Nebraska to the Car Wash, mowed the sidewalk (East side) from old Hwy 83 to 6th St, and from (North) Nebraska to the alley (Mendez, Roque, Saucedo)

7/25/2019 City crew mowed and trimmed and picked up trash at following locations: Sam Houston gathered brush together so it can be ready for pick up. From Stewart to Caesar Chavez also picked up trash, and placed brush together so it can be ready for pick up. Caesar Chavez from Old Hwy 83 South past Sam Houston. Mowed the Alley South of Sam Houston, then mowed Caesar Chavez & Sam Houston. (Tomas, Pablo, Daniel, Miguel)

7/26/2019 City crew mowed and trimmed, picked up trash at these locations: Ridge from Nebraska to Caesar Chavez, Nebraska South of Ridge on both sides. Mowed Firemen Park, mowed and trimmed Guadalupe St. vacant lots West of Retama (Tomas, Pablo, Daniel, Miguel)

7/29/2019 City crew mowed and trimmed at the following locations: San Antonio from Ridge Rd south to the canal on both sides , Ridge Rd from Standard St. west to San Antonio Rd, , Moore Rd from San Antonio east to the canal both sides mowed and trimmed, Hwy Old 83 from Family Dollar to Trevino Tire Service, mowed easement on the corner of King and Old Hwy 83, mowed, scraped and trimmed Tierra de Sol Apartments, Miguel Hidalgo st, and picked up tires, Mowed and trimmed Old Hwy 83 Jesse's and the Trailer Park (Mendez , Roque, Saucedo, Miguel Andrade)

7/31/2019 City crew mowed and trimmed, collected brush & tires West side of canal from Rail Road North to Memorial Funeral Home. also mowed and trimmed at the following locations: (Alley's) between Water Plex and Meme's Drive Thru from Raul Longoria east to the canal, the Alley behind Golden Chick, the Alley between Kansas & Ohio, also the alley W 8th St & San Antonio (Tomas, Pablo, Daniel, Miguel)

●Street Signs –

7/8/2019 City crew fix a Stop Sign at Ridge road, Stewart. Installed new post and Stop Sign on Sam Houston & San Antonio (Isaias Gonzalez, Armando Cordova)

7/17/2019 City crew repaired 3 Stop Signs on New Sub. on Minnesota Rd (Isaias Gonzalez, Armando Cordova, David A Garcia) City crew pick up a sign on Hwy 83 (Mendez, Roque, Saucedo , Miguel Andrade)

7/18/2019 City crew painted School crossings on Ridge Rd and San Antonio and applied crack seal (Raudy, Alex, Gilbert, Robert)

7/19/2019 City crew painted School Crossings for Carmen Elementary on Ridge Rd and Nebraska and fixed area around manhole with asphalt on Bears Trail (Raudy, Alex, Gilbert)

●Alley's –

7/1/2019 City crew applied round- up at the following locations Citrus St, Cougar St, Athol, alley and Doe St, Mesquite St, and trimmed trees, picked up brush and junk (Alex, Robert, Gilbert)

7/2/2019 City crew mowed ,trimmed, at the following locations: San Antonio St, Bear's Trail, Ridge from San Antonio St to the Police Dept. , Nebraska south of Ridge Rd, Valencia Subdivision, Moore from the canal to San Antonio to the entrance of Las Flores Subdivision to the El Campo Verde.(Tomas, Armando Cordova, Daniel , Isaias Gonzalez, Daniel)

7/2/2019 City crew mowed, trimmed trees. On Santa Fe. (Raudy,Alex, Gilbert, Robert)

7/3/2019 City crew applied round - up at the following locations: West 4th St, 3rd St also included the alley next to Rancho Grande and 1st St, and Kansas, South Kansas,

East 8th St, West and East 6th St, West 9th St and Kansas St (Gilbert, Robert)

7/8/2019 City crew mowed and trimmed at the following locations: E. 4th St, Stewart Rd (Isaias Gonzalez, David Garcia)

7/8/2019 City crew applied round - up at the following locations: (2) Alleys on 1st, 2nd St, also on East & West El Dora Rd, Stewart Rd. (Gilbert, Robert)

7/8/2019 City crew mowed alleys at the following locations: S. San Antonio (Raudy, Alex)

7/9/2019 City crew mowed Alleys at the following locations: 1st, 2nd, 3rd, 4th St also behind Church's & Dollar Tree store (Armando Cordova, Isaias Gonzalez, David Garcia)

7/9/2019 City crew mowed (Alley's) at the following locations: Citrus & Athol St, W. Chaparral St & W. 1st St bet W. 1st & 2nd St (Raudy, Alex, Gilbert)

7/10/2019 City crew mowed, alley on Buffalo & Hackberry and finish mowing the drainage ditch on Sgt Trevino & Cesar Chavez, Sioux Rd from Retama to Raul Lon (Tomas,Pablo, Daniel)

7/10/2019 City crew mowed at the following locations: (Alley's) Hackberry St, Ebony St., Library W. 10th St, W. 9th St, Standard St, King Rd. and applied round - up on W. 1st , Rail Rd St. (Raudy, Alex, Gilbert Robert)

7/10/2019 City crew mowed alleys at the following locations: Ebony St, Alameda St (Isaias Gonzalez, Armando Cordova, David A Garcia)

7/10/2019 City crew mowed and trimmed at the following locations: Cristiano St, and around the shop. (Raudy, Alex, Gilbert, Robert)

7/12/2019 City crew mowed alleys on I Rd & San Antonio, Sam Houston & Ridge, also mowed the entrance of Hunee Dr neighborhood. (Raudy, Alex, Gilbert, Robert)

7/15/2019 City crew mowed and trimmed at the following locations Jaime St, Leticia, Francis St, W. 8th, 9th, 10th, 11th St (Isaias Gonzalez, Armando Cordova, David A Garcia)

7/15/2019 City crew mowed alleys at the following locations: Kansas St & 2nd St Easy St, Kansas & 9th St and Right of way on 2nd St, also applied round – up on S. Miguel Hidalgo St Coil Dr (Raudy, Alex, Gilbert, Robert)

7/16/2019 City crew mowed the Right of Way on Moore Rd and Minnesota Rd, pick up debris on Road on West Hall Acres Rd (Isaias Gonzalez, Armando Cordova, David Garcia)

7/17/2019 City crew mowed alleys at the following locations: W.7th, 8th, 9th St and 12th St North to West (Isaias Gonzalez, Armando Cordova, David A Garcia)

7/19/2019 City crew mowed and trimmed at the following locations: Hall Acres Rd, City /Shop. Loaded a roll off with tires. (Isaias Gonzalez, Armando Cordova, David Garcia)

7/22/2019 City crew loaded, counted tires from tire round – up event on to a Roll-off and took them to Donna Recycling Center picked up trash around City Shop (Isaias Gonzalez, Armando Cordova, David A Garcia, M. A)

7/25/2019 City crew mowed grass on Sam Houston & Cesar Chavez (Isaias Gonzalez, Armando Cordova, David A Garcia) City crew mowed alley on Foster, applied round - up, picked up 4 loads of tires (Robert, Gilbert)

7/26/2019 City crew scraped curbs using tractor and trimmed the Right of Way, drain inlets on Jacaranda, Tulipan, Jardin St (Isaias Gonzalez, Armando Cordova, David A

Garcia)

7/29/2019 City crew mowed and trimmed at the following locations: (Alley's) Gonzalez St, Gomez St, W. Amy St, E. Rail Rd E. 4th St, and scraped curbs on Wyoming Ave (Armando Cordova, David A. Garcia)

7/29/2019 City crew mowed at the following locations: (Alley) bet 8th St & 9th St, bet E. Ciro Dr & E. Sgt Trevino, E. 14th St & Ohio Ave, and also sprayed round - up (Raudy , Alex, Robert, Gilbert)

7/30/2019 City crew mowed and trimmed at the following locations: San Juanita St, S. King St, Chaparral St, Washingtonia St (Isaias Gonzalez, David Garcia)

7/30/2019 City crew mowed and trimmed, collected trash at the following locations: San Juan Garden, Old Hwy 83 E. of Stewart Rd, Cesar Chavez, and the (Alley) from Nebraska east to the Canal, Rail Rd, 4th ,3rd, 2nd, 1st St. (Tomas, Pablo, Daniel, Miguel A)

7/31/2019 City crew mowed and trimmed at the following locations: (Alleys) Jesenia St, Jenica St, Jacob St, Lilia St and mow grass on Sylvia Cir (Isaias Gonzalez, David Garcia, Armando Cordova)

●Street and Alley patching–

7/8/2019 City crew repaired sinkhole on E Sgt Trevino Rd, N. Lincoln Ave (Raudy, Alex)

7/16/2019 City crew repaired potholes on Ridge Rd, Moore Rd, San Antonio (Raudy, Alex, Robert, Gilbert)

7/17/2019 City crew crack sealed Ridge Rd and painted school cross walk on the intersection of Ridge Rd, San Antonio (Raudy, Alex, Robert, Gilbert)

7/22/2019 City Crew used crack seal and repaired (5) pot holes from Nebraska to I Rd

West & East (Alex, Gilbert, Robert)

7/23/2019 City crew repaired pot holes and filled them with asphalt on Ridge Rd. (Raudy, Alex)

7/25/2019 City crew repaired pot hole on S Nebraska Ave, Ridge Rd, and Retama (Raudy, Alex)

7/26/2019 City crew repaired pot holes at the following locations: Jessica Dr, West View St, S. Cesar Chavez, Shawnee Bend, Via Cantera Dr. (Raudy, Alex)

7/31/2019 City crew painted school crossings on El Dora St (Raudy, Alex, Gilbert, Robert)

●Trimming Trees –

7/2/2019 City crew trimmed trees at the following locations 1st St , Maria Ln (Raudy, Alex, Gilbert, Robert)

7/5/2019 City crew trimmed trees on Rancho Grande , North & South Gonzalez St, North & South Zapata St, West & East 1st St West & East Guadalupe St, West & East Retama St, North & South El Sauz St, South Gomez St, Sendero St, Brecha St North & South , West & East Hackberry, West I RD , North & West I Rd, North & South Alameda St, West & East Rio Grande, North & South Rio Bravo St, West & East Rio Blanco St, Rio Colorado St, West & East Rio Pecos St. (Robert & Gilbert)

7/5/2019 City crew trimmed tree limbs on Cedro St. (Raudy, Alex)

7/10/2019 City crew trimmed tree limbs on Hackberry St (Raudy, Alex, Robert, Gilbert)

7/24/2019 City crew trimmed trees on Cesar Chavez (Isaias Gonzalez, Armando Cordova, David Garcia, M.A)

7/24/2019 City crew trimmed trees on S. Nebraska Ave, Grato St (Raudy, Alex)

KEEP SAN JUAN BEAUTIFUL BOARD MEETING MINUTES-Attached

Minutes of Keep San Juan Beautiful Board

Regular Meeting

Date: Wednesday, July 24, 2019

Time: 6:06 p.m.

Place: San Juan Memorial Library

Members Present: Yvonne Lopez, Member
Robert Ramirez, Member
Homer Villarreal, Member

Staff Present: Jose J. Salinas

Order of Business

I. Call Meeting to Order

a. Yvonne Lopez called meeting to order at 6:06 p.m. at San Juan Memorial Library in San Juan, Texas.

II. Invocation

a. Robert Ramirez led the Invocation.

III. Pledge of Allegiance

a. Yvonne Lopez led the Pledge of Allegiance

IV. Public Comments

a. No Public Comments

V. Discussion and Possible Action on all the Following Matters:

- A. Keep San Juan Beautiful neighborhood cleanup report.
 - I. Jose J. Salinas – Recap on June 27th Clean up and Tire roundup.
- B. Discussion on Keep San Juan Beautiful School project for fiscal year 2019-2020.
 - I. Art work storm drainage project.
- C. Discussion on Golf tournament and change in fundraiser event (Skeet shoot, 5k).
- D. Presentation by Ms Cris Lash from Keep McAllen Beautiful.

VI. TREASURE REPORT

A.

VII. CONSENT AGENDA

A.

VIII. OTHER BUSINESS/ANNOUNCEMENTS

IX. SET NEXT MEETING

A. Next meeting, Wednesday, August 14, 2019 at 6pm

X. ADJOURNMENT

- A. Yvonne Lopez to adjourn the meeting at 7:04 PM
 - a. Robert seconds the motion.
 - b. Motion passes by general consent.
 - c. Meeting adjourned at 7:04 PM.



Mayor: Mario Garza
Mayor Pro-Tem: Leonardo “Lenny” Sanchez
Commissioners: Jesus “Jesse” Ramirez
Ernesto “Neto” Guajardo
Marco “Markie” Villegas

MEMORANDUM

TO: Benjamin Arjona, City Manager

FROM: Patrick Willingham, Director of Parks and Recreation

DATE: 7/30/2019

SUBJECT: 4th of July Festival Expense Report.

This report is an expense/revenue report for the Annual City of San Juan 4th of July Festival. The festival was held this past July 3, 2019 at the San Juan Municipal Park. Attached you will find a breakdown of the expenses the city incurred as well as any revenues we received as well.

adelaida cordero



**City of San Juan
July 4th Festival
Expense / Revenue Report 2019**

EXPENSES:	
Music & DJ	\$ 2,950.00
Moon Jumps & Rides	\$ 4,500.00
Production, Stage, Generators	\$ 6,200.00
Float Labor	\$ 500.00
Float Material	\$ 781.68
Enchanted Kids Show	\$ 300.00
Tabel Rental	\$ 325.00
Rick Cano Comedian	\$ 75.00
Promoter's Fee	\$ 1,755.00
Total	\$ 17,386.68

REVENUES:	
Vendors	\$ 1,750.00
Dunking Booth	\$ 250.00
Drinks - Parks Booth	\$ 460.00
Ronnie Cruz (Food Sponsor)	
JC Auto	\$ 500.00
City Taxi	\$ 250.00
Raba - Kistner	\$ 500.00
Cruz - Hogan	\$ 1,000.00
Harvey Ince (Dogget) (Food Sponsor)	
Bob Trevino Insurance (Food Sponsor)	
Rick Renteria Core & Main (Food Sponsor)	
Frank Guerra (Ferguson) (Food Sponsor)	
Jesse Aguirre (Food Sponsor)	
Rick Palacios (Food Sponsor)	
Firesworks (EDC Sponsor)	\$ 10,000.00
Total	\$ 14,710.00

Total \$ (2,676.68)



Mayor: Mario Garza
Mayor Pro-Tem: Leonardo “Lenny” Sanchez
Commissioners: Jesus “Jesse” Ramirez
Ernesto “Neto” Guajardo
Marco “Markie” Villegas

MEMORANDUM

TO: Benjamin Arjona, City Manager

FROM: David Salinas, Director of Utilities

DATE: 8/6/2019

SUBJECT: Presentation by Utility Service Partners, Inc. on the National League of Cities Service Line Program.

Presentation by Utility Service Partners, Inc. on the National League of Cities Service Line Program:

- Texas State Presentations
- Program Highlights
- NLC SLW



NLC Service Line Program: Benefits to Cities & Residents



NLC Service Line
Warranty Program

WHY CHOOSE UTILITY SERVICE PARTNERS?



EXPERIENCE

Offering services
for over 15 years



REPUTATION

98% customer
satisfaction



PARTNERSHIP

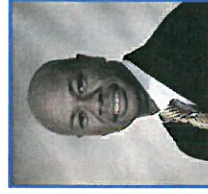
Endorsed by National
League of Cities



**BBB Torch Award for
Marketplace Ethics**
Trust • Performance • Integrity
2013 Winner
Western Pennsylvania Better Business Bureau®

2018 WINNER
**BBB Torch Awards
for Ethics**
Better Business Bureau of Western PA

"This award underscores one of the primary reasons the National League of Cities selected USP as a partner. The organization's exemplary record of customer service and transparency is what has driven the success of this partnership over the years."



Clarence Anthony
Executive Director
National League of Cities



CITIES STRONG TOGETHER

Administered by
Utility Service Partners, Inc.
a HomeServe Company

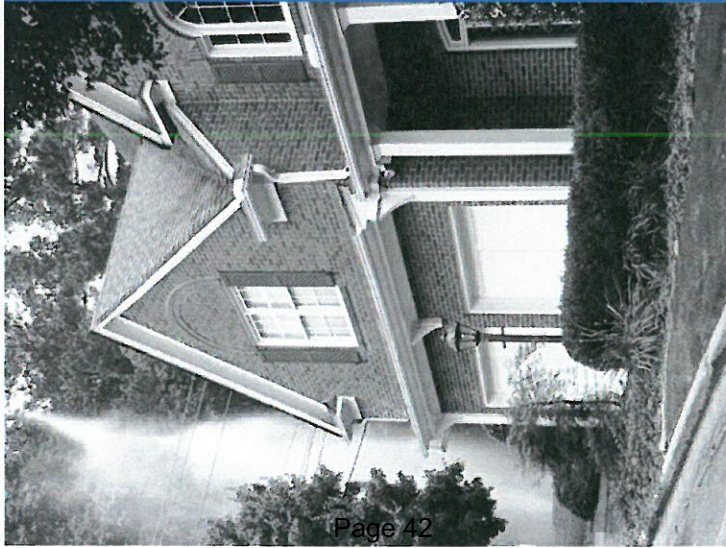
**NLC Service Line
Warranty Program**

AGING INFRASTRUCTURE IS PROBLEMATIC FOR CITIES & HOMEOWNERS



- In Texas, infrastructure upgrades over the next 20 years are estimated at \$8.7 billion for drinking water, and \$11.83 billion for wastewater
- Lateral lines are subjected to the same elements as public lines -ground shifting, fluctuating temperatures, tree root penetration, corrosion and more
- Failed lines waste thousands of gallons of water and present an environmental hazard
- Common homeowner misconceptions the municipality is responsible for maintenance of the water and sewer lines on their property or repairs are covered by their homeowner's policy

NLC SERVICE LINE WARRANTY PROGRAM BENEFITS



- Only Service Line Program Endorsed by the National League of Cities
- No cost for the City to participate
- Ongoing Revenue Stream for the Municipalities
- Educates homeowners about their lateral line responsibilities
- Free Public Awareness Campaign
- Peace of Mind - with one toll-free call a reputable plumber is dispatched
- All repairs performed to code by local licensed contractors
- Contractors undergo rigorous vetting process to ensure quality service

NLC SERVICE LINE WARRANTY PROGRAM AND WHAT IT COVERS



SEWER/SEPTIC LATERAL
COVERAGE



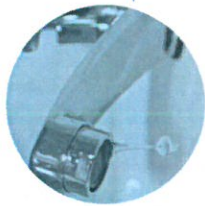
WATER/WELL LINE
COVERAGE

Homeowner repair protection for leaking, clogged or broken water and sewer lines from the point of utility connection to the home exterior

Coverage includes:

- Educating homeowners about their service line responsibilities
- Up to \$8,500 coverage per repair incident
- Includes coverage for thawing of frozen external water lines
- No annual or lifetime limits, deductibles, service fees, forms, or paperwork
- 24/7/365 availability
- Repairs made only by licensed, local contractors
- Affordable rates and multiple payment methods

NLC SERVICE LINE WARRANTY PROGRAM AND WHAT IT COVERS



INTERIOR PLUMBING AND DRAINAGE

Coverage includes:

- Up to \$3,000 coverage per repair incident.
- Repair of clogged toilets
- Includes coverage for broken or leaking water, sewer, or drain lines under the slab or basement floor
- No annual or lifetime limits, deductibles, service fees, forms, or paperwork
- 24/7/365 availability
- Repairs made only by licensed, local contractors
- Affordable rates and multiple payment methods

Homeowner repair protection for in-home water supply lines and in-home sewer lines and all drain lines connected to the main sewer stack that are broken or leaking inside the home after the point of entry

MARKETING APPROACH

- No Public Funds are used in marketing, distribution, or administration of the program.
 - Only market by direct mail, no telemarketing
 - Would never mail without your review and approval of marketing material before each and every campaign
 - Limited mailing campaigns per year
 - Consumer friendly marketing
 - Always voluntary for the homeowner
- 
- Consumers can enroll one of three ways:
 - Calling into our toll free number that is provided on the mailing;
 - Returning the bottom of the letter to us in the self addressed stamped envelope provided
 - Visiting our consumer website www.slwofa.com at any time

SOLUTIONS FOR MUNICIPALITIES AND THEIR HOMEOWNERS



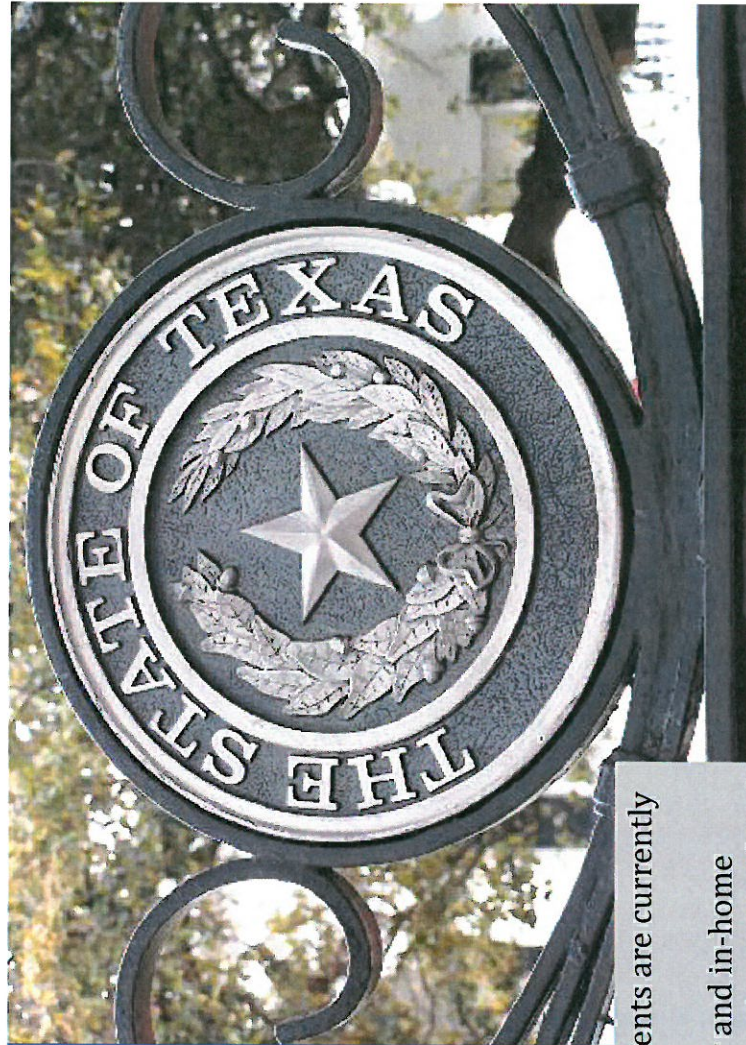
- More than 650 municipal and utility partnerships
- Currently serving over 3.4 million customers
- Saved customers over \$394 million in repair costs over the past 3 years
- Consistent customer satisfaction rating of 98%
- 9 of every 10 customers surveyed have recommended the program to friends, family and neighbors

41 Texas Partners and Customer Data

- City of Anna
- City of Arlington
- City of Bryan
- City of Crandall
- City of Commerce
- City of Corinth
- City of Corrigan
- City of Dayton
- City of Decatur
- City of Denison
- City of Diboll
- City of Ferris
- City of Forest Hill
- City of Forney
- City of Hondo
- City of Hurst
- City of Hutchins
- City of Kaufman
- City of Kennedale
- City of Killeen
- City of Kyle
- City of La Marque
- City of Lancaster
- City of Lewisville
- Town of Little Elm
- City of Marshall
- City of Mercedes
- City of Midland
- City of Navasota
- City of Odessa
- City of Penitas
- City of Princeton
- City of Roanoke
- City of Rockport
- City of Rowlett
- City of San Angelo
- The City of Texarkana
- City of Uvalde
- City of Waxahachie
- City of Wilmer
- Denton County Fresh Water Supply District 1

• Over 92,000 Texas residents are currently enrolled in the program

• Over 4,880 water, sewer and in-home plumbing repair jobs have been completed over the last year, saving Texas homeowners more than \$2.5 million



NLC Service Line
Warranty Program



For more information contact...

Emilie Zalfini
Manager, Regional Water Team
724-749-1060
EZalfini@UtilitySP.net

NLC Service Line Warranty Program Highlights

- The only utility line warranty program endorsed by the National League of Cities (NLC)
- Endorsed by multiple state leagues
- Over 500 municipalities participating nationwide
- No cost to or liability for the city to participate
- Ongoing revenue stream for city
- Educates homeowners about their lateral line responsibilities
- Utility Service Partners (USP) handles all marketing and management of the program
- 24/7/365 bilingual customer service
- All repairs performed to city code by local, licensed contractors
- Reduces calls from residents to City Hall for lateral water and sewer line issues
- Homeowner billed by NLC Service Line Warranty Program
- Provides residents an affordable solution that covers cost of repairs to water and sewer lines for which the homeowner is responsible
- No public funds are used in the marketing, distribution or administration of the NLC Service Line Warranty Program
- The NLC Service Line Warranty Program must be supported by the city into which it is being introduced before any warranty offer letters are mailed to homeowners in the community

PARTICIPATING CITIES (SAMPLE OF OVER 500)

Phoenix, AZ	Ottawa, KS	Independence, MO
Tucson, AZ	Elsmere, KY	Las Vegas, NV
San Diego, CA	Baltimore, MD	Dayton, OH
San Angelo, TX	Beverly Hills, MI	Tulsa, OK

NLC SERVICE LINE WARRANTY PROGRAM BENEFITS

CITY

- Provides non-tax revenue stream without any investment
- Reduces calls to City/Public Works when a homeowner's line fails
- Contractors undergo rigorous vetting process to ensure quality service
- Reduces costs associated with sending Public Works to residents' homes to assess lateral line issues
- Keeps money in the local economy by using contractors in the metro area
- Contractors must be current with insurance and required licenses

RESIDENTS

- Affordable utility line repair solution for families on a budget
- Educates homeowners about their service line responsibilities
- Prevents aggravation of having to find a reliable, reputable plumber
- Peace of mind – with one toll-free call a reputable plumber is dispatched
- Keeps money in the homeowner's pocket; without warranty, repairs cost from hundreds to thousands of dollars
- No service fees or deductibles and no paperwork or forms to complete

ACCOLADES & ACCOMPLISHMENTS



- The **only** utility line warranty program endorsed by the National League of Cities
- Over **1.3 million repairs** performed over the last three years saving customers over **\$454 million**
- A customer satisfaction rating of **4.7 out of 5 stars***
- **Accredited by the Better Business Bureau with A+ rating**

* Average repair service rating from customers surveyed via text message and email post service from October 2018 – February 2019

Learn more about the program at www.utilitysp.net or call 1-866-974-4801.

WHY SHOULD OUR CITY offer this program?



Because aging infrastructure impacts private lines, too.

Nationwide a water main breaks every two minutes. The same elements that cause those failures also exist on your residents' private lines: age of lines, deteriorating pipe material, freezing and thawing, and ground shifting.*

This program provides an optional — proactive — solution to a problem that is bound to strike your residents at some point in time.



Homeowners believe service line repairs are the city's responsibility.

When private service lines break or leak, many homeowners call the city first and are often surprised — and frustrated — to learn that the city can't help.

Educational marketing about homeowners' responsibility for service lines is a key component of the program.



An unexpected repair expense can be hard on a budget — and peace of mind.

Studies show that most Americans do not have enough savings to cover an emergency repair cost that could be from hundreds to as much as \$3,500 or more. In addition, many can be overwhelmed by having to find a trustworthy contractor.

The program provides affordable repair plans backed by vetted, local-area contractors, keeping dollars in the local economy.

* 2016 survey conducted by the Associated Press-NORC Center for Public Affairs Research

WHY CHOOSE

to partner with the

NLC Service Line Warranty Program?



- ▲ At no cost to the city, the Program offers affordable protection for in-home plumbing and external water and sewer lines that will cover the cost of repairing leaks, breaks and clogs.
- ▲ The program features generous coverage amounts, and there is never a service fee or deductible. There are no annual or lifetime limits — just peace of mind for the homeowner.
- ▲ Contractors dispatched to the homeowner's residence undergo a rigorous background check before being accepted into the network.
- ▲ Contractors are local to the community to help keep money in the local economy.

The NLC Service Line Warranty Program is administered by Utility Service Partners (USP), a HomeServe Company.



- ▲ Partnered with **over 600** municipalities and utilities across North America.
- ▲ **4.7 out of 5 stars*** customer satisfaction rating.
- ▲ Performed over **1.3 million repairs** over the last three years, saving customers over **\$454 million.**

* Average repair service rating from customers surveyed via text message and email post service from October 2018 – February 2019.

2018 WINNER



AGENDA ITEM AND RECOMMENDATION SUMMARY
CITY COMMISSION REGULAR MEETING
AUGUST 13, 2019

Hold a Public Hearing and Consider an Ordinance in First Reading for a Rezoning Request from Expressway Corridor District (EC) to Single-Family Residence District (R-S) of 15.932 acre tract of land out of Lot 3, Block 35, Alamo Land and Sugar Company Subdivision, located approximately a quarter of a mile West of Cesar Chavez Road, along the South side of Sgt. Leonel Trevino Road, as Requested by Estefania Rios. ***Tabled***

STAFF COMMENTS AND RECOMMENDATIONS:

At the City Commission Meeting on July 23, 2019 the City Commission tabled this item.

Previously, staff provided the following background:

The applicant is proposing to rezone 15.932 acres along Sgt. Leonel Trevino Road from the Expressway Corridor District (EC) to Single-Family Residence District (R-S) in order to build a residential subdivision. It is noted that the property is part of the Expressway Corridor District that was approved by the City Commission on April 2017 after a study funded by the San Juan Economic Development Corporation in corporation with the Planning Department to develop a vision plan for the US 83/IH2 expressway corridor area within the City of San Juan.

The surrounding properties consist of a mixture of single-family and commercial uses.

Staff mailed a notice of the public hearing before the Planning and Zoning Commission to twenty-two (22) property owners within a two hundred (200) feet radius and received no comments in favor or against the request.

RECOMMENDATION:

During the regular meeting on May 2, 2019, the Planning and Zoning Commission recommended denial of the rezoning request with a 5-1 vote.

PREPARED BY:

Roberto Escobar,
Planning Director

APPROVED BY:

Benjamin Arjona, City
Manager

MEETING DATES:
PLANNING AND ZONING COMMISSION – 05/02/2019
CITY COMMISSION – 08/13/2019
DATE PREPARED – 07/25/2019

PAGE 1

STAFF REPORT
GENERAL INFORMATION

APPLICATION: Rezoning Request from Expressway Corridor District (EC) to Single-Family Residence District (R-S) of 15.932 acre tract of land out of Lot 3, Block 35, Alamo Land and Sugar Company Subdivision.

APPLICANT: Estefania Rios

SURVEYOR/ENGINEER: Melden and Hunt, Inc.

LEGAL: A 15.932 acre tract of land out of Lot 3, Block 35, Alamo Land and Sugar Company Subdivision.

LOCATION: The property is located approximately a quarter of a mile West of Cesar Chavez Road, along the South side of Sgt. Leonel Trevino Road.

EXISTING ZONING: Expressway Corridor District (EC)

**EXISTING LAND USE/
ADJACENT ZONING:** North – Residential; Single-Family Residence District (R-S)
South – Commercial; Expressway Corridor District (EC)
East – Vacant; Expressway Corridor District (EC)
West – Reservoir; Single-Family Residence District (R-S)

ACCESS AND CIRCULATION: This property has access onto Sgt. Leonel Trevino Road.

PUBLIC SERVICES: Water and sewer services will be provided by the City of San Juan.

RECOMMENDATION: Staff recommends denial of the rezoning request.

EVALUATION AND CONDITIONS FOR APPROVAL

The applicant is proposing to rezone 15.932 acres along Sgt. Leonel Trevino Road from the Expressway Corridor District (EC) to Single-Family Residence District (R-S) in order to build a residential subdivision. It is noted that the property is part of the Expressway Corridor District that was approved by the City Commission on April 2017 after a study funded by the San Juan Economic Development Corporation in corporation with the Planning Department to develop a vision plan for the US 83/IH2 expressway corridor area within the City of San Juan.

The surrounding properties consist of a mixture of single-family and commercial uses.

Staff mailed a notice of the public hearing before the Planning and Zoning Commission to twenty-two (22) property owners within a two hundred (200) feet radius and received no comments in favor or against the request.

ATTACHMENTS:

Location Map
Aerial Photo
Zoning Map
Survey
Expressway Corridor Study
List of neighboring property owners receiving notice
Photos
Ordinance

FINAL RESOLUTION OF REQUEST & COMMENTS:

P&Z – 05/02/2019 Commissioner Guajardo made a motion to deny the rezoning request as presented by staff. Commissioner Magallan seconded the motion. The motion passed with a (5-1) vote with Commissioner Cardenas voting nay.

Mr. Escobar explained that Melden and Hunt, Inc. is applying for rezoning on behalf to Estefania Rios. He said the City did an Expressway Corridor Study in 2016 that was created to protect the area along the Expressway. The study was finalized in 2017 after public hearings, workshops and approval from the Planning and Zoning and City Commissions.

Mario Reyna, from Melden & Hunt, Inc., said that they are proposing to change the zoning to single-family use in order to build 76 family homes, approximately 13 million would be generated in taxes every year for the city. He said that he that the developer wants to bring a nice neighborhood to the City of San Juan.

Commissioner Cardenas asked the board want exactly they wanted in that area. She also said that she has seen that there is single-family residential to the North side of the property and she would

like to see continuity in the land uses and leave the commercial zone along the Expressway. Mr. Escobar said that the Expressway Corridor Study was created to protect all these properties from single-family residential zoning. He said that study was created before his time (study started in 2016 and adopted in 2017) and that some of the Commissioners were part of the study.

Mr. Escobar said that staff reviewed and initially denied the request as the Expressway Corridor Zoning doesn't allow single-family residential homes on its own in that area but that the applicant insisted on presenting the rezoning request before the board. Commissioner Cardenas asked if the property next door was zoned as single-family residential. Mr. Escobar said yes, there is a park and a reservoir that belong to the City of San Juan and some homes that were left out of study.

Vice-Chairman Alaniz said that across the street there are single-family residences but if they allow this rezoning they cannot deny somebody else. He also said that people need to be respectful the hours that staff and the board put into these studies and that they need to comply with the regulations.

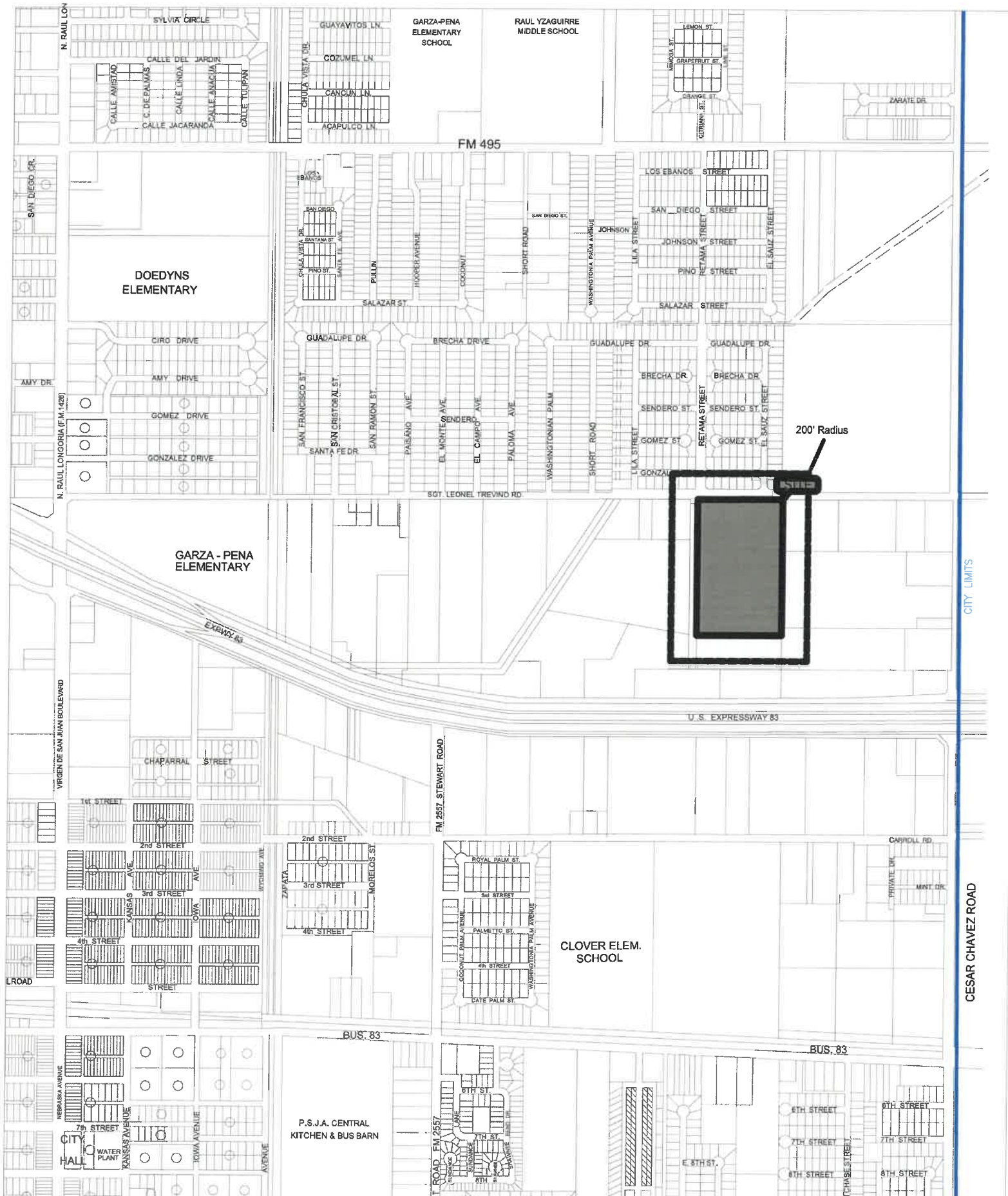
Commissioner Cardenas asked what was on the property now. Mr. Escobar said that the property was empty.

Vice-Chairman Alaniz reminded the board that the main purpose of the study was to attract more businesses and corporations to invest in the city. He also said as soon as the Expressway Corridor District was approved people started to see the difference and new businesses started coming to the city along the Expressway Corridor.

Mario Reyna said that the developer is interested in investing in the City of San Juan only and not another city. He said that he believes this is the right time to rezone the property and investment.

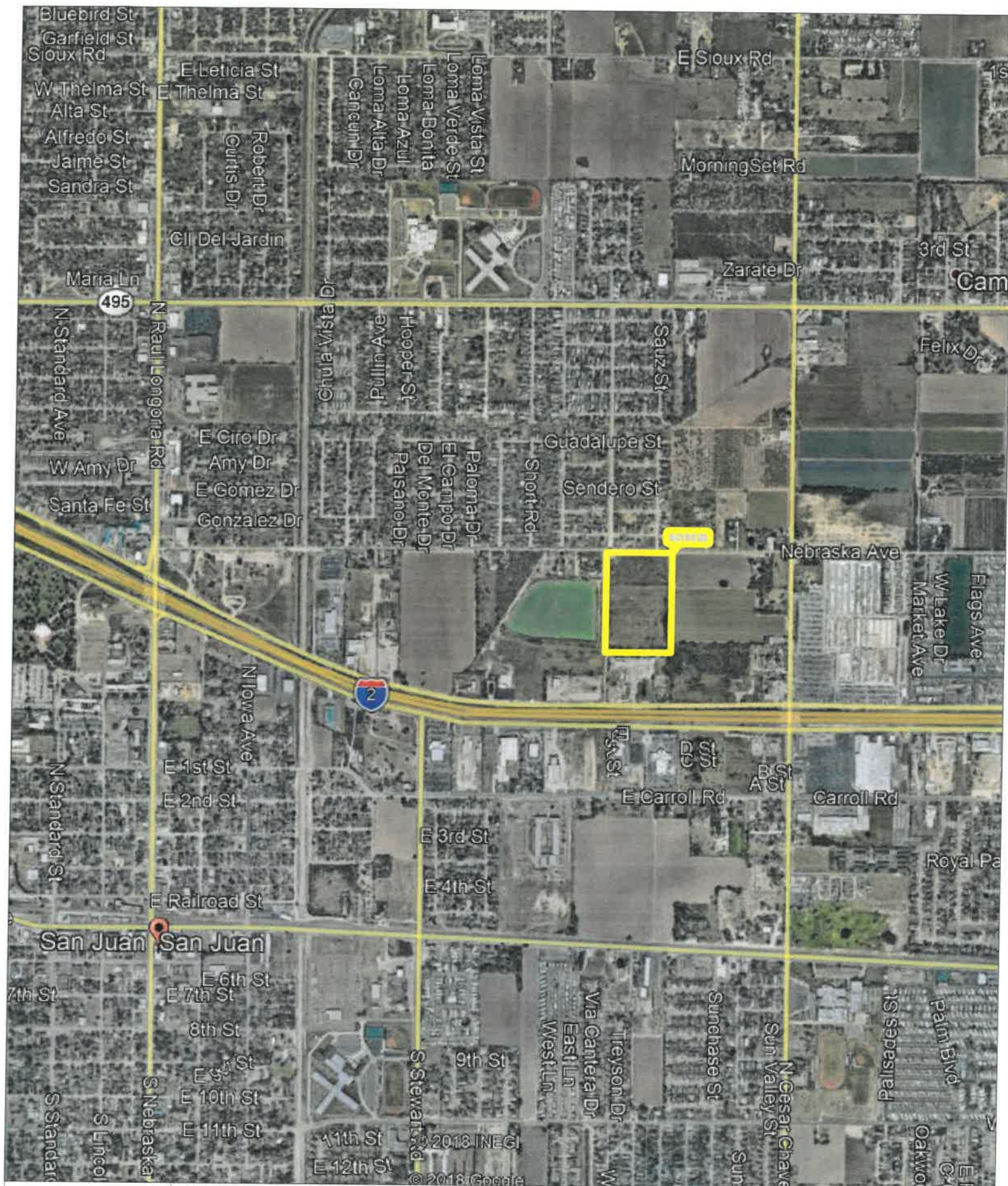
Vice-Chairman Alaniz closed the public hearing at 6:12 p.m.

Commissioner Alvarado said that he feels that they need to stay with the zoning as is due to the time invested in the study.



- Legend**
- CITY LIMITS
 - Proposed area

Rezoning Request from Expressway Corridor District (EC) to Single-Family Residence District (R-S) of 15.932 acre tract of land out of Lot 3, Block 35, Alamo Land and Sugar Company, located approximately a quarter of a mile West of Cesar Chavez Road, along the South side of Sgt. Leonel Trevino Road, as Requested by Estefania Rios.

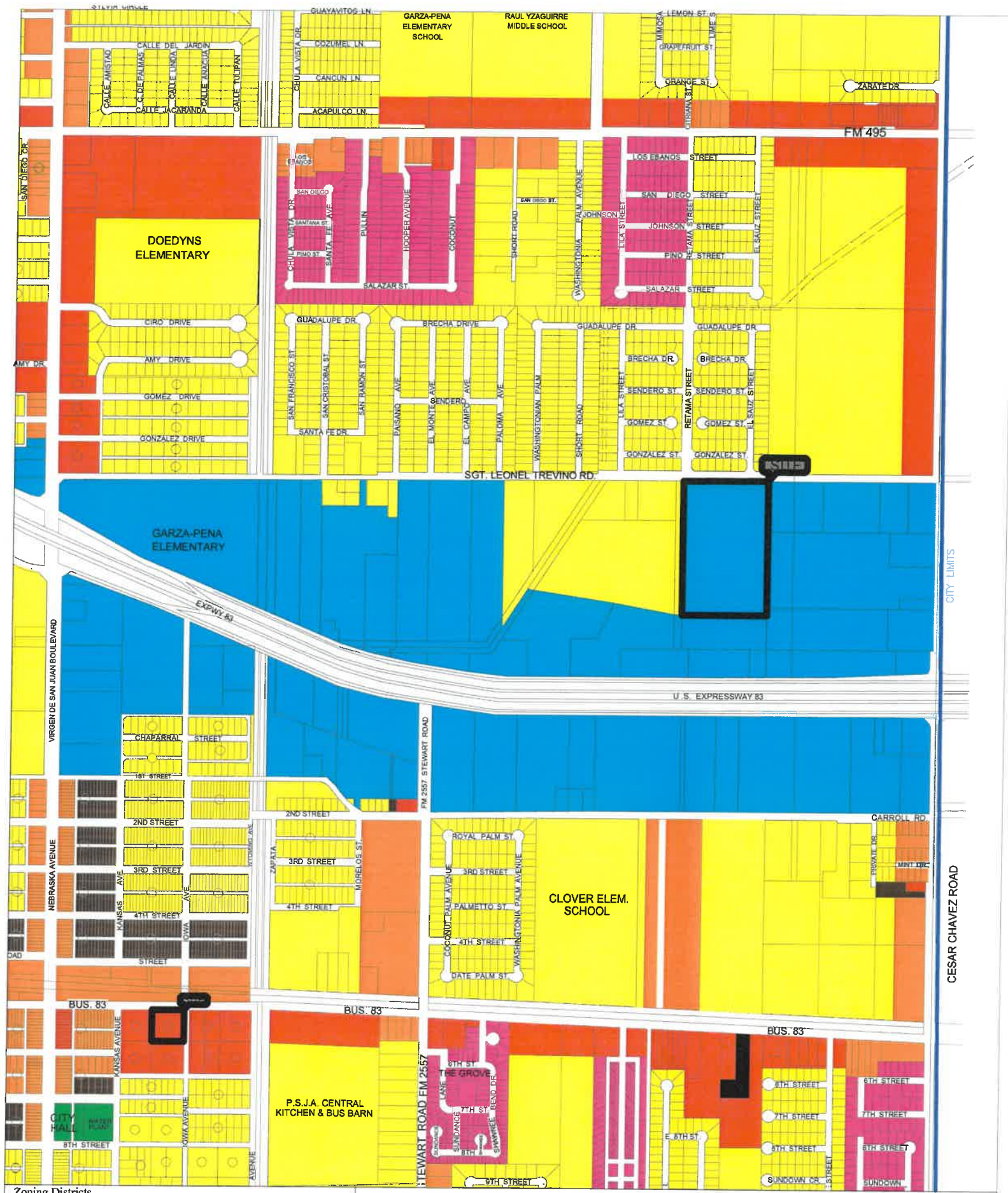


Legend

- CITY LIMITS
- Proposed area

Rezoning Request from Expressway Corridor District (EC) to Single-Family Residence District (R-S) of 15.932 acre tract of land out of Lot 3, Block 35, Alamo Land and Sugar Company, located approximately a quarter of a mile West of Cesar Chavez Road, along the South side of Sgt. Leonel Trevino Road, as Requested by Estefania Rios.

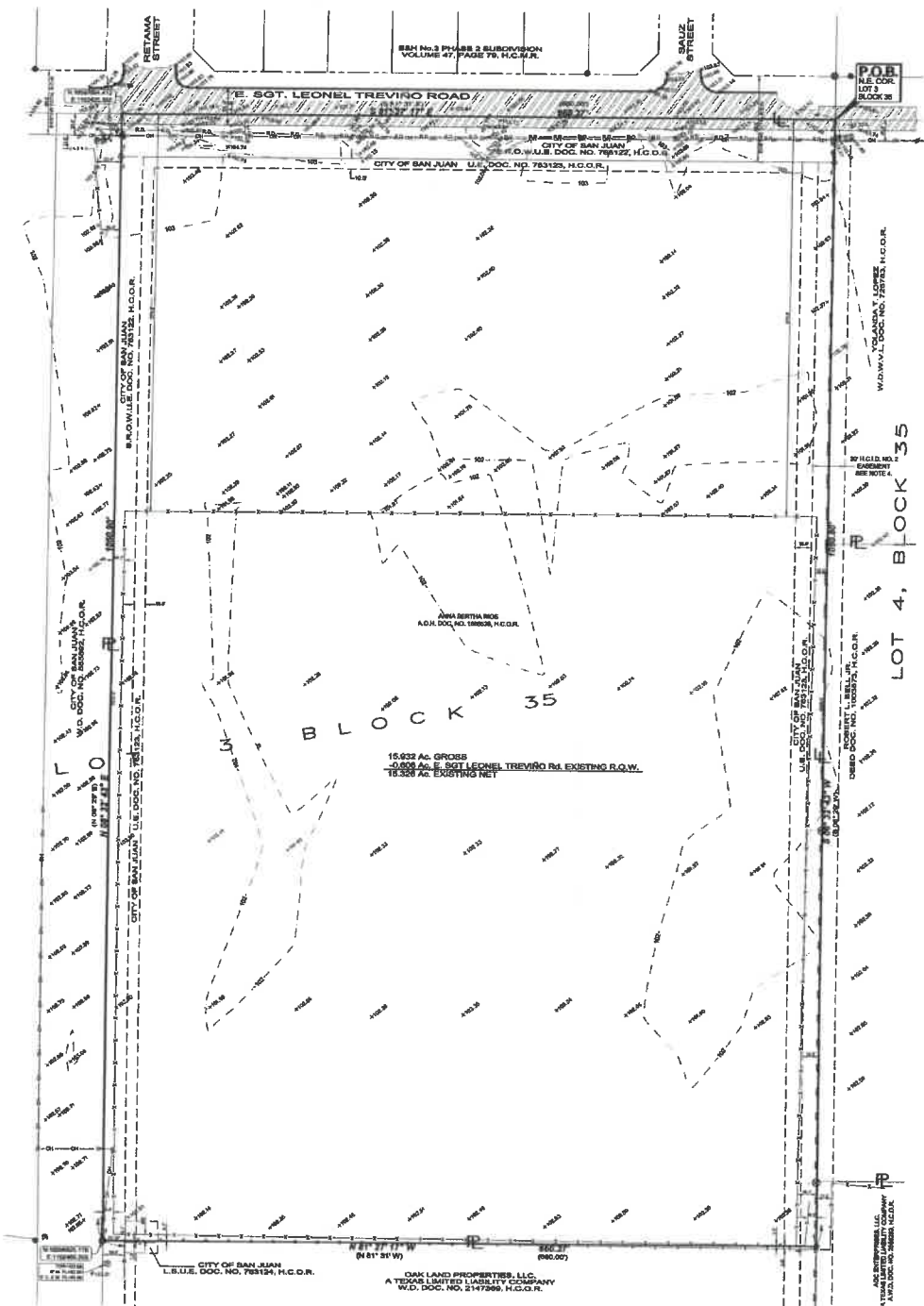




- Zoning Districts**
- Single Family Residential (R-S)
 - Manufactured Home (R-MH)
 - Multi-Family Residential (R-MF)
 - Neighborhood Commercial (C-1)
 - General Business (C-2)
 - Heavy Commercial (C-3)
 - Light Industrial (I-1)
 - Heavy Industrial (I-2)
 - Open Space (O)
 - Exp. Corridor (EC)

Rezoning Request from Expressway Corridor District (EC) to Single-Family Residence District (R-S) of 15.932 acre tract of land out of Lot 3, Block 35, Alamo Land and Sugar Company, located approximately a quarter of a mile West of Cesar Chavez Road, along the South side of Sgt. Leonel Trevino Road, as Requested by Estefania Rios.





- LEGEND**
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**PLAT SHOWING
15.932 ACRES OUT OF
LOT 3, BLOCK 35,
ALAMO LAND AND SUGAR
COMPANY SUBDIVISION
VOLUME 1, PAGES 24-26, H.C.M.R.
CITY OF SAN JUAN,
HIDALGO COUNTY, TEXAS**

I, FRED L. KURTZ, A REGISTERED PROFESSIONAL LAND SURVEYOR, DO HEREBY CERTIFY THE FOREGOING PLAT TO BE TRUE AND CORRECT REPRESENTATION OF A SURVEY MADE ON THE GROUND ON 12/17/18 UNDER MY DIRECTION AND SUPERVISION.

FRED L. KURTZ, RPLS. NO. 4781 DATE: 12/17/18



JOB NO. 18235.08	REVISION	DATE	BY
DRAWING DATE: 02/01/2019			
DRAWN BY: J.C.L.G.			
FILE NAME: 18235.08			
1-1074, PG. 3			
PAGE: 2 OF 3			
© Copyright 2018 Menden & Hunt, Inc.			

M Menden & Hunt, Inc.
CONSULTANTS • ENGINEERS • SURVEYORS

115 W. AUSTIN • DALLAS, TEXAS 75241
PH: (214) 581-0811 • FAX: (214) 581-1330

February 07, 2019

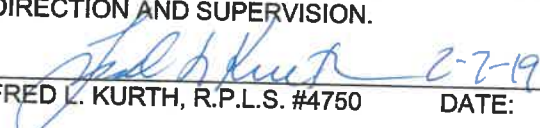
**METES AND BOUNDS DESCRIPTION
15.932 ACRES OUT OF
LOT 3, BLOCK 35,
ALAMO LAND AND SUGAR
COMPANY SUBDIVISION
CITY OF SAN JUAN,
HIDALGO COUNTY, TEXAS**

A tract of land containing 15.932 acres situated in the City of San Juan, Hidalgo County, Texas, being a part or portion out of Lot 3, Block 35, Alamo Land and Sugar Company Subdivision, according to the plat thereof recorded in Volume 1, Pages 24-26, Hidalgo County Map Records, which said 15.932-acre tract was conveyed to Anna Bertha Rios, by virtue of an Affidavit of Heirship recorded under Document Number 1888526, Hidalgo County Official Records, said 15.932 acres also being more particularly described as follows:

BEGINNING at a Nail set on the Northeast corner of said Lot 3, Block 35, for the Northeast corner of this herein described tract;

1. THENCE, S 08° 32' 43" W (S 08° 29' W deed call) along the East line of said Lot 3, at a distance of 40.00 feet pass a No. 4 rebar set on the existing South right-of-way line of E. Sgt. Leonel Treviño Road, continuing a total distance of 1,050.90 feet to a No. 4 rebar found, for the Southeast corner of this tract;
2. THENCE, N 81° 27' 17" W (N 81° 31' W deed call) a distance of 660.37 feet (660.00 feet deed call) to a No. 5 rebar found [Northing: 16596625.178, Easting: 1102469.203], for the Southwest corner of this tract;
3. THENCE, N 08° 32' 43" E (N 08° 29' E deed call) at a distance of 1,010.90 feet pass a No. 4 rebar set on the existing South right-of-way line of E. Sgt. Leonel Treviño Road, at a distance of 1,030.90 feet pass a No. 4 rebar found in line, continuing a total distance of 1,050.90 feet to a Nail set [Northing: 16597664.412, Easting: 1102625.355] on the North line of said Lot 3, for the Northwest corner of this tract;
4. THENCE, S 81° 27' 17" E (S 81° 31' E deed call) along the North line of said Lot 3 and within the existing right-of-way of E. Sgt. Leonel Treviño Road, a distance of 660.37 feet (660.00 feet deed call) to the POINT OF BEGINNING and containing 15.932 acres, of which 0.606 of one acre lies within the existing right-of-way of E. Sgt. Leonel Treviño Road, leaving an existing net of 15.326 acres of land, more or less.

I, FRED L. KURTH, A REGISTERED PROFESSIONAL LAND SURVEYOR DO HEREBY AFFIRM THAT THIS METES AND BOUNDS DESCRIPTION REPRESENTS THE RESULTS OF A SURVEY MADE ON THE GROUND ON 12/21/2018 UNDER MY DIRECTION AND SUPERVISION.


FRED L. KURTH, R.P.L.S. #4750

DATE:



Rezoning Request from Expressway Corridor District (EC) to Single-Family Residence District (R-S) of 15.932 acre tract of land out of Lot 3, Block 35, Alamo Land and Sugar Company Subdivision, located approximately a quarter of a mile West of Cesar Chavez Road, along the South side of Sgt. Leonel Trevino Road, as Requested by Estefania Rios.

Rios, Estefania
5609 N. 41st Street
McAllen, TX 78504

Gomez, Graciela Gonzalez
207 W. 3rd Street
San Juan, TX 78589-2713

Guajardo, Javier
900 El Sauz St.
San Juan, TX 78589

Melden & Hunt, Inc.
115 West McIntyre
Edinburg, TX 78541

Resendez, Marisa
823 Gonzalez Dr.
San Juan, TX 78589-4592

Sandoval, Luis A. and Carolina
3517 Lerma Dr.
Edinburg, TX 78539-4760

Rios, Anna Bertha
5609 N. 41st Street
McAllen, TX 78504-5393

Garcia, Juan Javier
905 Gonzalez
San Juan, TX 78589-4777

Lopez, Yolanda
413 W. Eldora Rd.
San Juan, TX 78589-5047

Cantu, Yesenia
P.O. Box 1941
San Juan, TX 78589

Bell, Robert Jr.
116 S. Ware Rd.
McAllen, TX 78501-8204

Medrano, Jose G. Valladares &
Adriana E. Trevino Jasso
909 Gonzalez Dr.
San Juan, TX 78589

AGC Enterprises LLC.
P.O. Box 4915
McAllen, TX 78502-4915

Salazar, Manuel and Maria c.
911 Gonzalez Dr.
San Juan, TX 78589

Oakland Properties LLC.
840 E. Expressway 83
San Juan, TX 78589-5133

Guerrero, Edward & Gabriela
Garcia
913 Gonzalez Drive
San Juan, TX 78589

San Juan City
709 S. Nebraska Avenue
San Juan, TX 78589-2698

Padilla, Andres and Maria M.
Pantaleon
2608 Vanessa Avenue
McAllen, TX 78503

Charles, Ivey LTD.
1919 W. US Highway 83
McAllen, TX 78501-7002

Cardiel, Maria G. Castaneda
610 E. Eldora Rd. Unit 128
Pharr, TX 78577

Estrada, Eduardo
118 Jaime St.
San Juan, TX 78589-3403

Perales, Leodoro
2415 W. Hackberry Avenue
McAllen, TX 78501-7529

Rezoning Request from Expressway Corridor District (EC) to Single-Family Residence District (R-S) of 15.932 acre tract of land out of Lot 3, Block 35, Alamo Land and Sugar Company Subdivision, located approximately a quarter of a mile West of Cesar Chavez Road, along the South side of Sgt. Leonel Trevino Road, as Requested by Estefania Rios.



Proposed Site



ORDINANCE NO.

AN ORDINANCE AMENDING THE ZONING ORDINANCE NO. 98-006, THE ZONING ORDINANCE OF THE CITY OF SAN JUAN, TO CHANGE THE ZONING DISTRICT FROM EXPRESSWAY CORRIDOR DISTRICT (EC) TO SINGLE-FAMILY RESIDENCE DISTRICT (R-S) FOR A PROPERTY LEGALLY DESCRIBED AS A 15.932-ACRE TRACT OF LAND OUT OF LOT 3, BLOCK 35, ALAMO LAND AND SUGAR COMPANY SUBDIVISION, LOCATED APPROXIMATELY A QUARTER OF A MILE WEST OF CESAR CHAVEZ ROAD, ALONG THE SOUTH SIDE OF SGT. LEONEL TREVINO ROAD BE IT ORDAINED BY THE CITY COMMISSION OF THE CITY OF SAN JUAN, TEXAS:

Consistent with the City's land use plan as set-forth in the land use map that is a part of the City's Zoning Ordinance, and consistent with the City's intentions of allowing and encouraging single-family district development that generates property taxes, water and sewer revenues and sales tax revenues.

The zoning district of the property legally described as 15.932 acre tract of land out of Lot 3, Block 35, Alamo Land and Sugar Company Subdivision, located approximately a quarter of a mile West of Cesar Chavez Road, along the South side of Sgt. Leonel Trevino Road shall be changed to Single-Family Residence District (R-S) and the zoning map shall be amended accordingly.

PASSED and **APPROVED** on first reading on the 13th day of August, 2019.

PASSED and **APPROVED** on second and final reading on the ____ day of _____, 2019.

CITY OF SAN JUAN

MARIO GARZA
MAYOR

ATTEST:

APPROVED BY:
Palacios, Garza & Thompson, P.C.

DIANA CAVAZOS
CITY SECRETARY

CITY ATTORNEY

SAN JUAN EXPRESSWAY CORRIDOR STUDY

**PREPARED FOR
SAN JUAN ECONOMIC DEVELOPMENT CORPORATION
AND
CITY OF SAN JUAN, TEXAS**

**BY
ANN COOKE BAGLEY, FAICP
BAGLEY ASSOCIATES**

FEBRUARY, 2017

RESOLUTION NO. 17-06

RESOLUTION FOR THE ADOPTION OF THE US 83/IH 2 EXPRESSWAY CORRIDOR STUDY

WHEREAS, the **San Juan Economic Development Corporation** felt it was necessary to prepare a study for the City of San Juan to adopt that shows what the vision for future development and redevelopment of the expressway corridor within the City of San Juan is; and

WHEREAS, the **San Juan Economic Development Corporation** hired Bagley Associates to prepare the study in coordination with the City of San Juan Planning Department; and

WHEREAS, it is important to adopt the study, inclusive of the vision, that shows potential investors that the City of San Juan has a vision and plan for the expressway corridor area; and

WHEREAS, the project consultant took time to meet with many of the property owners along the corridor on a one-to-one basis to gather their feedback as well; and

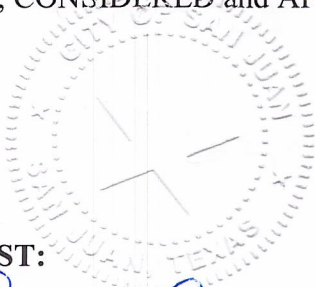
WHEREAS, a well-attended public meeting took place on March 3, of 2016 to gather feedback from the stakeholders and the community in general on what that vision with its associated recommendations should be; and

WHEREAS, the Planning and Zoning Commission of the City of San Juan voted unanimously on February 2, 2017 to recommend adoption of the study to the City Commission.

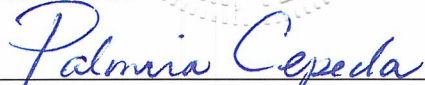
NOW THEREFORE BE IT RESOLVED THAT THE CITY COMMISSION OF THE CITY OF SAN JUAN, TEXAS, THAT:

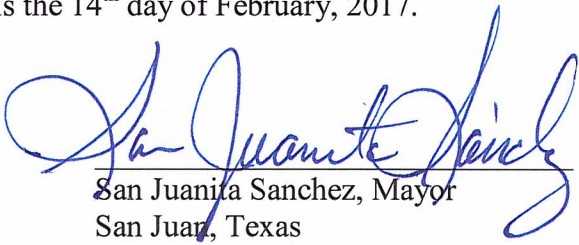
The City of San Juan adopts the Expressway Corridor Study as shown in Exhibit "A"

READ, CONSIDERED and APPROVED this the 14th day of February, 2017.



ATTEST:


Palmira Cepeda, Interim City Secretary
San Juan, Texas


San Juanita Sanchez, Mayor
San Juan, Texas

SAN JUAN EXPRESSWAY CORRIDOR STUDY

The San Juan Economic Development Corporation working with, and on behalf of the City of San Juan, Texas, initiated the San Juan Expressway Corridor Study (the Study) to assess current conditions and make recommendations for the area adjacent to US 83/IH2 as the highway/freeway crosses the City. Current land uses and zoning may not provide the appropriate land use controls and assurances that are needed to attract new developments, ones that are complementary to the existing businesses, particularly the luxury car dealerships. It is not the intent of the Study to suggest the closing of existing businesses, but to look at the near and long term future for what could be developed to provide the opportunities for the highest and best uses.

CITY OF SAN JUAN

The City of San Juan is a city of 11 square miles located in Hidalgo County in the Rio Grande Valley of Texas. It is part of the McAllen-Edinburg-Mission and Reynosa-McAllen metropolitan areas, east of Pharr (US 281) and McAllen and west of Alamo and Mercedes.

According to the 2010 United States Census, the population was 33,856 people in 8,882 households with 7,831 families residing in San Juan. It is assumed that the population has increased in the past five years as the whole region on both side of the border is experiencing phenomenal growth.

The City is a home rule city governed by a City Commission with day to day operations handled by the City Manager and professional staff. Its governance is guided by the following statements.

Mission Statement: The City of San Juan improves the quality of life for all by providing affordable, consistently reliable, quality services so that its citizens can realize their full potential.

Vision Statement: An exemplary service provider, the City of San Juan will be a political leader in the region, cultivating local attractions, aesthetics, location and community spirit to become a center for commerce, culture and recreation.

SAN JUAN ECONOMIC DEVELOPMENT CORPORATION

The San Juan Economic Development Corporation (SJEDC) is a 4b sales tax nonprofit corporation dedicated to the economic and community development for the City of San Juan, Texas. Its **Mission** is “to create wealth through new investments and expansion of existing businesses for the creation of more and better job opportunities.”

The SJEDC is the funding source for the Study. The results will be presented to both the SJEDC and the Planning and Zoning Commission for their consideration and recommendation to the City Commission for acceptance of the Study and for any zoning or development initiative changes.

PURPOSE OF THE STUDY

The purpose of the Study is to provide the groundwork for developing the underutilized area parallel to US 83/IH2 that will:

- ✧ support existing businesses;
- ✧ attract complementary new businesses;
- ✧ protect area from detracting business;
- ✧ promote the area as an economic destination; and
- ✧ develop a vision for the area that will support new zoning regulations that enhance the area.

In the absence of a current Comprehensive Plan or Future Land Use Map, the Study will provide the basis, analysis, guidance, and recommendations to support any potential changes to the City’s Zoning Ordinance for consideration, adoption, and implementation by the City Commission.



STUDY AREA ANALYSIS

The study area is approximately 381 acres consisting of certain tracts transected by 2.16 miles of US 83/IH2 freeway main and frontage lanes as shown on **Figure 1 - Expressway Corridor Study Area** on the next page. The major local north south streets are Cesar Chavez Road on the east, North Raul Longoria (FM 1420)/Nebraska Avenue and Veterans Boulevard (I Road) on the west. The northern boundary is Sgt. Lemel Trevino Road and property lines. The southern boundary follows the property lines. The Basilica of the National Shrine of Our Lady of San Juan del Valle is adjacent to the Study Area.

EXISTING CONDITIONS IN STUDY AREA

EXISTING LAND USES

There are approximately 117 lots/tract/parcels as shown on the map, **Figure 2 - Existing Expressway Corridor Existing Land Use** on the following page and in **Table 1 - Current Land Use in the Expressway Corridor** below.

TABLE 1 - CURRENT LAND USE IN THE EXPRESSWAY CORRIDOR				
	LAND USE	TRACTS	ACRES *	PERCENT
	Single Family	25	15.234	4.02
	Multifamily	1	9.97	2.63
	Mobile Home Park	1	2.70	0.70
	Commercial	46	125.618	33.10
	Public	5	24.46	6.45
	Vacant	39	201.326	53.1
	TOTAL	117	379.308	100.00±

Source: City of San Juan Planning Department and Hidalgo Central Appraisal District, February 2016

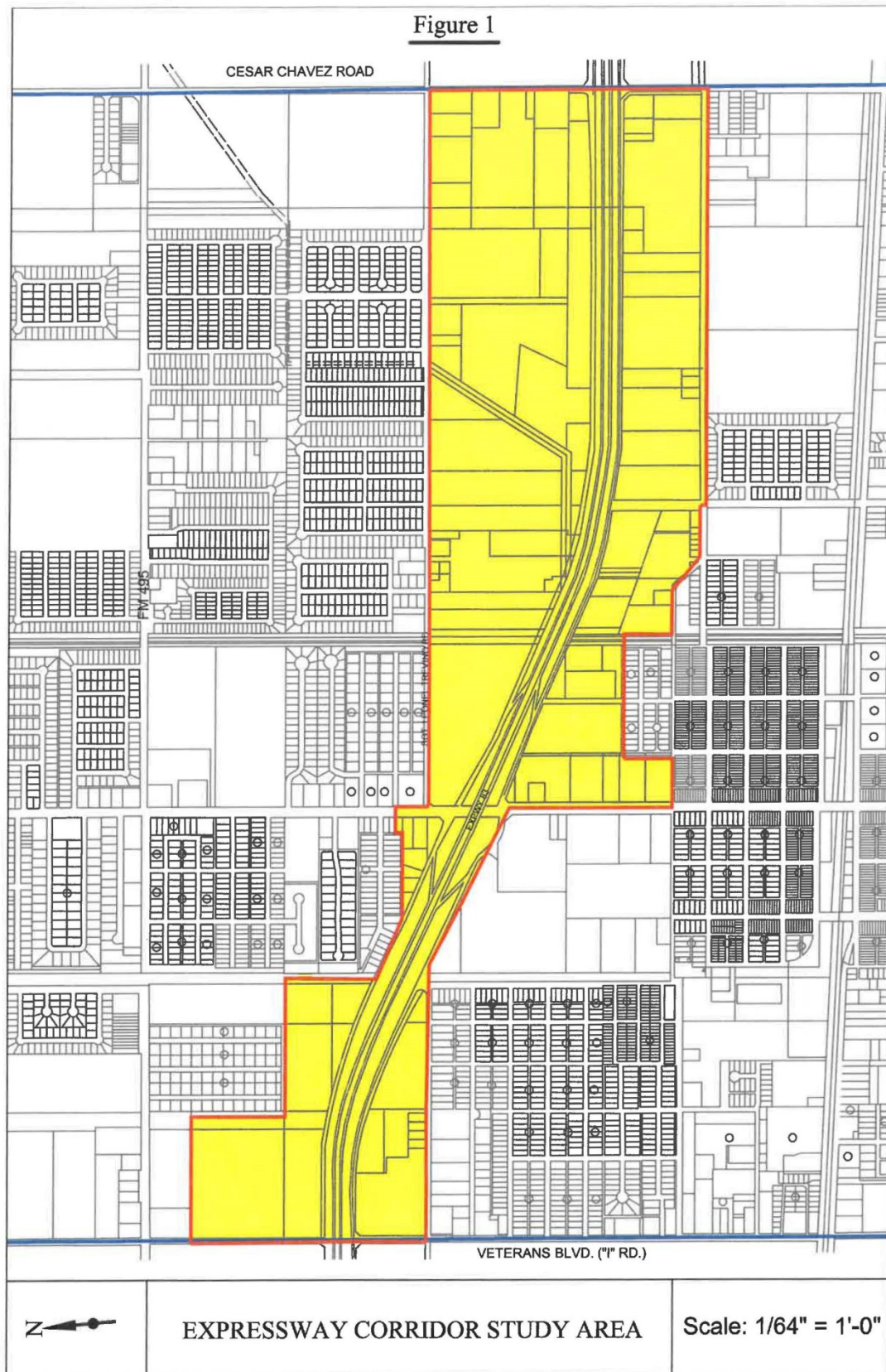
Currently, developed commercial property uses include new car dealerships, tire supply, home supply store, glass company, tree and landscaping businesses, bank, alternative financial institution, fast food restaurants with drive-thru service, used auto sales, heavy equipment sales, funeral home, commercial recreational (bingo), insurance office, and motel in approximately 125.618 acres, approximately 33 percent of area.

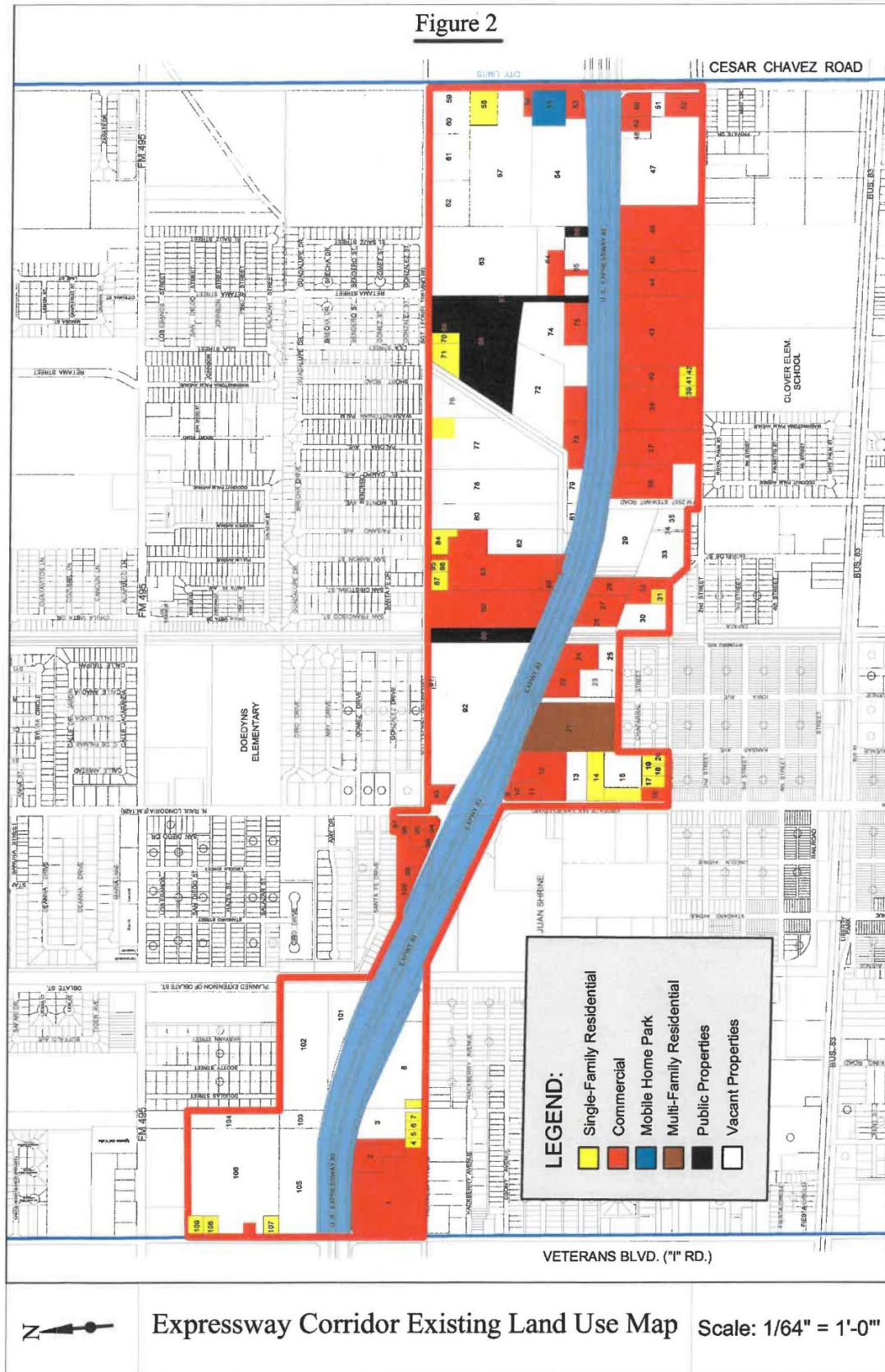
While there may be as many as 85 restaurants in San Juan, only four are in the Study Area, three fast food drive-thru types and one sit-down type. Automotive Uses in the Study Area listed in the City's Business Directory include the four dealerships and a national chain auto parts store. Smaller auto sales and services are not listed in the Directory. One bank is listed with a Study Area address. There are six businesses that are in the Miscellaneous category including a funeral home, glass company, and outdoor equipment. A number of businesses do not appear in the Directory.

Residential uses are single family houses (25), apartment complex, and mobile home Park in in 27.904 acres for 7.35 percent of the land coverage.

Public facilities (24.46 acres, 6.45 percent) are the fresh water reservoir and a small gated public park. This acreage includes the future right-of-way of Retama Street between US83/IH2 and Sgt. Lemel Trevino Road.

The remaining 201.32 acres, 53.14 percent of the land in the Study Area, are essentially vacant. Several of the vacant tracts were previously developed, but the buildings have been demolished.





CURRENT ZONING

The base zoning districts in the study area includes C-3 Heavy Commercial District, C-2, General Business District, O Undeveloped/Open Space District and R-S, Single Family Residential District as shown on the excerpt from the City's Zoning Map, **Figure 3 - Corridor Study Zoning Map**. A small area of C-1, Neighborhood Commercial along frontage road is not included in the Study Area. The Basilica of the National Shrine of Our Lady of San Juan del Valle is adjacent and zoned R-S, Single Family.

The districts with permitted and special uses are found in Appendix A, Chapter 2, Zoning of the City of San Juan Code of Ordinances, Article IV, Sections 1.00 through 11.00. The C-3 Heavy Commercial District, the largest underlying district, allows almost all commercial uses, some of which are described in very broad categories, particularly retail. It is a "cumulative" district in which all the uses that are allowed in the more restrictive commercial districts (C-1 and C-2) permitted and conditional uses. The C-3 Heavy Commercial zoning would be considered "wide open" and would allow many uses that may not be compatible with the future vision for the expressway frontage. Additionally, uses in the MF District, with the exception of manufactured housing, are also permitted.

The Expressway Overlay District (Article V, Section 6.00) only seems to address building setback lines, driveway design and access roads. It is shown in black on the Figure 3 - Corridor Study Zoning Map.

INFRASTRUCTURE AND PUBLIC SAFETY QUESTIONS

The Public Works Director and consulting City Engineer were asked if water and sewer capacity was in place to serve additional and potentially dense new development. The answers were yes for the most part or doable in a short timeframe. Figure 4 - Water, Figure 5 - Sewer, Figure 6 Storm are in Appendix A.

The Fire Chief was queried as to the height to which his fleet vehicles/apparatus could handle for fires. He indicated seven stories. He did indicate there would need to be assistance from neighboring cities if there were additional stories.

The Texas Department of Transportation (TxDOT) has 300 to 350 feet of right-of-way which should be adequate as there are no plans to widen the Expressway at this time. A traffic count from TxDOT 2012 Pharr District Traffic Map shows 135,000 vehicles for the average daily traffic along Expressway 83 between Veteran's Boulevard and Raul Longoria Road.

Stormwater Pollution Prevention plans are required for all new development over one acre in area.

INTERVIEWS

As an initial and integral part of this Study, major stakeholders and interested citizens were interviewed using variations of the following four questions each followed by a brief summary of answers. A more detailed compilation of the replies are in the Appendix.

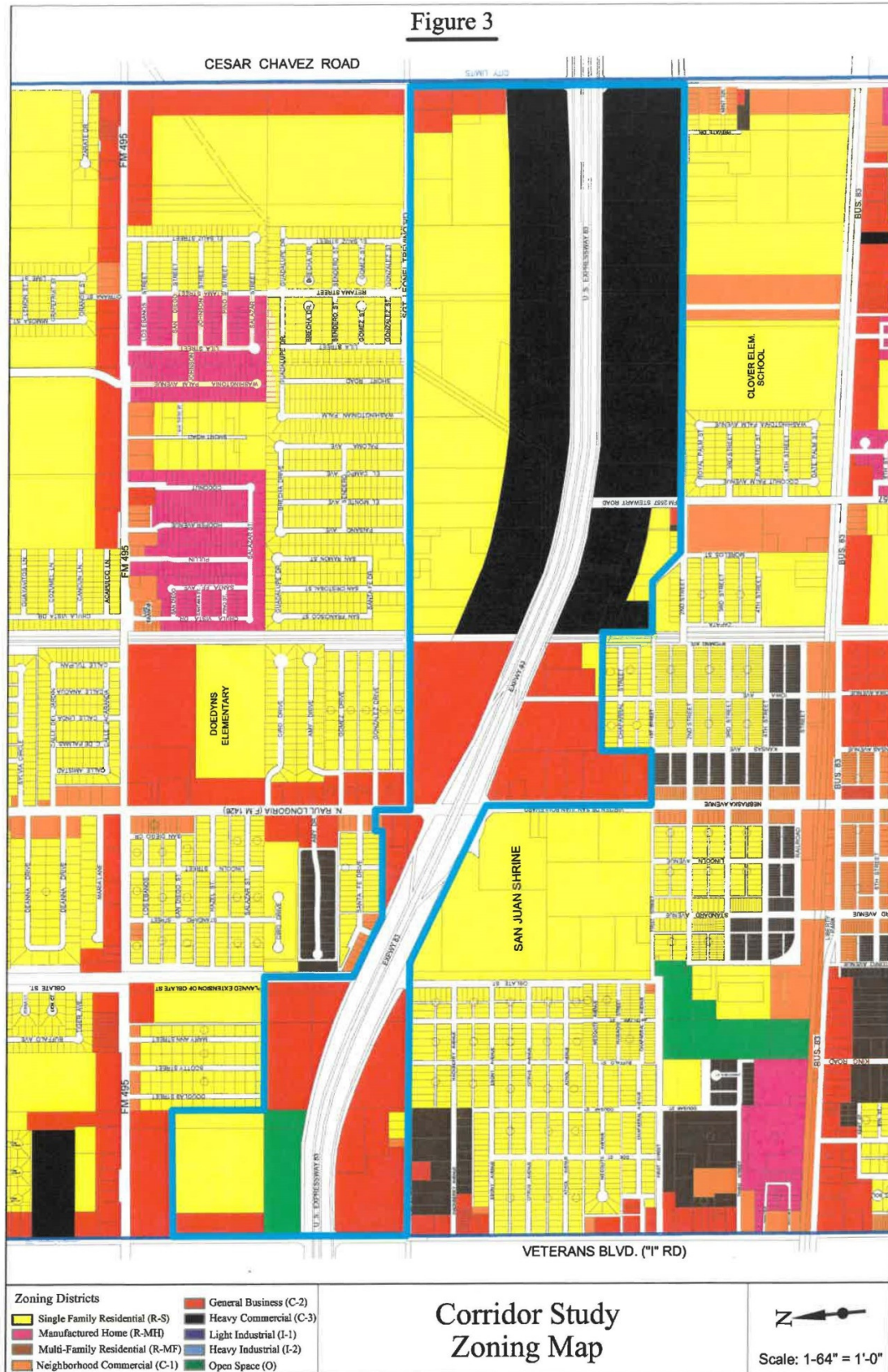
1. What are the strengths and positive aspects about the area right now?

Answers: Access to upper and lower Rio Grande Valley, centrally located within 15 to 25 mile drive for shopping and service, good visibility from Expressway in both directions, high traffic volume, land availability and price; development tax incentives, adjacency to the Basilica. Some felt the land prices were low and others that they were expensive.

2. What is keeping the area from developing?

Answers: Unattractive, utility poles, lack of landscaping, signs, flea market, different views of the future.





3. What could be located in the area? What types of uses and/or businesses?

Answers: Places to eat: upper casual restaurants, family friendly restaurants, day spa, coffee shop (not just drive thru), wine bar, jewelry store, men's clothing, dog groomer, computer store, art gallery, unique hotel, boutiques and specialty store, businesses not in McAllen, Pharr, etc.

Make connections between the businesses such as sidewalks, jogging trails, landscaping. Use detention areas as amenities with landscaping. Connect business on both sides with shuttles.

4. Are there internal or external pressures that would keep the area from moving forward?

Answers: Negative perceptions of the City, lack of common vision or goals were mentioned by a number of the respondents.

Additional interviews and public meetings will precede any final recommendations and decisions that are to be made. A compilation of the responses may be found in Appendix B.

PUBLIC PARTICIPATION

An introductory presentation of the planning process was given to a joint meeting of the Planning and Zoning Commission and the San Juan Economic Development Corporation Board on Thursday, January 7, 2016 in the Commission Room at the San Juan Public Library. On Tuesday, January 12, 2016, a similar presentation was made to the City Commission, also in the Commission Room. The presentations in both video and text were shared on the City's website along with maps and other information.

On Thursday, March 3, 2016, a Community Meeting was held at 6:30 PM in the Commission Room hosted by the San Juan EDC. Letters were sent to the property owners in the study area. Notices were posted on the City's website and in the local newspaper. The meeting reviewed the purpose of the Study, an overview of existing conditions, and gave the approximately 30 attendees the opportunity to ask questions and supply input as to the uses and even suggest brand names of businesses they would like to see in the Corridor. See Appendix B for meeting notices and meeting input.

Public hearings for the Study were held by the Planning and Zoning Commission On February 2, 2017 to recommend adoption of the Study to the City Commission and at City Commission on February 14, 2017. Public hearings will also be held on any future zoning changes.

OBSERVATIONS

The following observations were made considering the analysis and interview answers.

- ✧ What is wanted: businesses that are a destination, complementary to existing businesses, high end and/or casual restaurants (Landry's), special shopping, day spa, fitness center, Apple or tech store, jewelry store, toy store, upscale coffee shop, a wine bar, etc.
- ✧ A hotel with enough stories to be visible from freeway, a more "upscale brand."
- ✧ Building set in a more park atmosphere—sidewalks, jogging paths, exercise stations, shade structures, benches, landscaping, and detention ponds that are pretty, kiosks that would provide shade, information and walk-up shops.
- ✧ Places to go while car being serviced, places to have seasonal markets, food trucks where there is paved parking and available restrooms.
- ✧ Need to be respectful of the Basilica and the pilgrims visiting there - where to eat, stay
- ✧ Although the freeway divides the City, there are two exits and one cross under in the 2.16 mile length. There is good visibility of the adjacent area in both directions from the freeway.
- ✧ Existing, potentially incompatible, businesses may relocate in the future.
- ✧ This area of the Valley is becoming increasing international in business and population that extends beyond the international border.



RECOMMENDATIONS

There is an opportunity to establish a new destination in the Valley! The first recommendation is to create a new zoning district for the Freeway Corridor. It would be similar to a planned development district by allowing uses that are complementary to the Basilica and luxury car dealerships, but limiting business that are not compatible or the highest and best uses. The new district should be more than an overlay to existing zoning as is currently in place. The new regulations should look at the new and different uses in the area that may not be currently allowed, while expanding and adding new definitions. Consideration should be given to mixed use development, new multifamily, along with different types of commercial uses. Uses that are **not** listed would not be allowed in the future.

New approaches to landscaping, particularly with native water wise plantings, should be considered. Sidewalks and walking trails with shade structures, public art and benches could connect the businesses and provide areas for recreation and public functions.

Architectural guidelines should encourage creative building designs that reflect the Valley heritage or the growing international culture of the area. This approach could result in an attractive destination area of the City that is different from the neighboring cities. By including minimal architectural standards in the new zoning district, guidance could be given to property owners or potential investors on external appearance and materials required for all new development. By encouraging new buildings to be designed with plazas and situated perpendicular to the roadway, future development could not only take advantage of the tract depths, but provide the opportunity for more visual interest.

The new district would not displace any existing businesses. A few uses and structures might become legal nonconforming uses and subject to those requirements already in the Zoning Ordinance. This district could provide for the future of San Juan as an area that would support the infrastructure, provide new jobs, and increase the tax base—all of benefit to the deserving citizens of San Juan.

The new district would provide predictability for potential new developments by clarifying what is allowed and not allowed in the Corridor. This should provide the SJEDC with a clear view of what can be developed and what businesses to pursue. It is noteworthy to consider how international the area is becoming and this trend should be reflected in future development.

Mixed-use developments should be encouraged in the new district. Several tracts could be combined to provide the opportunity for better master planning.

The development and redevelopment of the Study Area should include emphasis on using low-impact development techniques and water-wise plantings for both environmental and practical reasons. Drainage is a concern and new projects require Stormwater Pollution Prevention plans.

VISION, GOAL, AND ACTIONS FOR THE SAN JUAN EXPRESSWAY CORRIDOR

A Vision is a statement of what the community wants the area to become. It is a verbal image of the possibilities. It is future oriented and will be the results of planning efforts. The Vision is that:

The US83/IH2 Expressway Corridor is a unique destination for pilgrims, tourists, luxury car purchasers, and shoppers at distinctive, complementary businesses in a safe, attractive, and inviting environment.

To implement the Vision, a Goal and Actions are needed. A goal is a “dream with a deadline”. Actions are the steps to achieve the Vision and Goal.



The Goal to move forward is:

Create a new zoning district that guides development and redevelopment along the US83/IH30 corridor by providing desired and appropriate guidelines for new opportunities that will take advantage of the location of properties identified in the Expressway Corridor.

To implement the Goal, there are specific actions/steps to be taken.

- Action 1: Develop criteria for a new, separate Expressway Corridor District to replace the current zoning and overlay districts.
- Action 2: Establish permitted and specific uses for the district.
- Action 3: Create zoning requirements for setbacks, height, lot coverage and other applicable requirements. Incorporate architectural design guidelines that encourage new design elements.
- Action 4: Allow mixed-use developments.
- Action 4: Create landscaping guidelines that encourage native water-wise plants and trees.
- Action 5: Incorporate low-impact development guidelines.
- Action 6: Consider new on and off-premise sign requirements, particularly digital signs.
- Action 7: Continue to work to attract innovative and sustainable new development.

CONCLUSIONS

This Study reveals the opportunities in the Corridor for San Juan on which to capitalize on to guide new, improved, and desired development. The Vision, Goal, and Actions provide the direction and the means for accomplishment. A new zoning district specifically for the area could include uses that are not currently allowed in the Study Area and create that new destination that is just waiting to happen.

APPENDICES

APPENDIX A – MAPS

Figure 4 – Water

Figure 5 – Sewer

Figure 6 – Storm Sewer

APPENDIX B – COMMUNITY INPUT

Interview Summaries

Meeting Notices

Newspaper Article



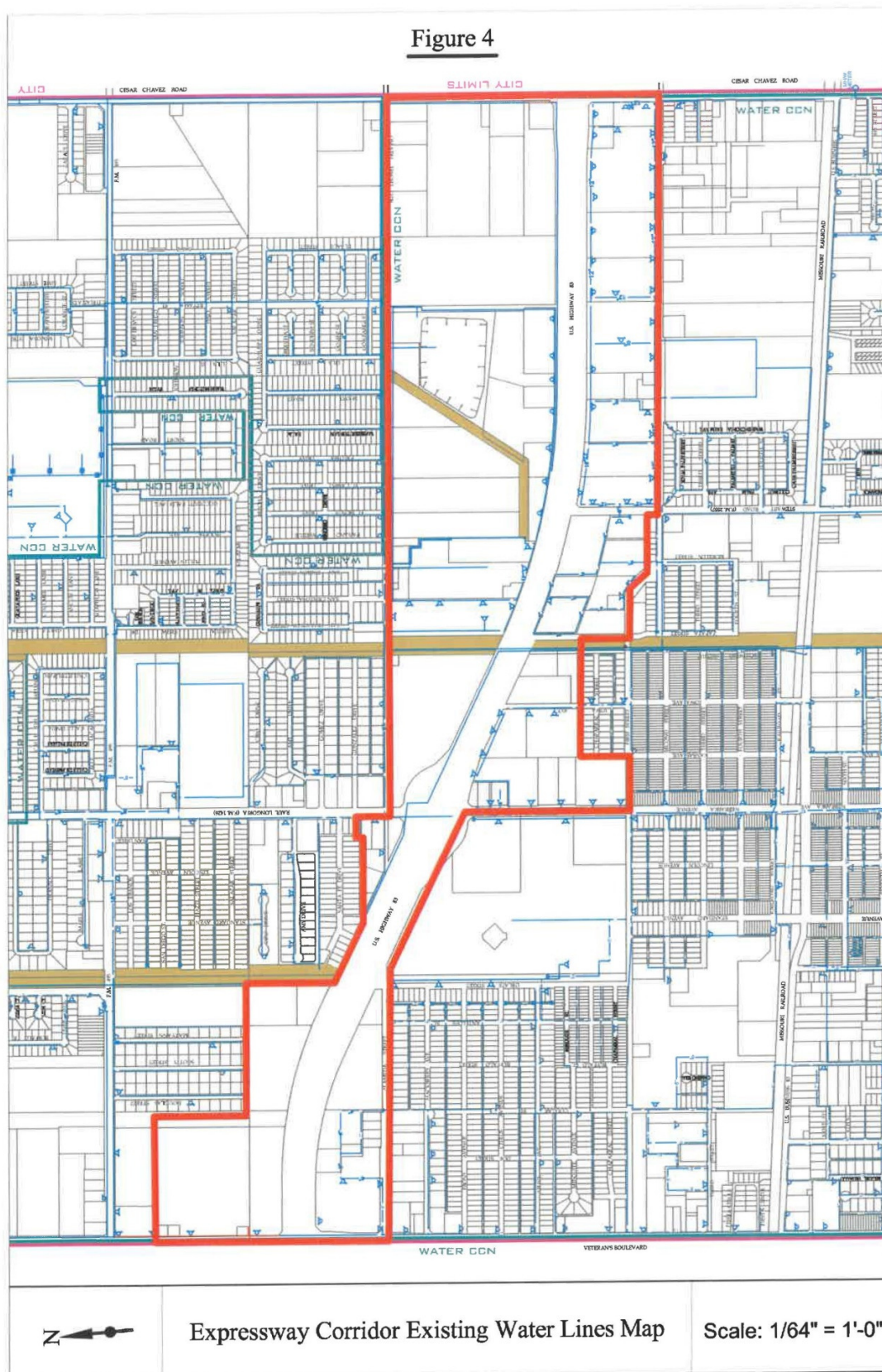
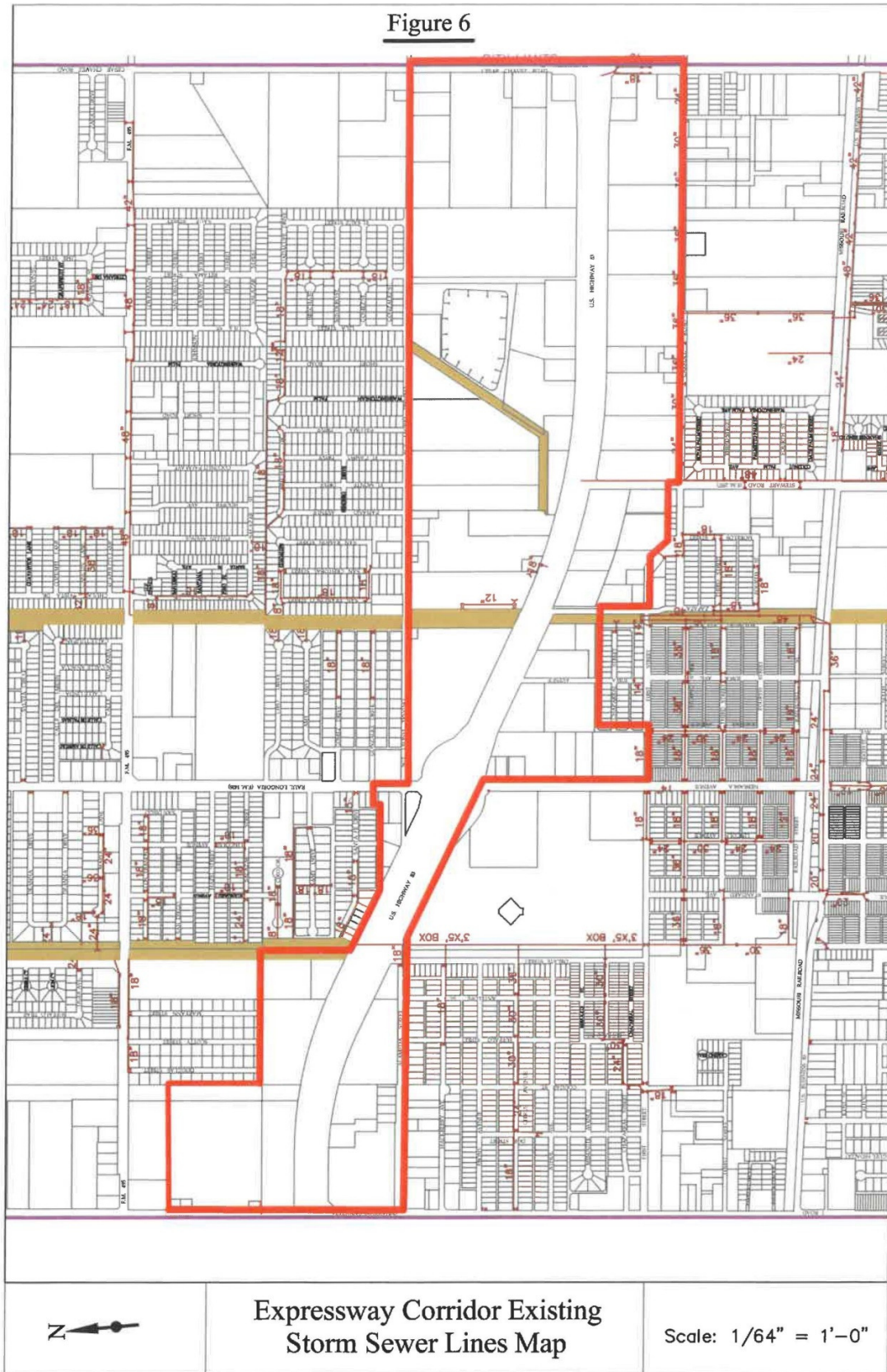


Figure 5

Expressway Corridor Existing
Sewer Lines Map

Scale: 1/64" = 1'-0"



PUBLIC PARTICIPATION INTERVIEW REPLIES AND COMMENTS

(The following is a compilation of comments in their own words.)

INTERVIEW QUESTIONS

The San Juan Economic Development Corporation is funding a study of the adjacent properties on both sides of US83/IH2 to determine the highest and best uses in the 2.5 mile corridor across the City.

Please answer the following questions. Your answers will provide important insight into what is needed and what can be accomplished by the Study.

Thank you for responding to these questions. You may add your name or be anonymous. Please return the questionnaire to Xavier Cervantes, AICP, Director of Planning.

1. In your opinion what are the strengths and positive aspects about the study area right now?

The Properties are in the mid part of town and have easy access to expressway. The properties are raw land and easily to accommodate the sizes for the proposed use of the property. The district zoning to the properties can be changed to accommodate the use of the property, providing the zoning is appropriate for the area.

Strength - access to upper and lower Valley, 15 to 20 mile drive for purchases or service for over 1.5 million people

Strengths and positive aspects is the several areas are still available for development and have not been converted into a business that would not fit in with existing ones. There needs to be some type of rules or restrictions to keep the area with looking like our neighboring cities to the west.

The area is open for almost any high end business. It has high volumes of traffic, access to thoroughfare and majority of properties are commercially zoned. Most of the business established in this area will attract additional business and cooperation based on the location.

The area is developing nicely with many luxury auto dealerships (the city's new motto could be The Luxury Car Capital of South Texas) and the GILSA project which is a high-end home decor business from Mexico that decided to locate here because of the dealerships. Now we have Lexus coming for sure and possibly more luxury auto dealerships coming in the future. The area has so much potential since we still have many vacant large tracts of land along the expressway.

The greatest asset for the area is the presence of the Basilica of Our Lady of San Juan del Valle along the expressway. We attract close to 1.5 million visitors per year. The other positive for the area is the luxury car dealerships along the highway.

Strengths:

1. High traffic volumes
2. Good opportunity for business growth
3. Centralized location
4. Accessibility and central location to the Valley

Open door meetings cognizant of transparency provide greater public input toward public solutions by consensus.



2. What do you think is keeping the area from developing? The City isn't commercializing San Juan enough. City of San Juan need to post our good qualities in the media via TV, radio, Newspapers and online/website(s). Put up signs entering and exiting San Juan showing we are a friendly city, Events being conducted in the City to bring people around and spend money in the City of San Juan. Not just publicize City of San Juan during the holidays.....publicize City of San Juan itself. Let's make sure we don't have a Flea Market like the one located on the northeast side of Expressway and Cesar Chavez Rd. If we have a flea market, it has to have better buildings/structures and weather proof parking spaces.

2008 Real Estate Market drop made a huge impact in the economy. This was a huge factor that stalled any new growth in the community/

Almost did not come because of flea market

Conflicts of interest among wealthy business owners and selfish minded pork barrel politicians excluding homegrown small businesses. No progress.

3. What types of land uses and/or businesses would you like to see located in the area? Hotels, Hospitals, clinics (medical buildings). Also Restaurants, clothing/retail stores, Industrial warehouses/business. Refrigerated businesses that deliver meat, groceries and/or fruits and vegetable products to US and to Mexico. Entertaining business for both adults and children.

Types of Businesses – upper casual restaurants, fitness center, tech store, art gallery, pet grooming entrance signs, landscaping different lighting (LED) can become a quality corridor

The types of uses or businesses that I would like to see are nice restaurants, steak-house, seafood, tech stores that attract lots of customers, medium to big box retail stores. The types of business that will be complimentary to our dealerships and the Basilica – examples Hotel, coffee place, places where people can meet for business or family gatherings.

Either a strip plaza or a big retailer like Bass Pro Shops that plopped themselves down in Harlingen, and brought more businesses to that corridor.

Businesses needed

1. Restaurants
2. Shopping center
3. Hotels
4. Nightlife entertainment

I would love for restaurants such as Fogo de Chao or Rainforest Cafe to locate along the expressway in San Juan. Those restaurants are regional destinations that could really improve the city's image and would bring substantial property and sales tax revenues. A Neiman Marcus store would be nice too.

Businesses for health lifestyle—restaurants, boutiques and specialty stores, comfortable environment with parks for jogging and bike riding,

New businesses, Innovative landscaping,

Indoor pool, low impact physical therapy for seniors and public at large.

High-end restaurants; Chiles, Chick-Fil-A, Applebee's, etc. Hotels, work-out gyms, farmers market

We need some hotels (like the Marriott chain) and nationwide restaurant chains to come into the area (like Chili's, Café Express etc. Movie Theater to serve PSJA, another possible Main Event.

4. Are there internal or external pressures that you think would keep the area from moving forward?

Any infrastructures if city doesn't have any. City needs to assist the Developers with infrastructure in order to convince them we are here to help. City needs to conduct an environmental study report, like the one we are doing right now and notify the proposed developers of the study so they may show the banks the study because this is what the Banks require for their collateral. Not to accept junkyards or landfills along the expressway. The City needs to be cleaned up, starting with the streets. Not just fixing internal streets but planting greenery on the corners of the City streets. Also install more lighting. Make sure there is enough drainage in order not to have flooding in the City.

Pressures – need to understand progress is coming

External pressures would include financial restraints, incentives, support from city and county political personnel

In my opinion, political “Red Tape” and inconsistencies by public officials in supporting business may be a causal factor for the slow flow of business. In addition, the amount of “incentives” requested by potential businesses may be a factor based on budget restraints.

What is keeping the area from developing is probably the infrastructure, the type of business, access to and from frontage and what the developers want or envision. What are the areas zoned as? Developers want to make sure that their investment is going to fit in and not be next to business like to the east of San Juan.

There needs to be a teamwork approach for the City of San Juan to be able to grow.

There are some areas that still lack the proper water and sewer infrastructure along the Northeast end of the corridor. Apparently the land prices are high and that also keeps the area from developing.

Unfortunately, San Juan has nothing to offer people to draw them here, other than the aforementioned.

Other than the two positives already mentioned, there is nothing else to bring people here. Furthermore, political infighting has given this community a bad name. Who wants to invest in a place where the city leaders are always fighting against each other, instead of working together to better the community?

What is keeping from developing – unattractiveness

Pressures – lack of common goals/visions from leadership I can't think of any. The City of San Juan and the San Juan EDC are both doing everything possible to get the area to develop as quickly as possible but we also desire good quality development. Rome was not built in one day right.

The only ones that might complaining about the possible growth will be local homeowners that have been there since the 50s, 60s, etc. Born and raised in San Juan and now living in a very large city, San Juan NEEDS to get with the program. I think San Juan does not need any more auto dealerships. Don't need that strip of Hwy 83 to look like Lemmon Ave in Dallas that the majority of the businesses are auto sales. We need either HEB to expand, or have a 2nd grocery store. San Juan needs to get hotels, restaurants in the San Juan city limits so that out of town people that visit the Basilica leave their money in the city and not in McAllen or elsewhere.



You are invited to come and visit about what should be built along the
Us83/IH2 Freeway Corridor at a

Community Meeting

A study is underway to look at the land on each side of the Freeway as it crosses San Juan. What types of businesses and uses would you like to see close to the existing Basilica, luxury car dealerships, home improvement store, glass company, funeral home and more? Your ideas and thoughts as residents and business owners in San Juan are very important.

Please join the
San Juan Planning and Zoning Commission
and
San Juan Economic Development Corporation

Thursday, March 3, 2016 for this important meeting at 6:30 PM in the
City Commission Room next to the San Juan Memorial Library
1010 S. Standard Avenue.

Light refreshments will be provided

For more information, please contact
the San Juan Economic Development Corporation at
956-783-3448

or

the City of San Juan Planning Department of the at
956-223-2220

You can also look online at www.cityofsanjuantexas.com or www.sjedc.com



COMMENTS FROM THE COMMUNITY MEETING ON MARCH 16, 2016

Attendees were asked to write on poster sheets on the wall to input their thoughts.

From the Uses poster

Department stores

Fitness

Upscale car wash

Hotels

Restaurants – steakhouse, seafood

Tax producing entities for sales and property taxes

Day spa

From the “Name That Brand” poster

Ikea

Cheesecake Factory

Spaghetti Warehouse

Wholesale food

Health and Fitness/Gym

Cheddar’s

Steakhouses – Ruth’s Chris, Fleming’s, Morton’s

Chase Bank

Apple Store

Hotel with conference capabilities

Starbucks or similar

Upscale spa – Bliss

Hotel – Hotel Zaza, Hotel Indigo or similar boutique hotel with restaurant and bar

La Madeline

Rainforest Café

Saks Off 5th

Nordstrom Rack

Neiman Marcus store or outlet Last Call

Amazon Store



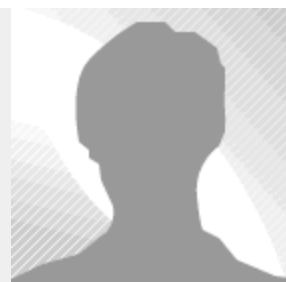
FROM THE WEDNESDAY MARCH 9, 2016 *McALLEN MONITOR*

San Juan conducts Master Plan study



Posted: Wednesday, March 9, 2016 8:10 pm

MITCHELL FERMAN | STAFF WRITER



- Posted on Mar 9, 2016 by [Mitchell Ferman](#)

Sheets hung on the wall during a San Juan master plan meeting last Thursday. Ann Bagley, an urban planner from Dallas who's helping with the project, thought to put up the posters for the community to give their suggestions on what they'd like to see in the city.

The San Juan Economic Development Corporation wants to develop the underutilized area by the U.S. 83/Interstate 2 expressway corridor, and Bagley was brought in to provide a study. There are 381.02 acres in the study area, and 60 percent of it is vacant or undeveloped.

The main goals are to support existing businesses, attract complementary new businesses, protect the area from detracting uses and promote the area as an economic destination.

The study is organized in three phases. Phase I will identify existing conditions and issues, including input from property owners and interested persons. Phase II is the development of appropriate zoning uses and criteria. Phase III is making recommendations and potential adoption of new zoning criteria.

A handful of community members in attendance shouted out a few ideas for developing the area in focus. But that's where the sheets on the wall came in.

One sheet asked community members to suggest specific businesses they would like to see. Suggestions included: Ikea, Cheesecake Factory, Whole Foods, Cheddar's, Apple Store, upscale coffee shop.

The other sheet asked for something similar but more so the types of businesses they'd like to see. Those suggestions included a health and fitness club, department stores, nice hotels and a steakhouse.

Citizens, the EDC and other officials said they are excited about the possibilities.

mferman@themonitor.com



AGENDA ITEM AND RECOMMENDATION SUMMARY
CITY COMMISSION REGULAR MEETING
AUGUST 13, 2019

Consider Removal and Appointment of Board Members Related to the Parks and Recreation Advisory Board.

STAFF COMMENTS AND RECOMMENDATIONS:

The San Juan Parks and Recreation Advisory Board consists of seven (7) members serving two (2) year staggered terms. As per the Parks and Recreation Bylaws if a member is absent three (3) or more consecutive times the individual shall be automatically dropped from membership.

At this time we have two members, Rick Martinez and Robert Williamson, whose terms have expired. As part of your packet is the list of current members, attendance sheet and applications that were submitted.

RECOMMENDATION:

Consider Removal/Appointment to the San Juan Parks and Recreation Advisory Board.

PREPARED BY:

Benjamin Arjona,
City Manager

APPROVED BY:

Benjamin Arjona, City
Manager



**Parks & Recreation Advisory Board
2019-2020**

Name/Address	Phone	Date Appointed	Term Expires
Moy Vazaldua	956-457-7043	6/11/2019	6/11/2021
Ramiro Herrera		6/11/2019	6/11/2021
Claudia Alvarado	956-789-9484	10/22/2017	10/22/2019
603 W. Chaparral St.			
San Juan, Texas 78589			
Rick Martinez		1/1/2017	1/1/2019
Robert Williamson	956-784-9751	4/11/2017	4/11/2019
715 W. 10th Street			
San Juan, TX 78589			
Erica Lopez	956-884-+5538	12/12/2017	12/12/2019
700 Oliviero Avenue			
San Juan, TX 78589			
Ralph Quintanilla		1/22/2019	1/22/2021



Park's Advisory Board Attendance Form

2018 - 2019

2018	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
											26	*
Mark Alaniz											P/NQ	*
Stephanie Alvarez											A/NQ	*
Rick Martinez											P/NQ	*
Claudia Alvarado											A/NQ	*
Erica Lopez											A/NQ	*
Robert Williamson											P/NQ	*
Laura Martinez											A/NQ	*

2019	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	2	6	25	*	21	12	22	6				
Moy Valzaldia	*	A	P	*	P	P	NQ	P				
Ramiro Herrera	*	P	P	*	A	P	NQ	P				
Rick Martinez , Re-Appointment	*	A	P	*	P	P	NQ	P				
Claudia Alvarado	*	P	P	*	P	P	NQ	A				
Erica Lopez	*	P	A	*	P	A	NQ	P				
Robert Williamson, Re-Appointment	*	P	A	*	A	P	NQ	A				
Ralph Quintanilla	*	P	P	*	A	P	NQ	A				

LEGEND

* - NO MEETING HELD

P - PRESENT

A - ABSENT

E - EXCUSED

R - RESIGNED

NQ - NO QUORUM

NM- NEW MEMBER

Re. REPLACED

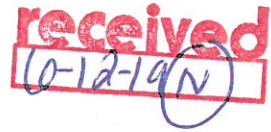
TE - TERM EXPIRED

AO - AUTOMATICALLY OUT

LC - LIBRARY CLOSED

NOTES:

City of San Juan



Application for Appointment

Date: 06/12/2019

Board / Commission / Committee: Parks and Recreation Advisory Board

Name: Jonathan L. Gongora

Mailing Address: 416 Judean Lane, San Juan, TX 78589

Preferred Phone and Fax: 956-252-8888

Employer: Pharr-San Juan-Alamo ISD Occupation: Coach

Email Address: JonathanGongora@gmail.com

Are you or can you be qualified to vote in a City of San Juan Election? ☒ Yes ☐ No

Are you a City of San Juan resident? ☒ Yes ☐ No How Long? 32 Years

Have you ever represented any other private person, group or entity for compensation before the City Commission or any department, commission, board of committee of the city within the last three years? ☐ Yes ☒ No

Do you, your spouse, or your employer have any financial interest, direct or indirect in any contract with the City? ☐ Yes ☒ No

Do you, your spouse, or your employer have any financial interest, direct or indirect in the sale to the city of any land, materials, supplies or service? ☐ Yes ☒ No

List Professional or Social Membership(s)

Pony Umpire

PSJA AFT Union

Experience / Knowledge Pertaining to Board / Commission / Committee of Interest:

I have experience in coaching different sports with both City League and Organized UIL Sports. Currently, I umpire with the City of San Juan and have been for the last 10 years. I have knowledge in different areas of sports with both coaching and playing.

Application will be kept on file for two (2) years: thereafter applicants must reapply. Applications may be faxed (956) 787-5978, mailed to the City Secretary (709 S. Nebraska, San Juan, Tx 78589) or emailed to

City of San Juan

Application for Appointment

Date: October 24, 2017

Board / Commission / Committee: Parks & Recreation Board ✓

Name: Laura Ann Martinez

Mailing Address: 503 E. 12th Street

716-400-1615

Preferred Phone and Fax: _____

Employer: PSJA ISD

Occupation: TEACHERS AID

Lauramtz05@yahoo.com

Email Address: _____

Are you or can you be qualified to vote in a City of San Juan Election? ☒ Yes ☐ No

Are you a City of San Juan resident? ☒ Yes ☐ No How Long? 5 yrs

Have you ever represented any other private person, group or entity for compensation before the City Commission or any department, commission, board of committee of the city within the last three years? ☐ Yes ☒ No

Do you, your spouse, or your employer have any financial interest, direct or indirect in any contract with the City? ☐ Yes ☒ No

Do you, your spouse, or your employer have any financial interest, direct or indirect in the sale to the city of any land, materials, supplies or service? ☐ Yes ☒ No

List Professional or Social Membership(s)

St. John The Baptist Church

Coach San Juan Parks and Rec.

Experience / Knowledge Pertaining to Board / Commission / Committee of Interest:

I have been coaching my son for the last couple of years in basketball, football and baseball. I enjoy being a productive member of our beloved community and look forward to any opportunity to get more involved.

Application will be kept on file for two (2) years: thereafter applicants must reapply. Applications may be faxed (956) 787-5978, mailed to the City Secretary (709 S. Nebraska, San Juan, Tx 78589) or emailed to pcepeda@cityofsanjuantexas.com

City of San Juan

Application for Appointment

Date: October 23, 2017

Board / Commission / Committee: Parks and Recreation Advisory Board

Name: Herman Garza

Mailing Address: 200 W. Expressway 83 Suite H

Preferred Phone and Fax: 956.223.7153

Employer: RGV STRATA Occupation: Engineer

Email Address: hgarza@rgvstrata.com

Are you or can you be qualified to vote in a City of San Juan Election? ☒ Yes ☐ No

Are you a City of San Juan resident? ☒ Yes ☐ No How Long? 20 Years

Have you ever represented any other private person, group or entity for compensation before the City Commission or any department, commission, board of committee of the city within the last three years? ☐ Yes ☒ No

Do you, your spouse, or your employer have any financial interest, direct or indirect in any contract with the City? ☐ Yes ☒ No

Do you, your spouse, or your employer have any financial interest, direct or indirect in the sale to the city of any land, materials, supplies or service? ☐ Yes ☒ No

List Professional or Social Membership(s)

American Society of Professional

BBB

Experience / Knowledge Pertaining to Board / Commission / Committee of Interest:

8 years in Civil Engineering

Application will be kept on file for two (2) years: thereafter applicants must reapply. Applications may be faxed (956) 787-5978, mailed to the City Secretary (709 S. Nebraska, San Juan, Tx 78589) or emailed to pcepeda@cityofsanjuantexas.com

City of San Juan

Application for Appointment

Date: October 24, 2017

Board / Commission / Committee: Parks & Recreation Board

Name: Vicente Castillo

Mailing Address: 200 E 7th St San Juan, Tx 78589

(956)961-8434

Preferred Phone and Fax: _____

Employer: Southern Steel Fabricators Occupation: Welding

aureaestevez@live.com

Email Address: _____

Are you or can you be qualified to vote in a City of San Juan Election? ☒ Yes ☐ No

Are you a City of San Juan resident? ☒ Yes ☐ No How Long? 17 yrs

Have you ever represented any other private person, group or entity for compensation before the City Commission or any department, commission, board of committee of the city within the last three years? ☐ Yes ☒ No

Do you, your spouse, or your employer have any financial interest, direct or indirect in any contract with the City? ☐ Yes ☒ No

Do you, your spouse, or your employer have any financial interest, direct or indirect in the sale to the city of any land, materials, supplies or service? ☐ Yes ☒ No

List Professional or Social Membership(s)

_____	_____
_____	_____
_____	_____

Experience / Knowledge Pertaining to Board / Commission / Committee of Interest:

Baseball/Softball Coach

Application will be kept on file for two (2) years: thereafter applicants must reapply. Applications may be faxed (956) 787-5978, mailed to the City Secretary (709 S. Nebraska, San Juan, Tx 78589) or emailed to pcepeda@cityofsanjuantexas.com

AGENDA ITEM AND RECOMMENDATION SUMMARY
CITY COMMISSION REGULAR MEETING
AUGUST 13, 2019

Discussion and Possible Action on Accepting and Awarding Bid #5018-75-0311-5000-7500-UCP-GVG for the 2018 Urban County Street Improvements Project.

STAFF COMMENTS AND RECOMMENDATIONS:

The City of San Juan is working on using \$275,084.00 funds available thru the Hidalgo County Urban County Program for the Street Improvements Project that includes Shufford Street, King Road, Mayfair Street, Hampton Street and Taylor Street.

On July 31, 2019, the Hidalgo County Urban County Program opened a bid invitation for the 2018 Street Improvements Project where a total of ten (10) bids were received and reviewed. A Pre-Bid Conference was held on July 18, 2019 at the Urban County Program office in Pharr, Texas.

The lowest responsible bidder was Diamond Eight Industries, LLC. from Santa Rosa, Texas who submitted a base bid of \$278,658.00. The estimated construction cost of the project was approximately \$355,500.00 and the City will be responsible for any additional costs and material testing services needed.

RECOMMENDATION:

Consider accepting and awarding Bid #5018-75-0311-5000-7500-UCP-GVG for the 2018 Street Improvements Project.

PREPARED BY:

Roberto Escobar,
Planning Director

APPROVED BY:

Benjamin Arjona, City
Manager

INVITATION TO BIDDERS

The County of Hidalgo would like to invite you to submit a bid on the following:

Bid No.:	Bid Description:	Opening Date:
5018-75-0311-5000-7500-UCP-GVG	City of San Juan 2018 Street Improvements Project (Shufford St., King Rd., Mayfair St., Hampton St. & Taylor St.)	Wednesday, July 31, 2019 9:30 a.m.

Specifications: Specifications including drawings and technical specifications may be viewed and/or obtained at **Cruz-Hogan Consultants, Inc., located at 605 E. Violet Avenue, Suite 1, McAllen, TX 78504 Phone: (956) 682-5022.** Copies of the above documents may be obtained at the office of the engineer in accordance with the Instruction to Bidders upon the non-refundable deposit of **\$150.00** for each set of documents.

Pre-Bid Conference: A Pre-Bid Conference will be held on **Thursday, July 18, 2019 at 10:00 a.m.** at the Urban County Program office located at 1916 Tesoro Street Pharr, Texas 78577.

Requirements: Upon submitting sealed bid, bidders are required to properly identify (handwritten, typed, or printed) sealed envelope and/or packet as follows: Bidder's name and address on the upper left hand corner of the sealed envelope and/or package and **Bid No 5018-75-0311-5000-7500-UCP-GVG "City of San Juan 2018 Street Improvements Project (Shufford St., King Rd., Mayfair St., Hampton St. & Taylor St.)"** on the lower left hand corner of sealed envelope and/or packet. Overnight mail must also be properly labeled on the outside of express envelope or package.

The sealed bid must contain one (1) original and two (2) copies of bid and must be clearly identified and addressed for delivery to:
Martha L. Salazar, CPPB, Hidalgo County Purchasing Agent
Hidalgo County Purchasing Department

US Postal Mail/Courier Address:
2812 S. Business Hwy. 281
Hidalgo County New Administration Building
Edinburg, Texas 78539

Physical Location:
2802 S. Business Hwy. 281
Hidalgo County New Administration Building
(Southeast of Canton Rd & Business 281)
Edinburg, Texas 78539

Deadline: Sealed bids will be accepted until **Wednesday, July 31, 2019 at 9:30 a.m.** at which time they will be opened in the Hidalgo County Purchasing Department Conference Room at Physical Location: 2802 S. Business Hwy 281, Hidalgo County New Administration Building in Edinburg, Texas 78539. No facsimiles or late arrivals will be accepted. Any bid received after that time will not be opened and will be returned.

Bid Security: Bid Security in the amount of 5% of the largest possible total of bids submitted must accompany each bid in accordance with the Instruction to Bidders. The surety must be a guaranteed or surety company acceptable to the Hidalgo County and listed in U. S. Treasury Circular No. 570.

Davis-Bacon Prevailing Wage Rates: This project is funded by the U.S. Department of Housing & Urban Development Community Development Block Grant Program and bidders must adhere to Texas State Prevailing Wage Requirements for Hidalgo County and Davis-Bacon Federal Wage Rates, including Certified Payroll. Be advised applicable wage rates may change.

Section 3/WMBE: The County of Hidalgo will actively encourage participation of Section 3 businesses and Women and Minority Business Enterprises (WMBEs) on this project. All Section 3 business contractors, potential Section 3 business contractors, and WMBE contractors are strongly encouraged to submit bids. Please contact Hidalgo County-Urban County Program at 956-787-8127 for inquiries concerning Section 3 or specifics on how to become a Section 3 business. HUD Regulations 24 CFR 135.9, Requirements applicable to HUD NOFAs for section 3 covered programs states the following: (a) *Certification of compliance with part 135.* All notices of funding availability (NOFAs) issued by HUD that announce the availability of funding covered by section 3 shall include a provision in the NOFA that notifies applicants that section 3 and the regulations in part 135 are applicable to funding awards made under the NOFA. Additionally the NOFA shall require as an application submission requirement (which may be specified in the NOFA or application kit) a certification by the applicant that the applicant will comply with the regulations in part 135. (For PHAs, this requirement will be met where a PHA Resolution in Support of the Application is submitted.) With respect to application evaluation, HUD will accept an applicant's certification unless there is evidence substantially challenging the certification. (b) *Statement of purpose in NOFAs.* (1) For competitively awarded assistance in which the grants are for activities administered by an HA, and those activities are anticipated to generate significant training, employment or contracting opportunities, the NOFA must include a statement that one of the purposes of the assistance is to give to the greatest extent feasible, and consistent with existing Federal, State and local laws and regulations, job training, employment, contracting and other economic opportunities to section 3 residents and section 3 business concerns.

The County reserves the right to refuse and reject any/all bids and to waive any/all formalities or technicalities, or to accept the bid considered the best and most advantageous to the County. By order of the Commissioners' Court of the County of Hidalgo, Texas on this the **3rd day of June 2018.**

MARTHA L. SALAZAR, CPPB
HIDALGO COUNTY PURCHASING AGENT
REPORT ROAD HAZARDS @ 1-866-HCR-SAFE OR 1-866-427-7233

CRUZ-HOGAN *Consultants, Inc.*

ENGINEERS | PLANNERS | CONSULTANTS

McAllen | Harlingen | Weslaco

TBPE Firm Reg No. F-4860

August 06, 2019

Diana Serna
Director
Hidalgo County - Urban County Program
1916 Tesoro Street
Pharr, Texas 78577

Re: Letter of Recommendation
Urban County Program No.: 5018-75-0311-5000-UCP-GVG
City of San Juan 2018 Street Improvements Project
City of San Juan, Texas

Dear Mrs. Serna:

We have reviewed the ten (10) bids received on July 31, 2019 for The City of San Juan 2018 Street Improvements Project in the City of San Juan, Texas. Enclosed you will find a Bid Tabulation and Itemized Bid Tabulation Sheets for your review. As noted in red in the Itemized Bid Tabulation Form are the corrected bid amounts based on unit price with the affected total bid. These mathematical errors did not affect the top 3 Bidders.

The lowest responsible Bidder, Diamond Eight Industries, LLC from Santa Rosa, Texas submitted a Base Bid of \$278,658.00. After conferring with the City of San Juan staff, we recommend the low bid submitted by Diamond Eight Industries, LLC be accepted and a contract be awarded in the amount of \$278,658.00. The estimated construction cost of the project was approximately \$355,500.00.

If you have any questions, please feel free to contact me at (956) 682-5022.

Sincerely,



Ronnie Cruz, P.E., CFM
Vice President

RC/cr

Enclosures

cc: Gualalupe V. Garcia, Urban County
Benjamin Arjona, City of San Juan
Roberto Escobar, City of San Juan
Roel Garza, City of San Juan
Alissa Perez, Diamond Eight Industries, LLC

via E-mail: guadalupe.garcia@co.hidalgo.tx.us
via E-mail: barjona@sjtx.us
via E-mail: rescobar@sjtx.us
via E-Mail: rgarza@sjtx.us
via E-mail: estimating@diamond8industries.com

CRUZ-HOGAN Consultants, Inc.

BID TABULATION

URBAN COUNTY PROGRAM

CITY OF SAN JUAN 2018 STREET IMPROVEMENTS PROJECT

Pre-Bid Conference: Thursday, July 18, 2019 - 10:00 a.m.

Location: Urban County Program Office, 1916 Tesoro Street, Pharr, TX 78577

Bid Opening: Wednesday, July 31, 2019 - 9:30 a.m.

Location: Hidalgo County Purchasing Department Conference Room, 2802 S. Business Hwy 281 Edinburg, TX 78539

	BIDDER	ADDENDUM NO. 1	BID BOND	TOTAL BID AMOUNT
1	Diamond Eight Industries, LLC	Acknowledged	Included	*\$278,550.00 *\$278,658.00
2	La Feria Excavation, Inc.	Acknowledged	Included	\$295,587.00
3	IOC Company, LLC	Acknowledged	Included	\$299,880.00
4	RDH Site and Concrete, LLC	Acknowledged	Included	\$304,740.00
5	Earthworks Enterprise (2GS, LLC)	Acknowledged	Included	\$323,310.00
6	Texas Cordia Construction, LLC	Acknowledged	Included	\$326,400.00
7	Roth Excavating, Inc.	Acknowledged	Included	\$355,425.00
8	R.E. Friedrichs Company (REFCO)	Acknowledged	Included	*\$370,756.00 *\$370,466.60
9	Clore Construction, LLC	Acknowledged	Included	\$379,790.35
10	Jimmy Closner & Sons Construction Co., Inc.	Acknowledged	Included	\$496,885.00

*Incorrect bid unit item totals

*Corrected bid unit item totals

ITEMIZED BID TABULATION SHEET
City of San Juan 2018 Street Improvements Project
(Shufford St., King Rd., Mayfair St., Hampton St., Taylor St.)
Urban County Bid No. 5018-75-0311-5000-7500-UCP-GVG

				DIAMOND EIGHT INDUSTRIES, LLC		LA FERIA EXCAVATION, INC.		IOC COMPANY, LLC		RDH SITE AND CONCRETE, LLC		2GS, LLC DBA EARTHWORKS ENTERPRISE		TEXAS CORDIA CONSTRUCTION, LLC		ROTH EXCAVATING, INC		R.E. FRIEDRICHS COMPANY		CLORE EQUIPMENT, LLC		JIMMY CLOSNER & SONS CONSTRUCTION CO., INC.	
Item No	Item Description	Unit	Est. Qty.	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total
BID																							
1	Scarify existing asphalt paving and base material and prepare existing base material for reuse. To include all scarifying, break down of existing asphalt pavement, mixing, watering of existing base material, reshaping and compaction to final grade. All complete in place. (Total reused and new base thickness shall be 8” minimum).	SY	14,100	\$4.25	\$59,925.00	\$2.41	\$33,981.00	\$3.00	\$42,300.00	\$2.50	\$35,250.00	\$4.00	\$56,400.00	\$1.00	\$14,100.00	\$2.00	\$28,200.00	\$5.87	*\$82,838.10 *\$82,767.00	\$3.34	\$47,094.00	\$10.00	\$141,000.00
2	Lime stabilization of 8” new flexible base and salvage caliche base with 1% lime (7 lbs/sy). To include all mixing, watering and compaction, etc. All complete in place.	SY	14,100	\$1.50	\$21,150.00	\$1.55	\$21,855.00	\$3.75	\$52,875.00	\$2.50	\$35,250.00	\$1.00	\$14,100.00	\$3.00	\$42,300.00	\$3.00	\$42,300.00	\$2.12	*\$29,963.10 *\$29,892.00	\$2.24	\$31,584.00	\$6.00	\$84,600.00
3	New Flexible Base, Type E, Grade 3 Caliche. To include installation, compaction, and reshaping to final to final grade. All complete, in place.	CY	1,200	\$16.09	*\$19,200.00 *\$19,308.00	\$29.00	\$34,800.00	\$18.00	\$21,600.00	\$18.50	\$22,200.00	\$40.00	\$48,000.00	\$25.00	\$30,000.00	\$25.00	\$30,000.00	\$19.26	*\$23,113.10 *\$23,112.00	\$58.22	\$69,864.00	\$30.00	\$36,000.00
4	Prime coat (.20 gal/sy). All complete in place.	SY	14,100	\$0.25	\$3,525.00	\$1.45	\$20,445.00	\$0.80	\$11,280.00	\$1.00	\$14,100.00	\$1.10	\$15,510.00	\$1.00	\$14,100.00	\$1.75	\$24,675.00	\$1.52	*\$21,503.10 *\$21,432.00	\$1.73	\$24,393.00	\$1.20	\$16,920.00
5	2” inch type “D” hot mix asphalt concrete pavement (220 lbs/sy). To include compaction. All complete in place.	SY	14,100	\$11.25	\$158,625.00	\$11.90	\$167,790.00	\$9.75	\$137,475.00	\$12.50	\$176,250.00	\$11.50	\$162,150.00	\$13.00	\$183,300.00	\$15.00	\$211,500.00	\$12.72	*\$179,423.10 *\$179,352.00	\$12.18	\$171,738.00	\$13.10	\$184,710.00
6	Remove existing curb and gutter and replace with new 18” curb and gutter. To include demolition, concrete, return filets, steel reinforcing, joints and etc. All complete, in place.	LF	450	\$10.50	\$4,725.00	\$21.10	\$9,495.00	\$40.00	\$18,000.00	\$27.00	\$12,150.00	\$25.00	\$11,250.00	\$49.00	\$22,050.00	\$15.00	\$6,750.00	\$17.91	*\$8,063.10 *\$8,059.50	\$25.31	\$11,389.50	\$15.50	\$6,975.00

ITEMIZED BID TABULATION SHEET
City of San Juan 2018 Street Improvements Project
(Shufford St., King Rd., Mayfair St., Hampton St., Taylor St.)
Urban County Bid No. 5018-75-0311-5000-7500-UCP-GVG

				DIAMOND EIGHT INDUSTRIES, LLC		LA FERIA EXCAVATION, INC.		IOC COMPANY, LLC		RDH SITE AND CONCRETE, LLC		2GS, LLC DBA EARTHWORKS ENTERPRISE		TEXAS CORDIA CONSTRUCTION, LLC		ROTH EXCAVATING, INC		R.E. FRIEDRICHS COMPANY		CLORE EQUIPMENT, LLC		JIMMY CLOSNER & SONS CONSTRUCTION CO., INC.	
Item No	Item Description	Unit	Est. Qty.	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total	Unit Price	Total
7	Remove existing curb and gutter and replace with new 18" valley gutter. To include demolition, concrete, return filets, steel reinforcing, joints and etc. All complete in place.	LF	120	\$20.00	\$2,400.00	\$22.80	\$2,736.00	\$65.00	\$7,800.00	\$27.00	\$3,240.00	\$25.00	\$3,000.00	\$85.00	\$10,200.00	\$12.50	\$1,500.00	\$54.69	*\$6,563.10	\$66.93	\$8,031.60	\$14.00	\$1,680.00
																			*\$6,562.80				
8	Traffic Control to include Barricades, Signs, Detours, & Traffic Handling as per TxDot Manual of Uniform Traffic Control Devices. Latest Edition.	MO	3	\$1,500.00	\$4,500.00	\$680.00	\$2,040.00	\$1,000.00	\$3,000.00	\$1,200.00	\$3,600.00	\$2,000.00	\$6,000.00	\$2,000.00	\$6,000.00	\$1,500.00	\$4,500.00	\$3,087.70	\$9,263.10	\$3,247.50	\$9,742.50	#####	\$16,500.00
9	Construction staking and surveying. All complete in place.	LS	1	\$1,500.00	\$1,500.00	\$1,630.00	\$1,630.00	\$4,800.00	\$4,800.00	\$1,500.00	\$1,500.00	\$5,000.00	\$5,000.00	\$2,350.00	\$2,350.00	\$3,500.00	\$3,500.00	\$5,763.10	\$5,763.10	\$4,330.00	\$4,330.00	#####	\$1,500.00
10	Temporary Erosion, Sedimentation and Water Pollution Prevention and Control. Includes Implementation and maintenance of SWP3 to State and Federal Regulations. All complete, in place.	LS	1	\$3,000.00	\$3,000.00	\$815.00	\$815.00	\$750.00	\$750.00	\$1,200.00	\$1,200.00	\$1,900.00	\$1,900.00	\$2,000.00	\$2,000.00	\$2,500.00	\$2,500.00	\$4,263.10	\$4,263.10	\$1,623.75	\$1,623.75	#####	\$7,000.00
TOTAL PROJECT BID AMOUNT					*\$278,550.00														*\$370,756.00				
					*\$278,658.00		\$295,587.00		\$299,880.00		\$304,740.00		\$323,310.00		\$326,400.00		\$355,425.00		*\$370,466.60		\$379,790.35		\$496,885.00

*Incorrect bid unit item totals
*Corrected bid unit item totals

AGENDA ITEM AND RECOMMENDATION SUMMARY
CITY COMMISSION REGULAR MEETING
AUGUST 13, 2019

Discussion and Possible Action Regarding Request for Qualifications Concerning Agent of Record for Health, Dental, Life, AD&D and Supplemental Insurance.

STAFF COMMENTS AND RECOMMENDATIONS:

On July 3, and July 10, 2019, Staff Advertised in the Advance News Journal for RFQ 19-07-07-16 for an Agent of Record for Health, Dental, Life, AD&D and Supplemental Insurance. In response staff received submissions from the following firms:

1. Newkirk and Newkirk, Inc. - McAllen, Texas
2. Ortegón Insurance Agency, LLC - Weslaco, Texas
3. Salazar Insurance Group - Harlingen, Texas
4. Bob Trevino Insurance - Pharr, Texas

RECOMMENDATION:

Select and Authorize the City Manager to Negotiate and Enter into a Contract Agreement for an Agent of Record for Health, Dental, Life, AD&D and Supplemental Insurances.

PREPARED BY:

Rene J. Jaime,
Purchasing/Risk
Manager

APPROVED BY:

Benjamin Arjona, City
Manager

Insurance Agent Services

Offered to



By

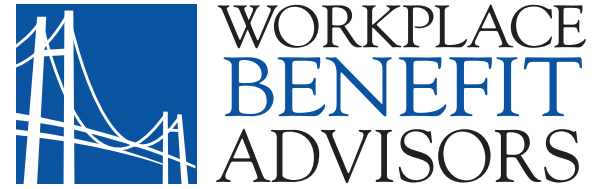


Bob Trevino Insurance

For

RFQ—Bid #19-07-07-16
Agent of Record for Health, Dental,
Life, AD&D and Supplemental
Insurance

- *Years of Operation:*
Our firms have been serving communities & businesses of the Rio Grande Valley for over 34 years.
- *Account Managers*
Senior Account Manager-Korina Gonzalaz
Licensed Agent -Monica Vasquez
- *Ability to Provide Trending Analysis:*
We have the benefit of partnering with many nationally recognized Insurance companies, this allows our agency to take full advantage of their research and analytics on upcoming trends, which we pass onto our clients for the opportunity of future cost savings.
- *Ability to provide Customer Service:*
Our firms are full service agencies; A one stop for all your insurance needs. We have seven full time licensed agents with over 15 years of experience on worksite products to educate and provide the best possible guidance for Employers and employees insurance needs.
Our claims and service department provides support and assist with claim submission, benefit policy changes, renewal changes and capabilities to order ID Cards instantaneously. Also prepare and present quotes that are uniquely customized to fit our client's needs.
- *Local Office:*
819 N Veterans Blvd, Pharr, TX 78577
- *Commission Fee:*
Our firms do not charge commissions directly from our client's, we charge a fee dependent on services that are expected and provided which is negotiated directly with the insurance carriers
- *Human Resource Management Component:*
We understand that HR departments wear many hats that is why we assign a designated Account Manager to handle and coordinate the day to day activities of seeing new hires, billing concerns, and claims management, this helps minimize the workload of the Human Resource department.
- *Philosophy:*
To provide health care and support service throughout the community catering to the public and private sector's needs with a genuine commitment to provide quality care to the consumer.
- *Wellness Program:*
We coordinate with partnering insurance carriers to facilitate health fares and invite neighboring healthcare facilities to provide services for the employees and to promote health and fitness awareness.
- *Legal and Compliance Capability:*
HIPAA compliant to provide data privacy and security provisions for safeguarding medical information.



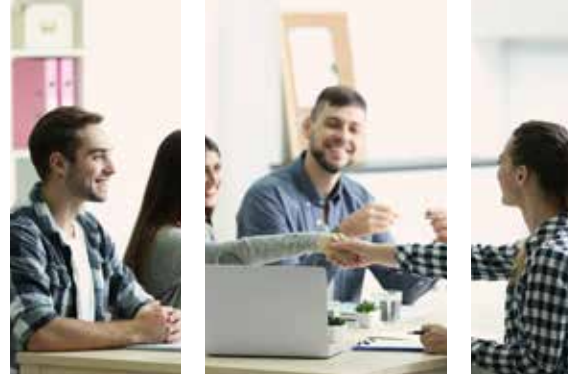
“One Agency For All
Your Insurance Needs”



Life
Cancer
Accident
Critical
Illness
Disability
Medical
Dental
Vision

**ADMINISTRATION
ENROLLMENT
SERVICE**

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Over Two Decades of Experience



Our Objectives

Provide people and businesses in the Rio Grande Valley area with a very high degree of professional service and knowledge in all phases of insurance. As an independent agency, representing many A rated companies, we are able to tailor an insurance policy or program to an individual's or business's needs.

Our Goal

To offer optimum customer service from initial policy placement through renewals, changes and claim submission.



Our Reputation and Client Focus

Professionalism, value and service is what we offer.

Our extensive portfolio ranges from an individual plan to groups over 4,000 lives insured. The insurance carriers we partner with are some of the strongest and most respected for their financial strength and services. We pride ourselves in our ability to provide insurance to any organization or individual, as the companies we represent extend authority, to us, as your local source for quality coverage.

Our view is simple...

Great service with effective communication

WHAT WE DO

Administration

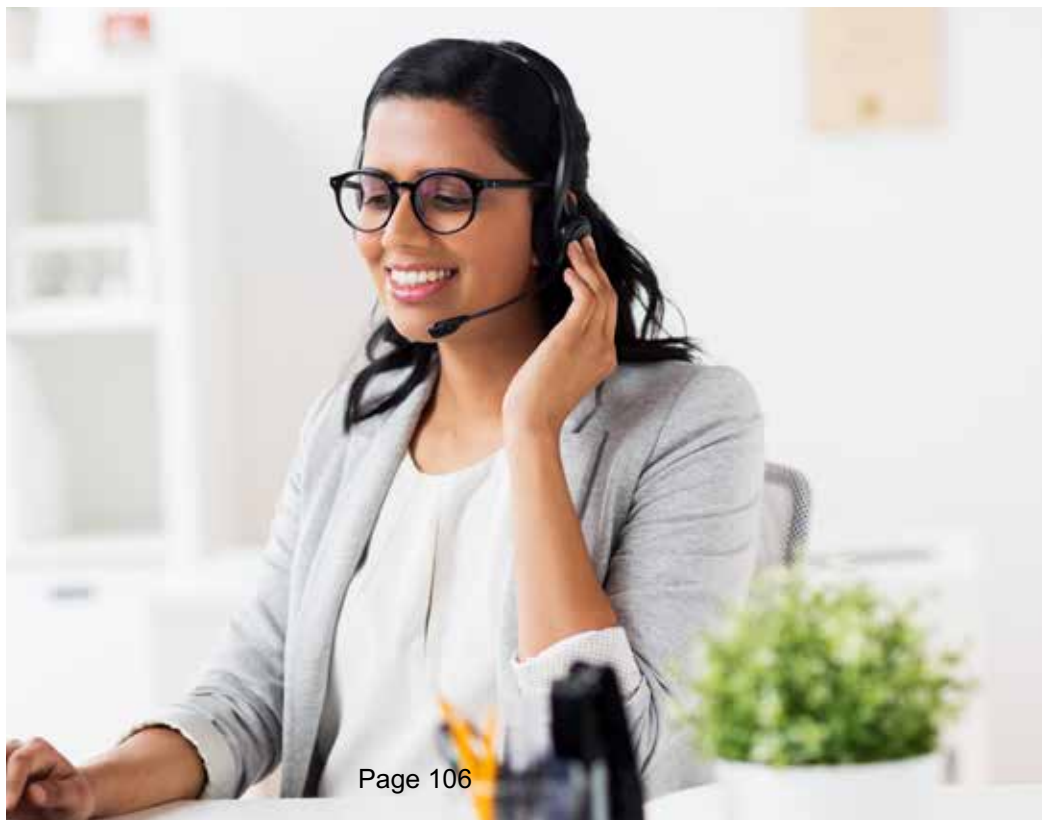
We have the experience for understanding what makes your organization unique which allows us to implement a customized program that truly fits your needs. Managing benefit eligibility and enrollment can be challenging, so we simplify the process. Our administrative services offer flexible and hassle-free solutions that truly save you time and energy.

Enrollment

Support for employee enrollments are important in today's competitive marketplace. At Workplace Benefit Advisors we include employee self-service, call center, and one-on-one counseling.

Service

Our team of licensed agents have an average of 15 years experience to ensure the best guidance, ready to provide second to none service on all insurance needs.



Benefit Administration

Workplace Benefit Advisors specializes in facilitating business' benefit administration processes and providing custom solutions to ensure efficient and accurate data reporting and offers recommendations for improvement based on best practices.



Benefits

- Manages and ensures data remains secure
- Fully customized to meet customer needs
- Streamlines the benefit administration process
- Manages new hire enrollments
- Ad hoc reports in real-time
- Manages COBRA and evidence of insurability events
- Tracks employee demographic changes

One-on-One Meetings

Face-to-Face Guidance with Personal Objectives in Mind

Workplace Benefit Advisors has been delivering focused, results driven communications for years through our team of professional Benefit Counselors. We go on-site to provide your employees a personalized enrollment experience, because no communication tactic compares to a face-to-face meeting when discussing the complex issues surrounding today's benefit options.



Benefits

- Creates a personal connection that improves employees' level of trust
- Helps employees become more educated health care consumers
- Relieves Human Resources' time by reducing the administrative burden
- Delivers consistent, branded messaging for all employees

Electronic Data Interchange (EDI)

Data Integration Simplified

EDI enrollment connections can pose problems due to frequent client-vendor format variation, however, Workplace Benefit Advisors EDI team are experts in, not only managing and manipulating all import/export formats, eliminating this challenge, but also in supplying custom and standard formatting based on your program's set-up and scope of service.



Benefits

- Process is customized to meet requested format and frequency
- Transfers measurable metrics to employer's record keeping database
- Improves consistency and eliminates manual data entry (i.e., errors).

Data Cleansing and Reporting

Our data management system allows the efficient gathering and updating of personnel data and election records, returning a secure, proven process to employers for vendor transmission of information.

Benefits

- Removes errors from billing remittances
- Transmits data in a HIPAA-compliant environment
- Ensures accurate and reliable data feeds

Offers real-time customized reporting such as:

- Employee status (e.g., hourly, FTE, PTE)
- Dependent eligibility
- Not-Seen Reports
- Benefit participation



Call Center

When Your Employee Benefit Guidance Is On the Line

Our licensed counselor-assisted call center services have made us the industry leader for educating, enrolling and serving individuals on behalf of their employer.



Benefits

- Creates a personalized experience for each employee
- Ideal for enrolling executives, field employees and new hires
- Monitors and records all inbound/outbound calls for quality assurance
- Catalogues and tracks all call interactions, enabling real-time reporting
- Ongoing benefit services for employees during plan year

Dedicated Benefit Consultants

Workplace Benefit Advisors dedicated Benefit Representatives complement internal Human Resource teams to ensure individual personal attention is allocated to each employee, alleviating the on-boarding of new hires and enrolling of current employees which, otherwise, would become an additional stressor and consume valuable HR hours.

Benefits

- Contributes to increased employee trust
- Delivers consistent, branded messaging for all employees
- Increases employee engagement, understanding and appreciation
- Relieves Human Resources' time by reducing the administrative burden
- Employee demographic and status changes



Confirmation Statements

Following an enrollment or life event, Workplace Benefit Advisors, provides each employee with a summary of benefit elections, coverage tiers, employer contribution and deduction periods. Not only can this document be used to collect post-enrollment documents but also be turned into a Total Compensation Statement.



Benefits

- Reminds employees of additional actions needed regarding: Evidence of Insurability, dependent verification, FML, COBRA, SBC's
- Relieves Human Resources' time by reducing the administrative burden
- Provides accessible records for Human Resources, management and employees
- Notifies employee of incomplete enrollment
- Offers the occasion to reinforce total compensation value information
- Complements Health Care Reform requirement to share value of medical plan

Benefit Summary Books

Customized and Comprehensive Employee Benefit Guides

One of the most effective means for communicating employee benefits is through the use of benefit summary books. Our guide books include Summary of Benefits and Coverage (SBC) requirements and aid employees with making educated decisions about their benefits.

Benefits

- Offers employees a resource to use throughout the year
- Reduces the administrative burden on Human Resources by decreasing the number of benefit related questions
- Presents concise and understandable benefit explanations
- Gives Human Resources/benefits staff a convenient way to answer benefit related questions
- Helps employees make educated benefit choices

Availability

- Distributed by employer
- Hand delivered by Benefit Consultants during one-on-one meetings
- Via Email





POLICY HEALTH CANCER
PEACE LIFE **INSURANCE**
CRITICAL ILLNESS SECURITY



WORKPLACE
BENEFIT
ADVISORS

819 North Veterans Boulevard | Pharr, Texas 78577

(956) 781-7771 | 1 (888) 556-2825

County of Hidalgo

2818 South Business Highway 281
Edinburg Texas 78539
Flora Vasquez, Employee Benefits
956-292-2075
Flora.vazquez@co.hidalgo.tx.us

Pharr San Juan Alamo Independent School District

601 East Kelly
Pharr Texas 78577
Alma Mata , Insurance Specialist
956-354-2029
Alma.mata@psjaisd.us

Mission Consolidated Independent School District

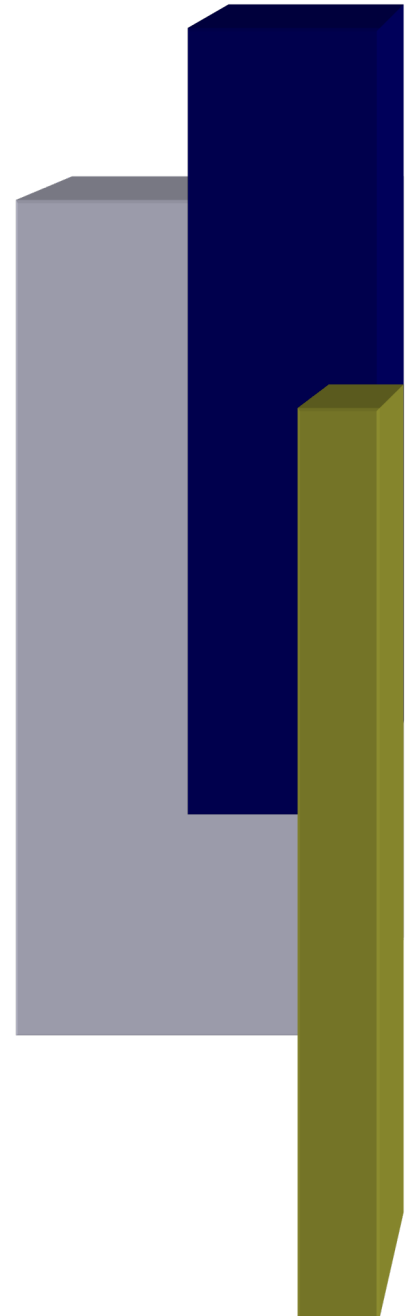
Bryce Avenue
Mission Texas 78572
Sylvia Cruz, Director Risk Management
956-323-6000
scruc04@mcisd.org

Edcouch Elsa Independent School District

920 West Santa Rosa
Elsa TX 78538
Robert Elizondo, Insurance Department
956-262-6000
relizondo@eeisd.org

Donna Independent School District

116 North 10th Street
Donna Texas
Angie Gonzalez-de los Rios, Director
Safety and Risk Management
956 461-4350
angegonzalez@donnaisd.net





General Lines Agent

Life, Accident, Health and HMO, Property and Casualty

ALBERTO TREVINO

819 NORTH I ROAD
PHARR, TX 78577

is authorized to transact business as described above

License No: 767168

Issue Date: 09-03-1986

Expiration Date: 02-28-2021

Generated by Sircon 184465979

TEXAS DEPARTMENT OF INSURANCE THIS IS TO CERTIFY THAT ALBERTO TREVINO 819 NORTH I ROAD, PHARR, TX 78577 LICENSE NUMBER: 767168	IS HEREBY AUTHORIZED TO TRANSACT BUSINESS IN ACCORDANCE TO THE LICENSE DESCRIPTION SHOWN BELOW: General Lines Agent Life, Accident, Health and HMO, Property and Casualty Issue Date: 09-03-1986 Expiration Date: 02-28-2021 Generated by Sircon 184465979
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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

04/22/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Brown & Brown Program Insurance Services, Inc. d.b.a. CalSurance Associates P.O. Box 7048 Orange, CA 92863-7048	CONTACT NAME:	
	PHONE (A/C, No, Ext): (800)745-7189	FAX (A/C, No):
INSURED Agents of American Heritage Life Insurance Company, members of The Financial Sales Professionals Purchasing Group ALBERTO TREVINO DBA: Bob Trevino Insurance and Workplace Benefits Advisors 819 NORTH I ROAD PHARR, TX 78577	E-MAIL ADDRESS: info@calsurance.com	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A: Continental Casualty Company	
	INSURER B:	
	INSURER C:	
	INSURER D:	
INSURER E:		
INSURER F:		
NAIC #		
20443		

COVERAGES **CERTIFICATE NUMBER:** 5878267 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY						
	☐ CLAIMS-MADE ☐ OCCUR						EACH OCCURRENCE \$
							DAMAGE TO RENTED PREMISES (Ea occurrence) \$
							MED EXP (Any one person) \$
							PERSONAL & ADV INJURY \$
							GENERAL AGGREGATE \$
							PRODUCTS - COMP/OP AGG \$
	GEN'L AGGREGATE LIMIT APPLIES PER:						
	☐ POLICY ☐ PRO-JECT ☐ LOC						
	☐ OTHER						
	AUTOMOBILE LIABILITY						
	☐ ANY AUTO						COMBINED SINGLE LIMIT (Ea accident) \$
	☐ OWNED AUTOS ONLY						BODILY INJURY (Per person) \$
	☐ HIRED AUTOS ONLY	☐ SCHEDULED					BODILY INJURY (Per accident) \$
		☐ NON-OWNED AUTOS					PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB ☐ OCCUR						EACH OCCURRENCE \$
	EXCESS LIAB ☐ CLAIMS-MADE						AGGREGATE \$
	☐ DED ☐ RETENTION \$						
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICE/MEMBER EXCLUDED? ☐ Y / N						PER STATUTE ☐ OTH-ER ☐
	(Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. EACH ACCIDENT \$
							E.L. DISEASE - EA EMPLOYEE \$
							E.L. DISEASE - POLICY LIMIT \$
A	CLAIMS MADE AND REPORTED						
	Description Deductible						Aggregate Each Agent \$2,000,000
	Agent/Enroller Basic Coverage			267868196-12	5/1/2019	5/1/2020	Each Claim \$2,000,000
	Errors & Omissions						Policy Aggregate \$50,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

Coverage is for sales and/or servicing of Life Insurance products, A&H Ins., Disability Income Ins., Fixed Annuities and sale or attempted sale of Employee Benefit Plans, Individual Retirement Plans and KEOGH Retirement Plans. Retention: \$500 American Heritage Life and/or Allstate Life of New York products & services; \$2,500 all other covered products & services. Please refer to the policy for specific sub-limits & limitations for Insolvency claims. Coverage ceases as of the date of contract termination.

Individual Coverage Effective Date is the later of the date indicated under Policy Eff or date of contract with sponsor.

CERTIFICATE HOLDER

CANCELLATION

ALBERTO TREVINO
DBA: Bob Trevino Insurance and Workplace Benefits Advisors
819 NORTH I ROAD
PHARR, TX 78577

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

**Request for Taxpayer
Identification Number and Certification**► Go to www.irs.gov/FormW9 for instructions and the latest information.**Give Form to the
requester. Do not
send to the IRS.**Print or type.
See Specific Instructions on page 3.

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

Alberto Trevino

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

Bob Trevino Insurance3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.☒ Individual/sole proprietor or single-member LLC☐ C Corporation☐ S Corporation☐ Partnership☐ Trust/estate☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ►**Note:** Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.☐ Other (see instructions) ►

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

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

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

819 North Veterans Blvd

6 City, state, and ZIP code

Pharr TX 78577

7 List account number(s) here (optional)

Requester's name and address (optional)

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

4 5 4 - 7 8 - 5 5 5 1

or

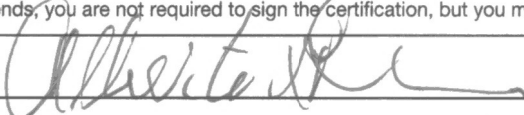
Employer identification number

- - - - -

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

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

Date ►

6-20-19

General Instructions

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

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

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

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

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

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

By signing the filled-out form, you:

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

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

Check the appropriate box on line 3 for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3.

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5 ²
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor ⁴
For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

***Note:** The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Visit www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

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.

None

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

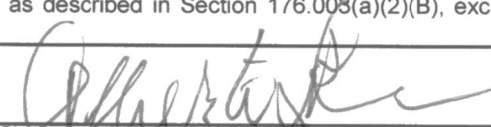
B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ 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

REQUEST FOR QUALIFICATIONS

Sealed bids addressed to Rene J. Jaime, Purchasing/Risk Manager, City of San Juan, 709 S. Nebraska Ave, San Juan, Texas, will be received on Tuesday, July 16, 2019, until 10:00 a.m., at which time they will be taken to the City Hall Conference Room and will be read aloud.

**SEALED BIDS FOR
RFQ - BID #19-07-07-16
AGENT OF RECORD
FOR HEALTH, DENTAL, LIFE, AD&D AND SUPPLEMENTAL INSURNACES
PURCHASING DEPARTMENT
CITY OF SAN JUAN
709 S. NEBRASKA AVE.
SAN JUAN, TEXAS 78589-2649**

Specification can be obtained by calling the Purchasing Division 956.223.2204, by picking them up at the San Juan City Hall, 709 S. Nebraska, San Juan, Texas between the hours of 8:30 a.m. – 4:30 p.m., Monday thru Friday, or by downloading them from the City's web-site, www.cityofsanjuantexas.com.

Be advised that if a firm downloads the bidding document from the web page and is contemplating bidding on the project, the respondent must register with Rene J. Jaime, Purchasing / Risk Manager so that any changes/additions via Addendum can be forwarded to the firm. Register with the Purchasing Division by email at rjaime@sjtx.us. In the subject line of your email, please include RFQ 19-07-07-16 / Agent of Record. Within the email, please include the firm's name, contact person's name and tile, email address, mailing address and phone.

The City of San Juan reserves the right to refuse and reject any or all bids and to waive any or all formalities or technicalities or to accept the bid to be the best and most advantageous to the City, and hold the bids for a period of sixty (60) days without taking action. Bids submitted past the aforementioned date and time will not be accepted.

Caution to those submitting bids; those not in proper form may be rejected.

I. GENERAL INFORMATION:

City of San Juan (City) is seeking written proposals from qualified insurance agents to serve as the Agent of Record for insurance services including health, dental, life, AD&D and supplemental insurances. This is to include providing the City of San Juan with recommendations on related products to offer our employees, providing service and maintenance of those products and related claims and education regarding benefits and related processes and assistance to City of San Juan employees related to our group benefits.

The Agent of Record Contract will be for a period of one (1) year from day of award with the provision to extend the contract an additional two (2) years (with one-year intervals) at the City's discretion.

The City of San Juan must receive one (1) hard copy of your submission and one electronic pdf copy on a flash drive by **10:00 a.m. on Tuesday, July 16, 2019**. Proposals must be in a sealed envelope, clearly marked **RFQ 19-07-07-16 INSURANCE AGENT OF RECORD PROPOSAL** and should be delivered and received by mail or in person to the following address:

**City of San Juan
Attention: Rene J. Jaime, Purchasing / Risk Manager
709 S. Nebraska
San Juan, Texas 78589**

Proposals should be prepared simply and economically, providing a straightforward, concise description of proposer's capabilities to satisfy the requirements of the RFQ. Emphasis should be on completeness and clarity of the content. In addition, some of those responding may be placed on a short list to make a brief 5-minute presentation based on their submission to the City Commission during a City Commission meeting.

Proposals shall be firm for a period of sixty (60) days after the closing date. Each responding proposer may withdraw their proposal if it has not been accepted within sixty (60) days from the RFQ closing date.

The award of this contract will be made by the City on the basis of the proposal which, in the City's sole and absolute judgment, will best serve the best interests and needs of the City. The City reserves the right to accept or reject any or all the proposals, and waive any informalities and irregularities in said proposals.

All proposers must provide the information requested in Section III, Proposal Submission Requirements. Failure to respond to any or all requested information may result in disqualification by the City.

Questions, interpretations or clarifications of this RFQ must be requested in writing. All questions should be directed to Rene J. Jaime, Purchasing/Risk Manager. All questions are due by 4:00PM on Thursday, July 11, 2019. Send questions to rjaime@sjtx.us.

II. SCHEDULE OF EVENTS/DATES:

ACTION	DATE
Issue RFQ	Wednesday, July 3, 2019
Final Questions Due	Thursday, July 11, 2019
Proposals Due	Tuesday, July 16, 2019
Proposal Review	TBD
Notice of Intent to Award	TBD

III. PROPOSAL SUBMISSION REQUIREMENTS:

The proposing agent shall be responsible for preparing an effective, clear, and concise proposal. The proposals must include the following minimum information:

1. Cover letter addressed to Rene J. Jaime, Purchasing / Risk Manager and signed by a person legally authorized to bind the applicant to its proposal. The cover letter must include name of the agency, broker and/or agent, address, telephone and fax numbers of the agency and email address of the person(s) who are authorized to represent the proposer. The letter should also include that the agent has made no agreements with any company that places it as the sole agent for such company.
2. Name(s), titles, and qualifications of proposed broker(s) / agents with experience in Municipal accounts of similar size and scope of service;
3. Name(s), titles, and qualifications of proposed key personnel with experience in Municipal accounts of similar size and scope of service;
4. Articulate plan and ability to provide service delivery and support to meet the following scope of work, including examples of reports, if applicable:
 - a. Proximity to the City of San Juan;
 - b. Routine and emergent consultation relating to insurance-related issues;
 - c. Philosophy regarding addressing customer/client questions and needs.
 - d. Provide consultation in the area of insurance products and recommendations.

IV. MINIMUM QUALIFICATIONS:

1. Primary servicing agent shall reside within 20 miles of City of San Juan.
2. Any proposer must be licensed to provide insurance services in the State of Texas;
3. Demonstrated experience in servicing public sector accounts of equal size, complexity, and scope;

V. SELECTION PROCESS:

1. Each proposal received will be evaluated to determine if it meets the stated requirements. Failure to meet these requirements will be cause for eliminating the proposal from further consideration.
2. The City reserves the right to reject any and all proposals, to accept or reject all parts of the proposal, and to be the sole judge of the suitability of the proposals offered.
3. Proposals will be evaluated generally on the following criteria, which is neither weighted nor prioritized:
 - a. Qualifications of the agency
 - b. Ability to meet scope of work and service required
 - c. Proximity to the City
4. All submittals in response to this RFQ are public records and available for inspection and copying upon request. Any portions of the RFQ submittal marked as confidential will not be made public without consent of the

consultant prior to the award of the contract.

VI. ADDITIONAL INSTRUCTIONS, NOTIFICATIONS AND INFORMATION

1. **No Gratuities** – Respondents will not offer any gratuities, favors, or anything of monetary value to any official or employee of the City of San Juan for the purpose of influencing this selection. Any attempt by a Respondent to influence the selection process by any means other than disclosure of qualifications and credentials through the proper channels, will be grounds for exclusion from the selection process. Accordingly, contacts with members of the City Staff, which are outside of the establish process should not be initiated.
2. **All Information True** – By submitting a response, Respondents represent and warrant to the City that all information provided in the response submitted shall be true, correct and complete. Respondents who provide false, misleading or incomplete information, whether intentional or not, in any of the documents presented to the City of San Juan for consideration in the selection process may be excluded.

VII. CONFLICT OF INTEREST

Bidders are advised that they must be in compliance with the below mentioned law:

CHAPTER 176 OF THE TEXAS LOCAL GOVERNMENT CODE

Effective January 1, 2006, Chapter 176 of the Texas Local Government Code requires that any vendor or person considering doing business with a local government entity disclose in the Questionnaire Form CIQ, the vendor or person's affiliation or business relationship that might cause a conflict of interest with a local government entity. By law, this questionnaire must be filed with the records administrator of the City of San Juan no later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code. A person commits an offense if the person violates Section 176,006, Local Government Code. An offense under this section is a Class C misdemeanor.

For more information or to obtain Questionnaire CIQ, go to the Texas Ethics Commission web page at www.ethics.state.tx.us/forms/CIQ.pdf. If you have any question about compliance, please consult your own legal counsel. Compliance is the individual responsibility of each person or agent of a person who is subject to the filing requirements.

VIII. TERMS AND CONDITIONS:

1. Term of Agreement: The City anticipates selecting the Agent of Record to commence services as soon as reasonably appropriate. A contract may be negotiated for a one-year period with an option to renew for an addition two years on a year by year basis.
2. Withdrawal of RFQ: Proposals may be withdrawn before the RFQ submittal deadline by submitting a written request to Rene J. Jaime, Purchasing / Risk Manager. Re-submittal before the RFP submittal deadline can be made, however, they may not be re-submitted after the deadline.
3. RFQ Costs: All costs incurred in the preparation and presentation of the RFQ shall be the responsibility of the responding party to the RFQ. All documents submitted as part of the RFQ will become property of the City. Requests for specific material to be returned will be considered. Any material submitted that is confidential must be clearly marked as such.
4. City of San Juan Contacts: The designated individual responsible for coordination of the RFQ is Rene J. Jaime, Purchasing / Risk Manager. Any questions relating to this RFQ should be directed to rjaime@sjtx.us in writing only.



SALAZAR INSURANCE GROUP

July 15, 2019

City of San Juan

Attn: Rene J. Jaime, Purchasing/Risk Manager

709 S. Nebraska Ave.

San Juan, TX 78589-2649

RE: RFQ-BID #19-07-07-16 Agent of Record for Health, Dental, Life, AD&D and Supplemental Ins.

Salazar Insurance Group, LLC (SIG) is pleased to submit a proposal for Agent of Record for insurance services including health, dental, life, AD&D, and supplemental insurances at the City of San Juan. Our agency is well established in the Rio Grande Valley with offices in Brownsville, Harlingen, McAllen, and Rio Grande City. Our agency is staffed with 20 employees and 50 licensed insurance agents who are locally based. Furthermore, our offices manage the day to day customer service issues that our accounts need from our team on a daily basis. Because we work with a wide range of health, dental, life and supplemental carriers, our approach and representation to enrollments and product offerings allows for us to provide competitive cost savings and deliver cost management. Our goal is to provide outstanding service, competency, and dedication to your account and employees' insurance needs with excellence in communication, execution, and performance.

Joe Salazar, owner of Salazar Insurance Group, has been in business for 20+ years. Salazar Insurance Group currently provides Section 125/Voluntary products and Health Insurance (fully insured and self-funded) to school districts, municipalities, and commercial businesses. Our book of business ranges from groups that have 3 to 7,500 employees. We use a wide range of benefit platforms and enrollment technologies as we bring both innovative and creative solutions to our clients' and customers' needs. We have included a copy of our agency biography along with our scope of services with current and former references for your review and consideration. Lastly, our agency has made no agreements with any company that places it as the sole agent for such company.

Salazar Insurance Group office locations and contact numbers are noted below:

Harlingen Office – 611 E. Loop 499 Harlingen, TX 78550 (956) 425-8573 Fax (956) 428-0027

Brownsville Office – 2039 E. Price Rd., Ste. C Brownsville, TX 78521 (956) 554-0028 Fax (956) 544-5922

McAllen Office – 400 W. Pecan Blvd. McAllen, TX 78501 (956) 803-4004 Fax (956) 800-4088

Rio Grande City Office – 1 South Fort Ringgold, Bldg. 1 Rio Grande City, TX (956) 716-6850 Fax (956) 716-6880

We feel that Salazar Insurance Group will be a good fit for your organization and hope that we can meet to further discuss and have an opportunity to present you with a solution to services that you are requesting.

Respectfully,

Joe Salazar III

President

voteright@aol.com

(956) 425-8573



General Lines Agency
Life, Accident, Health and HMO

SALAZAR INSURANCE GROUP LLC
611 E LOOP 499
HARLINGEN, TX 78550

is authorized to transact business as described above.

License No: 1509262

Issue Date: 06-18-2008

Expiration Date: 06-18-2020

Generated by Sircon 168715842

TEXAS DEPARTMENT OF INSURANCE THIS IS TO CERTIFY THAT SALAZAR INSURANCE GROUP LLC 611 E LOOP 499, HARLINGEN, TX 78550 LICENSE NUMBER: 1509262	 IS HEREBY AUTHORIZED TO TRANSACT BUSINESS IN ACCORDANCE TO THE LICENSE DESCRIPTION SHOWN BELOW: General Lines Agency Life, Accident, Health and HMO Issue Date: 06-18-2008 Expiration Date: 06-18-2020 Generated by Sircon 168715842
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PRODUCER LOUIS MARINACCIO CA LICENSE #: 0B44869 8430 ENTERPRISE CIRCLE, STE 200 LAKEWOOD RANCH, FL 34202		THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND, OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW	
INSURED SALAZAR III, JOE F DBA SALAZAR INSURANCE GROUP LLC 611 E LOOP 499 HARLINGEN, TX 78550		INSURERS AFFORDING COVERAGE INSURER A ARCH INSURANCE COMPANY INSURER B INSURER C	NAIC# 11150

COVERAGES

THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INST LTR	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE (MM/DD/YY)	POLICY EXPIRATION DATE (MM/DD/YY)	LIMITS	
	GENERAL LIABILITY ☐ CLAIMS MADE ☐ OCCUR GEN'L AGGREGATE LIMITY APPLIES PER: ☐ POLICY ☐ PROJECT ☐ LOC				EACH OCCURRENCE \$ FIRE DAMAGE (Any one fire) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS-COMP/OP AGG \$	
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ ALL OWNED AUTOS ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ☐ NON-OWNED AUTOS				COMBINED SINGLE LIMIT \$ (Ea accident) BODILY INJURY \$ (per person) BODILY INJURY \$ (per accident) PROPERTY DAMAGE \$ (per accident)	
	GARAGE LIABILITY ☐ ANY AUTO				AUTO ONLY-EA ACCIDENT \$ (Ea accident) OTHER THAN EA ACC \$ AUTO ONLY: AGG	
	EXCESS LIABILITY ☐ OCCUR ☐ CLAIMS MADE DEDUCTIBLE RETENTION \$				EACH OCCURRENCE \$ AGGREGATE \$ \$ \$ \$	
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY				WC STATUTORY OTHER LIMITS \$ E.L EACH ACCIDENT \$ E.L. DISEASE-EA EMPLOYEE \$ E.L. DISEASE-POLICY LIMIT \$	
A	LIFE/HEALTH INSURANCE AGENTS ERRORS AND OMISSIONS COVERAGE	CAP0005647-13	5/1/2019	5/1/2020	Per Claim \$1,500,000 Annual Aggregate \$1,500,000	

This is an individual insurance agent's E&O claims made policy. This policy includes coverage for products and services of all life and health companies including Life, Accident, Health, Long-term care, Workers' compensation, Disability, Fixed and Indexed annuities, Variable life, Variable annuities, Flexible and Scheduled premium annuities, and Mutual funds registered with the Securities and Exchange Commission and sold or serviced through a Broker/Dealer that is a member of NASD. The following deductibles apply: \$0 for Colonial product claims, \$2500 for non-Colonial product claims. Defense costs are provided up to \$500,000 in addition to the applicable limits of liability; Defense Costs will only erode the applicable Limit of Liability once the \$500,000 has eroded. Please note that this certificate of insurance is a summary of coverage and the certificate does not amend, extend, or alter the coverage afforded by the insurance policy, and coverage is subject to all of the terms, conditions and exclusions of the policy. In the instance of any conflict, the insurance language contained in the policy will prevail and control. For full policy details, visit www.aip-benefits.org

CERTIFICATE HOLDER ☐ ADDITIONAL INSURED, INSURED LETTER:
CANCELLATION**PROOF OF INSURANCE**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

Authorized Representative:



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.

None

2 ☐ Check this box if you are filing an update to a previously filed questionnaire.

(The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information in this section is being disclosed.

None

Name of Officer

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

A. Is the local government officer named in this section receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes

☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer named in this section AND the taxable income is not received from the local governmental entity?

☐ Yes

☐ No

C. Is the filer of this questionnaire employed by a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more?

☐ Yes

☐ No

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

4

Signature of vendor doing business with the governmental entity

07/15/2019

Date

**ATTACHMENT A
FELONY CONVICTION NOTIFICATION**

State of Texas Legislative Senate Bill No. 1, Section 44.034, Notification of Criminal History, Subsection (a), states "a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony."

Subsection (b) states "a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract."

THIS NOTICE IS NOT REQUIRED OF A PUBLICLY-HELD CORPORATION
PLEASE COMPLETE THE INFORMATION BELOW

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

VENDOR'S NAME: Salazar Insurance Group LLC

AUTHORIZED COMPANY OFFICIAL'S NAME (PRINTED):
Joe Salazar III

A. My firm is publicly-held corporation, therefore, this reporting requirement is not applicable.

Signature of Company Official: _____

B. My firm is not owned nor operated by anyone who has been convicted of a felony.

Signature of Company Official: 

C. My firm is owned or operated by the following individual(s) who has/have been convicted of a felony:

Name of Felon(s): _____

Details of Conviction(s): _____

Signature of Company Official: _____

Request for Taxpayer Identification Number and Certification

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

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

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Salazar Insurance Group LLC	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate ☒ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► S Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. ☐ Other (see instructions) ►	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) See instructions. 611 E. Loop 499 6 City, state, and ZIP code Harlingen, TX 78550 7 List account number(s) here (optional)	Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

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

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

Social security number									
			-						
or									
Employer identification number									
2	6	-	2	8	6	7	9	2	1

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

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

Sign
Here

Signature of
U.S. person ►

Date ►

07/15/2019

General Instructions

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

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

Purpose of Form

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

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

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

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



SALAZAR INSURANCE GROUP

Expertise:

SIG currently provides 125/Voluntary Products, Core Benefits, Health Insurance and Life & Health Insurance Counseling in school districts, municipalities and businesses throughout Texas.

Background:

- Owned by Joe Salazar III
- Started as an enroller with Colonial Life in 1994
- Became District Manager for Colonial in 1998
- Founded Salazar Insurance Group in 2008
- 40+ Licensed Representatives
- Three offices in South Texas (Harlingen, Brownsville and McAllen)

Industry Involvement:

- RGCCISD Superintendent's Scholarship Golf Tournament – Corporate Sponsor – 9 years
- BISD Superintendent's Scholarship Golf Tournament - Corporate Sponsor 12 years
- School Partnership Programs with many districts
- Boys & Girls Club Sponsors

Licensing:

Group 1 Health/Life – Property & Casualty - LHIC

References:

<i>Brownsville ISD</i> Micaela Escobar 1900 Price Road Brownsville, Texas 78521 (956) 548-8000	<i>Tropical Texas Behavioral Health</i> Les Ortega-Soto 1901 S. 24th Ave. Edinburg, Texas 78539 (956) 289-7082
<i>Weslaco ISD</i> Michael De La Rosa 319 W. 4 th Weslaco, Texas 78596 (956) 969-6521	<i>City of McAllen</i> Jolee Perez 1300 West Houston Ave. McAllen, Texas 78505 (956) 681-1400
<i>San Benito CISD</i> Lucy Garcia 240 N. Crockett St. San Benito, Texas 78586 (956) 361-6185	<i>Rio Grande City CISD</i> Susie Castillo Fort Ringgold Rio Grande City, Texas 78582 (956) 716-6700
<u>FORMER CLIENTS</u> <i>Mission Regional Medical Center</i> Nilsa Guajardo 900 Bryan Road Mission, Texas 78572 (956) 323-1050	<u>FORMER CLIENTS</u> <i>Del Valle ISD</i> Lisa Torres 5301 Ross Road Ste. 118 Del Valle, Texas 78617 (512) 386-3027



SALAZAR INSURANCE GROUP

Additional References

City of Weslaco
255 S. Kansas Ave. Weslaco, TX 78596
Company (956) 968-3181
Contact Veronica Ramirez
vsramirez@weslacotx.gov
Relationship 27 years
300 employees

City of Brownsville
1001 E. Elizabeth St. Brownsville, TX 78521
Company number (956) 548-6037
Contact Ivan Reyes
Contact (956) 548-6064
ivanr@cob.us
Relationship 23 years
1,100 employees

City of Donna
307 S. 12th St. Donna, TX 78537
Company number (956) 464-3314
Contact Chris Garza
cgarza@cityofdonna.org
Relationship 24 years
145 employees

City of McAllen
1300 W. Houston Ave. McAllen, TX 78505
Contact (956) 681-1400
Contact Jolee Perez
jrperez@mcallen.net
Relationship 23 years
1,300 employees



SALAZAR INSURANCE GROUP

Joe Salazar III

Owner, Agent

Bio:

Joe started his insurance career with Colonial Life Insurance Company in 1994. In 1998 he became the District Manager for Colonial, representing the Rio Grande Valley. During his career with Colonial, Salazar also sold other products from other companies, including Self Funded Health plans. Through this, he was able to establish his own agency, opening offices in three different locations throughout south Texas. Salazar subsequently became a key player in different Insurance Companies' mass marketing operations in the Rio Grande Valley and the Houston area.

In 2007, Salazar was instrumental in securing Southwest Airlines Flight Attendants and Ramp Operation's insurance plans. His agency enrolled nearly 20,000 Southwest Airline employees in more than 65 locations throughout the United States that year. In 2011, Salazar helped secure Cypress-Fairbanks ISD in the Houston area. His enrollment team enrolled nearly 15,000 employees in 100 different locations in the month of June.

Paul J. "PJ" Piper

Office Manager

Bio:

PJ started his insurance career in 1994 with Colonial Life. His hard work and dedication helped him move up the ranks, and is now in charge of 30+ representatives and oversee enrollments for Salazar Insurance Group. PJ is not only in charge of pre-enrollment setup, but also post-enrollment data transfers as well. PJ understands technology, and is very familiar with payroll and HR systems. He has won Colonial's prestigious award "Coordinator of the year" five years in a row.

Dion D. Chavez

Sales Manager

Bio:

Dion was a middle school English Teacher at San Benito CISD before he started his insurance career in 1998. Dion is among the top insurance representatives in the country, winning numerous awards. His main responsibility is to recruit, train and educate our Account Executives and Enrollment Team.

Dion earned his Bachelor of Arts degree from the University of Texas at Brownsville, and an Associate of Arts degree from Texas Southmost College. He graduated Cum Laude, recognized on National Dean's List, inducted into Phi Theta Kappa and International Scholastic Order, elected to president of Phi Theta Kappa Fall of 1993. Dion has been working with Salazar Insurance Group since 1998, and plays a very important and key role in the leadership of SIG.



SALAZAR INSURANCE GROUP

Leti Martinez

Account Executive

Bio:

In December 2000 Ms. Martinez started her insurance career as an Account Manager with Mutual of Omaha in Brownsville. In 2014 she obtained her LHIC License to work as a consultant for SIG clients. She was assigned to Brownsville ISD from 2000-2007 to monitor and maintain their existing Health Benefits and to make sure clients policies and demands were met. During this time with Brownsville ISD, she worked closely with employees to help them understand their benefits. In 2007-2009 she worked with Healthsmart as an account executive, to continue her relationship with BISD and its employees. In 2009 she became an Account Executive for Salazar Insurance Group, and is responsible for maintaining great customer service with our School District clients. Her office is located at 2035 Price Road, Suite A, Brownsville, Texas 78521

Ms. Martinez graduated from James Pace High School in Brownsville in 1993, and then received a Bachelor in business administration from University of Texas at Brownsville in 1999.

Robert Daniels

Account Executive

Bio:

Robert started his career in 1990. He has worked in the Brownsville area since that year. He is well known for his excellent customer service at the City of Brownsville, Brownsville ISD and Cameron County. Robert also works out of the SIG Brownsville office located across the street from BISD's administration building located on Price Road. Mr. Daniels was born in Tampico Tamp. Mexico and moved to Brownsville, Texas in 1962. He graduated high school from Hanna High School in Brownsville, and then received a Bachelors degree from Universida De Las Americas in Puebla Mexico.

Laisa Macias

Administrative Asst./Agent/Customer Care

Bio:

Laisa is part of the support staff at SIG, assisting the agents and handling claims for employees. You will find her answering the phones in the afternoons and she can process a multitude of claims and help with product education. Laisa has a background in retail management and attended Texas State University.



SALAZAR INSURANCE GROUP

Agent services to be provided

We offer dedicated telephone, billing, and enrollment teams to support our accounts. Our account plan administrators have access to their own personal web-site, toll-free phone line, 24-hour fax, and team qualified service specialists solely dedicated to providing our accounts with personalized support.

We provide the means to file claims quickly and easily by fax, telephone, or online. Policyholders can also opt to expedite a claim payment by selecting an overnight delivery option at an additional cost. We provide a proactive telephone notice for every claim filed when we've received the claim and noted the claim file.

We further provide streamlined enrollments in which your employees can enroll in all their benefits – core and voluntary. Our trained enrollment team can meet with employees to review their benefits in a way that is easy to understand, discuss their own personal situation, and enroll them through the enrollment technologies and systems that best meet their needs.

Furthermore, we offer consistent communications. Your company's benefits program is communicated consistently to all employees, regardless of location or enrollment option. We can provide enrollment communications via letters, fliers, PowerPoint presentations, brochures, e-mails, posters, tent cards or whatever best works in pointing out key details to employees regarding their benefit offerings.

In addition, we provide daily enrollment reporting. The reporting tool allows us to provide you with data on who is enrolling, who's not, and details on elections being made each day during the enrollment. We can also update employee data through the enrollment system for personnel records to ensure current data.

Lastly, we offer Flexible options for custom data feeds, new hire support, and assistance in Section 125 administration.

Our team of customer service professionals is one of our greatest strengths. In addition to our professional, courteous local sales representatives, we have trained, dedicated team of service representatives in our Customer Service Center, including some who speak in Spanish. In addition to the dedicated telephone line, the Service Center supports fax and e-mail requests.

Our sophisticated systems enable us to focus on meeting our accounts' individual needs and schedules. Our people and systems can provide billing options to support virtually any account. Through our system, premiums can be paid through one payroll slot, and we are constantly increasing our capabilities to make business administration as easy as possible for our plan administrators.

We strive to help save costs, save time, and save energy by our quality approach to benefits administration. To that end, we deliver on our commitments, and our customers enjoy the advantage of a superior approach to convenient, simple, and courteous service.

REQUEST FOR QUALIFICATIONS

Sealed bids addressed to Rene J. Jaime, Purchasing/Risk Manager, City of San Juan, 709 S. Nebraska Ave, San Juan, Texas, will be received on Tuesday, July 16, 2019, until 10:00 a.m., at which time they will be taken to the City Hall Conference Room and will be read aloud.

**SEALED BIDS FOR
RFQ - BID #19-07-07-16
AGENT OF RECORD
FOR HEALTH, DENTAL, LIFE, AD&D AND SUPPLEMENTAL INSURANCES
PURCHASING DEPARTMENT
CITY OF SAN JUAN
709 S. NEBRASKA AVE.
SAN JUAN, TEXAS 78589-2649**

Specification can be obtained by calling the Purchasing Division 956.223.2204, by picking them up at the San Juan City Hall, 709 S. Nebraska, San Juan, Texas between the hours of 8:30 a.m. – 4:30 p.m., Monday thru Friday, or by downloading them from the City's website, www.cityofsanjuantexas.com.

Be advised that if a firm downloads the bidding document from the web page and is contemplating bidding on the project, the respondent must register with Rene J. Jaime, Purchasing / Risk Manager so that any changes/additions via Addendum can be forwarded to the firm. Register with the Purchasing Division by email at rjaime@sjtx.us. In the subject line of your email, please include RFQ 19-07-07-16 / Agent of Record. Within the email, please include the firm's name, contact person's name and title, email address, mailing address and phone.

The City of San Juan reserves the right to refuse and reject any or all bids and to waive any or all formalities or technicalities or to accept the bid to be the best and most advantageous to the City, and hold the bids for a period of sixty (60) days without taking action. Bids submitted past the aforementioned date and time will not be accepted.

Caution to those submitting bids; those not in proper form may be rejected.

I. GENERAL INFORMATION:

City of San Juan (City) is seeking written proposals from qualified insurance agents to serve as the Agent of Record for insurance services including health, dental, life, AD&D and supplemental insurances. This is to include providing the City of San Juan with recommendations on related products to offer our employees, providing service and maintenance of those products and related claims and education regarding benefits and related processes and assistance to City of San Juan employees related to our group benefits.

The Agent of Record Contract will be for a period of one (1) year from day of award with the provision to extend the contract an additional two (2) years (with one-year intervals) at the City's discretion.

The City of San Juan must receive one (1) hard copy of your submission and one electronic pdf copy on a flash drive by **10:00 a.m. on Tuesday, July 16, 2019**. Proposals must be in a sealed envelope, clearly marked **RFQ 19-07-07-16 INSURANCE AGENT OF RECORD PROPOSAL** and should be delivered and received by mail or in person to the following address:

**City of San Juan
Attention: Rene J. Jaime, Purchasing / Risk Manager
709 S. Nebraska
San Juan, Texas 78589**

Proposals should be prepared simply and economically, providing a straightforward, concise description of proposer's capabilities to satisfy the requirements of the RFQ. Emphasis should be on completeness and clarity of the content. In addition, some of those responding may be placed on a short list to make a brief 5-minute presentation based on their submission to the City Commission during a City Commission meeting.

Proposals shall be firm for a period of sixty (60) days after the closing date. Each responding proposer may withdraw their proposal if it has not been accepted within sixty (60) days from the RFQ closing date.

The award of this contract will be made by the City on the basis of the proposal which, in the City's sole and absolute judgment, will best serve the best interests and needs of the City. The City reserves the right to accept or reject any or all the proposals, and waive any informalities and irregularities in said proposals.

All proposers must provide the information requested in Section III, Proposal Submission Requirements. Failure to respond to any or all requested information may result in disqualification by the City.

Questions, interpretations or clarifications of this RFQ must be requested in writing. All questions should be directed to Rene J. Jaime, Purchasing/Risk Manager. All questions are due by 4:00PM on Thursday, July 11, 2019. Send questions to rjaime@sjtx.us.

II. SCHEDULE OF EVENTS/DATES:

ACTION

Issue RFQ

Final Questions Due

Proposals Due

Proposal Review

Notice of Intent to Award

DATE

Wednesday, July 3, 2019

Thursday, July 11, 2019

Tuesday, July 16, 2019

TBD

TBD

III. PROPOSAL SUBMISSION REQUIREMENTS:

The proposing agent shall be responsible for preparing an effective, clear, and concise proposal. The proposals must include the following minimum information:

1. Cover letter addressed to Rene J. Jaime, Purchasing / Risk Manager and signed by a person legally authorized to bind the applicant to its proposal. The cover letter must include name of the agency, broker and/or agent, address, telephone and fax numbers of the agency and email address of the person(s) who are authorized to represent the proposer. The letter should also include that the agent has made no agreements with any company that places it as the sole agent for such company.
2. Name(s), titles, and qualifications of proposed broker(s) / agents with experience in Municipal accounts of similar size and scope of service;
3. Name(s), titles, and qualifications of proposed key personnel with experience in Municipal accounts of similar size and scope of service;
4. Articulate plan and ability to provide service delivery and support to meet the following scope of work, including examples of reports, if applicable:
 - a. Proximity to the City of San Juan;
 - b. Routine and emergent consultation relating to insurance-related issues;
 - c. Philosophy regarding addressing customer/client questions and needs.
 - d. Provide consultation in the area of insurance products and recommendations.

IV. MINIMUM QUALIFICATIONS:

1. Primary servicing agent shall reside within 20 miles of City of San Juan.
2. Any proposer must be licensed to provide insurance services in the State of Texas;
3. Demonstrated experience in servicing public sector accounts of equal size, complexity, and scope;

V. SELECTION PROCESS:

1. Each proposal received will be evaluated to determine if it meets the stated requirements. Failure to meet these requirements will be cause for eliminating the proposal from further consideration.
2. The City reserves the right to reject any and all proposals, to accept or reject all parts of the proposal, and to be the sole judge of the suitability of the proposals offered.
3. Proposals will be evaluated generally on the following criteria, which is neither weighted nor prioritized:
 - a. Qualifications of the agency
 - b. Ability to meet scope of work and service required
 - c. Proximity to the City
4. All submittals in response to this RFQ are public records and available for inspection and copying upon request. Any portions of the RFQ submittal marked as confidential will not be made public without consent of the

consultant prior to the award of the contract.

VI. ADDITIONAL INSTRUCTIONS, NOTIFICATIONS AND INFORMATION

1. **No Gratuities** – Respondents will not offer any gratuities, favors, or anything of monetary value to any official or employee of the City of San Juan for the purpose of influencing this selection. Any attempt by a Respondent to influence the selection process by any means other than disclosure of qualifications and credentials through the proper channels, will be grounds for exclusion from the selection process. Accordingly, contacts with members of the City Staff, which are outside of the establish process should not be initiated.
2. **All Information True** – By submitting a response, Respondents represent and warrant to the City that all information provided in the response submitted shall be true, correct and complete. Respondents who provide false, misleading or incomplete information, whether intentional or not, in any of the documents presented to the City of San Juan for consideration in the selection process may be excluded.

VII. CONFLICT OF INTEREST

Bidders are advised that they must be in compliance with the below mentioned law:

CHAPTER 176 OF THE TEXAS LOCAL GOVERNMENT CODE

Effective January 1, 2006, Chapter 176 of the Texas Local Government Code requires that any vendor or person considering doing business with a local government entity disclose in the Questionnaire Form CIQ, the vendor or person's affiliation or business relationship that might cause a conflict of interest with a local government entity. By law, this questionnaire must be filed with the records administrator of the City of San Juan no later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code. A person commits an offense if the person violates Section 176,006, Local Government Code. An offense under this section is a Class C misdemeanor.

For more information or to obtain Questionnaire CIQ, go to the Texas Ethics Commission web page at www.ethics.state.tx.us/forms/CIQ.pdf. If you have any question about compliance, please consult your own legal counsel. Compliance is the individual responsibility of each person or agent of a person who is subject to the filing requirements.

VIII. TERMS AND CONDITIONS:

1. Term of Agreement: The City anticipates selecting the Agent of Record to commence services as soon as reasonably appropriate. A contract may be negotiated for a one-year period with an option to renew for an addition two years on a year by year basis.
2. Withdrawal of RFQ: Proposals may be withdrawn before the RFQ submittal deadline by submitting a written request to Rene J. Jaime, Purchasing / Risk Manager. Re-submittal before the RFP submittal deadline can be made, however, they may not be re-submitted after the deadline.
3. RFQ Costs: All costs incurred in the preparation and presentation of the RFQ shall be the responsibility of the responding party to the RFQ. All documents submitted as part of the RFQ will become property of the City. Requests for specific material to be returned will be considered. Any material submitted that is confidential must be clearly marked as such.
4. City of San Juan Contacts: The designated individual responsible for coordination of the RFQ is Rene J. Jaime, Purchasing / Risk Manager. Any questions relating to this RFQ should be directed to rjaime@sjtx.us in writing only.

Yvonne Ortegon
Ortegon Insurance Agency, LLC
505 S. Texas Blvd.
Weslaco, TX 78596
Work Ph: 956-373-1109
Cell Ph: 956-463-0945
Fax: 956-284-0503
Email: Yvonne@OrtegonAgency.com

City of San Juan

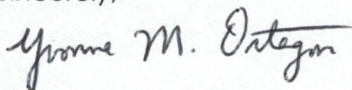
Attention: Rene J. Jaime, Purchasing / Risk Manger
709 S. Nebraska
San Juan, Texas 78589

RE: RFQ 19-07-07-16 INSURANCE AGENT OF RECORD PROPOSAL

Dear Mr. Rene J. Jaime,

Please accept this letter as confirmation for the submission of the above reference RFQ. I, Yvonne M. Ortegon, am the owner and founder of Ortegon Insurance Agency, LLC. My firm is a Texas Certified Minority and Woman Owned Business. My office is located in Weslaco, TX, which is approximately 10 miles from the City of San Juan. I am licensed to provide insurance services in the State of Texas. My firm exclusively focuses on the needs of the public sector and nonprofits in South Texas. As an Agent, I have no agreements with any companies that places me as the sole agent for such company.

Sincerely,



Yvonne M. Ortegon
Ortegon Insurance Agency, LLC



REQUEST FOR QUALIFICATIONS

**SEALED BIDS FOR
RFQ – BID#19-07-07-16
AGENT OF RECORD
FOR HEALTH, DENTAL, LIFE, AD&D AND SUPPLEMENTAL INSURANCES**

III. PROPOSAL SUBMISSION REQUIREMENTS:

1. Cover letter is attached. As an Agent, Yvonne M. Ortegon, has made no agreements with any company that places it as the sole agent for such company.
 - a. Agency Name: Ortegon Insurance Agency, LLC.
 - b. Agent/Owner: Yvonne M. Ortegon
 - c. Address: 505 S. Texas Blvd., Weslaco, TX 78596
 - d. Telephone: Work (956) 373-1109, Cell (956)463-0945
 - e. Fax Number: (956) 284-0503
 - f. Email Address: yvonne@ortegonagency.com
2. Name(s), titles, and qualifications of proposed broker(s)/agents with experience in Municipal accounts of similar size and scope of service.
 - a. Yvonne M. Ortegon, Agent/Broker/Owner
 - Yvonne Ortegon was born and raised in Weslaco, TX. She holds a Bachelor's degree in Finance-Risk Management from St. Mary's University in San Antonio, TX. She also earned a Masters in Business Administration (MBA) from the University of Texas at Pan American in Edinburg, TX. She has been licensed as a General Lines Insurance Agent in the State of Texas since 1996 and has over 20 years' experience in the Insurance/Employee Benefits and Human Resources fields.
 - Current Employee Benefits Consultant with the City of Pharr
 - Current Agent of Record (AOR) for the following School Districts
 - a. Pharr – San Juan – Alamo ISD: Approx. 4,700 Employees
 - b. San Benito CISD: Approx. 1,600 Employees
 - c. Weslaco ISD: Approx. 2,200 Employees
 - b. Robert Rodriguez, Agent/Broker
 - Robert Rodriguez has been licensed as a General Lines Insurance Agent in the State of Texas since 1999. He has worked with several Municipal accounts of similar size and scope of service.

- c. Dominic Rodriguez, Agent/Broker
- Dominic Rodriguez has been licensed as a General Lines Insurance Agent in the State of Texas Since 2007. He has worked with several Municipal accounts of similar size and scope of service.
3. Name(s), titles, and qualifications of proposed key personnel with experience in Municipal accounts of similar size and scope of service.
- a. Yvonne M. Ortegon, Agent/Broker/Owner
- Yvonne Ortegon was born and raised in Weslaco, TX. She holds a Bachelor's degree in Finance-Risk Management from St. Mary's University in San Antonio, TX. She also earned a Masters in Business Administration (MBA) from the University of Texas at Pan American in Edinburg, TX. She has been licensed as a General Lines Insurance Agent in the State of Texas since 1996 and has over 20 years' experience in the Insurance/Employee Benefits and Human Resources fields.
 - Current Employee Benefits Consultant with the City of Pharr
 - Current Agent of Record (AOR) for the following School Districts
 - a. Pharr – San Juan – Alamo ISD: Approx. 4,700 Employees
 - b. San Benito CISD: Approx. 1,600 Employees
 - c. Weslaco ISD: Approx. 2,200 Employees
4. Articulate plan and ability to provide service delivery and support to meet the following scope of work, including examples of reports, if applicable:
- a. Proximity to the City of San Juan – Approx. 10 miles.
- The primary servicing agent shall reside within 20 miles of the City of San Juan.
- b. Routine and emergent consultation relating to insurance-related issues.
- Ortegon Insurance Agency is 100% independent and has no ties to any insurance company or benefit provider. Ortegon Insurance Agency will be accountable only to the City of San Juan and never allow outside influences to impact our ability to service the city.

Budgeting for the public sector is a complex process with multiple stakeholder groups and the need to factor the changing regulatory landscape, including healthcare reform. Ortegon Insurance Agency is solely dedicated to striving to meet the needs of public and nonprofit employers in South Texas.

As a provider of services to the public, we understand that the City of San Juan faces unique challenges. Your organization is exempt from certain laws and governed by others that may allow for flexibility and cost efficiency. Tax revenue streams and other sources that are subject to change drive the design and financing of your employee compensation and insurance benefit programs. Also, in many cases, the City of San Juan's decisions are affected by collective bargaining agreements and intense public scrutiny.

We take these factors into consideration. We bring a broad range of sector-focused solutions and expertise such as collective purchasing, benchmarking data and healthcare utilization review and analysis. Ortegon Insurance Agency will strengthen the City of San Juan with:

- Guidance throughout the bargaining process and recommendations on best practices moving forward
- Communication with employees so they understand the value of their benefit package
- Deep understanding of compliance and legal issues, including healthcare reform and labor laws
- Collaborative communication with key stakeholders to build consensus and resolve issues.

c. Philosophy regarding addressing customer/client questions and needs.

- The founder and sole proprietor, Yvonne M. Ortegon, believes that the focus on the needs of the public sector employers and a culture of putting others before self has allowed the firm to carve out a unique niche. Ortegon Insurance Agency provides customized services to handle the needs of their clients. They focus on exceptional customer service. They want to educate their clients on the diverse insurance products available and how they work, so that their clients are confident in choosing the insurance products that are right for their organization.

It is imperative that the City of San Juan's employees clearly understand your benefit programs and the role it plays as part of their total compensation package. Employees who have a greater understanding of their benefit program will value it more and will be more likely to stay with their organization. A strong communications program is also very important in a competitive recruiting environment.

Your communications strategy will address the cost drivers specific to your plan and adhere to the City of San Juan's cultural and financial constraints. At the same time, it will provide your employees with a competitive benefits program that they highly value. This dynamic approach allows you to validate and define an effective long-term benefits strategy by aligning employer and employee needs.

In addition to employee communications strategy development, Ortegon Insurance Agency's communications services, resources and technology solutions include:

- Open enrollment and new hire orientation materials
- Employee education programs and websites
- Benefit confirmation statements
- Employee newsletters

With Oregon Insurance Agency, you have the expertise and the commitment required to communicate a straightforward, compelling message about the value of the City of San Juan's benefit programs.

- d. Provide consultation in the area of insurance products and recommendations.
- Proper vendor management begins with the selection of the right partner for the City of San Juan's employee benefits program. Ortegon Insurance Agency interacts with vendors to truly understand their capabilities and offerings. You can be confident we will recommend only those companies whose insurance products and services combine the broadest and most effective range of options at a fair value. Ortegon Insurance Agency has the experience, the relationships and the independence your organization needs to get the most effective combinations of rates, policy terms and plan design.

To make sure the best interests of the City of San Juan are represented in all interactions with vendors, Ortegon Insurance Agency will handle all ongoing service in addition to negotiations. This includes support and training for your staff on how to work effectively with your selected vendors. We will coordinate all your open enrollment activities and support and maintain all your communication needs. This includes providing service and maintenance of these benefit products and related claims in order to assist the City of San Juan's employees regarding all their group benefits.

RFQ: 19-07-07-16

Insurance Agent of Record Proposal

City of San Juan

**Attention: Rene J. Jaime, Purchasing / Risk Manager
709 S. Nebraska
San Juan, Texas 78589**

Tuesday, July 16, 2019 @ 10:00 a.m.

**Submitted by
Newkirk & Newkirk, Inc.
3101 N. Jackson, McAllen, Texas 78501 Telephone (956) 664-0200 Fax (956) 664-0203**

CITY OF SAN JUAN
AGENT OF RECORD FOR EMPLOYEE HEALTH, DENTAL, LIFE AND AD&D AND SUPPLEMENTAL INSURANCES
RFQ – BID # 19-07-07-16
DUE DATE: TUESDAY JULY 16, 2019 AT 10:00 A.M.

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- Certification Regarding Drug-Free Workplace
- Certificate of Texas Historically Underutilized Business (HUB)
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- Minimum Standard Non-Discrimination in Employment Policy
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- Minimum Standard Non-Discrimination in Employment Policy
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- Submission of Registration for Bidding & Acknowledgement email
- New Application & Commodity Listing with City of San Juan
- Tax Payer Identification Number
- W-9

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Tab 1 Company Information

- **Introduction Letter**
- **Contact Information**
- **Agents & Staff**
- **Organization Chart**
- **Scope of Services**
- **References**



NEWKIRK & NEWKIRK, INC.

Insurance Services for Businesses & Individuals

July 16, 2019

City of San Juan
Attention: Rene J. Jaime, Purchasing / Risk Manager
709 S. Nebraska
San Juan, Texas 78589

RE: RFQ 19-07-07-16 Insurance Agent of Record Proposal

We respectfully submit our "Statement of Qualifications" for RFQ # 19-07-07-16 and would like to thank you for allowing us an opportunity to offer our Agent Services for your Employee Health, Dental, Life, AD&D and Supplemental Insurances.

We are a professional support center committed in providing services to public entities, non-profits, private business owners, and individuals in the entire State of Texas by offering unsurpassed customer service, integrity and confidentiality. Our firm, which specializes in Employee Benefits, will serve you, the client, by conducting careful analyses of loss ratios, group utilization and history in order to provide competitive quotes and any other suitable options. Further, we extend our customer service to your employees and we are available for enrollment as well as addressing ongoing service questions and resolving issues.

Newkirk & Newkirk has not been, or is currently under any litigation for improper or fraudulent or unfair activities. Further, we do not have an agreement with any company that places it as the sole agent for such company nor an affiliation with any carriers other than appointments to do business with over 160 carriers/companies.

If considered, I am available for further questions or discussion and if considered, am open to the negotiations of a fair and reasonable price for the services rendered. The content of this package will provide additional information pertaining to our office, our history and the services being offered.

Thank you and please feel free to contact me at the office number or my business cell number 956-778-6395. Additional contact information is within this letterhead.

Sincerely,


Pierre Newkirk
Newkirk & Newkirk, Inc.

WWW.NEWKIRKANDNEWKIRK.COM

3101 North Jackson Rd. McAllen, Texas 78501 Telephone (956) 664-0200 Fax (956) 664-0203 pierre.newkirk@voyafa.com

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Contact Information for Newkirk & Newkirk, Inc.

Office Phone # 956-664-0200 Office Fax # 956-664-0203

3101 N. Jackson Rd., McAllen, Texas 78501

Agent/Broker/Consultant
(Primary)

Pierre Newkirk
pierre.newkirk@voyafa.com
Cell Phone 956/778-6395

Service Agent (Secondary)

Marisa Rivera
mrivera@newkirkandnewkirk.com
Cell Phone 956/867-2226

Back-up Agents

Martin Trevino martin@newkirkandnewkirk.com;

Ramiro Garza: rgnewkirk@yahoo.com

Monique Farias: mfarias@multi-line.com

Service Associates

Connie Pena
connie@newkirkandnewkirk.com

Patricia Cavazos
patricia@newkirkandnewkirk.com

Krisann Mejia,
krisann@newkirkandnewkirk.com

Joe Zamora
joe@newkirkandnewkirk.com

Nadia Saenz
nadia@newkirkandnewkirk.com

NEWKIRK & NEWKIRK, INC.'S AGENTS & STAFF

AGENTS:

Pierre Newkirk- President and Lead Contact: Licensed Agent; Oversees daily operations of Newkirk & Newkirk, Inc.

Marisa Rivera, Ramiro Garza, Susie Gonzalez, Tonya Garcia, Martin Trevino, Cecilia Garza, Monique Farias and Pete Morales- Licensed Agents and Benefit Specialists which gather company information to assist in the quoting process, assist with enrollments, provide customer service to clients/employees (one to one basis as necessary) and explain benefits. All agents maintain customer service relation with both employer and employees as necessary.

OFFICE STAFF:

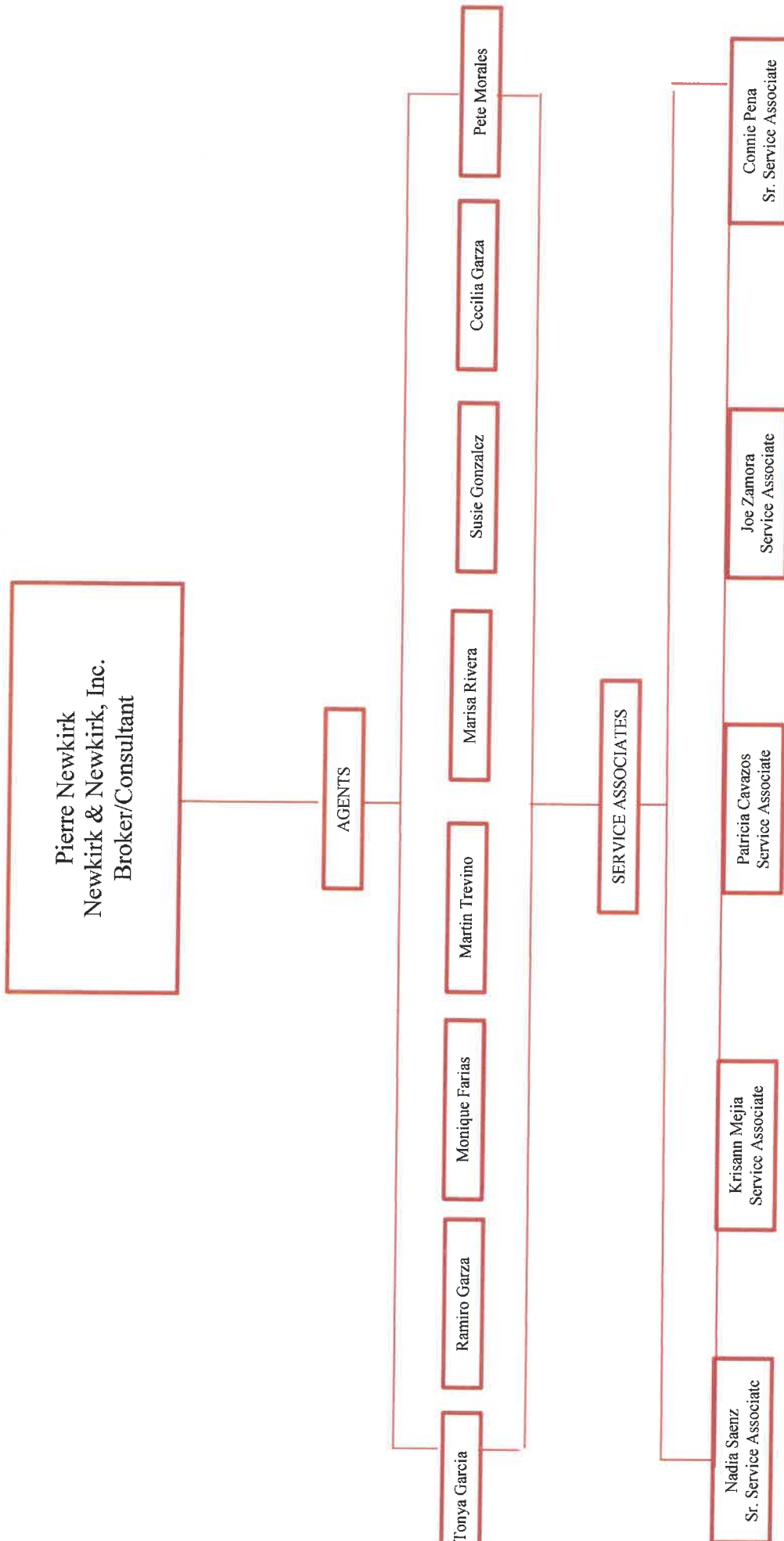
Nadia Saenz, Connie Peña, Patricia Cavazos, Krisann Mejia and Joe Zamora are employees which have an average of 15 years of experience and provide Agent support and administrative functions, such as prepare quotes, assist in RFP preparation, respond to customer service requests, process corrections on policies, order ID cards, process additions, terminations and cancellations of employees within the group and maintain activity logs on each account.

As mentioned previously, our office staff is available during regular business hours in addition to after business hours as requested, to accommodate unusual work schedules or busy day-to-day activities. The entire staff and agents will be at your disposal.

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Scope of Services
City of San Juan, Texas
July 16, 2019

1. INCEPTION

- Introduce ourselves/organization to the client and present our services, processes, etc.
- Discuss reports necessary throughout the service contract

2. ANALYSIS OF LOSS EXPOSURE/CONTROL

- Collect data for prior year, (i.e. claims experience, utilization, rates, trends, administration experience, etc.) from the current carrier(s) to begin review and analysis to include fees and commission structure
- Meet with Client on cost, measure for budget allocation to consider when/if requesting bids
- Identify and report relevant changes, loss exposure, losses and changes in policy and/or benefits
- If instructed, establish the timeline with client and proceed with solicitation of bids from other carriers

3. SOLICITATION AND NEGOTIATION AND STRATEGY OF PLAN

- Prepare the bid specifications to consider the timeline of the renewal of current plans
- Request bids from multiple carriers that meet the specifications
- Collect and analyze the responses and evaluate the quality of bids, cost effectiveness, competitiveness, and carrier credentials and negotiate with carrier based on client budget
- Select options and prepare proposal comparisons to present to Client, committee etc. and
- Discuss the data and details with respect to the benefits, plan design, and plan management, as well as cost/rates, employee and dependent cost, and value added services to include wellness strategies on a short term and long term basis
- Finalize selection of plans, benefits, rates, contributions and carrier contracts.

4. ANNUAL OPEN ENROLLMENT

- **Establish Timeline**
- Assist with announcements of Open Enrollment
- Establish schedule of employee enrollment, prepare the employee benefit package(s), and commit the agents and representatives for the enrollment process,
- Report to the Human Resource or designated client contact person to:
 - Meet the accommodations of enrollment
 - Follow through with missing documentation or employees

5. MAINTAIN INSURANCE CARRIER RELATIONSHIP

- Coordinate the paperwork finalization and implementation of the enrollment and any contract documentation with the insurance carrier(s).
- Report on the final closing and completion of enrollment
- Continue services required for status of benefits and claims administration issues, performance updates

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6. MAINTAIN PROMPT CLIENT SERVICES

- Assist the Client with questions, service, benefits, invoices, contracts, policies, problem resolution and/or administration and service procedures on invoices and employee updates.
- Scheduled visits and/or calls with the Client
- Availability for new hire enrollment or existing employee problem resolution available on location or by telephone.

7. PROVIDE UPDATES

- Services are available on a fixed schedule (**timeline**) or upon request throughout the year to initiate an analysis to review and evaluate costs, claims utilization, administrative issues and trends and performance with Client

8. YEAR ROUND EMPLOYEE BENEFITS

- Provide informational material as requested for meetings, workshops, Health Fairs or payroll stuffers to clarify and simplify guidelines of the employee benefits, offer workshops.

9. EXTENSION TO HUMAN RESOURCE DEPARTMENT

- Staff is professional and knowledgeable to discuss the Human Resource organizational dynamics and information on COBRA, HIPPA FMLA, Affordable Care Act and employee benefit requirements at the local, state and federal level as well as the impacts on the public and private sectors. Many issues may be referred to Department of Labor.

10. COMMISSIONS AND FEES

- Schedules of commission rates are different for different products and from carrier to carrier. This is paid by carrier and not invoiced to client

11. LEGISLATION

- News that comes about in the industry/government, during these volatile times will be reported to the client and agent/broker will recommend the changes required, if any, that may affect the employee benefits.

12. ADMINISTRATION SERVICES

- Additional administrative services that are required of the client will be discussed and recommendation(s) will be made. The Affordable Care Act has initiated IRS and/or Department of Labor Forms and rules that may need to be referred to your accountant or a professional in Labor/Employer requirements. As well, the Federal Government requires the employer to offer COBRA or State Continuation, as applicable. The agent/broker will discuss the options and facilitate information and/or contacts.

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13. THIRD PARTY REFERRAL

- To keep the client in compliance with any services or industry related legislative changes, not available by the agent/broker, contact information on a third party entity(s) can be provided.

14. GENERAL SCOPE OF SERVICES

- Agent/Broker is committed to retain the ongoing level of ethics, education and training to continuously provide accurate and fair business practices to our Clients. The above services are not limited to a fixed schedule and the Agent/Broker is available to accommodate requests from the client at their request.
- Records are kept on processes, services, telephone calls and emails with the Client as it pertains to the account and/or employee benefits.

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REFERENCES

City of Donna
307 S. 12th Street
Donna, TX 78537
Contact: Chris Garza
Finance
Email: cgarza@cityofdonna.org
Office: (956) 464-3314
Coverage: Vision
2011 to Present
Carrier: Avesis
2009 to present
80+

City of La Feria
115 E. Commercial Ave.
La Feria, TX 78559
Amanda Morales
Human Resources
Office: (956) 797-2261
Email: amorales@cityoflaferia.com
Coverage: Dental, Vision
Carrier: Principal
2013 to present
58

City of Crystal City
101 E. Dimmit St.
Crystal City, TX 78839
Becky Moncada
Human Resources
Office: (830) 374-3477
Email: rmoncada@cityofcc.org
Coverage: Health/Vision: TML
GAP: SunLife
Dental: Ameritas
Life/AD&D: Dearborn National
2013 to Present
50+

City of Pearsall
215 S. Ash St.
Pearsall, TX 78061
Ruben Frausto
Human Resources
Email: rfrausto@cityofpearsall.org
Office (830) 334-3676
Coverage: Health, Dental, Vision, Gap, Life
AD&D
Carrier: UHC, TML, Sunlife
2014 to Jan 2019
73

Amigos Del Valle
4138 Crosspoint Blvd.
Edinburg TX 78539
Contact: Alex Guerra
Executive Director
(956) 213-9400
Email: aguerra@advrgv.org
Coverage: Health, Dental, Vision, Gap, Life
& Supplemental
Carrier: BCBS, Ameritas, The Standard,
SunLife, Companion Life
2014 to 2017
100+

Region One Education Service Center
1900 West Schunior Street
Edinburg, TX. 78541
Contact: Hortencia Olivarez
Title: Administrator
(956) 984-6286
Coverage: Dental
Carrier(s) Assurant
2014 to 2016
240+

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Tab 2 Company Expertise/Experience

- **Credentials**
- **Licenses**
- **Errors & Omissions**

NEWKIRK & NEWKIRK, INC.

Credentials

Our corporate office and main staff resides in McAllen Texas. Within this section, you will find my licenses and errors and omissions as well my experience, accomplishments and credential written below. In Tab 1, the scope of our services are simply described, however, we find that suitable accommodations to the client can be made to service them and the employees in their insurance needs.

ESTABLISHMENT

Newkirk & Newkirk, Inc., established in 1992, has been in operation successfully in South Texas since its inception. The firm is a Texas corporation and has one duly authorized officer, Pierre Newkirk, who is also its sole shareholder.

PERSONNEL

Newkirk & Newkirk, Inc. has six full time administrative support workers, and eight licensed insurance agents including Mr. Newkirk. Newkirk & Newkirk, Inc. is headquartered in the Rio Grande Valley and has ten additional support staff members in our Austin and San Antonio offices that assist with our caseload.

OBJECTIVE

Newkirk & Newkirk, Inc. is committed to support each client's developmental and implementation of their individual financial plans helping them meet their financial objectives. Our firm performs at the highest level of professionalism in all areas of our organization and values clientele relationships by providing dependable and quality resources. Our goal is to meet the client's objective and timeframe and requirements related to the employee benefits

CLIENTELE

Newkirk & Newkirk, Inc. currently services over 500 group health insurance accounts, over 350 life insurance clients, and over 320 investment clients in a variety of industries (i.e. private business, municipalities, school districts etc).

ACCOMPLISHMENTS

Pierre Newkirk, along with the firm has been awarded VOYA's Top 4 Percent Producer for the last eight years. Mr. Newkirk has been part of the Voya and Jefferson Pilot Million Dollar Round Table for the last ten years. The firm has participated and aided the University of Texas RGV in Edinburg, Texas with gifting and retirement planning for the last ten years alongside one of its board members, Mr. Bill Ellis, a local McAllen attorney, who is board certified in Estate Planning. For the last fifteen years, Newkirk & Newkirk, Inc. has been named Top Producer for AETNA, BlueCross BlueShield, Celtic, Humana Leaders Club, and Valley Baptist in the South Texas Region. Mr. Newkirk has been nominated as a Premier Partner with Jefferson Pilot for all his years in the insurance field.

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3101 North Jackson Rd. McAllen, TX 78501 Telephone (956) 664-0200 Fax (956) 664-0203 pierre.newkirk@voyafa.com

REGISTERED REPRESENTATIVE OF AND SECURITIES OFFERED THROUGH VOYA FINANCIAL ADVISORS, INC.
NEWKIRK AND NEWKIRK, INC. IS NOT A SUBSIDIARY OF NOR CONTROLLED BY VOYA FINANCIAL ADVISORS, INC

NEWKIRK & NEWKIRK, INC.

Credentials

Page 2

In addition to experience with health insurance carriers, Newkirk & Newkirk, Inc. has also carried for 19 years many ancillary products with numerous companies (i.e. Colonial Heritage, Ameritas, Dearborn National, Humana, BlueCross, AETNA, Block Vision, Avesis, MetLife, UNUM, Lincoln Financial, Prudential, The Standard, Principal, and United Healthcare among others). The firm consistently adds companies as they expand their products and/or become available in the market.

CREDENTIALS

Newkirk & Newkirk, Inc. is licensed to work with over 160 companies including, but not limited to: Aetna, Blue Cross Blue Shield of Texas, New England Financial, ING, Jefferson Pilot, Lincoln Financial, among others. Newkirk & Newkirk, Inc. has Errors & Omissions coverage of \$100 million aggregate limit. The firm has a Security License 6, 63 and is a member of the National Association for the Securities Exchange Commission, National Association of Security Dealers (NASD), and SIPC. Newkirk & Newkirk has not been under any litigation for improper or fraudulent or unfair activities. Financial Statements are available for the perusal of our clients.

JOB PERFORMANCE

Newkirk & Newkirk, Inc. works along side several local CPA firms and law firms for the purpose of establishing our clients with Estate Planning, Charitable Planning, and financial planning.

OTHER VENTURES

Newkirk & Newkirk, Inc. has established a sister company, Multi-Line Agency, Inc., a Texas Corporation, that offers clients various types of commercial insurance, including but not limited to general liability, professional liability, commercial packages, and worker's compensation.

DUTIES AND RESPONSIBILITIES

We will provide assistance with enrollment, claims processing, additions, changes and terminations. Be advised that we are experts in fully insured plans as well as self-funded and level funded plans and major medical plans. In addition, we will provide educational opportunities for employees to learn how to maximize their insurance benefits. Finally, we will conduct an annual review of all claims vs. premium in order to prepare for subsequent renewals. Above and beyond the annual reviews we will also provide quarterly reviews for all employee benefit plans.

WWW.NEWKIRKANDNEWKIRK.COM

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07152019

**General Lines Agency**

Life, Accident, Health and HMO

NEW KIRK & NEW KIRK INC3101 N JACKSON
MCALLEN, TX 78501**is authorized to transact business as described above**

License No: 11556

Issue Date: 11-14-2000

Expiration Date: 11-14-2020

Generated by Sircon 176905746

TEXAS DEPARTMENT OF INSURANCE THIS IS TO CERTIFY THAT NEW KIRK & NEW KIRK INC 3101 N JACKSON, MCALLEN, TX 78501 LICENSE NUMBER: 11556	 IS HEREBY AUTHORIZED TO TRANSACT BUSINESS IN ACCORDANCE TO THE LICENSE DESCRIPTION SHOWN BELOW: General Lines Agency Life, Accident, Health and HMO Issue Date: 11-14-2000 Expiration Date: 11-14-2020 Generated by Sircon 176905746
---	---



Life and Health Insurance Counselor

PIERRE NEWKIRK

3101 N JACKSON
MCALLEN, TX 78501

is authorized to transact business as described above

License No: 1759618

Issue Date: 04-24-2012

Expiration Date: 12-31-2020

Generated by Sircon 178646238

TEXAS DEPARTMENT OF INSURANCE THIS IS TO CERTIFY THAT PIERRE NEWKIRK 3101 N JACKSON, MCALLEN, TX 78501 LICENSE NUMBER: 1759618	 IS HEREBY AUTHORIZED TO TRANSACT BUSINESS IN ACCORDANCE TO THE LICENSE DESCRIPTION SHOWN BELOW: Life and Health Insurance Counselor Issue Date: 04-24-2012 Expiration Date: 12-31-2020 Generated by Sircon 178646238
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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

1/31/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION** IS **WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Arthur J. Gallagher & Co. Insurance Brokers of CA. 18201 Von Karman Ave Suite 200 Irvine CA 92612	CONTACT NAME: Richard Huynh PHONE (A/C, No, Ext): 949-349-9855 E-MAIL ADDRESS: certrequests@ajg.com FAX (A/C, No): 949-349-9955
INSURED Voya Financial Advisors, Inc. Voya Financial, Inc. 909 Locust Street Des Moines IA 50309	INSURER(S) AFFORDING COVERAGE INSURER A: AIG Specialty Insurance Company INSURER B: Lexington Insurance Company INSURER C: INSURER D: INSURER E: INSURER F:
INGAMER-01	NAIC # 26883 19437

COVERAGES**CERTIFICATE NUMBER:** 1661661390**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVP	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☐ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO-JECT ☐ LOC OTHER:					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ OWNED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ HIRED AUTOS ONLY ☐ NON-OWNED AUTOS ONLY					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB ☐ OCCUR EXCESS LIAB ☐ CLAIMS-MADE DED RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? ☐ Y ☐ N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below					PER STATUTE ☐ OTH-ER ☐ E.I. EACH ACCIDENT \$ E.I. DISEASE - EA EMPLOYEE \$ E.I. DISEASE - POLICY LIMIT \$
A B	E&O Insurance Claims Made & Reported		03-825-28-18 03-825-28-22	12/31/2018 12/31/2018	12/31/2019 12/31/2019	Non-Voya Claim \$2M* Per Voya Claim \$4M** Policy Aggregate \$30M

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

The certificate holder listed below is defined as an Insured under this policy. If an entity is listed, coverage only applies to the errors & omissions of Insured VFA reps only. Limits of Liability (as listed above): *applies to non-Voya Life Products**applies to Voya Products, Securities and outside RIA activity. Deductible (per claim): \$500 Voya Life VA, VL, Fixed Products/\$2,500 Non-Voya Life & Fixed Products/\$10,000 Securities, Mutual Funds and Investment Advisory. Coverage: Sale & servicing of Life, A&H, Disability Long Term Care, Fixed Products, VL, VA, Mutual Funds, Securities & Investment Advisory through VFA. E&O Policy for Illinois Reps (03-825-28-22). The above aggregate does not apply to NY domiciled reps.

CERTIFICATE HOLDER**CANCELLATION**

PIERRE NEWKIRK
NEWKIRK & NEWKIRK, INC.
3101 N JACKSON RD
MCALLEN TX 78501

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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Tab 3 Forms

- **Conflict of Interest**
- **Certification Regarding Debarment, Suspension and Other Matters**
- **Certification Regarding Drug-Free Workplace**
- **Certificate of Texas Historically Underutilized Business (HUB)**
- **Certification Regarding Lobbying**
- **Certification of No Felony Conviction**
- **Minimum Standard Non-Discrimination in Employment Policy**
- **Non-Collusion Affidavit**

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

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

N/A

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.

N/A

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.

N/A

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 N/A

Signature of vendor doing business with the governmental entity

Date

**CERTIFICATION REGARDING DEBARMENT, SUSPENSION AND OTHER
RESPONSIBILITY MATTERS**

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668, 682), Department of Health and Human Services (45 CFR Part 76).

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

1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property;
3. Are not presently indicated for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and,
4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the statements in this certification, such prospective recipient shall attach an explanation to this certification form.

Newkirk & Newkirk, Inc.

Name of Organization/Firm

Pierre Newkirk
Signature of Authorized Representative

7-15-2019
Date

Pierre Newkirk Agent/Consultant
Print Name and Title of Authorized Representative

CERTIFICATION REGARDING DRUG-FREE WORKPLACE

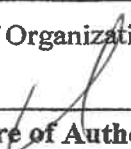
This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned subcontractor certifies it will provide a drug-free workplace by:

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

Newkirk & Newkirk, Inc.

Name of Organization/Firm


Signature of Authorized Representative

7-15-2019
Date

Pierre Newkirk Agent/Consultant

Print Name and Title of Authorized Representative



GLENN HEGAR TEXAS COMPTROLLER OF PUBLIC ACCOUNTS

The Texas Comptroller of Public Accounts (CPA) administers the Statewide Historically Underutilized Business (HUB) Program for the State of Texas, which includes certifying minority-, woman- and service disabled veteran-owned businesses as HUBs and facilitates the use of HUBs in state procurement and provides them with information on the state's procurement process.

We are pleased to inform you that your application for certification/re-certification as a HUB has been approved. Your company's profile is listed in the State of Texas HUB Directory and may be viewed online at <https://mycpa.cpa.state.tx.us/tpasscmbsearch/index.jsp>. Provided that your company continues to meet HUB eligibility requirements, the attached HUB certificate is valid for the time period specified.

You must notify the HUB Program in writing of any changes affecting your company's compliance with the HUB eligibility requirements, including changes in ownership, day-to-day management, control and/or principal place of business. *Note: Any changes made to your company's information may require the HUB Program to re-evaluate your company's eligibility.*

Please visit our website at <http://comptroller.texas.gov/procurement/prog/hub/> and reference our publications (i.e. Grow Your Business pamphlet, HUB Brochure and Vendor Guide) providing additional information on state procurement resources that can increase your company's chances of doing business with the state.

Thank you for your participation in the HUB Program! If you have any questions, you may contact a HUB Program representative at 512-463-5872 or toll-free in Texas at 1-888-863-5881.

Texas Historically Underutilized Business (HUB) Certificate



Certificate/VID Number:	1742950891800
File/Vendor Number:	497971
Approval Date:	19-JUL-2016
Scheduled Expiration Date:	19-JUL-2020

The Texas Comptroller of Public Accounts (CPA), hereby certifies that

NEWKIRK & NEWKIRK, INC.

has successfully met the established requirements of the State of Texas Historically Underutilized Business (HUB) Program to be recognized as a HUB. This certificate printed 22-JUL-2016, supersedes any registration and certificate previously issued by the HUB Program. If there are any changes regarding the information (i.e., business structure, ownership, day-to-day management, operational control, business location) provided in the submission of the business' application for registration/certification as a HUB, you must immediately (within 30 days of such changes) notify the HUB Program in writing. The CPA reserves the right to conduct a compliance review at any time to confirm HUB eligibility. HUB certification may be suspended or revoked upon findings of ineligibility.

Paul A. Gibson

Paul Gibson, Statewide HUB Program Manager
Statewide Support Services Division

Note: In order for State agencies and institutions of higher education (universities) to be credited for utilizing this business as a HUB, they must award payment under the Certificate/VID Number identified above. Agencies, universities and prime contractors are encouraged to verify the company's HUB certification prior to issuing a notice of award by accessing the Internet (<https://mycpa.cpa.state.tx.us/tpasscmbsearch/index.jsp>) or by contacting the HUB Program at 512-463-5872 or toll-free in Texas at 1-888-863-5881.

Rev. 06/16

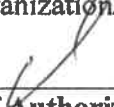
CERTIFICATION REGARDING LOBBYING

This certification is required by the Federal Regulations Implementing Section 1352 of the Program Fraud and Civil Remedies Act, Title 31 U.S. Code for the Department of Agriculture (7 CFR Part 3018), Department of Labor (29 CFR Part 93), Department of Education (34 CFR Part 82), Department of Health and Human Services (45 CFR Part 93).

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

1. No federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned to any person for influencing or attempting to influence an officer or employee of Congress, or an employee or a Member of Congress in connection with the awarding of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a federal contract, grant, loan, or cooperative agreement.
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, and or cooperative agreement, the undersigned shall complete and submit Standard Form – LLL, "Disclosure Form to Report Lobbying", in accordance with the instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all sub-recipients shall certify and disclose accordingly.

Newkirk & Newkirk, Inc.
Name of Organization/Firm


Signature of Authorized Representative

7-15-2019
Date

Pierre Newkirk Agent/Consultant
Print Name and Title of Authorized Representative

Felony Conviction Notification

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

Vendor's Name: NEWKIRK AND NEWKIRK, INC.

Authorized Representative of Company PIERRE NEWKIRK
(please print):

Please check off one box and sign the form in the appropriate space(s):

☐ A. My firm is a publicly held corporation; therefore, this reporting requirement is not applicable.

Signature of Company Official

Date

☒ B. My firm is not owned nor operated by anyone who has been convicted of a felony.

Signature of Company Official

7-15-2019
Date

☐ C. My firm is owned and operated by the following individual(s) who has/have been convicted of a felony:

Name of Felon(s):

Details of Conviction(s):

Signature of Company Official: _____ Date: 7-15-2019

Minimum Standard Non-Discrimination in Employment Policy

Title VII of the Civil Rights Act of 1964 prohibits discrimination in employment on the basis of race, color, sex, or ethnic origin; the Age Discrimination in Employment Act (ADEA) prohibits discrimination against employees 40 years and older; and the Americans with Disabilities Act (ADA) prohibits discrimination in employment on the basis of disabilities and requires that employers reasonably accommodate individuals with disabilities who can otherwise perform a job. As with other labor standards, independent contractors generally would not be covered by anti-discrimination laws

As an Equal Employment Opportunity (EEO) employer, the Contractor will conduct its personnel activities in accordance with established federal, state and local EEO laws and regulations.

During the performance of this contract, contractor and its subcontractors shall not unlawfully discriminate against any employee or applicant for employment or service because of sex, race, religion, color, national origin, ancestry, physical disability (including HIV and AIDS), mental disability, medical condition (cancer), marital status, age (over 40) or denial of family care leave.

Contractors and subcontractors shall insure that the evaluation and treatment of their employees and applicants for employment/service are free of such discrimination and harassment.

THE UNDERSIGNED CERTIFIES THAT THE CONTRACTOR AND EMPLOYEES WILL COMPLY WITH THE ABOVE REQUIREMENTS.

CONTRACTOR OR SUBCONTRACTOR NAME: Newkirk & Newkirk, Inc.

PRINT, SIGNED AND CERTIFIED BY: Pierre Newkirk

NAME: TITLE: Broker / Agent

SIGNATURE:  DATE: 7-15-2019

NON-COLLUSION AFFIDAVIT

STATE OF TEXAS §
 §
COUNTY OF HIDALGO §

By the signature below, the signatory for the bidder certifies that neither he nor the firm, corporation, partnership or institution represented by the signatory or anyone acting for the firm bidding this project has violated the antitrust laws of this State, codified at Section 15.01, *et seq.*, Texas Business and Commerce Code, or the Federal antitrust laws, nor communicated directly or indirectly the bid made to any competitor or any other person engaged in the same line of business, nor has the signatory or anyone acting for the firm, corporation or institution submitting a bid committed any other act of collusion related to the development and submission of this bid proposal.

Signature: _____

Printed Name: PIERRE NEWKIRK

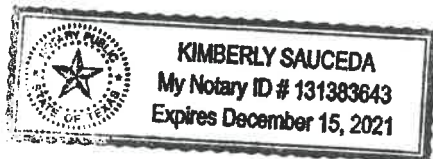
Title: AGENT/BROKER

Company: NEWKIRK & NEWKIRK, INC.

Date: 7-15-2019

SUBSCRIBED and sworn to before me the undersigned authority by Pierre Newkirk the Agent of, Newkirk & Newkirk on behalf of said bidder.

Newkirk & Newkirk



Kimberly Saucedo
Notary Public in and for the
State of Texas

My commission expires: Dec. 15, 2021

Tab 4 Other

- **Submission of Registration for Bidding & Acknowledgement email**
- **New Application & Commodity Listing with City of San Juan**
- **Tax Payer Identification Number**
- **W-9**

From: Rene Jaime [mailto:rjaime@sjtx.us]
Sent: Thursday, July 11, 2019 3:51 PM
To: Marissa Rivera <mriviera@newkirkandnewkirk.com>
Subject: Re: RFQ 19-07-07-16 / Agent of Record

Good afternoon,

Received. Thank you for your interest in working with the City of San Juan.

Rene J. Jaime
Purchasing / Risk Manager
City of San Juan, Texas
www.cityofsanjuantexas.com
Ph: (956) 223-2204
Cl: (956) 821-4047
Fx: (956) 223-2396

"The only thing necessary for the triumph of evil is for good men to do nothing."

Edmond Burke

This email and any files transmitted with it are confidential and intended solely for the use of the individual or entity to whom they are addressed. If you have received this email in error please notify me and delete this email immediately. This message contains confidential information and is intended only for the individual named. If you are not the named addressee you should not disseminate, distribute or copy this e-mail. Please notify the sender immediately by e-mail if you have received this e-mail by mistake and delete this e-mail from your system. If you are not the intended recipient you are notified that disclosing, copying, distributing or taking any action in reliance on the contents of this information is strictly prohibited.

In order to submit encrypted files, please click the link below:

Encrypted Drop Box

On Thu, Jul 11, 2019 at 11:06 AM Marissa Rivera <mriviera@newkirkandnewkirk.com> wrote:

Mr. Rene J. Jaime
Purchasing / Risk Manger

This is to submit our registration for bidding on the project named above. Please include both agents listed below on any changes/additions in form of Addendum.

Agent/Broker Pierre Newkirk – pierre.newkirk@vovafa.com
Agent Marisa Rivera – mriviera@newkirkandnewkirk.com

Firm Name: Newkirk & Newkirk, Inc.
3101 N Jackson, McAllen, TX 78501
956/664-0200

Thank you.

Marisa Rivera
Newkirk & Newkirk, Inc.
Office 956/664-0200
Fax 956/664-0203
Cell 956/867-2226

ATTENTION CLIENTS- HEALTH CARE REFORM: Newkirk & Newkirk, Inc. is aware that you have concerns over the upcoming changes of health care reform. Be assured that you can reach out to any agent of Newkirk & Newkirk, Inc. at any time for continued service and updates or to schedule appointments. Over the next few months we will be sending important email notifications that may require your immediate action based on the impacts of health care reform. As necessary we will also be scheduling additional workshops or scheduling specific appointments to discuss modifications, if any, to your group.

HIPAA Compliance Disclosure: The documents accompanying this e-mail transmission may contain confidential information belonging to the sender that is legally privileged. This information is intended only for the use of the individual or entity named above. The authorized recipient of this information is prohibited from disclosing this information to any other party and is required to destroy the information after its stated need has been fulfilled, unless otherwise required by state law. If you are not the intended recipient, you are hereby notified that any disclosure, copying, distribution, or action taken in reliance on the contents of these documents is strictly prohibited.

CITY OF SAN JUAN

☒ New Application ☐ Add Commodities ☐ Name and/or Address Change ☐ Delete Commodities		Federal ID # or Social Security #: 74-2950891		Date: 7/1/19					
1. Applicant's Name and Mailing Address for Bidding Forms and Purchase Orders: _____ Pierre Newkirk _____ 3101 N Jackson _____ McAllen TX 78501 _____ Phone Number: (956) 664-0200 E-Mail Address: _____ Fax Number: 956-664-0203 pnew102292@aol.com			2. Mailing Address for Payments (If different from Item 1): _____ _____ _____ _____ Phone Number: _____ E-Mail Address: _____ Fax Number: _____						
3. Type of Organization (Check One):									
☐ Individual ☐ Partnership ☐ Non-Profit Organization ☒ Corporation, Incorporated Under Laws of the State of:									
4. How Long in Present Business: 22 years									
5. Persons Authorized to Sign Bids, Offers and Contracts (Indicate Agent):									
Name		Title		Telephone # (Include Area Code)					
Pierre Newkirk		Owner/Agent/Broker		(956) 664-0200					
6. Persons to Contact on Bids or Quotes:									
Name		Title		Telephone # (Include Area Code)					
Pierre Newkirk		Owner/Agent/Broker		(956) 664-0200					
7. Type of Business:									
☐ Manufacturer ☐ Factory Representative ☐ Wholesale Dealer ☐ Retail Dealer Construction: ☐ Unlimited Contractor ☐ Limited Contractor ☒ Service Establishment - Define: provide consultant work for Employee Benefits as well as provide quotes ☐ Other - Define: _____ and services for all employee benefit products									
8. Minority Category ☒ Yes ☐ No If Yes, Define: HUB see attached									
I hereby certify that information supplied herein is correct. Please provide copies of HUB Certification documents with your submittals (Historically Underutilized Business)									
Pierre Newkirk, Owner/Agent/Broker _____ Print or Type Name and Title Signature									
FOR PURCHASING DEPARTMENT USE ONLY									
Date Recd.	Item Mailed	Item Recd.	Date Ent.	Vendor #	Name Key	1	2		

CITY OF SAN JUAN PURCHASING DEPARTMENT
 709 S. NEBRASKA
 SAN JUAN, TX 78589-2649
 TELEPHONE: (956) 223-2200
 www.cityofsanjuantexas.com

CITY OF SAN JUAN
Commodity/Class ID Listing

Please indicate which products and/or services your company can supply by checking the appropriate box(es).

Company Name: Newkirk & Newkirk, Inc.

Class	Description
☐ 015	ADDRESS COPYING, AND DUPLICATING MACHINE SUPPLIES, CHEMICALS, INKS, PAPER, ETC.
☐ 025	AIR COMPRESSORS AND ACCESSORIES
☐ 031	AIR CONDITIONING, HEATING, AND VENTILATING: EQUIPMENT, PARTS AND ACCESSORIES (SEE RELATED ITEMS IN CLASS 740)
☐ 037	AMUSEMENT, DECORATIONS, ENTERTAINMENT, TOYS, ETC.
☐ 045	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE
☐ 055	AUTOMOTIVE ACCESSORIES FOR AUTOMOBILES, BUSES, TRUCKS, ETC.
☐ 060	AUTOMOTIVE MAINTENANCE ITEMS AND REPAIR/REPLACEMENT PARTS
☐ 065	AUTOMOTIVE BODIES, ACCESSORIES, AND PARTS
☐ 075	AUTOMOTIVE SHOP EQUIPMENT AND SUPPLIES
☐ 080	BADGES, EMBLEMS, NAME TAGS AND PLATES, JEWELRY, ETC.
☐ 105	BEARINGS (EXCEPT WHEEL BEARINGS AND SEALS -SEE CLASS 060)
☐ 110	BELTS AND BELTING: CONVEYOR, ELEVATOR, POWER TRANSMISSION, AND V-BELTS
☐ 115	BIOCHEMICALS, RESEARCH
☐ 125	BOOKBINDING SUPPLIES
☐ 140	BROOM, BRUSH, AND MOP MANUFACTURING MACHINERY AND SUPPLIES
☐ 145	BRUSHES (NOT OTHERWISE CLASSIFIED)
☐ 150	BUILDER'S SUPPLIES
☐ 190	CHEMICALS AND SOLVENTS, COMMERCIAL (IN BULK)
☐ 192	CLEANING COMPOSITIONS, DETERGENTS, SOLVENTS, AND STRIPPERS - PREPACKAGED
☐ 200	CLOTHING, ATHLETIC, CASUAL, DRESS, UNIFORM, WEATHER RELATED, WORK
☐ 201	CLOTHING ACCESSORIES (SEE CLASS 800 FOR SHOES AND BOOTS)
☐ 207	COMPUTER ACCESSORIES AND SUPPLIES
☐ 225	COOLERS, DRINKING WATER (WATER FOUNTAINS)
☐ 255	DECALS AND STAMPS
☐ 310	ENVELOPES, PLAIN OR PRINTED
☐ 335	FERTILIZERS AND SOIL CONDITIONERS
☐ 340	FIRE PROTECTION EQUIPMENT AND SUPPLIES
☐ 345	FIRST AID AND SAFETY EQUIPMENT AND SUPPLIES (EXCEPT NUCLEAR AND WELDING)
☐ 350	FLAGS, FLAG POLES, BANNERS, AND ACCESSORIES
☐ 360	FLOOR COVERING, FLOOR COVERING INSTALLATION AND REMOVAL EQUIPMENT, AND SUPPLIES
☐ 365	FLOOR MAINTENANCE MACHINES, PARTS, AND ACCESSORIES
☐ 395	FORMS, CONTINUOUS: COMPUTER PAPER, FORM LABELS, SNAP-OUT FORMS, AND FOLDERS FOR FORMS
☐ 405	FUEL, OIL, GREASE AND LUBRICANTS
☐ 425	FURNITURE: OFFICE

CITY OF SAN JUAN
Commodity/Class ID Listing

Please indicate which products and/or services your company can supply by checking the appropriate box(es).

Company Name: Newkirk & Newkirk, Inc.

Class	Description
☐ 440	GLASS AND GLASING SUPPLIES
☐ 445	HAND TOOLS (POWERED AND NON-POWERED), ACCESSORIES AND SUPPLIES
☐ 450	HARDWARE AND RELATED ITEMS
☐ 460	HOSE, ACCESSORIES, AND SUPPLIES: INDUSTRIAL, COMMERCIAL, AND GARDEN
☐ 485	JANITORIAL SUPPLIES, GENERAL LINE
☐ 515	LAWN MAINTENANCE EQUIPMENT, ACCESSORIES, AND PARTS (NON-AGRICULTURAL APPLICATIONS)
☐ 540	LUMBER AND RELATED PRODUCTS
☐ 545	MACHINERY AND HARDWARE, INDUSTRIAL
☐ 550	MARKERS, PLAQUES AND TRAFFIC CONTROL DEVICES
☐ 555	MARKING AND STENCILING DEVICES
☐ 570	METALS: BARS, PLATES, RODS, SHEETS, STRIPS, STRUCTURAL SHAPES, TUBING, AND FABRICATED ITEMS
☐ 578	MISCELLANEOUS PRODUCTS
☐ 580	MUSICAL INSTRUMENTS, ACCESSORIES, AND SUPPLIES
☐ 590	NOTIONS AND RELATED SEWING ACCESSORIES AND SUPPLIES
☐ 600	OFFICE MACHINES, EQUIPMENT, AND ACCESSORIES
☐ 605	OFFICE MECHANICAL AIDS, SMALL MACHINES, AND APPARATUSES
☐ 610	OFFICE SUPPLIES: CARBON PAPER AND RIBBONS, ALL TYPES
☐ 615	OFFICE SUPPLIES, GENERAL
☐ 630	PAINT, PROTECTIVE COATINGS, VARNISH, WALLPAPER, AND RELATED PRODUCTS
☐ 635	PAINTING EQUIPMENT AND ACCESSORIES
☐ 640	PAPER AND PLASTIC PRODUCTS, DISPOSABLE
☐ 645	PAPER (FOR OFFICE AND PRINT SHOP USE)
☐ 650	PARK, PLAYGROUND, RECREATIONAL AREA AND SWIMMING POOL EQUIPMENT
☐ 655	PHOTOGRAPHIC EQUIPMENT AND SUPPLIES (NOT INCLUDING GRAPHIC ARTS, MICROFILM, AND X-RAY)
☐ 658	PIPE AND TUBING
☐ 670	PLUMBING EQUIPMENT, FIXTURES, AND SUPPLIES
☐ 680	POLICE EQUIPMENT AND SUPPLIES
☐ 690	POWER GENERATION EQUIPMENT, ACCESSORIES, AND SUPPLIES
☐ 691	POWER TRANSMISSION EQUIPMENT - ELECTRICAL, MECHANICAL, AIR AND HYDRAULIC
☐ 720	PUMPING EQUIPMENT AND ACCESSORIES
☐ 725	RADIO COMMUNICATION, TELEPHONE, AND TELECOMMUNICATION EQUIPMENT, ACCESSORIES, AND SUPPLIES
☐ 730	RADIO COMMUNICATION AND TELECOMMUNICATION TESTING, MEASURING, AND ANALYZING EQUIPMENT, ACCESSORIES AND SUPPLIES
☐ 735	RAGS, SHOP TOWELS, AND WIPING CLOTHS

CITY OF SAN JUAN
Commodity/Class ID Listing

Please indicate which products and/or services your company can supply by checking the appropriate box(es).

Company Name: Newkirk & Newkirk, Inc.

Class	Description
☐ 790	SEED, SOD, SOIL, AND INOCULANTS
☐ 800	SHOES AND BOOTS
☐ 801	SIGNS, SIGN MATERIALS, SIGN MAKING EQUIPMENT, AND RELATED SUPPLIES
☐ 803	SOUND SYSTEMS, COMPONENTS, AND ACCESSORIES: GROUP INTERCOM, MUSIC, PUBLIC ADDRESS, ETC.
☐ 805	SPORTING GOODS, ATHLETIC EQUIPMENT AND ATHLETIC FACILITY EQUIPMENT
☐ 863	TIRES, PASSENGER, RADIAL, ALL SEASON
☐ 885	WATER AND WASTEWATER TREATING CHEMICALS
☐ 890	WATER SUPPLY, GROUNDWATER, SEWAGE TREATMENT, AND RELATED EQUIPMENT (NOT FOR AIR CONDITIONING, STEAM BOILER, OR LABORATORY REAGENT WATER)
☐ 895	WELDING EQUIPMENT AND SUPPLIES
☒ 918	CONSULTING SERVICES
☒ 953	INSURANCE, ALL TYPES
☐ 961	MISCELLANEOUS PROFESSIONAL SERVICES
☐ 962	MISCELLANEOUS SERVICES
☐ 966	PRINTING AND RELATED SERVICES
☐ 968	PUBLIC WORKS AND RELATED SERVICES
☐ 981	RENTAL OR LEASE OF EQUIPMENT - GENERAL EQUIPMENT



Date: 7/1/2019

Dear Vendor:

RE: TAXPAYER IDENTIFICATION NUMBER FOR VENDOR # 74-2950891

For Newkirk & Newkirk, Inc.

Federal Income Tax law requires us to have your taxpayer identification number (TIN) on file. Under Federal Regulation Section 6109, you are required to provide us with this information on the W-9 form included with this mailing.

We will not have to file an annual Information Return Form 1099 MISC for you if you are a corporation, tax-exempt organization, government agency or other exempt payee. However, the law requires that you provide us with your TIN number in addition to telling us what kind of payee you are. If you do business as an individual or sole proprietor, your social security number serves as your TIN number. Please complete the entire form, sign and return the W-9 form, within 10 business days.

Fax to: (956) 223-2396

E-mail to: rjaime@cityofsanjuantexas.com or

Mail to: City of San Juan

Attn: Accounts Payable
709 S. Nebraska
San Juan, Texas 78589-2649

Sincerely,

Rene J. Jaime
Purchasing/Risk Manager

Request for Taxpayer Identification Number and Certification

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

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

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Pierre Newkirk	
2 Business name/disregarded entity name, if different from above Newkirk & Newkirk, Inc.	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. ☐ Individual/sole proprietor or single-member LLC ☒ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate ☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. ☐ Other (see instructions) ►	
4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ (Applies to accounts maintained outside the U.S.)	
5 Address (number, street, and apt. or suite no.) See instructions. 3101 N Jackson	Requester's name and address (optional)
6 City, state, and ZIP code McAllen, TX 78501	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

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

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

Social security number										
				-			-			
or										
Employer identification number										
7	4	-	2	9	5	0	8	9	1	

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

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

Sign
Here

Signature of
U.S. person ►

Date ► **7-15-2019**

General Instructions

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

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

Purpose of Form

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

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

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

AGENDA ITEM AND RECOMMENDATION SUMMARY
CITY COMMISSION REGULAR MEETING
AUGUST 13, 2019

Consider Authorizing the City Manager to Declare Nine City Vehicles and Twenty Gambling Machines Awarded to the San Juan Police Department on February 5, 2019 in Case # 14-02253 by San Juan Municipal Court Judge Eloy Hernandez as Salvage and Surplus Property.

STAFF COMMENTS AND RECOMMENDATIONS:

As per Texas Local Government Code 252, "Salvage Property" means personal property, other than items routinely discarded as waste because of use, time, accident, or any other cause is so worn, damaged or obsolete that it has no value for the purpose for which it was originally intended.

"Surplus Property" means property that is not salvage property or items routinely discarded as waste, if not currently needed or required by the City, and possesses some usefulness for the purposes for which it was intended.

The surplus and salvage property consists of nine City vehicles, and 20 gambling machines awarded by our San Juan Municipal Court in Case # 14-02253 on February 5, 2019. Attached in this agenda packet are documents listing and picturing said property.

RECOMMENDATION:

Staff is recommending authorizing the City Manager to sell the before mentioned property in auction and/or dispose of items not sold in auction, in the best interest of the City of San Juan.

PREPARED BY:

Rene J. Jaime,
Purchasing/Risk
Manager

APPROVED BY:

Benjamin Arjona, City
Manager

**SAN JUAN POLICE DEPARTMENT
INTER-OFFICE MEMORANDUM**

To: Honorable Judge Ricardo Perez, Eloy Hernandez

From: PROPERTY CUSTODIAN/ SERGIO BENITEZ

Date: February 5, 2019

Ref: ABANDONED /RECOVERED PROPERTY

Ref: Found Property, unclaimed and or / abandoned items, to include but not limited to cases where there are no known suspects and/or charges filed. The case investigator has reviewed all the items and has given authorization for disposal.

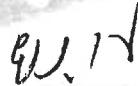
The following items are in our property room as inventory. As per Article 18.17 of the Code of Criminal Procedures, we are requesting your approval to have these items removed from our inventory system and have them disposed of by proper means authorities (i.e. destruction, donation, auction, awarded to the San Juan Police Department, ect.). The item's have not been claimed with or without the three (3) ninety (90) day letters sent to the last known owner and address, no attempt has been made by the last known owner.

Case #14-02253 Twenty gambling machines

RESPECTFULLY SUBMITTED,

**SAN JUAN POLICE DEPARTMENT
PROPERTY CUSTODIAN
SERGIO BENITEZ**
(Municipal Court Seal)



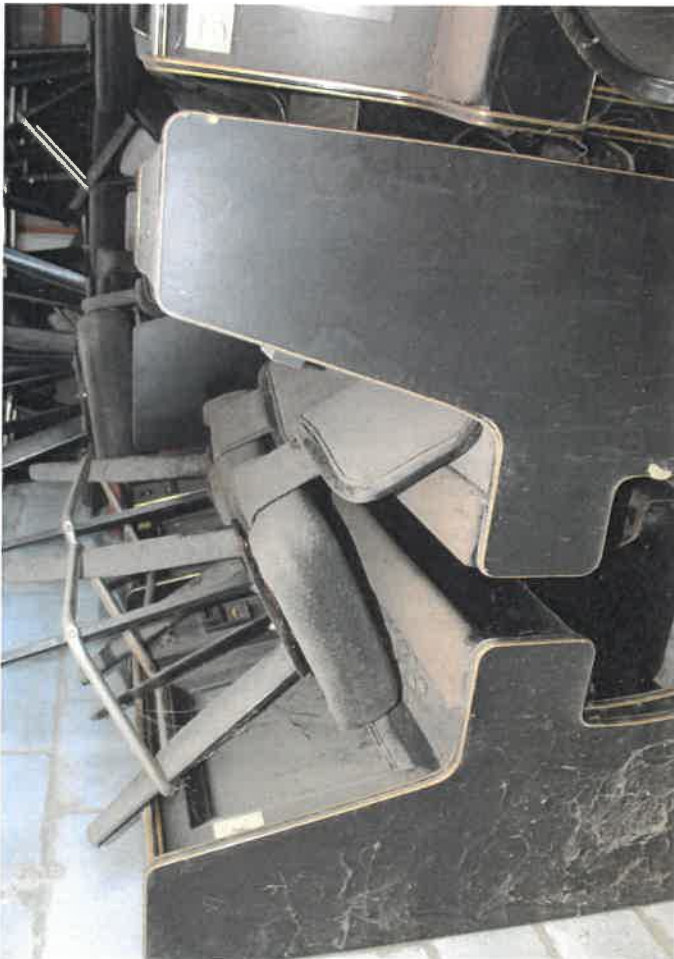
Judge's Signature 
(Judge)(Clerk)(Deputy Clerk), Municipal Court
City of San Juan, Hidalgo County, Texas

Date 2-5-19

Eloy Hernandez
JUDGE'S PRINTED NAME

C/C

CAPTAIN RAY CASAREZ





AUGUST 13, 2019 REQUEST TO CONSIDER VEHICLES FOR AUCTION					
YEAR	MAKE	MODEL	UNIT#	DEPARTMENT	VIN
1992	GMC	SIERRA C1500 / PICKUP TRUCK	403	PUBLIC WORKS	1GTDC14Z5NZ539904
1994	GMC	XPEDITOR WX / GARBAGE TRUCK	434	SANITATION	4V2DCFMD1RN676348
1997	FORD	MEDIUM HEAVY F700 / BRUSH TRUCK	730	SANITATION	1FDNF70J3VVA38219
1999	FORD	CROWN VICTORIA	103	IT	2FAFP71W8XX188303
1999	FORD	CROWN VICTORIA	308	PARKS	2FAFP71WXXX188304
2000	FORD	F150	410	SANITATION	1FTRF17W4YNB21134
2000	FORD	F150	301	PARKS	1FTRF17W0YNB21132
2002	FORD	CROWN VICTORIA	102	IT	2FAFP71W32X125425
2002	FORD	F150	NONE	PLANNING	1FTRF17W9YNB21128

City Commission Agenda Item August 13, 2019



SANITATION / 1997 / FORD / MEDIUM HEAVY F700 / BRUSH TRUCK / UNIT 730 / VIN # 1FDNF70J3VVA38219





SANITATION / 2000 / FORD / F150 / UNIT 710 / VIN # 1FTRF17W4YNB21134



PUBLIC WORKS / 1992 / GMC / SIERRA C1500 PICKUP TRUCK / UNIT 403 / 1GTDC14Z5NZ539904



PARKS / 1999 / FORD / CROWN VICTORIA / UNIT 308 / VIN # 2FAFP71WXXX188304



PARKS / 2000 / FORD / F150 / UNIT 301 / VIN # 1FTRF17W0YNB21132



PLANNING / 2002 / FORD / F150 / UNIT 131 / VIN # 1FTRF17W9YNB21128



INFORMATION TECHNOLOGY / 1999 / FORD / CROWN VICTORIA / UNIT 103 / VIN 2FAFP71W8XX188303



INFORMATION TECHNOLOGY / 2002 / FORD / CROWN VICTORIA / UNIT 102 / VIN # 2FAPF71W32X125425

AGENDA ITEM AND RECOMMENDATION SUMMARY
CITY COMMISSION REGULAR MEETING
AUGUST 13, 2019

Discussion and Consider Proposed Tax Rate for the City of San Juan for Fiscal Year Beginning October 1, 2019 through September 30, 2020 and Setting Public Hearings.

STAFF COMMENTS AND RECOMMENDATIONS:

In Accordance with Property Tax Law, if the Proposed Tax Rate (\$.6993/\$100) will exceed the Effective Tax Rate (\$.6721/\$100) or Rollback Tax Rate (\$.7366/\$100) a Record Vote must be Taken and also schedule two (2) Public Hearings. The two (2) Public Hearings will be scheduled on Tuesday, August 27, 2019 at 6:00 P.M. for the First Hearing and the Second Hearing on Tuesday, September 10, 2019 at 6:00 P.M. The Public Hearing will take place at the City of San Juan Memorial Library Multipurpose Room located at 1010 S. Standard.

RECOMMENDATION:

Consider Proposed Tax Rate for the City of San Juan For Fiscal Year Beginning October , 2019 through September 30, 2020 and Setting Public Hearing.

PREPARED BY:

Leroy Gonzales,
Interim Director

APPROVED BY:

Benjamin Arjona, City
Manager

2019 Governing Body Summary #1A*

Benchmark 2019 Tax Rates

City of San Juan

Date: 08/02/2019 04:55 PM

DESCRIPTION OF TAX RATE	TAX RATE PER \$100	THIS YEAR'S TAX LEVY**	ADDITIONAL TAX LEVY
Effective Tax Rate	\$0.6721	\$6,738,636	
One Percent \$100 Tax Increase***	\$0.6788	\$6,805,812	\$67,176
One Cent per \$100 Tax Increase***	\$0.682100	\$6,838,898	\$100,262
Notice & Hearing Limit****	\$0.6721	\$6,738,636	\$0
Rollback Tax Rate	\$0.7366	\$7,385,329	\$646,693
Last Year's Tax Rate	\$0.699300	\$7,011,350	\$272,714
Proposed Tax Rate	\$0.6993	\$7,011,350	\$272,714

*These figures are provided as estimates of possible outcomes resulting from varying the tax rate. Please be aware that these are only estimates and should not be used alone in making budgetary decisions.

**Tax levies are calculated using line 19 of the Effective Tax Rate Worksheet and this year's frozen tax levy on homesteads of the elderly or disabled.

***Tax increase compared to effective tax rate.

****The Notice and Hearing Limit is the highest tax rate that may be adopted without publishing Texas Comptroller's Notice 50-819 and holding two public hearings (Notice 50-818 must still be published). It is the lower of the rollback tax rate or the effective tax rate.

Benchmark 2018 and 2019 Tax Rate Comparison
City of San Juan, Texas

2018 Total Taxable Value \$ 933,785,282
2019 Total Taxable Value \$ 1,002,624,028
2016-2017 Taxable Value Increase \$ 68,838,746

	2018		2019			
	Tax Rate Per \$100	Tax Levy	Tax Rate Per \$100	Tax Levy	Additional Tax Levy	2018-2019 Comparison
Effective Tax Rate	\$ 0.6988	\$ 6,525,292	0.6721	\$ 6,738,636	\$	213,344
One Cent per \$100 Tax Increase	\$ 0.7088		0.6821	\$ 6,838,898	\$ 100,262	
Two Cent per \$100 Tax Increase	\$ 0.7188		0.7021	\$ 6,838,898	\$ 200,524	
Notice of Hearing Limit	\$ 0.6988	\$ 6,525,292	0.6721	\$ 6,738,636	\$ -	
Rollback Tax Rate	\$ 0.7480	\$ 6,984,714	0.7366	\$ 7,385,329	\$ 646,693	
Last Year's Current Tax Rate	\$ 0.6993	\$ 6,525,960	0.6993	\$ 7,011,350	\$ 272,714	\$ 485,390
Proposed Tax Rate	\$ 0.6993	\$ 6,525,960	0.6993	\$ 7,011,350	\$ 272,714	

2019 Tax Rate Calculation Worksheet

Date: 07/31/2019 03:10 PM

Taxing Units Other Than School Districts or Water Districts**City of San Juan**

Taxing Unit Name

Phone (area code and number)

Taxing Unit's Address, City, State, ZIP Code

Taxing Unit's Website Address

GENERAL INFORMATION: Tax Code Section 26.04(c) requires an officer or employee designated by the governing body to calculate the effective tax rate and rollback tax rate for the taxing unit. These tax rates are expressed in dollars per \$100 of taxable value calculated. The calculation process starts after the chief appraiser delivers to the taxing unit the certified appraisal roll and the estimated values of properties under protest.

School districts do not use this form, but instead use Comptroller Form 50-859 Tax Rate Calculation Worksheet for School Districts.

Water districts as defined under Water Code Section 49.001(1) do not use this form, but instead use Comptroller Form 50-858 Water District Rollback Tax Rate Worksheet.

This worksheet is provided to assist taxing units in determining tax rates. The information provided in this worksheet is offered as technical assistance and not legal advice. Taxing units should consult legal counsel for interpretations of law regarding tax rate preparation and adoption.

SECTION 1: Effective Tax Rate (No New Taxes)

The effective tax rate enables the public to evaluate the relationship between taxes for the prior year and for the current year based on a tax rate that would produce the same amount of taxes (no new taxes) if applied to the same properties that are taxed in both years. When appraisal values increase, the effective tax rate should decrease.

The effective tax rate for a county is the sum of the effective tax rates calculated for each type of tax the county levies.

Effective Tax Rate Activity	Amount/Rate
1. 2018 total taxable value. Enter the amount of 2018 taxable value on the 2018 tax roll today. Include any adjustments since last year's certification; exclude Tax Code Section 25.25(d) one-third over-appraisal corrections from these adjustments. This total includes the taxable value of homesteads with tax ceilings (will deduct in Line 2) and the captured value for tax increment financing (will deduct taxes in Line 14). ¹	\$1,053,191,220
2. 2018 tax ceilings. Counties, cities and junior college districts. Enter 2018 total taxable value of homesteads with tax ceilings. These include the homesteads of homeowners age 65 or older or disabled. Other taxing units enter 0. If your taxing unit adopted the tax ceiling provision in 2018 or a prior year for homeowners age 65 or older or disabled, use this step. ²	\$116,442,223
3. Preliminary 2018 adjusted taxable value. Subtract Line 2 from Line 1.	\$936,748,997
4. 2018 total adopted tax rate.	\$0.6993/\$100
5. 2018 taxable value lost because court appeals of ARB decisions reduced 2018 appraised value.	
A. Original 2018 ARB Values.	
B. 2018 values resulting from final court decisions.	\$3,786,424
C. 2018 value loss. Subtract B from A. ³	\$79,461
6. 2018 taxable value, adjusted for court-ordered reductions. Add Line 3 and Line 5C.	\$936,828,458
7. 2018 taxable value of property in territory the taxing unit deannexed after Jan. 1, 2018. Enter the 2018 value of property in deannexed territory. ⁴	\$0
8. 2018 taxable value lost because property first qualified for an exemption in 2019. Note that lowering the amount or percentage of an existing exemption does not create a new exemption or reduce taxable value. If the taxing unit increased an original exemption, use the difference between the original exempted amount and the increased exempted amount. Do not include value lost to freeport or goods-in-transit exemptions.	
A. Absolute exemptions. Use 2018 market value:	\$518,075
B. Partial exemptions. 2019 exemption amount or 2019 percentage exemption times 2018 value:	\$1,115,125
C. Value loss. Add A and B. ⁵	

	\$1,633,200
9. 2018 taxable value lost because property first qualified for agricultural appraisal (1-d or 1-d-1), timber appraisal, recreational/scenic appraisal or public access airport special appraisal in 2019. Use only properties that qualified in 2019 for the first time; do not use properties that qualified in 2018.	
A. 2018 market value:	\$0
B. 2019 productivity or special appraised value:	\$0
C. Value loss. Subtract B from A. ⁶	\$0
10. Total adjustments for lost value. Add lines 7, 8C and 9C.	\$1,633,200
11. 2018 adjusted taxable value. Subtract Line 10 from Line 6.	\$935,195,258
12. Adjusted 2018 taxes. Multiply Line 4 by Line 11 and divide by \$100.	\$6,539,820
13. Taxes refunded for years preceding tax year 2018. Enter the amount of taxes refunded by the taxing unit for tax years preceding tax year 2018. Types of refunds include court decisions, Tax Code Section 25.25(b) and (c) corrections and Tax Code Section 31.11 payment errors. Do not include refunds for tax year 2018. This line applies only to tax years preceding tax year 2018. ⁷	\$4,767
14. Taxes in tax increment financing (TIF) for tax year 2018. Enter the amount of taxes paid into the tax increment fund for a reinvestment zone as agreed by the taxing unit. If the taxing unit has no 2019 captured appraised value in Line 16D, enter 0. ⁸	\$0
15. Adjusted 2018 taxes with refunds and TIF adjustment. Add Lines 12 and 13, subtract Line 14. ⁹	\$6,544,587
16. Total 2019 taxable value on the 2019 certified appraisal roll today. This value includes only certified values and includes the total taxable value of homesteads with tax ceilings (will deduct in Line 18). These homesteads include homeowners age 65 or older or disabled. ¹⁰	
A. Certified values:	\$1,127,856,272
B. Counties: Include railroad rolling stock values certified by the Comptroller's office:	\$0
C. Pollution control and energy storage system exemption : Deduct the value of property exempted for the current tax year for the first time as pollution control or energy storage system property:	\$0
D. Tax increment financing: Deduct the 2019 captured appraised value of property taxable by a taxing unit in a tax increment financing zone for which the 2019 taxes will be deposited into the tax increment fund. Do not include any new property value that will be included in Line 21 below. ¹¹	\$0
E. Total 2019 value. Add A and B, then subtract C and D.	\$1,127,856,272
17. Total value of properties under protest or not included on certified appraisal roll. ¹²	
A. 2019 taxable value of properties under protest. The chief appraiser certifies a list of properties still under ARB protest. The list shows the appraisal district's value and the taxpayer's claimed value, if any, or an estimate of the value if the taxpayer wins. For each of the properties under protest, use the lowest of these values. Enter the total value. ¹³	\$0

B. 2019 value of properties not under protest or included on certified appraisal roll.

The chief appraiser gives taxing units a list of those taxable properties that the chief appraiser knows about, but are not included in the appraisal roll certification. These properties also are not on the list of properties that are still under protest. On this list of properties, the chief appraiser includes the market value, appraised value and exemptions for the preceding year and a reasonable estimate of the market value, appraised value and exemptions for the current year. Use the lower market, appraised or taxable value (as appropriate). Enter the total value.¹⁴

\$0

C. Total value under protest or not certified: Add A and B.

\$0

18. 2019 tax ceilings. Counties, cities and junior colleges enter 2019 total taxable value of homesteads with tax ceilings. These include the homesteads of homeowners age 65 or older or disabled. Other taxing units enter 0. If your taxing units adopted the tax ceiling provision in 2018 or a prior year for homeowners age 65 or older or disabled, use this step.¹⁵

\$125,232,244

19. 2019 total taxable value. Add Lines 16E and 17C. Subtract Line 18.

\$1,002,624,028

20. Total 2019 taxable value of properties in territory annexed after Jan. 1, 2018.

Include both real and personal property. Enter the 2019 value of property in territory annexed.¹⁶

\$0

21. Total 2019 taxable value of new improvements and new personal property located in new improvements. New means the item was not on the appraisal roll in 2018. An improvement is a building, structure, fixture or fence erected on or affixed to land. New additions to existing improvements may be included if the appraised value can be determined. New personal property in a new improvement must have been brought into the taxing unit after Jan. 1, 2018, and be located in a new improvement. New improvements **do** include property on which a tax abatement agreement has expired for 2019.¹⁷

\$28,887,295

22. Total adjustments to the 2019 taxable value. Add Lines 20 and 21.

\$28,887,295

23. 2019 adjusted taxable value. Subtract Line 22 from Line 19.

\$973,736,733

24. 2019 effective tax rate. Divide Line 15 by Line 23 and multiply by \$100.¹⁸

\$0.6721/\$100

25. COUNTIES ONLY. Add together the effective tax rates for each type of tax the county levies. The total is the 2019 county effective tax rate.¹⁹

¹Tex. Tax Code Section 26.012(14)⁹Tex. Tax Code Section 26.012(13)²Tex. Tax Code Section 26.012(14)¹⁰Tex. Tax Code Section 26.012³Tex. Tax Code Section 26.012(13)¹¹Tex. Tax Code Section 26.03(c)⁴Tex. Tax Code Section 26.012(15)¹²Tex. Tax Code Section 26.01(c) and (d)⁵Tex. Tax Code Section 26.012(15)¹³Tex. Tax Code Section 26.01(c)⁶Tex. Tax Code Section 26.012(15)¹⁴Tex. Tax Code Section 26.01(d)⁷Tex. Tax Code Section 26.012(13)¹⁵Tex. Tax Code Section 26.012(6)⁸Tex. Tax Code Section 26.03(c)¹⁶Tex. Tax Code Section 26.012(17)

SECTION 2: Rollback Tax Rate

The rollback tax rate is split into two separate rates:

1. **Maintenance and Operations (M&O):** The M&O portion is the tax rate that is needed to raise the same amount of taxes that the taxing unit levied in the prior year plus eight percent. This rate accounts for such things as salaries, utilities and day-to-day operations.
2. **Debt:** The debt tax rate includes the debt service necessary to pay the taxing unit's debt payments in the coming year. This rate accounts for principal and interest on bonds and other debt secured by property tax revenue.

The rollback tax rate for a county is the sum of the rollback tax rates calculated for each type of tax the county levies. In most cases the rollback tax rate exceeds the effective tax rate, but occasionally decreases in a taxing unit's debt service will cause the effective tax rate to be higher than the rollback tax rate.

Rollback Tax Rate Activity	Amount/Rate
26. 2018 maintenance and operations (M&O) tax rate.	\$0.5320/\$100
27. 2018 adjusted taxable value. Enter the amount from Line 11.	\$935,195,258
28. 2018 M&O taxes.	
A. Multiply Line 26 by Line 27 and divide by \$100.	\$4,975,238
B. Cities, counties and hospital districts with additional sales tax: Amount of additional sales tax collected and spent on M&O expenses in 2018. Enter amount from full year's sales tax revenue spent for M&O in 2018 fiscal year, if any. Other taxing units enter 0. Counties exclude any amount that was spent for economic development grants from the amount of sales tax spent.	\$988,538
C. Counties: Enter the amount for the state criminal justice mandate. If second or later year, the amount is for increased cost above last year's amount. Other taxing units enter 0.	\$0
D. Transferring function: If discontinuing all of a department, function or activity and transferring it to another taxing unit by written contract, enter the amount spent by the taxing unit discontinuing the function in the 12 months preceding the month of this calculation. If the taxing unit did not operate this function for this 12-month period, use the amount spent in the last full fiscal year in which the taxing unit operated the function. The taxing unit discontinuing the function will subtract this amount in H below. The taxing unit receiving the function will add this amount in H below. Other taxing units enter 0.	\$0
E. Taxes refunded for years preceding tax year 2018: Enter the amount of M&O taxes refunded in the preceding year for taxes before that year. Types of refunds include court decisions, Tax Code Section 25.25(b) and (c) corrections and Tax Code Section 31.11 payment errors. Do not include refunds for tax year 2018. This line applies only to tax years preceding tax year 2018.	\$3,608
F. Enhanced indigent health care expenditures: Enter the increased amount for the current year's enhanced indigent health care expenditures above the preceding tax year's enhanced indigent health care expenditures, less any state assistance.	\$0
G. Taxes in TIF: Enter the amount of taxes paid into the tax increment fund for a reinvestment zone as agreed by the taxing unit. If the taxing unit has no 2019 captured appraised value in Line 16D, enter 0.	\$0
H. Adjusted M&O Taxes. Add A, B, C, E and F. For taxing unit with D, subtract if discontinuing function and add if receiving function. Subtract G.	\$5,967,384
29. 2019 adjusted taxable value. Enter Line 23 from the Effective Tax Rate Worksheet.	\$973,736,733
30. 2019 effective maintenance and operations rate. Divide Line 28H by Line 29 and multiply by \$100.	\$0.6128/\$100
31. 2019 rollback maintenance and operation rate. Multiply Line 30 by 1.08.	\$0.6618/\$100
32. Total 2019 debt to be paid with property taxes and additional sales tax revenue.	

Debt means the interest and principal that will be paid on debts that:

- (1) are paid by property taxes,
- (2) are secured by property taxes,
- (3) are scheduled for payment over a period longer than one year and
- (4) are not classified in the taxing unit's budget as M&O expenses.

A. **Debt** also includes contractual payments to other taxing units that have incurred debts on behalf of this taxing unit, if those debts meet the four conditions above. Include only amounts that will be paid from property tax revenue. Do not include appraisal district budget payments. Enter debt amount.

\$2,584,363

B. Subtract **unencumbered fund amount** used to reduce total debt.

\$0

C. Subtract **amount paid** from other resources.

D. **Adjusted debt.** Subtract B and C from A.

\$845,125

\$1,739,238

33. Certified 2018 excess debt collections. Enter the amount certified by the collector.

\$0

34. Adjusted 2019 debt. Subtract Line 33 from Line 32D.

\$1,739,238

35. Certified 2019 anticipated collection rate. Enter the rate certified by the collector. If the rate is 100 percent or greater, enter 100 percent.

100.00%

36. 2019 debt adjusted for collections. Divide Line 34 by Line 35

\$1,739,238

37. 2019 total taxable value. Enter the amount on Line 19.

\$1,002,624,028

38. 2019 debt tax rate. Divide Line 36 by Line 37 and multiply by \$100.

\$0.1734/\$100

39. 2019 rollback tax rate. Add Lines 31 and 38.

\$0.8352/\$100

40. COUNTIES ONLY. Add together the rollback tax rates for each type of tax the county levies. The total is the 2019 county rollback tax rate.

SECTION 3: Additional Sales Tax to Reduce Property Taxes

Cities, counties and hospital districts may levy a sales tax specifically to reduce property taxes. Local voters by election must approve imposing or abolishing the additional sales tax. If approved, the taxing unit must reduce its effective and rollback tax rates to offset the expected sales tax revenue.

This section should only be completed by a county, city or hospital district that is required to adjust its effective tax rate and/or rollback tax rate because it adopted the additional sales tax.

Activity	Amount/Rate
41. Taxable Sales. For taxing units that adopted the sales tax in November 2018 or May 2019, enter the Comptroller's estimate of taxable sales for the previous four quarters. ²⁰ Estimates of taxable sales may be obtained through the Comptroller's Allocation Historical Summary webpage. Taxing units that adopted the sales tax before November 2018, skip this line.	\$0
42. Estimated sales tax revenue. Counties exclude any amount that is or will be spent for economic development grants from the amount of estimated sales tax revenue. ²¹ Taxing units that adopted the sales tax in November 2018 or in May 2019. Multiply the amount on Line 41 by the sales tax rate (.01, .005 or .0025, as applicable) and multiply the result by .95. ²² - or - Taxing units that adopted the sales tax before November 2018. Enter the sales tax revenue for the previous four quarters. Do not multiply by .95.	\$988,538
43. 2019 total taxable value. Enter the amount from Line 37 of the Rollback Tax Rate Worksheet.	\$1,002,624,028
44. Sales tax adjustment rate. Divide Line 42 by Line 43 and multiply by \$100.	\$0.0986/\$100
45. 2019 effective tax rate, unadjusted for sales tax. ²³ Enter the rate from Line 24 or 25, as applicable, on the Effective Tax Rate Worksheet.	\$0.6721/\$100
46. 2019 effective tax rate, adjusted for sales tax. Taxing units that adopted the sales tax in November 2018 or in May 2019. Subtract Line 44 from Line 45. Skip to Line 47 if you adopted the additional sales tax before November 2018.	\$0.6721/\$100
47. 2019 rollback tax rate, unadjusted for sales tax. ²⁴ Enter the rate from Line 39 or 40, as applicable, of the Rollback Tax Rate Worksheet.	\$0.8352/\$100
48. 2019 rollback tax rate, adjusted for sales tax. Subtract Line 44 from Line 47.	\$0.7366/\$100

¹⁷Tex. Tax Code Section 26.012(17)

¹⁸Tex. Tax Code Section 26.04(c)

¹⁹Tex. Tax Code Section 26.04(d)

²⁰Tex. Tax Code Section 26.041(d)

²¹Tex. Tax Code Section 26.041(i)

²²Tex. Tax Code Section 26.041(d)

²³Tex. Tax Code Section 26.04(c)

²⁴Tex. Tax Code Section 26.04(c)

SECTION 4: Additional Rollback Protection for Pollution Control

A taxing unit may raise its rate for M&O funds used to pay for a facility, device or method for the control of air, water or land pollution. This includes any land, structure, building, installation, excavation, machinery, equipment or device that is used, constructed, acquired or installed wholly or partly to meet or exceed pollution control requirements. The taxing unit's expenses are those necessary to meet the requirements of a permit issued by the Texas Commission on Environmental Quality (TCEQ). The taxing unit must provide the tax assessor with a copy of the TCEQ letter of determination that states the portion of the cost of the installation for pollution control.

This section should only be completed by a taxing unit that uses M&O funds to pay for a facility, device or method for the control of air, water or land pollution.

Additional Rollback Protection for Pollution Control Activity	Amount/Rate
49. Certified expenses from the Texas Commission on Environmental Quality (TCEQ). Enter the amount certified in the determination letter from TCEQ. ²⁵ The taxing unit shall provide its tax assessor-collector with a copy of the letter. ²⁶	\$0
50. 2019 total taxable value. Enter the amount from Line 37 of the Rollback Tax Rate Worksheet.	\$1,002,624,028
51. Additional rate for pollution control. Divide Line 49 by Line 50 and multiply by \$100.	\$0/\$100
52. 2019 rollback tax rate, adjusted for pollution control. Add Line 51 to one of the following lines (as applicable): Line 39, Line 40 (counties) or Line 48 (taxing units with the additional sales tax).	\$0.7366/\$100

SECTION 5: Total Tax Rate

Indicate the applicable total tax rates as calculated above.

Effective tax rate (Line 24; line 25 for counties; or line 46 if adjusted for sales tax)	\$0.6721
Rollback tax rate (Line 39; line 40 for counties; or line 48 if adjusted for sales tax)	\$0.7366
Rollback tax rate adjusted for pollution control (Line 52)	\$0.7366

SECTION 6: Taxing Unit Representative Name and Signature

Enter the name of the person preparing the tax rate as authorized by the taxing unit.

print here

Printed Name of Taxing Unit Representative

sign here

Taxing Unit Representative

Date

²⁵Tex. Tax Code Section 26.045(d)

²⁶Tex. Tax Code Section 26.045(i)

AGENDA ITEM AND RECOMMENDATION SUMMARY
CITY COMMISSION REGULAR MEETING
AUGUST 13, 2019

Consider Selecting a Bidder and Awarding Bid # 19-08-08-06 - Rental of Mobile Trailer Mounted 2 Meter Belt Filter Press and Ancillary Equipment.

STAFF COMMENTS AND RECOMMENDATIONS:

On July 24, and July 31, 2019, Bid # 19-08-08-06 - Rental of Mobile Trailer Mounted 2 Meter Belt Filter Press and Ancillary Equipment was advertised in the Advance News Journal and on August 6, 2019, staff received two responses from the following firms:

1. Aspen Rentals - Angleton, Texas
2. Press Rentals - Evans, Georgia

RECOMMENDATION:

Selection and Authorize the City Manager to Negotiate and Enter into a Contract for Bid # 19-08-08-06 - Rental of Mobile Trailer Mounted 2 Meter Belt Filter Press and Ancillary Equipment.

PREPARED BY:

Rene J. Jaime,
Purchasing/Risk
Manager

APPROVED BY:

Benjamin Arjona, City
Manager

INVITATION TO BID

Sealed bids addressed to Rene J. Jaime, Purchasing/Risk Manager, City of San Juan, 709 S. Nebraska Avenue, San Juan, Texas 78589-2649 are to be received no later than Tuesday August 6, 2019, at 10:00 a.m., for the rental of a Mobile 2 Meter Belt Filter Press and Ancillary Equipment, at which time they will be taken to City Hall Conference Room, and read aloud.

RENTAL OF A MOBILE TRAILER MOUNTED 2 METER BELT FILTER PRESS AND ANCILLARY EQUIPMENT SPECIFICATIONS

REQUEST FOR SEALED BID #19-08-08-06

CITY OF SAN JUAN

709 S. NEBRASKA AVENUE

SAN JUAN, TEXAS 78589-2649

Specifications can be obtained by calling the Purchasing Department 956.223.2200, by picking them up at the San Juan City Hall, 709 S. Nebraska Avenue, San Juan, Texas between the hours of 8:30 a.m. – 4:30 p.m., Monday thru Friday, or by downloading them from the City's web-site, www.cityofsanjuantexas.com.

Be advised that if a company downloads the bidding documents from the web page and is contemplating on bidding on the services, the respondent must register prior to bid opening with the Purchasing Department so that any changes/additions via Addendum can be forwarded to the company. Register with the Purchasing Department by e-mail at RJ Jaime@sjtx.us. Please include the bid name and bid number in the email's subject line and your company's name, address, phone and email address, as well as your contact person's name and title in the body of the email.

The City of San Juan reserves the right to refuse and reject any or all bids and to waive any or all formalities or technicalities or to accept the bid to be the best and most advantageous to the City, negotiate a final lease agreement and hold the bids for a period of 60 days without taking action. Bids submitted past the aforementioned date and time will not be accepted. **Caution to those submitting bids; those not in the proper form may be rejected.**

**CITY OF SAN JUAN
INSTRUCTIONS TO RESPONDENTS**

Please read the specifications/requirements thoroughly and be sure the service to provide the rental of a **mobile 2 meter belt filter press and ancillary equipment** complies with all specifications/requirements. Any variation from the specifications/requirements must be clearly indicated on letterhead attached to bid. If no exceptions are noted, and you are the successful bidder, it will be required that the **belt filter press and ancillary equipment** be provided as specified by the bid specifications.

PURPOSE

The purpose of these specifications/requirements and bid documents are to execute a contract for:

RENTAL OF A MOBILE TRAILER MOUNTED 2 METER BELT FILTER PRESS AND ANCILLARY EQUIPMENT

INTENT

The **RENTAL OF A MOBILE 2 METER BELT FILTER PRESS AND ANCILLARY EQUIPMENT** to be furnished under this bid shall be in accordance with these specifications/requirements. All specifications/requirements shown are minimum. There is no intention to disqualify any bidder who can meet these specifications.

SUBMITTAL OF BID

Bids will be submitted in a sealed envelope; the envelope must be marked on the outside as follows:

**RENTAL OF A MOBILE TRAILER MOUNTED 2 METER BELT FILTER PRESS AND ANCILLARY EQUIPMENT
SPECIFICATIONS**

REQUEST FOR SEALED BID # 19-08-08-06

CITYOF SAN JUAN

709 S. NEBRASKA AVENUE

SAN JUAN, TEXAS 78589-2649

Bidders shall be required to submit bid on the Invitation to Bid form. **Bids submitted by fax or electronically will not be accepted.** Submittal of a bid in response to this solicitation for bids constitutes an offer by the Respondent and if accepted by the City constitutes a Contract. Bids which do not comply with these specifications/requirements may be rejected at the option of the City. Bids must be filed with the City of San Juan, before opening day and hour. No late bids will be accepted. Bids cannot be altered or amended after the opening time of bid. Any changes made before opening time are to be initialed to guarantee authenticity. Person signing bid must show title or authority to bind his/her firm in a contract.

SALES TAX

State sales tax must not be included in bid.

SUBSTITUTIONS

No substitutions or cancellations permitted without written approval from the City of San Juan.

NO BID RESPONSE

If unable to quote, bidder should return inquiry giving reasons. Failure to comply will obligate the City of San Juan to remove non-responsive bidders from bidder's list.

VARIATIONS

Any additions, deletions, or variations from the specifications/requirements provided herein must be noted. Any parts not specifically mentioned which are necessary to provide the service of a lease agreement of high speed communications via fiber optic cabling to city buildings and maintenance shall be furnished by the successful bidder.

TIME ALLOWED FOR ACTION TAKEN

The City may hold bids for 60 days after bid opening without taking action. Bidders shall be required to hold their bids firm for the same period of time.

RIGHT TO REJECT/AWARD

The City of San Juan reserves the right to refuse and reject any or all bids, and to waive any or all formalities or technicalities, negotiate a contract and to make sure awards of contract as may be deemed to be the best and most advantageous to the City of San Juan.

INDEMNIFICATION CLAUSE

The bidder agrees to indemnify and save harmless the City, the Purchasing Department and City Staff, from all suits and actions of every nature and description brought against them or any of them, for or on account of the use of patented appliances, products or processes, and the bidder shall pay all royalties and charges which are legal and equitable. Evidence of such payment or satisfaction shall be submitted upon request to the Purchasing Department, as a necessary requirement in connection with the final estimate for payment in which such patented appliance, products or processes are used.

PAYMENT

The City of San Juan will execute payment by mail in accordance with the State of Texas Prompt Payment Act after the service to provide a Lease Agreement for High Speed Communication via Fiber Optic Cabling to City Buildings and Maintenance has been found to meet the City of San Juan specifications/requirements. No other method of payment will be considered.

ASSIGNMENT

Neither the bidders' contract nor payment due to an awarded vendor may be assigned to a third party without the written approval of the Purchasing Department for the City of San Juan.

INTERPRETATIONS

Any questions concerning the lease agreement with regards to this solicitation for bids shall be directed to the Purchasing Manager by email to RJaime@sjtx.us as outlined in the bids. Such interpretations, which may affect the eventual outcome of this request for bids, shall be furnished in writing to all prospective registered bidders via Addendum. No interpretation shall be considered as binding unless provided in writing by the City of San Juan in accordance with paragraph entitled "Addendum".

STATUTORY REQUIREMENTS

It shall be the responsibility of the successful bidder to comply with all applicable State and Federal laws, Executive Orders, Municipal Ordinances, and the Rules and Regulations of all authorities having jurisdiction over the work to be performed hereunder and such shall apply to the contract throughout, and they will be deemed to be included in the contract as though written out in full in the contract documents (to include issues related to health, environmental, and safety to name a few).

RIGHT TO WAIVE

The City of San Juan reserves the right to waive or take exception to any part of these specifications/requirements when in the best interest of the City of San Juan.

HUB CERTIFICATION

State Certified "HUB (Historically Underutilized Businesses) vendor(s) are asked to provide a copy of their certification, if they have not previously done so (information to be emailed to the Purchasing Department at rjaime@sjtx.us.)

CONFIDENTIAL INFORMATION

Any information deemed to be confidential by the bidder should be clearly noted on the pages where confidential information is contained; however, the City cannot guarantee that it will not be compelled to disclose all or part of any public record under the Texas Public Information Act, since information deemed to be confidential by the bidder may not be considered confidential under Texas Law, or pursuant to a court order.

VERBAL THREATS

Any threats made to any employee of the City, be it verbal or written, to discontinue the providing of item/material/services for whatever reason and/or reasons shall be considered a breach of contract and the City will immediately sever the contract with the vendor on contract.

MATHEMATICAL ERRORS

In the event that mathematical errors exist in any bid, unit prices/rates -vs- totals, unit prices/rates will govern.

PAST PERFORMANCE

Bidders are advised that past performance as it relates to product and/or service on purchase/service/supply contracts previously held with the City shall be a factor in the award of this supply contract. The City's position on this matter shall be final.

JURISDICTION

Contract(s) executed as part of this solicitation shall be subject to and governed under the laws of the State of Texas. Any and all obligations and payments are due and performable and payable in Hidalgo County, Texas.

VENUE

The parties agree that venue for purposes of any and all lawsuits, cause of action, arbitration, and/or any other dispute(s) shall be in Hidalgo County, Texas.

CONFLICT OF INTEREST

Bidders are advised that they must be in compliance with the below mentioned law:

CHAPTER 176 OF THE TEXAS LOCAL GOVERNMENT CODE

Effective January 1, 2006, Chapter 176 of the Texas Local Government Code requires that any vendor or person considering doing business with a local government entity disclose in the Questionnaire Form CIQ, the vendor or person's affiliation or business relationship that might cause a conflict of interest with a local government entity. By law, this questionnaire must be filed with the records administrator of the City of San Juan no later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code. A person commits an offense if the person violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

For more information or to obtain Questionnaire CIQ, go to the Texas Ethics Commission web page at www.ethics.state.tx.us/forms/CIQ.pdf. If you have any question about compliance, please consult your own legal counsel. Compliance is the individual responsibility of each person or agent of a person who is subject to the filing requirements.

INSURANCE REQUIREMENTS

The Bidders agrees to carry adequate **General Liability and Automobile Liability Insurance as mandated by state law, as well as, Worker's Compensation insurance as mandated herein**. Bidders further agrees to indemnify and hold the City of San Juan harmless of any and all losses, damages or claims arising out of or in any way connected with any injury or injuries to any employee or employees of the contract and from any claims of any other person or persons for injuries, losses or damages sustained at, around, or in connection with the work, unless the negligence of the City of San Juan and/or servant and agents, is shown to be the sole proximate cause of said injury, loss, or damage. **Respondent will be responsible to provide necessary insurance as required by the City of San Juan and mandated by state law in compliance with what is shown below regarding minimum insurance coverage when submitting proposal.**

Minimum Insurance Requirements	
Type of Coverage	Limits of Liability
Workers Compensation	Statutory Coverage
Comprehensive General Liability (City Named as additional Insured)	Statutory Coverage
Bodily Injury & Property Damage Aggregate	\$500,000 each occurrence
Comprehensive auto	\$1,000,000 each occurrence

BUDGET APPROVAL

For purposes of this project, award will be contingent on approval of budget.

METHOD OF AWARD

Respondents are advised that the City of San Juan reserves the right to award this contract to the lowest responsible respondent, therefore providing the best value.

FAILURE TO COMPLETE PROJECT

Bids are advised that failure to complete the project within the time frame(s) allowed (after award of contract by fax, mail, email or by telephone order), shall be grounds for termination of contract. In the case of termination, written notice shall be given to the successful vendor and complete contract shall be severed.

CONTRACT

The contract shall be for a period of three months, with an option to extend on a month to month basis.

The City of San Juan reserves the right to terminate the contract if, in the opinion of the City of San Juan, the successful vendor's performance is not acceptable, no funds are available, or the City wishes, without cause, to discontinue the contract. Termination will be in written form allowing a thirty (30) day notice. The bidder shall be afforded the same right to terminate the contract in the same manner.

CITY OF SAN JUAN

Rental of a Mobile Trailer Mounted 2 Meter Belt Filter Press and ancillary Equipment

Please read specification thoroughly and make sure that the lease agreement offered will be in compliance with all requirements. Variation from the specifications is to be indicated on an attached letter with your company's letterhead and made part of the bid. If no exceptions are noted, and you are the successful bidder, it will be required that the lease agreement be provided as specified

SPECIFICATIONS

1. Mobile Trailer Mounted 2.0 Meter Belt Filter Press, (including sludge feed and drain hoses, automated flash blending polymer unit, sludge feed pump, VFD electronic controls and control center/room and sludge discharge auger (8-10ft high and 9ft out)
2. 40' Stacking Conveyor
3. Belt Press Tech, including hotel, per diem, truck, and air fare for a minimum of three days or sufficient time for setup and operational training. (work, standby and travel)
4. Transportation Cost FOB to the San Juan Wastewater Treatment Plant for all equipment including conveyor and ancillary equipment.

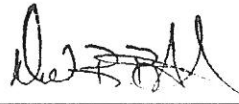
BIDDER AGREES TO COMPLY WITH ALL CONDITIONS LISTED BID SPECIFICATIONS HEREIN, AND NOTES. BIDDER HAS READ AND AGREES TO COMPLY WITH ALL TERMS AND CONDITIONS OF INVITATION TO BID. PURCHASES MADE FOR CITY USE ARE EXEMPT FROM THE STATE SALES TAX AND FEDERAL EXCISE TAX. DO NOT INCLUDED TAXES IN YOUR BID. BIDDER GUARANTEES PRODUCT OFFERED SHALL MEET OR EXCEED MINIMUM SPECIFICATIONS IDENTIFIED IN THE INVITAION TO BID.

Item	Description	Price Per Unit	Units	Extended Price
1	Mobile Trailer Mounted 2 Meter Belt Filter Press	10,750 ⁰⁰	1	10,750 ⁰⁰ per month
2	40' Stacking Conveyor	2,800 ⁰⁰	1	2,800 ⁰⁰ per month
3	Belt Press Tech	3,600 ⁰⁰	1	3,600 ⁰⁰
4	Transportation Cost FOB	*2,980 ⁰⁰	2	5,980 ⁰⁰

RECEIVED 10:19 AM 8/13/19. ^{RK}

"By the signature hereon affixed, the bidder hereby certifies that neither the bidder nor the firm, cooperation, partnership, or institution represented by the bidder, or anyone acting for such firm, cooperation, partnership, or institution has violated the antitrust laws of the State, codified in Section 15.01, et seq., Texas Business and Commerce Code, or the Federal antitrust laws, nor communicated directly or indirectly the bid made to any competitor or any other person engaged in such line of business."

7-31-19
DATE


SIGNATURE

979-864-3990
PHONE

Robi Booth
PRINT/TYPE NAME

VP
TITLE

Robi Booth
Vice President


Aspen Rentals
DEWATERING EQUIPMENT RENTAL • REPAIR & MAINTENANCE SERVICES

robi@aspen-rentals.com
23603 N. Highway 288
Angleton, TX 77515

Cell: (979) 201-9515
Main: (979) 864-3990
Fax: (979) 864-3998



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

07/30/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Stephens Insurance, LLC 100 Congress Avenue, Suite 750 Austin TX 78701		CONTACT NAME: DeJhauna Buck PHONE (A/C, No, Ext): (512) 542-3212 E-MAIL ADDRESS: dejhauna.buck@stephens.com FAX (A/C, No): (512) 542-3237	
INSURED Aspen Rentals Inc. 23603 North Highway 288 Angleton TX 77515		INSURER(S) AFFORDING COVERAGE INSURER A: Cincinnati Insurance Company INSURER B: Texas Mutual Insurance Company INSURER C: INSURER D: INSURER E: INSURER F:	
		NAIC # 10677 22945	

COVERAGES**CERTIFICATE NUMBER:** CL1972932072**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC OTHER:	Y		ENP0449593	08/05/2019	08/05/2020	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 Damage to Premises \$ 500,00
A	☒ AUTOMOBILE LIABILITY ☒ ANY AUTO ☐ OWNED AUTOS ONLY ☐ HIRED AUTOS ONLY ☐ SCHEDULED AUTOS ☐ NON-OWNED AUTOS ONLY			ENP0449593	08/05/2019	08/05/2020	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Underinsured motorist \$ Included
A	☒ UMBRELLA LIAB ☒ EXCESS LIAB DED RETENTION \$ ☒ OCCUR ☐ CLAIMS-MADE			ENP0449593	08/05/2019	08/05/2020	PROPERTY DAMAGE EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000 \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y/N ☒ Y	N/A		0001301465	02/18/2019	02/18/2020	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Equipment Leased / Rented to Others			ENP0449593	08/05/2019	08/05/2020	Limit \$432,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**City of San Juan
709 S Nebraska Avenue

San Juan

TX 78589

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Additional Named Insureds

Other Named Insureds

Blanco Sombrero, LLC

Additional Named Insured



1 August 2019

Rene J. Jamie
City of San Juan, TX
709 S. Nebraska Ave.,
San Juan, TX

Subject: Bid #19-08-06

Dear Rene:

Please see the below pricing for renting a 2M mobile belt press and a 40 ft stacking conveyor from Press Rentals for 3 months with the option to extend agreement on a month to month basis. I have also provided a blank lease agreement of ours for you to look over.

Please contact me at 706-955-5152 or aconcepcion@pressrentals.com if you have any questions or if I can be of further assistance.

Sincerely,

A handwritten signature in black ink that reads "Angelica Concepcion". The script is fluid and cursive, with the first name and last name clearly distinguishable.

Angelica Concepcion
Sales Coordinator

Press Rentals to provide

- (1) Trailer Mounted 2M Belt Press
- Technician to commission, train, and or operate equipment
- 40 ft. stacking conveyor

City of San Juan, TX to provide

- Electrical Supply & Hook Up - 480 V, 3 phase, 100 amp
- Clean Wash Water- 100 gpm 80 psi
- Polymer
- Filtrate discharge
- Dewatered cake disposal
- 8K forklift for setup/breakdown

Rental Rates

Mobilization, San Juan, TX.....\$8,580 lump sum

2M Belt Press

(3 month minimum rental).....\$17,000 per month

40 ft Stacking Conveyor.....\$4,500 per month

Demobilization, San Juan, TX.....\$8,580 lump sum

Technician (3 day minimum).....\$1,750 per day

EST. TOTAL (3 month rental).....\$86,910 EST. TOTAL

RECEIVED 9:53AM
8/5/19. R/A

Terms & Conditions

1. Pricing is effective for 90 days from date listed above.
2. Rental period is based on 24 hours per day, 30 days per month.
3. Executed lease agreement (attached)
4. Security deposit due prior to shipment of rental units.
5. Security deposit can be used to repair damaged equipment or applied to last month's rent at the end of the project only after all other invoices have been paid and equipment has been deemed not damaged by Press Rentals.
6. Rental rates are FOB Evans, GA.
7. Technician rate based on 12 hours per day; includes wages, per diem, housing and vehicle. Anticipate 1 day travel each way. To be invoiced weekly for charges.
8. Terms Net 30.
9. Mobilization and Demobilization includes transportation to & from project site.
10. All terms and conditions are based on equipment availability.
11. In the event equipment is returned to Press Rentals and additional deconning is necessary, deconning will be charged at a rate of \$1,000 per day.





2 METER BELT FILTER PRESS

The press equipped with the following features:

- Trailer mounted
- Stainless Steel Drain Pan
- Nema 4X – Stainless Steel Control Cabinet
- Variable Speed (VFD) Vogelsang or Moyno Feed Pump (0 – 400 gpm)
- Fluid Dynamics Polymer Dilution System
- 900 Gallon Polymer Aging Tank
- Variable Speed (VFD) Diluted Polymer Feed Pump (0 – 60 gpm)
- Sludge Flocculation Tank with variable speed mixer
- Wash Water Booster Pump – 5 hp (provides 100 psi boost)
- Air Compressor

CHAPTER 176 OF THE TEXAS LOCAL GOVERNMENT CODE

Effective January 1, 2006, Chapter 176 of the Texas Local Government Code requires that any vendor or person considering doing business with a local government entity disclose in the Questionnaire Form CIQ, the vendor or person's affiliation or business relationship that might cause a conflict of interest with a local government entity. By law, this questionnaire must be filed with the records administrator of the City of San Juan no later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code. A person commits an offense if the person violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

For more information or to obtain Questionnaire CIQ, go to the Texas Ethics Commission web page at www.ethics.state.tx.us/forms/CIQ.pdf. If you have any question about compliance, please consult your own legal counsel. Compliance is the individual responsibility of each person or agent of a person who is subject to the filing requirements.

INSURANCE REQUIREMENTS

The Bidders agrees to carry adequate **General Liability and Automobile Liability Insurance as mandated by state law, as well as, Worker's Compensation insurance as mandated herein**. Bidders further agrees to indemnify and hold the City of San Juan harmless of any and all losses, damages or claims arising out of or in any way connected with any injury or injuries to any employee or employees of the contract and from any claims of any other person or persons for injuries, losses or damages sustained at, around, or in connection with the work, unless the negligence of the City of San Juan and/or servant and agents, is shown to be the sole proximate cause of said injury, loss, or damage. **Respondent will be responsible to provide necessary insurance as required by the City of San Juan and mandated by state law in compliance with what is shown below regarding minimum insurance coverage when submitting proposal.**

Minimum Insurance Requirements	
Type of Coverage	Limits of Liability
Workers Compensation	Statutory Coverage
Comprehensive General Liability (City Named as additional Insured)	Statutory Coverage \$500,000 each occurrence
Bodily Injury & Property Damage Aggregate	\$1,000,000 each occurrence
Comprehensive auto	\$1,000,000 each occurrence

BUDGET APPROVAL

For purposes of this project, award will be contingent on approval of budget.

METHOD OF AWARD

Respondents are advised that the City of San Juan reserves the right to award this contract to the lowest responsible respondent, therefore providing the best value.

FAILURE TO COMPLETE PROJECT

Bids are advised that failure to complete the project within the time frame(s) allowed (after award of contract by fax, mail, email or by telephone order), shall be grounds for termination of contract. In the case of termination, written notice shall be given to the successful vendor and complete contract shall be severed.

CONTRACT

The contract shall be for a period of three months, with an option to extend on a month to month basis.

"By the signature hereon affixed, the bidder hereby certifies that neither the bidder nor the firm, cooperation, partnership, or institution represented by the bidder, or anyone acting for such firm, cooperation, partnership, or institution has violated the antitrust laws of the State, codified in Section 15.01, et seq., Texas Business and Commerce Code, or the Federal antitrust laws, nor communicated directly or indirectly the bid made to any competitor or any other person engaged in such line of business."

08/02/2019
DATE

Marvin E. Brown, Jr.
SIGNATURE

706-860-7737
PHONE

MARVIN E. BROWN, JR
PRINT/TYPE NAME

PRESIDENT
TITLE

EQUIPMENT LEASE

THIS EQUIPMENT LEASE (the "Lease") is made as of this ____ day of _____, 2019, by and between PRESS RENTALS, LLC., a Georgia limited liability corporation with offices at 5105 Pierce Court, Evans, Georgia 30809 ("Press Rentals"), and the party identified below (the "Lessee").

Press Rentals hereby leases to Lessee, and Lessee hereby leases from Press Rentals, the equipment described on **Schedule A** hereto (the "Equipment"), on the following terms and conditions:

1. Delivery; Term. The Equipment shall be shipped to Lessee at Lessee's project site identified on **Schedule A** hereto F.O.B. the current location of the Equipment. The lease term shall commence on the date on which the Equipment is delivered to Lessee and shall continue for the period specified on **Schedule A** hereto, which period may be extended with the mutual written consent of the parties.

2. Leased Employees. If indicated on **Schedule A** attached hereto, Press Rentals will provide such number of employees set forth on **Schedule A** to operate the Equipment during the term hereof for the hours indicated on **Schedule A** (the "Leased Employee(s)"). Lessee shall exercise control over the actions of the Leased Employee(s) to the same extent as though the Leased Employee(s) were directly employed by Lessee. Except as set forth in Section 3, Press Rentals shall be solely responsible for all salary and benefits owed to Leased Employee(s).

3. Rental. Throughout the term hereof, Lessee shall pay to Press Rentals rental for the Equipment and the Leased Employees (if any) in the amount specified on **Schedule A** hereto, without defense, setoff, or deduction whatsoever. In the event that Leased Employee(s) work more than the hours indicated on **Schedule A**, Lessee shall pay Press Rentals any additional costs for salary and benefits incurred by Press Rentals as a result thereof as additional rental hereunder. Rent shall be paid in advance, with the first payment being due on the date on which the Equipment is delivered to Lessee and subsequent payments due

on each weekly or monthly anniversary thereof as specified on **Schedule A** hereto.

4. Security Deposit. Lessee shall deposit with Press Rentals an amount indicated on **Schedule A** hereto (if any) as security for the full and complete satisfaction and performance of the duties and obligations of Lessee under this Agreement. If Lessee fails to pay Press Rentals any amount when due or otherwise defaults under its obligations hereunder, Press Rentals may, in addition to any other remedy Press Rentals may have hereunder or at law or in equity, use, apply or retain all or any part of such deposit for the payment of any amount due or any other sum in default. Press Rentals shall not be required to keep such deposit separate from its general funds and Lessee shall not be entitled to the payment of, or credit for, interest on such deposit. If Lessee shall fully and completely satisfy and perform each and every of the duties and obligations of Lessee hereunder to and through the expiration of the term of this Lease, such deposit shall be refunded to Lessee within 10 days thereafter.

5. Inspection. Press Rentals may, at its option, repair any such damage or defects of which Lessee notifies Press Rentals within such 24 hour period or may remove such damaged or defective Equipment from this Lease, with a pro rata adjustment to the monthly rent. In the event that Press Rentals refuses to repair such damage or defect, Lessee may remove such damaged or defective Equipment from this Lease, with a pro rata adjustment to the monthly rent, or may accept such Equipment in which case Lessee shall have

no further claim for such damage or defect. Except for any damage or defects of which Lessee so notifies Press Rentals as provided above, Lessee shall accept the Equipment in the condition or state delivered. Lessee shall visually inspect the equipment within 24 and mechanically test within 72 hours of delivery. Any damages or defects shall be reported within 24 hours of discovery.

6. Manner of Use. Lessee shall exercise due and proper care and comply with and conform to all laws and regulations relating to the possession, use or maintenance of the Equipment. Lessee shall at all times and at its expense shall keep and maintain the Equipment in good working condition, order, and repair, including maintaining the Equipment on its regular service schedule, including but not limited to grease, fluid and filter changes as required. Lessee shall make no alterations to the Equipment without the prior written consent of Press Rentals. Lessee is not authorized to incur for Press Rentals' account, any expense, or expend any money, in repairing said equipment, without written consent of the Press Rentals. Press Rentals and its representatives shall have the right at any time during normal business hours to inspect the Equipment and for that purpose shall have access to the location thereof.

7. Return of Equipment. Upon the expiration of this Lease, Lessee at its sole expense shall forthwith return the Equipment to Press Rentals at such place(s) designated by Press Rentals, in the same condition as when received by Lessee, reasonable wear and tear accepted. All replacement parts, additions, and accessories incorporated in or affixed to the Equipment shall thereupon become the property of Press Rentals.

8. Insurance. Lessee, at its expense, shall keep the Equipment insured at the full value thereof and for the term hereof against fire, theft, collision and extended coverage with losses, if any, payable to Press Rentals. Lessee shall also maintain commercial general liability insurance covering all operations at the project site, with

limits of not less than \$1,000,000 per occurrence and \$2,000,000 aggregate. Such insurance shall be written on an "occurrence" basis, shall name Press Rentals as an additional insured with respect to such activities, and shall provide that the insurer shall give Press Rentals not less than 30 days written notice prior to the cancellation or modification of such policies. Lessee shall, upon request of Press Rentals, deliver to Press Rentals copies of the policies or evidence of insurance reasonably satisfactory to Press Rentals.

9. Indemnity. Lessee shall indemnify and hold harmless Press Rentals and its affiliates and their respective directors, shareholders, officers, employees and agents (the "Press Rentals Indemnitees") from and against any and all damage, loss, liability and expense (including, without limitation, expenses of investigation and attorneys' fees and expenses) in connection with (i) any breach by Lessee of any covenant, condition, representation or warranty provided in this Lease or (ii) any and all actions or threatened actions incurred or suffered by any of the Press Rentals Indemnitees arising from, related to or associated with this Lease, the rental or operation of the Equipment or the actions or inactions of the Leased Employees, including without limitation liabilities arising out of the negligence or gross negligence of the Press Rentals Indemnitees.

10. No Warranties. Services performed by Leased Employees are provided on as "AS IS" and "WITH ALL FAULTS" basis.

11. Limitation of Damages. In no event shall Press Rentals be liable to Lessee or any other person, whether in contract or in tort, or under any other legal theory, for lost profits or revenues, loss of use or similar economic loss, or for any indirect, special, incidental, consequential or similar damages arising out of or in connection with the lease or use of the Equipment or the provision of services hereunder, or for any claim made against Press Rentals by any other person, even if Press Rentals has been advised of the possibility of such

claim. In no event shall Press Rentals' liability under any claim made by Lessee or any other person exceed the rental amount paid during the month in respect of which such claim is made.

12. Taxes. Lessee shall pay promptly when due all taxes and other public charges against or upon Lessee's use of the Equipment, as additional rental therefore.

13. Title. During the term hereof, title to the Equipment shall remain in Press Rentals. Lessee shall keep the Equipment free from any and all liens and encumbrances. Lessee shall give Press Rentals immediate notice of any attachment or other judicial process, liens, or encumbrances affecting the Equipment and shall indemnify and save Press Rentals harmless from any loss or damage caused thereby.

14. Default. Lessee shall be deemed to be in default hereunder if (i) Lessee fails to pay any rent or other amount herein provided within five (5) days after same has become due and payable, (ii) Lessee fails to observe, keep, or perform any other provision of this Lease required to be observed, kept, or performed by Lessee within ten (10) days after receipt of notice of such failure, (iii) a petition is filed by or against Lessee under the Bankruptcy Act or any amendment thereto, (iv) a receiver is appointed for Lessee or its property, (v) Lessee becomes insolvent, makes an assignment for the benefit of its creditors, or offers a composition or extension of any of its indebtedness, or (vi) Lessee, without Press Rentals' prior consent, sells, transfers, encumbers, assigns, sublets, or parts with the possession of the Equipment. Upon the occurrence of any such default, Press Rentals at its option, and without notice or demand, may declare this Lease in default and thereupon the Equipment and all rights of the Lessee herein shall be surrendered to Press Rentals and Press Rentals may take possession of the Equipment wherever found, with or without process of law, and for this purpose, may enter upon any premises of Lessee or wherever the same may be found, without liability therefore. The rights and remedies of Press Rentals in the event

of default described herein shall not be deemed exclusive but shall be cumulative and in addition to all other rights and remedies existing by law.

15. No Assignment. Except with Press Rentals' prior written consent, (i) neither this Lease nor Lessee's rights hereunder shall be assignable by Lessee or (ii) none of the Equipment may be subleased to any other party or moved from the location to which it was delivered.

16. Risk of Loss. Lessee hereby assumes and shall bear the entire risk of loss, theft, damage, and destruction of the Equipment from any cause whatsoever, and no loss, theft, damage, or destruction of the Equipment shall relieve Lessee of the obligation to pay rent or any other obligation of this Lease, and this Lease shall remain in full force and effect. In the event of damage of any kind whatsoever to any item of the Equipment (unless the same is damaged beyond repair), Lessee, at the option of Press Rentals, shall at Lessee's expense (a) replace the same in good repair, condition, and working order, or (b) replace the same with like Equipment of the same or later model in good repair, condition, and working order. If the Equipment, or any item thereof, is determined by Press Rentals to be lost, stolen, destroyed, or damaged beyond repair, Lessee shall immediately pay Press Rentals therefor an amount equal to the aggregate amount of unpaid total rent for the balance of the term of this Lease, or the amount of the unpaid total rent allocated to the item or items involved, as the case may be, together with the market value of the Equipment as determined by Press Rentals in any commercially reasonable manner. Upon such payment, this Lease shall terminate with respect to the Equipment or items thereof so paid for, and Lessee thereupon shall be entitled thereto to the Equipment, "as is", without warranty, express or implied, with respect to any matter whatsoever.

17. Force Majeure. Any delays in or failure of performance by Press Rentals shall not constitute a default hereunder if and to the extent such delay or failure of performance is caused by

occurrences beyond the reasonable control of Press Rentals, including, but not limited to: acts of God or the public enemy; fire or other casualty; compliance with any order or request of any governmental authority; acts of war; riots or strikes or other concerted acts of personnel; network failures or failures in communications; or any other causes beyond the reasonable control of Press Rentals, whether or not of the same class or kind as those specifically named above.

This instrument constitutes the entire agreement between the parties with respect to the subject matter hereof and neither this Lease nor any provision hereof may be changed, waived, discharged, or terminated, except by a written instrument signed by the party against whom enforcement of the change, waiver, discharge or termination is sought.

18. Attorneys Fees. In the event that at any time during the term of this Lease Press Rentals or Lessee shall institute any action or proceeding against the other relating to the provisions of this Lease, or any default hereunder, the unsuccessful party in such action or proceeding agrees to reimburse the successful party for the expenses of attorney's fees and disbursements incurred therein by the successful party. Such reimbursement shall include all legal expenses incurred prior to trial, at trial and at all levels of appeal and post judgment proceedings.

19. Miscellaneous. Time is of essence. Press Rentals' failure at any time to require strict performance by Lessee of any of the provisions hereof shall not waive or diminish Press Rentals' right thereafter to demand strict compliance with any other provision. Waiver of any default shall not waive any other default. Press Rentals' rights hereunder are cumulative and not alternative. All notices relating hereto shall be hand delivered or sent by mail to Press Rentals or Lessee at their respective principal business addresses, or at any later address last known to the sender. This Lease is irrevocable for the full term hereof and for the aggregate rent herein reserved, and the rent shall not abate by reason of termination of Lessee's right of possession and/or the taking of possession by Press Rentals or for any other reason. This Agreement shall be interpreted and enforced under the laws of the State of Georgia. If any provision hereof or any remedy provided for be invalid under any applicable law, such provision shall be inapplicable and deemed omitted, but the remaining provisions hereof shall be given effect in accordance with the manifest intent hereof.

IN WITNESS WHEREOF, the parties hereto have caused this Lease to be executed by their duly authorized representatives as of the date set forth above.

PRESS RENTALS, LLC.

LESSEE:

By _____
Its _____

By _____
Its _____
Address: _____

Schedule A to Equipment Lease
between
Press Rentals, LLC.
and
[Name of Lessee]

Description of Equipment	(1) Mobile 2M Belt Press
Lessee Project Site	
Lease Term	Monthly Belt Press Rental
Leased Employee(s)/Hours	
Rental Amount/Payment Frequency	Mobilization- Rental - Demobilization-
Security Deposit	\$17,000
Payment Terms	Net 30

PRESS RENTALS, LLC.

(the "Lessee")

By _____
Its _____

By _____
Its _____

AGENDA ITEM AND RECOMMENDATION SUMMARY
CITY COMMISSION REGULAR MEETING
AUGUST 13, 2019

Consider Authorizing the Chief of Police to Enter into a Renewal Agreement Between the United States Department of Justice, Drug Enforcement Administration (DEA) and the San Juan Police Department.

STAFF COMMENTS AND RECOMMENDATIONS:

This renewal agreement is made between the U.S. Department of Justice and the San Juan Police Department for the purpose of assigning an investigator to the Drug Enforcement Administration (DEA-HIDTA) task force. During the period of assignment to the DEA-HIDTA task force the San Juan Police department will remain responsible for establishing the Officers salaries and benefits to include overtime. Overtime amount for reimbursement will be \$18,649.00

RECOMMENDATION:

Authorized the Approval of the renewal agreement between the United States Department of Justice Drug Enforcement Administration (DEA) and the San Juan Police department.

PREPARED BY:

Juan Gonzalez, Chief
of Police

APPROVED BY:

Benjamin Arjona, City
Manager



U. S. Department of Justice
Drug Enforcement Administration
Houston Division
1433 West Loop South, Suite 600
Houston, Texas 77027

www.dea.gov

July 22, 2019

Juan Gonzalez
Chief of Police
San Juan Police Department
2301 N. Raul Longoria Road
San Juan, Texas 78589

Dear Chief Gonzalez:

Enclosed for your review and signature are the Task Force Agreements for Fiscal Year 2020. It is respectfully requested that these agreements be returned in the enclosed self-addressed envelope by August 30, 2019. Once all signatures are obtained, courtesy copies will be emailed to your office point of contact.

Thank you for your continuing support to the Drug Enforcement Administration Houston Division. Your unwavering commitment to provide investigative resources is vital and important. We look forward to continuing to work with you and the San Juan Police Department.

If you have any questions, please contact Program Support Specialist Myrna Garcia Robles at 571-324-8327 or by email mgarciarobles@dea.usdoj.gov.

Sincerely,

A handwritten signature in blue ink, appearing to read "Will R. Glaspy".

Will R. Glaspy

Special Agent in Charge

Enclosures

PROGRAM FUNDED STATE AND LOCAL TASK FORCE AGREEMENT

This agreement is made this 1st day of October 2019, between the United States Department of Justice, Drug Enforcement Administration (hereinafter "DEA"), and the San Juan Police Department (hereinafter "SJPD"), ORI TX1081300. The DEA is authorized to enter into this cooperative agreement concerning the use and abuse of controlled substances under the provisions of 21 U.S.C. § 873.

Whereas there is evidence that trafficking in narcotics and dangerous drugs exists in the McAllen, Texas area and that such illegal activity has a substantial and detrimental effect on the health and general welfare of the people of Texas, the parties hereto agree to the following:

1. The McAllen Task Force will perform the activities and duties described below:
 - a. disrupt the illicit drug traffic in the McAllen, Texas area by immobilizing targeted violators and trafficking organizations;
 - b. gather and report intelligence data relating to trafficking in narcotics and dangerous drugs; and
 - c. conduct undercover operations where appropriate and engage in other traditional methods of investigation in order that the Task Force's activities will result in effective prosecution before the courts of the United States and the State of Texas.
2. To accomplish the objectives of the McAllen Task Force, the SJPD agrees to detail one experienced officer(s) to the McAllen Task Force for a period of not less than two years. During this period of assignment, the assigned SJPD officer(s) will be under the direct supervision and control of DEA supervisory personnel assigned to the Task Force.
3. The SJPD officer(s) assigned to the Task Force shall adhere to all DEA policies and procedures. Failure to adhere to DEA policies and procedures shall be grounds for dismissal from the Task Force.
4. The SJPD officer(s) assigned to the Task Force shall be deputized as Task Force Officer(s) of DEA pursuant to 21 USC 878.
5. To accomplish the objectives of the McAllen Task Force, DEA will assign 23 Special Agents to the Task Force. DEA will also, subject to the availability of annually appropriated funds or any continuing resolution thereof, provide necessary funds and equipment to support the activities of the DEA Special Agents and SJPD officer(s) to the Task Force. This support will include: office space, office supplies travel funds, funds for the purchase of evidence and information, investigative equipment, training and other support items.
6. During the period of assignment to the McAllen Task Force, the SJPD will remain responsible for establishing the salaries and benefits, including overtime, of the SJPD officer(s) assigned to the Task Force and for making all payments due them. DEA will, subject to availability of funds,

reimburse the SJPD for overtime payments made by it to the SJPD officer(s) assigned to the McAllen Task Force for overtime, up to a sum equivalent to 25 percent of the salary of a GS-12, Step 1 (RUS) federal employee, currently \$18,649.00, per officer. ***Note: Task Force Officer's overtime "Shall not include any costs for benefits, such as retirement, FICA, and other expenses."***

7. In no event will the SJPD charge any indirect cost rate to DEA for the administration or implementation of this agreement.

8. The SJPD shall maintain on a current basis complete and accurate records and accounts of all obligations and expenditures of funds under this agreement in accordance with generally accepted accounting principles and instructions provided by DEA to facilitate on-site inspection and auditing of such records and accounts.

9. The SJPD shall permit and have readily available for examination and auditing by DEA, the United States Department of Justice, the Comptroller General of the United States and any of their duly authorized agents and representatives, any and all records, documents, accounts, invoices, receipts or expenditures relating to this agreement. The SJPD shall maintain all such reports and records until all litigation, claim, audits and examinations are completed and resolved or for a period of three (3) years after termination of this agreement, whichever is later.

10. The SJPD shall comply with Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, as amended, and all requirements imposed by or pursuant to the regulations of the United States Department of Justice implementing those laws, 28 C.F.R. Part 42, Subparts C, F, G, H and I.

11. The SJPD agrees that an authorized officer or employee will execute and return to DEA the attached OJP Form 4061/6, Certification Regarding Lobbying; Debarment, Suspension and Other Responsibility Matters; and Drug-Free Workplace Requirements. The SJPD acknowledges that this agreement will not take effect and no federal funds will be awarded until the completed certification is received.

12. When issuing statements, press releases requests for proposals, bid solicitations and other documents describing projects or programs funded in whole or part with federal money, the SJPD shall clearly state: (1) percentage of the total cost of the program or project which will be financed with federal money and (2) the dollar amount of federal funds for the project or program.

13. The term of this agreement shall be effective from the date in paragraph number one until September 30, 2020. This agreement may be terminated by either party on 30 days advance written notice. Billing for all outstanding obligations must be received by DEA within 90 days of the date of termination of this agreement. DEA will be responsible only for obligations incurred by SJPD during the term of this agreement.

For the Drug Enforcement Administration:

Will R. Glaspy
Special Agent in Charge

Date:_____

For the San Juan Police Department:

Juan Gonzalez
Chief of Police

Date:_____



U.S. DEPARTMENT OF JUSTICE
OFFICE OF JUSTICE PROGRAMS
OFFICE OF THE COMPTROLLER

CERTIFICATIONS REGARDING LOBBYING; DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS; AND DRUG-FREE WORKPLACE REQUIREMENTS

Applicants should refer to the regulations cited below to determine the certification to which they are required to attest. Applicants should also review the instructions for certification included in the regulations before completing this form. Signature of this form provides for compliance with certification requirements under 28 CFR Part 69, "New Restrictions on Lobbying" and 28 CFR Part 67, "Government-wide Debarment and Suspension (Nonprocurement) and Government-wide Requirements for Drug-Free Workplace (Grants)." The certifications shall be treated as a material representation of fact upon which reliance will be placed when the Department of Justice determines to award the covered transaction, grant, or cooperative agreement.

1. LOBBYING

As required by Section 1352, Title 31 of the U.S. Code, and implemented at 28 CFR Part 69, for persons entering into a grant or cooperative agreement over \$100,000, as defined at 28 CFR Part 69, the applicant certifies that:

(a) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the making of any Federal grant, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal grant or cooperative agreement;

(b) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form - LLL, "Disclosure of Lobbying Activities," in accordance with its instructions;

(c) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subgrants, contracts under grants and cooperative agreements, and subcontracts) and that all sub-recipients shall certify and disclose accordingly.

2. DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS (DIRECT RECIPIENT)

As required by Executive Order 12549, Debarment and Suspension, and implemented at 28 CFR Part 67, for prospective participants in primary covered transactions, as defined at 28 CFR Part 67, Section 67.510—

A. The applicant certifies that it and its principals:

(a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, sentenced to a denial of Federal benefits by a State or Federal court, or voluntarily excluded from covered transactions by any Federal department or agency;

(b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a

public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

(c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (1)(b) of this certification; and

(d) Have not within a three-year period preceding this application had one or more public transactions (Federal, State, or local) terminated for cause or default; and

B. Where the applicant is unable to certify to any of the statements in this certification, he or she shall attach an explanation to this application.

3. DRUG-FREE WORKPLACE (GRANTEES OTHER THAN INDIVIDUALS)

As required by the Drug-Free Workplace Act of 1988, and implemented at 28 CFR Part 67, Subpart F, for grantees, as defined at 28 CFR Part 67 Sections 67.615 and 67.620—

A. The applicant certifies that it will or will continue to provide a drug-free workplace by:

(a) Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition;

(b) Establishing an on-going drug-free awareness program to inform employees about—

(1) The dangers of drug abuse in the workplace;

(2) The grantee's policy of maintaining a drug-free workplace;

(3) Any available drug counseling, rehabilitation, and employee assistance programs; and

(4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;

(c) Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph (a);

(d) Notifying the employee in the statement required by paragraph (a) that, as a condition of employment under the grant, the employee will—

STATE AND LOCAL HIDTA TASK FORCE AGREEMENT

This agreement is made this 1st day of October 2019, between the United States Department of Justice, Drug Enforcement Administration (hereinafter "DEA"), and the San Juan Police Department (hereinafter "SJPD"). The DEA is authorized to enter into this cooperative agreement concerning the use and abuse of controlled substances under the provisions of 21 U.S.C. § 873.

Whereas there is evidence that trafficking in narcotics and dangerous drugs exists in the McAllen, Texas, area and that such illegal activity has a substantial and detrimental effect on the health and general welfare of the people of Texas, the parties hereto agree to the following:

1. The McAllen Task Force will perform the activities and duties described below:
 - a. disrupt the illicit drug traffic in the McAllen, Texas, area by immobilizing targeted violators and trafficking organizations;
 - b. gather and report intelligence data relating to trafficking in narcotics and dangerous drugs; and
 - c. conduct undercover operations where appropriate and engage in other traditional methods of investigation in order that the Task Force's activities will result in effective prosecution before the courts of the United States and the State of Texas.
2. To accomplish the objectives of the McAllen Task Force, the SJPD agrees to detail one experienced officer(s) to the McAllen Task Force for a period of not less than two years. During this period of assignment, the assigned SJPD officer(s) will be under the direct supervision and control of DEA supervisory personnel assigned to the Task Force.
3. The SJPD officer(s) assigned to the Task Force shall adhere to all DEA policies and procedures. Failure to adhere to DEA policies and procedures shall be grounds for dismissal from the Task Force.
4. The SJPD officer(s) assigned to the Task Force shall be deputized as Task Force Officer(s) of DEA pursuant to 21 USC 878.
5. To accomplish the objectives of the McAllen Task Force, DEA will assign 23 Special Agents to the Task Force. HIDTA will also, subject to the availability of annually appropriated funds or any continuing resolution thereof, provide necessary funds and equipment to support the activities of the DEA Special Agents and SJPD officer(s) to the Task Force. This support will include: office space, office supplies, travel funds, funds for the purchase of evidence and information, investigative equipment, training and other support items.
6. During the period of assignment to the McAllen Task Force, the SJPD will remain responsible for establishing the salaries and benefits, including overtime, of the SJPD officer(s) assigned to the Task Force and for making all payments due them. HIDTA will, subject to

availability of funds, reimburse the SJPd for overtime payments made by it to the SJPd officer(s) assigned to the McAllen Task Force for overtime, up to a sum equivalent to 25 percent of the salary of a GS-12, Step 1 (RUS) federal employee, currently \$18,649.00, per officer. ***Note: Task Force Officer's overtime "Shall not include any costs for benefits, such as retirement, FICA, and other expenses."***

7. In no event will the SJPd charge any indirect cost rate to DEA for the administration or implementation of this agreement.

8. The SJPd shall maintain on a current basis complete and accurate records and accounts of all obligations and expenditures of funds under this agreement in accordance with generally accepted accounting principles and instructions provided by DEA to facilitate on-site inspection and auditing of such records and accounts.

9. The SJPd shall permit and have readily available for examination and auditing by DEA, the United States Department of Justice, the Comptroller General of the United States and any of their duly authorized agents and representatives, any and all records, documents, accounts, invoices, receipts or expenditures relating to this agreement. The SJPd shall maintain all such reports and records until all litigation, claim, audits and examinations are completed and resolved or for a period of three (3) years after termination of this agreement, whichever is later.

10. The SJPd shall comply with Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, the Age Discrimination Act of 1975, as amended, and all requirements imposed by or pursuant to the regulations of the United States Department of Justice implementing those laws, 28 C.F.R. Part 42, Subparts C, F, G, H and I.

11. The SJPd agrees that an authorized officer(s) or employee will execute and return to DEA the attached OJP Form 4061/6, Certification Regarding Lobbying; Debarment, Suspension and Other Responsibility Matters; and Drug-Free Workplace Requirements. The SJPd acknowledges that this agreement will not take effect and no federal funds will be awarded until the completed certification is received.

12. When issuing statements, press releases requests for proposals, bid solicitations and other documents describing projects or programs funded in whole or part with federal money, the SJPd shall clearly state: (1) percentage of the total cost of the program or project which will be financed with federal money and (2) the dollar amount of federal funds for the program or project.

13. The term of this agreement shall be effective from the date in paragraph number one until September 30, 2020. This agreement may be terminated by either party on 30 days advance written notice. Billing for all outstanding obligations must be received by DEA within 90 days of the date of termination of this agreement. HIDTA will be responsible only for obligations incurred by SJPd during the term of this agreement.

For the Drug Enforcement Administration:

Will R. Glaspy
Special Agent in Charge

Date: _____

For the San Juan Police Department:

Juan Gonzalez
Chief of Police

Date: _____



U.S. DEPARTMENT OF JUSTICE
OFFICE OF JUSTICE PROGRAMS
OFFICE OF THE COMPTROLLER

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MINUTES OF REGULAR MEETING OF THE CITY OF SAN JUAN COMMISSION

DATE: Tuesday, March 12, 2019

TIME: 6:00 p.m.

PLACE: San Juan Memorial Library
Multipurpose Meeting Room
1010 S. Standard
San Juan, Texas 78589

MEMBERS PRESENT: Mario Garza, Mayor
Pete Garcia, Mayor Pro-Tem
Jesse Ramirez, Commissioner
Ernesto Guajardo, Commissioner

STAFF PRESENT: Benjamin Arjona, City Manager
Diana Cavazos, City Secretary
Tirso Garza, Chief of Fire
Juan Gonzalez, Chief of Police
Leroy Gonzales, Director of Finance
Adelaida Cordero, Director of Human Resources
Armandina Segin, Library Director
Patrick Willingham, Director of Parks & Recreation
Robert Escobar, Director of Planning
Juan Soto, Director of Sanitation/ Public Works
Rene Jaime, Purchasing/Risk Management
David Salinas, Director of Utilities
Mary Enriquez, Court Administrator
Pat Karr, Director of Information Technology

ORDER OF BUSINESS

I. CALL MEETING TO ORDER

Mayor Mario Garza called the meeting to order at 6:00pm.

II. INVOCATION

Benjamin Arjona, City Manager led the Invocation.

III. PLEDGE OF ALLEGIANCE

Mayor Mario Garza led the Pledge of Allegiance.

IV. PUBLIC COMMENTS

Alfredo Mata, CEO for Boys and Girls Club stated that in the year 2018 they had over 1,000 kids registered from the City of San Juan and the number continues increasing. Mr. Mata further stated that transportation was available at 3 elementary schools and 1 middle school up until 7:00 p.m.

Ms. Ana Vasquez, Unit Director stated the facility was open Monday through – Friday and membership had an annual fee of \$30.00.

V. PRESENTATIONS

- A. Presentation of Departmental Reports: Department of Planning and Zoning, Department of Parks and Recreation, San Juan Memorial Library and Department of Sanitation.

Discussion: Mayor Mario Garza thanked Roel Garza, Director of Sanitation and the department for the organizing the event for the community. He further mentioned he had received calls over the weekend of individuals complimenting the event. Mayor Pro-Tem Pete Garcia also thanked the department of Sanitation and mentioned he was impressed by how the department was ready to unload the trailers full of tires. Mayor Pro-Tem asked Mr. Roel Garza that if they still had a few more tires if they could still be taken to the department to which Mr. Garza responded yes.

Mayor Pro Tem Garcia asked Police Chief, Juan Gonzalez how much do the speed bump costs to which he responded between \$50-75 each. Mayor Pro Tem then asked how many speed bumps could be places in a street to which Chief Gonzalez responded that it depends on the width of the street. Mayor Pro Tem Garcia asked if there were any funds for street bumps to which Chief Gonzalez responded that at the time the funds had been depleted. Mayor Pro Tem Garcia then asked how long the speed bumps had been back ordered to which Chief Gonzalez responded that they were not back ordered, they just order sets of 12 at a time. Then they get placed on the streets according to the surveys and the requests from citizens. Currently they are working on placing bumps on six different locations. Mayor Pro Tem then asked if those funds come out from the Police Department's budget to which Chief Gonzalez responded yes, from the asset forfeiture funds. He further stated he would like for something to be done on 2nd street close to the park since a lady took a petition to him because of individuals that peel out of the park. Mr. Benjamin Arjona, City Manager responded that he'll have the department asses the location.

Commissioner Ramirez asked Roberto Escobar, Director of Planning and Zoning for any feedbacks that he has received from the businesses now that the Health Department is up and running to which he responded that business owners are getting both permits the same time. Commissioner Jesus "Jessie" Ramirez asked Mr. Escobar if everyone was in compliance. Mr. Escobar further stated that 252 letters were sent out but some businesses are still not complying with the health and occupational permits. Mayor Pro-Tem Pete Garcia asked Mr. Escobar about the Food Handling Program and if they are still honoring the County's to which he responded that individuals that acquire the County's permit which is good between 2 to 5 years is being honored.

Commissioner Jesus "Jesse" Ramirez asked on a status on the commercial pick up to which Mr. Roel Garza, Director of Sanitation responded that one truck was in the shop and that they were behind schedule, but as of today they are caught up.

Commissioner Jesus "Jesse" Ramirez asked if there was a set date for the opening ceremonies for baseball and softball season to which Mr. Patrick Willingham, Director of Parks and Recreation responded that it has been setup for Saturday, April 6th and that the official invitation would be sent out after spring break. Mayor Pro-Tem Pete Garcia asked what the costs of the neighborhood cleanup were to which Mr. Roel Garza, Sanitation Director responded that it was all over time, but he did not have an actual number. Mayor Pro Tem Garcia recommended getting the figures together so it can be included in the next year's budget. He further stated that maybe next year it can be done two or three times throughout the year since it worked out very well and there was participation from the residents.

Commissioner Ramirez stated the event at the library was successful with a great turn out today and asked how many children participated to which Ms. Sesin, Library Director responded it was 105 kids. Commissioner Ramirez thanked Ms. Sesin for putting together the event for the children especially for those that didn't do anything during spring break. Mayor Mario Garza asked how many kids were registered for baseball to which Mr. Willingham replied that close to 600 kids, 60 teams, some divisions were full already but the department is trying to accommodate everyone.

- B. Presentation on Free Women Self-Defense Classes and Self-Defense Classes for the Disabled.

Discussion: Patrick Willingham, Director of Parks and Recreation stated that instructors had offered these classes in other facilities and had been successfully attended. The classes will be offered on Tuesday's starting March 19th through May 21st at Amigos Del Valle. Mayor Mario Garza asked for the hours the classes would be given to which Mr. Willingham responded that it would be from 5:00 to 7:00 p.m. Benjamin Arjona, City Manager stated that the classes were primarily to the citizens at San Juan but they were open to the public. Commissioner Jesus "Jesse" Ramirez asked where registration would be held to which Mr. Willingham replied that it would be at the Parks and Recreation office.

VI. APPOINTMENTS

- A. Consider the Approval and Designation of a Liaison from the City Commission to the San Juan Memorial Library Advisory Board as Stated in the By-Laws.

Discussion: Armandina Sesin, Library Director stated that according to the Library Board Bylaws on Article II Section 2 the verbiage was changed to include a liaison from the City Commission to be included on the Board. Mayor Mario Garza asked the Commission for a recommendation to which Commissioner Jesus "Jesse" Ramirez stated that he had been attending the meetings but had not been appointed as a liaison.

Mayor Pro-Tem Pete Garcia made motion to appoint Commissioner Jesus "Jesse" Ramirez as a Liaison for the San Juan Library Board and was seconded by Commissioner Ernesto "Neto" Guajardo. Motion passed 4-0.

VII. DISCUSSION AND POSSIBLE ACTION ON ALL THE FOLLOWING MATTERS:

- A. Discussion and Possible Action on Paving Improvements Project Phase III and Authorize City Manager to Enter into a Contract Agreement with the next Engineer on Rotation.

Discussion: City Manager, Benjamin Arjona stated information was in the packet regarding streets that needed work. He further stated that they were very gracious in the sense that an additional \$1 million dollars were accommodated for street improvements. He further stated that in the packet there were also streets that had been repaved under different conditions. Mr. Arjona mentioned that some of the streets on page 22 had already been approved through Precinct 2. The following streets are recommended: Ridge all the way to 12th Street to Business 83, Ridge Road from Veterans to San Antonio, and West 7th Street to Nebraska Avenue to San Antonio are the ones recommended on the proposal along with others that are in very poor conditions. Mayor Pro Tem Pete Garcia asked if it was the ones highlighted in color to which Mr. Arjona responded that it was the ones not highlighted the ones that were recommended for approval.

Mr. Arjona further stated that he was asking for permission to go out for bids and selecting the next engineer that is under rotation. Mayor Garza stated that Lucky Drive was on there but that it was a private road to which Mr. Salinas, Utilities Director added that it was a dedicated access easement between the families that owned those lots but it was never dedicated to the city. Mayor Pro Tem Garcia asked if the actual streets would be given down the line to which Mr. Arjona responded that it would be taken back to the Commission with an estimate and the streets would be recommended based on the amount.

Mayor Pro-Tem Pete Garcia made motion to approve and was seconded by Commissioner Jesus “Jesse” Ramirez. Motion passed 4-0.

- B. Discussion and Possible Action to Authorize a Midyear Budget Amendment in the Utilities and Stormwater Funds and Authorize the City Manager to Execute Any Related Documents.

Discussion: David Salinas, Director of Utilities stated that back in October 2018 the commission approved a rate study along with a cost and development study. He further stated that unfortunately the information the contractor needed to put together took a long time and he had budgeted for the prior year. When this budget was opened he failed to include the \$30,000 therefore he was submitting the amendment for that amount.

Commissioner Jesus “Jesse” Ramirez asked if he had mentioned it had already been approved to which Mr. Salinas responded yes. Commissioner Ramirez asked what the status was on it to which Mr. Salinas responded that the last information he received from Mrs. Lori was the data was being cleaned because of the way it was stored on Incode was a little bit different. I believe they are at a 25-30% complete .

Commissioner Jesus “Jesse” Ramirez made motion to approve and was seconded by Mayor Pro-Tem Pete Garcia. Motion passed 4-0.

VIII. CONTRACTUALS/RESOLUTIONS

- A. Consider Authorizing the City Manager to Enter into a Memorandum of Understanding between the City of San Juan Police Department and the City of Pharr Police Department.

Discussion: Police Chief, Juan Gonzalez and Sergeant Rolando Garcia stated the resolution they are proposing to partner with the City of Pharr. Chief Gonzalez further stated that back in April 2018 the Commission had approved for the Police Department to purchase a tool for fingerprint matching that allows establishing individuals in a system to locate matches.

Sergeant Garcia stated there are three agencies in the Valley: Edinburg, Pharr and Hidalgo County Sheriff’s Office that use this tool. In the past they’ve used it seven times and two of those times they were cold cases. Sergeant Garcia further stated the purpose of this MOU is that it works as a localized database in the City of San Juan where we have over 9,000 arrests and those arrests have print cards in our system, with this upgrade we were able to go digital so anytime anyone gets arrested it searches faster. The ability of this is that all the agencies can remote into each other’s data base and search without interfering with their records.

Mayor Mario Garza asked if it was strictly finger prints to which Sergeant Garcia replied that they did a pilot program with the same company for about 2 months on facial recognition and

they were able to make 2 hits on one case. That software will be available to enforcement in 2020. Police Chief added that the past weekend an arrest was made at a Quickstop burglary of at least \$45,000 worth of equipment was taken and it turned out that the individual was involved in multiple other burglaries. Sergeant Garcia added that the same suspect committed an offense in Edinburg and since his prints were already in the system they could have compared those with the remote searches are doing. Commissioner Jesus “Jesse” Ramirez asked if the MOU would give access to files to which Sergeant responded yes. Mayor Mario Garza asked what other municipalities were participating to which Sergeant Garcia responded Edinburg Police Department and Hidalgo County Sheriff’s office. Mayor Garza asked if they had met with Hidalgo County to which Sergeant Garcia replied that fortunately his brother-in-law is a supervisor so the work closely together already.

Commissioner Jesus “Jesse” Ramirez made motion to approve and was seconded by Commissioner Ernesto “Neto” Guajardo. Motion passed 4-0.

- B. Considering Entering Into an Interlocal Cooperation Agreement between the City of San Juan and Hidalgo County to Provide Efficient and Effective Free Library Services to County Residents for Fiscal Year (2019-2020).

Discussion: Armandina Segin, Library Director stated that it is an annual agreement that they have with Hidalgo County and that the only change is the amount. The change is \$40.00 less from last year.

Mayor Pro-Tem Pete Garcia made motion to approve and was seconded by Commissioner Ernesto “Neto” Guajardo. Motion passed 4-0.

- C. Consideration and Possible Action on a Resolution Accepting Petition for Voluntary Annexation; Setting Dates and Times of Public Hearings; and Directing the Planning Department to Prepare Service Plan.

Discussion: Roberto Escobar, Director of Planning stated that it was a voluntary annexation request for petition located between Nebraska and Stewart on Moore Road. There is an existing subdivision but since it is outside the city limits they are asking for this voluntary annexation of 18.45 acres tract of land. They are looking into doing a hundred lot subdivision. Mayor Mario Garza asked it if was 15.45 acres to which Mr. Escobar responded yes and that they are setting the Public Hearing for April 9th.

Commissioner Jesus “Jesse” Ramirez made motion to approve and was seconded by Commissioner Ernesto “Neto” Guajardo. Motion passed 4-0.

IX. CONSENT AGENDA

- A. Consider Second and Final Reading of an Ordinance for the Conditional Use Permit for Sale of Alcoholic Beverages for Off-Premise Consumption at the “House of Liquor RR” legally described as Lot 1, Block B, Lettered Blocks Subdivision, located at the Southwest corner of Business 83 and Iowa Street, as Requested by Rolando Bocanegra Jr.
- B. Consider Second and Final Reading of an Ordinance for the Conditional Use Permit for the Sale of Alcoholic Beverages for Off-Premises Consumption at “El Barrilito Drive-

Thru” legally described as Lot 5, McBride Subdivision, located at 901 W. Fm 495, Suite 2, as requested by Asael Solis.

- C. Consider Second and Final Reading of an Ordinance for a Rezoning Request from Single-Family Resident District (R-S) to Neighborhood Commercial District (C-1) for a property legally described as Lots 3 and 4, Capri No. 2 Subdivision, located at corner of Pullin and FM 495, as Requested by Baltazar Alanis.
- D. Consider Second and Final Reading of an Ordinance for the Special use Permit for the construction of a New Monopole Cell Tower and a Variance requested to the Zoning Ordinance to Allow the Construction of a 125 feet Monopole Tower within the 200 feet setback from a Residential Property, legally described as Lot 2, Los Jardines Subdivision, as Requested by Branch Tower III, LLC.
- E. Consider Second and Final Reading of an Ordinance Abandoning a Street or Right-of-way Exhibits “A” and “B”, as Described as the South Twenty-eight (S28’) feet of Lot Six (6), Burg Subdivision, an addition to the City of San Juan, Hidalgo County, Texas, as recorded in Volume 1222, Page 565, Map Records of Hidalgo County, Texas as Requested by the Owners(s); Authorizing the Mayor to Execute any and all Necessary Transfer Documents for said Abandonment; Providing a Repealer Clause; Providing a Saving Clause; Providing for Effective Date; Providing for Publication; and Ordaining Other Provisions Related to the Subject Matter Hereof.
- F. Meeting Minutes
 - November 27, 2018
 - February 12, 2019

Commissioner Jesus “Jesse” Ramirez made motion to approve and was seconded by Commissioner Ernesto “Neto” Guajardo. Motion passed 4-0.

X. ADJOURNMENT 6:31P.M.

Mayor Pro-Tem Pete Garcia made motion to adjourn and was seconded by Commissioner Ernesto “Neto” Guajardo. Motion passed 4-0.

CITY OF SAN JUAN, TEXAS

Mario Garza, Mayor

ATTEST:

Diana H. Cavazos, City Secretary