

# CONFLICT OF INTEREST QUESTIONNAIRE

For vendor or other person doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 1491, 80th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the person 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 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 knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

OFFICE USE ONLY	
Date received	

1 Name of person doing business with local governmental entity.

**Kilgo Consulting, Inc.**

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

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

3 Name of local government officer with whom filer has employment or business relationship.

**None - not applicable**

Name of Officer

This section (item 3 including subparts A, B, C & D) must be completed for each officer with whom the filer 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 filer of the questionnaire?

Yes                       No

B. Is the filer of the questionnaire 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 of 10 percent or more?

Yes                       No

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

4

Sandra M. Milken

Signature of person doing business with the governmental entity

9/2/08

Date

# Request for Taxpayer Identification Number and Certification

Give form to the requester. Do NOT send to the IRS.

Print of type  
See Specific Instructions on page 2

Name (as shown on your income tax return)  
 Kilgo Consulting, Inc.  
 Business name, if different from above.

Exempt from backup

Individual/  Sole proprietor  Corporation  Partnership  Other ▶ -----

Check appropriate box:  Sole proprietor  Corporation  Partnership  Other ▶ -----

Address (number, street, and apt. or suite no.)  
 P.O. Box 270124  
 City, state and ZIP code  
 Austin, TX 78727

Requester's name and address (optional)

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 your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I Instructions on Page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

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

Social security number
or
Employer identification number
7 4 2 9 7 6 5 5 9

**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 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. person (including a U.S. resident alien).

Certification Instructions.-You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. (See the instructions on page 4.)

Sign Here      Signature of U.S. person ▶ *Sandra M. Milkey*      Date ▶ 9-2-08

**Purpose of Form**

A person who is required to file an information return with the IRS, must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

**U.S. person.** Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

- Certify the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee.

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

For federal tax purposes you are considered a person if you are:

- \* An individual who is a citizen or resident of the United States,
- \* A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States, or

\* Any estate (other than a foreign estate) or trust. See Regulations sections 301.707-6(a) and 7(a) for additional information.

**Foreign person.** If you are a foreign person, do not use Form W-9. Instead, use the appropriate Form W-8 (see Publication 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 recipient has otherwise become a U.S. resident alien for tax purposes.

If you 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:

- The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
- The treaty article addressing the income.
- The article number (or location) in the tax treaty that contains the saving clause and its exceptions.

# Kilgo Consulting, Inc.

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## Sole Source Certification

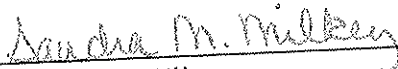
This is to certify that Kilgo Consulting, Inc. (Kilgo) has developed and published and is the sole source for the following products:

- **Research notebooks** containing the Kilgo alignment strategies based on Margaret Kilgo's analysis of the TEKS/TAKS and TEKS/SDAA II relationship to longitudinal statewide student performance data trends, Kilgo's Alignment strategies, Data-Driven Decisions Snapshot charts, and levels of questions.
- **Scope and Sequence materials** incorporating Kilgo alignment strategies, Kilgo's Alignment strategies, and Kilgo's levels of questions.
- **Data-Driven Decision Snapshot CD** - the spreadsheets contained in the research and the scope and sequence notebooks were created by Kilgo Consulting, Inc., and are available solely through Kilgo.

These materials are used in workshops that Kilgo Consulting conducts that train educators to use the Kilgo research and strategies to improve student achievement and the workshops and the workshop notebooks were created by and are the sole property of Kilgo Consulting, Inc. Workshops include: *Data-Driven Decisions Workshops, Assessment Workshops, and Scope & Sequence Workshops.*

Kilgo owns all copyrights and is the sole distributor for these products and owns the intellectual property associated with the research and resulting materials and workshops.

If you have any questions or require additional information please send an email to [milkey@sbcglobal.net](mailto:milkey@sbcglobal.net) or call 512.252.0710.

  
Sandra M. Milkey  
Kilgo Consulting, Inc.

9-2-08  
Date