



CHANGING THE
WORLD
THEIR FUTURE,
OUR MISSION

FY2024 Term Contract:	Financial Advisory Services #102-24-0
Awarded To:	1. <u>Estrada Hinojosa & Company Inc</u>
Term:	Three years/Two-year (one-year terms) option to renew
Term Period :	May 2023 – June 2026

Mission Consolidated Independent School District
Evaluation Matrix
Financial Advisory Services #102-24-0

Bid Evaluation Matrix		Vendors			
		Estrada Hinojosa & Company Inc	Frost Bank	Hilltop Securities Inc	PFM Financial Advisors LLC
Criteria	Weight				
Meet district's needs (100 points)					
Submitted information on the firm	15	15	15	15	15
Firms financial position	20	20	20	20	20
The firm meets the required qualifications	25	25	25	25	25
The firm's experience in Region One School Districts	30	30	15	30	15
Proposal is complete and compliant with the instructions in the solicitation	5	5	5	5	5
Provided 5 professional school District references	5	5	5	5	5
Total	100	100	85	100	85

Committee Members:

Joel Garcia - Assistance Superintendent for Finance
Dora Garcia - Director of Budget and Finance
Sylvia Esquivel - Accountant

Notes:

Frost Bank & PFM Financial did not list Region One school Districts

**Mission Consolidated Independent School District
Financial Advisory Services RFQ#- 102-24-0
Ranking - Tally**

Evaluator Name	Firm Name	
	Hilltop Securities	Estrada Hinojosa
Joel Garcia, Assistant Superintendent for Finance	2	1
Dora Garcia, Director for Budget and Finance	2	1
Sylvia Esquivel, Accountant	2	1
Total*	6	3

*Lowest score is highest ranking

The selected firm is Estrada, Hinojosa

Printed Name: Anabel Garza

Signature: Anabel Garza Date: 5/1/23

Ranking Facilitators: Daisy Cuevas

Daisy Cuevas, Purchasing Specialist
Anabel Garza, Purchasing Coordinator

Hilltop Securities Notes:

- The company has served the District for over 20 years, but not a local company. Also, the company did not replace Mr. Vela when retired.
- Did not answer all questions requested in the interview presentation.
- Has assisted Mission CISD with issuing/ refinance bonds.

Estrada Hinojosa Notes:

- The company is large and has local representation and offices.
- Constant communication with clients.
- Presented tax strategies in the interview.
- Innovative and experienced.
- Experience with school districts in the valley.
- Involved with local community.