

CONSULTING SERVICES **PROPOSAL**

prepared for:

GALVESTON ISD



Presented by
Leo Lopez



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Experience & Qualifications

Where education expertise and government advocacy meet

MoakCasey, LLC, has a strong executive leadership team, including Dr. Buck Gilcrease, Executive Chairman of the Board; Dr. Dan Huberty, Chief Executive Officer; and Leo Lopez, Chief Financial Officer, who have a combined 80 years of experience of locally elected and government service.

The MoakCasey team is comprised of strong professionals with vast experience within Texas school districts, the Texas Legislature, Texas state agencies and education organizations. Our unparalleled breadth of experience and diversity of skill sets equips our consultants to provide clients cutting-edge, personalized, full-service solutions.

Choosing MoakCasey as your strategic partner gives you a head start in achieving success. With our extensive network, in-depth expertise, and unwavering dedication, we are ready to champion your cause and drive positive change. We look forward to helping you achieve your goals.



Scope of Work

PART 1. SERVICES

The Consultant shall:

1.1 Efficiency Audit: Provide a comprehensive efficiency audit as outlined under Texas Education Code, Sections 11.184, and Legislative Budget Board guidelines.

1.2 VATRE Planning and Process Support: Guide the District through the full VATRE process, including:

- Development of timelines aligned to statutory deadlines
- Identification of required actions and decision points
- Support in ensuring compliance with applicable laws, notice requirements, and election procedures
- Coordination of financial and operational components necessary for successful planning and execution

1.3 Revenue and Financial Impact Analysis: Develop detailed revenue projections and financial modeling to illustrate the fiscal impact of the passage or non-passage of a Voter Approval Tax Rate Election (VATRE).

1.4 Board Communication and Presentation: Prepare and deliver clear, data-driven budget and VATRE-related presentations to the Board of Trustees, including communication of financial impacts, efficiency findings, and strategic considerations.

1.5 Ongoing Advisory Support: Provide ongoing consultation and support related to the efficiency audit, VATRE planning and associated financial services, as agreed to in writing by the parties.

PART 11. GENERAL PROVISIONS

In performing these Services, Consultant and the District agree to the following additional terms and conditions.

2.1. Consultant shall be available for direct consultation with the District, but shall maintain primary contact with its Chief Financial Officer.

2.2. The District shall provide for the reproduction and dissemination of major reports or other written materials.



Scope of Work

PART 11. GENERAL PROVISIONS (CONTINUED)

2.3. Services provided by Consultant shall be provided by direct staff of Consultant or through resources under subcontract.

2.4. The District shall provide Consultant with necessary background information relating to financial and other pertinent data.

2.5. Information obtained by Consultant from the District shall remain confidential unless authorization for the release of the information has been approved by an authorized representative of the District.

2.6. Consultant is not an employee of District, and is not entitled to fringe benefits, pension, workers' compensation, retirement, etc. District shall not deduct Federal income taxes, FICA (Social Security), or any other taxes required to be deducted by an employer, as this is the responsibility of Consultant.

2.7. Nothing in this Agreement shall be construed to prevent Consultant from entering into agreements with individual school districts or other education groups regarding financial planning and related services.

2.8. No provision of this Agreement shall be construed to prevent Consultant from undertaking sponsored research or services on Texas statewide school finance issues.

2.9. No provision of this Agreement shall be construed to entitle the District to access to general statewide finance modeling services and analyses prepared by Consultant except as covered under Part 1.

2.10. If Consultant undertakes any activity specified in Sections 2.7-2.9 that represent a potential conflict of interest, Consultant shall notify and work with the District to resolve the matter.



Scope of Work

PART 11. GENERAL PROVISIONS (CONTINUED)

2.11. Either party may terminate this agreement at anytime with or without cause by providing thirty (30) days written notice. The thirty (30) days notice will begin on the day the notice is faxed or e-mailed to Consultant. Upon receiving said notice, Consultant will immediately cease all work on behalf of District. In the event of termination, Fees shall be payable through the date of termination.

2.12. This Agreement shall be governed by the laws of the State of Texas and venue for all purposes incident to this Agreement shall lie in Travis County, Texas.

2.13. Nothing contained in this Agreement shall create a contractual relationship with or a cause of action in favor of a third party against either the District or Consultant.

2.14. In the event that the District is required to furnish information or records compiled by Consultant on the performance of the Agreement pursuant to the Texas Public Information Act, Consultant shall furnish such information and records to the District and the District shall have the right to release such information and records.

2.15. The District does not waive or relinquish any governmental immunities or defenses on behalf of itself and its trustees, officers, employees, or agents as a result of the execution of this Agreement and performance of the functions or obligations described herein. Nothing herein shall be construed as creating any personal liability on the part of any officer, director, employee or representative of the District.

Consultant affirms that it does not and will not boycott Israel during the term of the contract. (Required by Texas Gov't Code §2270). In accordance with Texas Government Code Chapter 2252, Subchapter F, Consultant certifies that it is not a company identified on the Texas Comptroller's list of companies known to have scrutinized business operations or contracts with, or provide supplies or services to, the Government of Iran, the Government of Sudan, or a foreign organization designated as a Foreign Terrorist Organization by the U.S. Secretary of State.

Key Project Personnel

PART III. PROJECT PERSONNEL



Leo Lopez

CHIEF
FINANCIAL
OFFICER

Leo Lopez serves as Chief Financial Officer and Board Member at MoakCasey, overseeing the firm's financial management, including accounting, budgeting, forecasting, and treasury functions across multiple affiliated entities. He also leads the firm's School Finance Consulting practice, supporting districts statewide with financial analysis, legislative insight, and executive coaching aligned to student outcomes. Leo contributes to the firm's advocacy efforts, helping districts interpret the fiscal impact of proposed legislation and develop effective strategies to support public education priorities. Prior to joining MoakCasey, Leo held leadership roles at the Texas Education Agency and Austin ISD, where he directed statewide school finance operations and played a key role in the development and implementation of House Bill 3 (2019). He holds a Bachelor of Business Administration from The University of Texas at Austin and is a graduate of the Texas Fiscal Officers' Academy.



Josh Haney

SENIOR
VICE PRESIDENT
FINANCE

Josh started his career at the Texas Comptroller of Public Accounts after he graduated from the LBJ School of Public Affairs at UT Austin. While at the Comptroller's office, he provided forecasts of state revenues and fiscal impact analyses of proposed legislation. He also led efforts within the agency to improve its revenue tracking and reporting processes. Josh joined MoakCasey in 2019 just as the Legislature was beginning to develop House Bill 3.

Key Project Personnel

PART III. PROJECT PERSONNEL (CONTINUED)



Lori Boswell

VICE PRESIDENT
SCHOOL FINANCE

Lori serves as Vice President of School Finance at MoakCasey, supporting Texas school districts with financial and operational advisory services. She brings more than 26 years of experience in public school finance and operations, with expertise in budgeting, financial reporting, revenue forecasting, debt and capital planning, and compliance. She most recently served as Assistant Superintendent of Business & Operations for Weatherford ISD and previously held senior financial leadership roles with Fort Worth ISD. She holds a Bachelor of Business Administration from the University of Illinois and is a Registered Texas School Business Administrator (RTSBA).



Oscar Ayala

DIRECTOR
SCHOOL FINANCE

Oscar joined MoakCasey in 2026 as Director of School Finance. In this role, he leverages his expertise in public school finance to support districts and stakeholders across Texas. Prior to joining MoakCasey, Oscar served as a financial analyst at the Texas Education Agency, where he played a key role in funding implementations and worked directly with school districts to ensure compliance with various school finance programs.



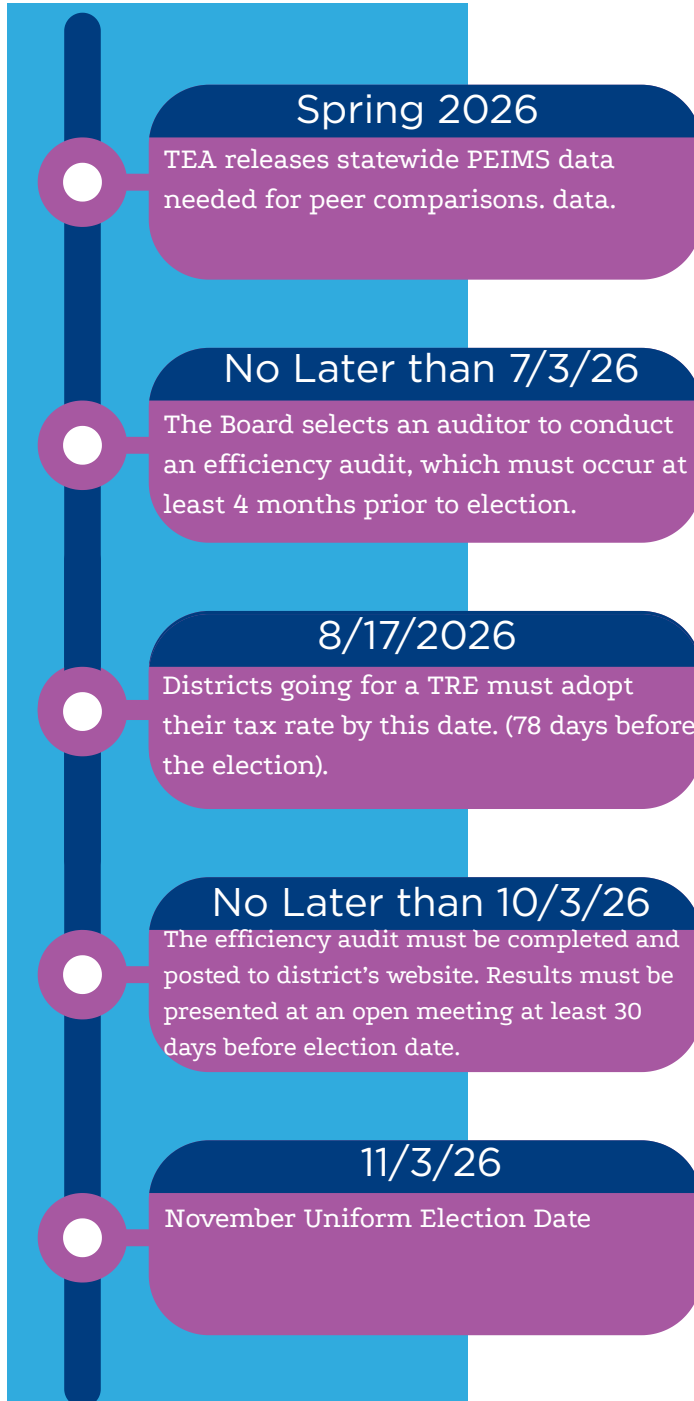
Kimberlee Ralph

PROJECT MANAGER

Kimberlee Ralph joined MoakCasey in 2025 and manages the firm's role in multi-district litigation, supporting districts with documentation, technical guidance, and court-mandated compliance. She also contributes to School Finance services, including property value audits and protests, Truth-in-Taxation, and revenue projections. Kimberlee brings over a decade of experience in public education across Texas, Colorado, and Washington, D.C. Most recently, she served as Chief of Staff in the Texas House of Representatives and as an associate researcher with the Learning Policy Institute.

Project Timeline

PART IV. PROJECT TIMELINE



Proposed Contract Terms & Contact Information

PART V. CONTRACT TERMS

MoakCasey proposes a contract that will commence with the acceptance of an executed contract until December 31, 2026 at the following rates:

- \$20,000 for Basic Fee for Services outlined in 1.1, 1.2, and 1.3
- \$1,500 for Basic Fee for virtual presentation outlined in 1.4 OR
- \$3,000 plus expenses for an in-person presentation outlined in 1.4
- \$375/HR for Basic Fee for Services outlined in 1.5
- Total expenses for services under this Agreement shall not exceed \$2,000 without prior written approval by the District

Contact Information

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