



SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT

Agenda Item Summary

Meeting Date: February 25<sup>th</sup>, 2021

Purpose:  Presentation/Report  Recognition  Discussion/ Possible Action

Closed/Executive Session  Work Session  Discussion Only  Consent

From: Dr. Marc Puig, Superintendent of Schools

Item Title: Approve the selection of firms to provide Architect, Legal, Financial Advisor, Independent Financial Audit and Third Party Administrator for Self Insured Workers Compensation Claims Administration services for the District.

Description: The district solicited responses to RFQ 2021-02, Architect Services, RFQ 2021-03, Legal Services, RFQ 2021-04, Financial Advisor Services, RFQ 2021-05, Independent Financial Audit Services and RFP 2021-07, Third Party Administrator for Self Insured Workers Compensation Claims Administration from prospective vendors to perform the listed services.

Historical Data: The Board of Trustees approved district staff to solicit responses from potential providers for Architect, Legal, Financial Advisor, Independent Financial Audit and Third Party Administrator for Self Insured Workers Compensation Claims Administration services for the District on November 18<sup>th</sup>, 2020 as these services are not performed by district staff.

Recommendation: Approve the selection of the following firms to provide Architect, Legal, Financial Advisor, Independent Financial Audit and Third Party Administrator for Self Insured Workers Compensation Claims Administration services for the District.

Architect Services: PBK Architects

Legal Services: Sanchez & Wilson, PLLC

Independent Financial Audit Services: Weaver Group

Financial Advisor Services: Specialized Public Finance

Third Party Administrator for Workers Compensation Claims Administration: Claims Administrative Services

District Goal/Strategy:

Strategy 1 We will engage all school community members through transparency and effective communication to promote a positive perception and create a strong brand.

APPROVED BY:

SIGNATURE

DATE

Chief Officer:

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CFO Funding Approval:

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Superintendent:

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Funding Budget Code and Amount:

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APPROVED BY:

SIGNATURE

DATE

Chief Officer:

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CFO Funding Approval:

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Superintendent:

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## SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT

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1450 Gillette Boulevard · San Antonio, Texas 78224 · (210) 977-7000 · Fax (210) 977-7017

To: Dr. Marc Puig, Superintendent of Schools

From: Dolores Sendejo, Deputy Superintendent

Date: February 15, 2021

Subject: Request for Qualifications (RFQ)

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On November 18, 2020, South San Antonio ISD issued a request for qualifications (RFQ) for professional services in the following areas: Architect, Legal (General Counsel), Financial Advisor, Independent Financial Auditor and Third Party Administrator for Self-Insured Workers' Compensation Claims Administration. Responses were due to the district on or before January 7, 2021.

Below is the list of responses to the RFQ by professional service category:

Architecture Services:

- 1) Garza, Bomberger & Associates
- 2) LPA Design Studios
- 3) PBK
- 4) Slay Architecture
- 5) VLK Architects

Legal Services:

- 1) O'Hanlon, Demerath & Castillo
- 2) J. Cruz & Associates
- 3) Sanchez & Wilson, PLLC
- 4) Walsh, Gallegos, Trevino, Russo & Kyle

Independent Financial Audit Services:

- 1) Carr, Riggs & Ingram
- 2) Garza Gonzalez
- 3) Weaver Group

Financial Advisors Services:

- 1) Hilltop Securities
- 2) RBC Capital Markets
- 3) Specialized Public Finance

Third Party Administrator for Workers Compensation Claims Administration:

- 1) Claims Administrative Services
- 2) Sedgewick

In the first phase of the selection process, each proposal respondent was required to submit qualification statements detailing their firm profile, professional experiences, and firm references. A committee consisting of the following administrators evaluated the qualification statements:

- Dolores Sendejo, Committee Facilitator
- Gilbert F. Rodriguez, Trustee Representative
- Stacey E. Alderete, Trustee Representative
- Ernesto Arrellano Jr., Trustee Representative
- Jeff Baum, Business Office Representative

After evaluating and scoring the qualification statements across each professional service category, the firms were ranked according to the average evaluation scores assigned by the evaluation committee. A cut point of 100 points was established with the exception of the Independent Financial Audit Services, which totaled 95.

In phase two of the selection process at the District's discretion, and the committee's recommendation one or more firm(s) were invited to demonstrate their solution(s) and/or system(s) and interview or host a District visit and were notified by e-mail.

The committee interviewed these firms on the following dates:

Architecture Services:

- 1) PBK (2.3.2021)
- 2) VLK Architects (2.5.2021)

Legal Services:

- 1) Sanchez & Wilson, PLLC (2.10.2021)
- 2) Walsh, Gallegos, Trevino, Russo & Kyle (2.8.2021)

Independent Financial Audit Services:

- 1) Weaver Group (2.11.2021)

Financial Advisors Services:

- 1) Hilltop Securities (2.12.2021)
- 2) Specialized Public Finance (2.12.2021)

Third Party Administrator for Workers Compensation Claims Administration:

- 1) Claims Administrative Services (2.4.2021)

Each firm was asked to make present information focusing on their relevant experience and what made them the best and most uniquely qualified team to serve South San Antonio ISD.

As determined through a rigorous evaluation of qualifications, demonstrated experience, and comprehensive interviews, the committee recommends the following firms as identified by category below:



Architecture Services:

- 1) PBK

Legal Services:

- 1) Sanchez & Wilson, PLLC

Independent Financial Audit Services:

- 1) Weaver Group

Financial Advisors Services:

- 1) Hilltop Securities
- 2) Specialized Public Finance

Third Party Administrator for Workers Compensation Claims Administration:

- 1) Claims Administrative Services



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Request For Qualifications 2021-02: Architecture Services

Evaluation Summary

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

	Group/Individual Evaluation Criteria	Garza, Bomberger & Assoc.	Slay Architecture	LPA Design Studios	PBK	VLK Architects
Criteria	Description					
1	Qualifications of the firm, specifically as they relate to this request.	30,30,25,40 = 125	18,30,25,15 = 88	25,30,30,20 = 105	25,40,40,40 = 145	25,40,35,0 = 100
2	Related project experience of the firm(s) and the individuals who would be assigned to this Project.	15,7,5,5 = 32	8,7,5,6 = 26	10,7,10,5 = 32	12,10,15,15 = 52	12,8,15,3 = 38
3	Available resources to complete the project. This criterion would include the analytical, design tools, personnel, resources or methodologies commonly used by the firm that may be applicable to the project categories.	15,12,7,5 = 39	12,12,7,4 = 35	12,12,12,5 = 41	14,15,15,15 = 59	15,15,15,2 = 47
4	Responsiveness to the RFQ. This would include any documents submitted such as concept plans, space planning, and design concepts and other related items.	3,3,3,2 = 11	2,3,3,4 = 12	5,3,5,2 = 15	5,3,5,5 = 18	4,3,5,0 = 12
5	Professional References	10,6,5,5 = 26	6,6,2,1 = 15	6,5,7,1 = 19	8,6,10,10 = 34	10,6,10,5 = 31
6	Proposer's ability to provide cost-effective services to the District.	10,10,7,0 = 27	5,10,2,0 = 22	10,10,7,7 = 34	10,12,15,15 = 52	10,11,15,0 = 36
	<b>TOTAL</b>	<b>260</b>	<b>198</b>	<b>246</b>	<b>360</b>	<b>264</b>



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Request For Qualifications 2021-02: Architecture Services

Evaluation Matrix

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation. (2)

Group/Individual Evaluation Criteria			Garza, Bomberger & Assoc.	Slay Architecture	LPA Design Studios	PBK	VLK Architects
Criteria	Description	Weighted Value					
1	Qualifications of the firm, specifically as they relate to this request.	0-40	30	18	25	25	25
2	Related project experience of the firm(s) and the individuals who would be assigned to this Project.	0-15	15	8	10	12	12
3	Available resources to complete the project. This criterion would include the analytical, design tools, personnel, resources or methodologies commonly used by the firm that may be applicable to the project categories.	0-15	15	12	12	14	15
4	Responsiveness to the RFQ. This would include any documents submitted such as concept plans, space planning, and design concepts and other related items.	0-5	3	2	5	5	4
5	Professional References	0-10	10	6	6	8	10
6	Proposer's ability to provide cost-effective services to the District.	0-15	10	5	10	10	10
	<b>TOTAL</b>	<b>0-100</b>	<b>83</b>	<b>51</b>	<b>68</b>	<b>74</b>	<b>76</b>

Date completed: 1/26/21  
 Evaluator's Name (print): Ernesto Arrellano, Jr.

Local/Bond/  
 past projects

Evaluator's Signature:

Bond/Austin/  
 past projects



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Request For Qualifications 2021-02: Architecture Services

Evaluation Matrix

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Group/Individual Evaluation Criteria			Garza, Bomberger & Assoc.	Slay Architecture	LPA Design Studios	PBK	VLK Architects
Criteria	Description	Weighted Value					
1	Qualifications of the firm, specifically as they relate to this request.	0-40	30	30	30	40	40
2	Related project experience of the firm(s) and the individuals who would be assigned to this Project.	0-15	7	7	7	10	8
3	Available resources to complete the project. This criterion would include the analytical, design tools, personnel, resources or methodologies commonly used by the firm that may be applicable to the project categories.	0-15	12	12	12	15	15
4	Responsiveness to the RFQ. This would include any documents submitted such as concept plans, space planning, and design concepts and other related items.	0-5	3	3	3	3	3
5	Professional References	0-10	6	6	7	6	6
6	Proposer's ability to provide cost-effective services to the District.	0-15	10	10	10	12	11
	TOTAL	0-100	68	68	67	86	83

Date completed: 2/1/2021

Evaluator's Name (print): JEFFREY W. BANN

Evaluator's Signature: 



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Request For Qualifications 2021-02: Architecture Services

Evaluation Matrix

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Group/Individual Evaluation Criteria			Garza, Bomberger & Assoc.	Slay Architecture	LPA Design Studios	PBK	VLK Architects
Criteria	Description	Weighted Value					
1	Qualifications of the firm, specifically as they relate to this request.	0-40	25	25	30	40	35
2	Related project experience of the firm(s) and the individuals who would be assigned to this Project.	0-15	5	5	10	15	15
3	Available resources to complete the project. This criterion would include the analytical, design tools, personnel, resources or methodologies commonly used by the firm that may be applicable to the project categories.	0-15	7	7	12	15	15
4	Responsiveness to the RFQ. This would include any documents submitted such as concept plans, space planning, and design concepts and other related items.	0-5	3	3	5	5	5
5	Professional References	0-10	5	2	7	10	10
6	Proposer's ability to provide cost-effective services to the District.	0-15	7	2	7	15	15
	<b>TOTAL</b>	<b>0-100</b>	<b>52</b>	<b>44</b>	<b>71</b>	<b>100</b>	<b>95</b>

Date completed: 2/2/2021

Evaluator's Name (print): Gilbert F. Rodriguez

*Gilbert F. Rodriguez*

Evaluator's Signature: \_\_\_\_\_



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

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Request For Qualifications 2021-02: Architecture Services

Evaluation Matrix

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Group/Individual Evaluation Criteria			Garza, Bomberger & Assoc.	Slay Architecture	LPA Design Studios	PBK	VLK Architects
Criteria	Description	Weighted Value					
1	Qualifications of the firm, specifically as they relate to this request.	0-40	40	15	20	40	0
2	Related project experience of the firm(s) and the individuals who would be assigned to this Project.	0-15	5	6	5	15	3
3	Available resources to complete the project. This criterion would include the analytical, design tools, personnel, resources or methodologies commonly used by the firm that may be applicable to the project categories.	0-15	5	4	5	15	2
4	Responsiveness to the RFQ. This would include any documents submitted such as concept plans, space planning, and design concepts and other related items.	0-5	2	4	2	5	0
5	Professional References	0-10	5	1	1	10	5
6	Proposer's ability to provide cost-effective services to the District.	0-15	0	0	7	15	0
TOTAL		0-100	57	30	40	100	10

Date completed: 2/1/2021

Evaluator's Name (print): Stacey E. Alderete

Evaluator's Signature: *Stacey Alderete*



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Request For Qualifications 2021-03: Legal Services

Evaluation Summary

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

	Group/Individual Evaluation Criteria	O'Hanlon, Demerath & Castillo	Walsh, Gallegos, Trevino, Russo & Kyle	Sanchez & Wilson, PLLC	J. Cruz & Assoc.	
Criteria	Description					
1	Professional qualifications, expertise, and board certifications of the proposer	40, 40, 45, 45 = 170	40, 45, 45, 45 = 175	25, 40, 45, 45 = 155	35, 35, 30, 45 = 145	
2	Experience of the proposer and personnel in representing governmental bodies	20, 18, 15, 5 = 68	20, 20, 20, 20 = 80	12, 18, 20, 20 = 70	15, 13, 8, 3 = 39	
3	Ability of proposer to provide services as set forth in Section II, and as required by SSAISD, including depth of proposers' experience	15, 17, 15, 5 = 62	20, 20, 20, 20 = 80	10, 18, 20, 20 = 68	15, 16, 8, 0 = 39	
4	Proposers past relationship with the District	5, 3, 5, 0 = 13	5, 3, 5, 5 = 18	0, 0, 5, 5 = 10	0, 0, 1, 0 = 1	
5	Impact on the ability of the District to comply with laws and rules relating to historically underutilized businesses	5, 6, 7, 0 = 18	10, 9, 10, 10 = 39	3, 7, 10, 10 = 30	5, 7, 4, 0 = 16	
	TOTAL	331	392	333	240	





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Request For Qualifications 2021-03: Legal Services

Evaluation Matrix

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

	Group/Individual Evaluation Criteria		O'Hanlon, Demerath & Castillo	Walsh, Gallegos, Trevino, Russo & Kyle	Sanchez & Wilson, PLLC	J. Cruz & Assoc.	
Criteria	Description	Weighted Value					
1	Professional qualifications, expertise, and board certifications of the proposer	0-45	45	45	45	45	
2	Experience of the proposer and personnel in representing governmental bodies	0-20	5	20	20	3	
3	Ability of proposer to provide services as set forth in Section II, and as required by SSAISD, including depth of proposers' experience	0-20	5	20	20	0	
4	Proposers past relationship with the District	0-5	0	5	5	0	
5	Impact on the ability of the District to comply with laws and rules relating to historically underutilized businesses	0-10	0	10	10	0	
	TOTAL	0-100	55	100	100	48	

Date completed: 2/1/2021

Evaluator's Name (print): Stacey E. Alderete

Evaluator's Signature: *Stacey Alderete*





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Request For Qualifications 2021-03: Legal Services

Evaluation Matrix

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

	Group/Individual Evaluation Criteria		O'Hanlon, Demerath & Castillo	Walsh, Gallegos, Trevino, Russo & Kyle	Sanchez & Wilson, PLLC	J. Cruz & Assoc.	
Criteria	Description	Weighted Value					
1	Professional qualifications, expertise, and board certifications of the proposer	0-45	40	40	25	35	
2	Experience of the proposer and personnel in representing governmental bodies	0-20	20	20	12	20	
3	Ability of proposer to provide services as set forth in Section II, and as required by SSAISD, including depth of proposers' experience	0-20	15	20	10	15	
4	Proposers past relationship with the District	0-5	5	5	0	0	
5	Impact on the ability of the District to comply with laws and rules relating to historically underutilized businesses	0-10	5	10	3	5	
	<b>TOTAL</b>	<b>0-100</b>	<b>85</b>	<b>95</b>	<b>50</b>	<b>75</b>	

Date completed: 1/27/21

Evaluator's Name (print):

Ernesto Arrellano, Jr

Evaluator's Signature:

1240 SR  
 †186 Assoc  
 † 90 Para

Redistricting †250  
 experience Law 250  
 St. Mary's Alum 65

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Request For Qualifications 2021-03: Legal Services


Evaluation Matrix

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Group/Individual Evaluation Criteria			O'Hanlon, Demerath & Castillo	Walsh, Gallegos, Trevino, Russo & Kyle	Sanchez & Wilson, PLLC	J. Cruz & Assoc.	
Criteria	Description	Weighted Value					
1	Professional qualifications, expertise, and board certifications of the proposer	0-45	20	25	20	35	
2	Experience of the proposer and personnel in representing governmental bodies	0-20	18	20	18	13	
3	Ability of proposer to provide services as set forth in Section II, and as required by SSAISD, including depth of proposers' experience	0-20	17	20	18	14	
4	Proposers past relationship with the District	0-5	3	3	0	0	
5	Impact on the ability of the District to comply with laws and rules relating to historically underutilized businesses	0-10	6	9	7	7	
TOTAL		0-100	84	97	83	71	

Date completed: 2/1/2021

Evaluator's Name (print): JEFFREY W. BROWN

Evaluator's Signature: 



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Request For Qualifications 2021-03: Legal Services

**Evaluation Matrix**

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

	Group/Individual Evaluation Criteria		O'Hanton, Demerath & Castillo	Walsh, Gallegos, Trevino, Russo & Kyle	Sanchez & Wilson, PLLC	J. Cruz & Assoc.	
Criteria	Description	Weighted Value					
1	Professional qualifications, expertise, and board certifications of the proposer	0-45	45	45	45	30	
2	Experience of the proposer and personnel in representing governmental bodies	0-20	15	20	20	8	
3	Ability of proposer to provide services as set forth in Section II, and as required by SSAISD, including depth of proposers' experience	0-20	15	20	20	8	
4	Proposers past relationship with the District	0-5	5	5	5	1	
5	Impact on the ability of the District to comply with laws and rules relating to historically underutilized businesses	0-10	7	10	10	4	
	<b>TOTAL</b>	<b>0-100</b>	<b>87</b>	<b>100</b>	<b>100</b>	<b>51</b>	

Date completed: 2/2/2021

Evaluator's Name (print): Gilbert F. Rodriguez

*Gilbert F. Rodriguez*

Evaluator's Signature: \_\_\_\_\_



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Request For Qualifications 2021-04: Financial Advisor Services

Evaluation Summary

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

	Group/Individual Evaluation Criteria	Hilltop Securities	Specialized Public Finance	RBC Capital Markets		
Criteria	Description					
1	Demonstrated abilities and firm experience acting as Financial Advisor for Texas School Districts	25, 25, 24, 25 = 99	20, 22, 15, 25 = 82	20, 25, 0, 0 = 45		
2	References	10, 10, 9, 10 = 39	0, 9, 5, 5 = 19	10, 8, 0, 0 = 18		
3	Experience and Qualifications of key personnel assigned to SSAISD	20, 22, 24, 15 = 81	20, 22, 12, 7 = 61	25, 22, 0, 0 = 47		
4	Availability and accountability of the proposer's firm/team	15, 20, 19, 17 = 71	15, 20, 10, 5 = 50	20, 15, 0, 0 = 35		
5	Financial stability	5, 5, 4, 5 = 19	5, 5, 3, 2 = 15	5, 5, 0, 0 = 10		
6	Past Experience with SSAISD	5, 4, 0, 0 = 9	0, 0, 0, 0 = 0	5, 5, 0, 0 = 10		
7	HUB status	0, 5, 5, 1 = 11	0, 5, 3, 1 = 9	0, 5, 0, 0 = 5		
8	Proof of professional licenses required to complete contemplated services	5, 5, 5, 5 = 20	5, 5, 5, 3 = 18	5, 5, 0, 0 = 10		
	<b>TOTAL</b>	<b>349</b>	<b>254</b>	<b>180</b>		



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

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Request For Qualifications 2021-04: Financial Advisor Services

Evaluation Matrix

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Group/Individual Evaluation Criteria			Hilltop Securities	Specialized Public Finance	RBC Capital Markets		
Criteria	Description	Weighted Value					
1	Demonstrated abilities and firm experience acting as Financial Advisor for Texas School Districts	0-25	25	25	0		
2	References	0-10	10	5	0		
3	Experience and Qualifications of key personnel assigned to SSAISD	0-25	15	7	0		
4	Availability and accountability of the proposer's firm/team	0-20	17	5	0		
5	Financial stability	0-5	5	2	0		
6	Past Experience with SSAISD	0-5	0	0	0		
7	HUB status	0-5	1	1	0		
8	Proof of professional licenses required to complete contemplated services	0-5	5	3	0		
	TOTAL	0-100	78	48	0		

Date completed: 2/1/2021

Evaluator's Name (print): Stacey E. Alderete

Evaluator's Signature: *Stacey Alderete*



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Request For Qualifications 2021-04: Financial Advisor Services

Evaluation Matrix

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Group/Individual Evaluation Criteria			Hilltop Securities	Specialized Public Finance	RBC Capital Markets		
Criteria	Description	Weighted Value					
1	Demonstrated abilities and firm experience acting as Financial Advisor for Texas School Districts	0-25	25	20	20		
2	References	0-10	10	0	10		
3	Experience and Qualifications of key personnel assigned to SSAISD	0-25	20	20	25		
4	Availability and accountability of the proposer's firm/team	0-20	15	15	20		
5	Financial stability	0-5	5	5	5		
6	Past Experience with SSAISD	0-5	5	5	5		
7	HUB status	0-5	5	5	5		
8	Proof of professional licenses required to complete contemplated services	0-5	5	5	5		
	TOTAL	0-100	85	65	90		

Date completed: 1/28/21  
 Evaluator's Name (print): Ernesto Anrellano, Jr.

Evaluator's Signature: 



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

1450 Gillette Boulevard · San Antonio, Texas 78224 · (210) 977-7000 · Fax (210) 977-7017

Request For Qualifications 2021-04: Financial Advisor Services

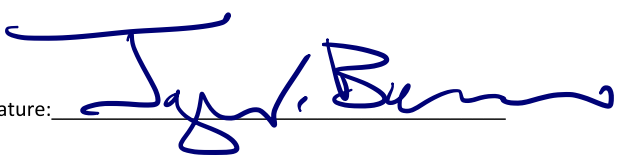
Evaluation Matrix

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Group/Individual Evaluation Criteria			✓ Hilltop Securities	Specialized Public Finance ✓	RBC Capital Markets ✓		
Criteria	Description	Weighted Value					
1	Demonstrated abilities and firm experience acting as Financial Advisor for Texas School Districts	0-25	25	22	25		
2	References	0-10	10	9	10		
3	Experience and Qualifications of key personnel assigned to SSAISD	0-25	22	22	22		
4	Availability and accountability of the proposer's firm/team	0-20	20	20	15		
5	Financial stability	0-5	5	5	5		
6	Past Experience with SSAISD	0-5	5	5	5		
7	HUB status	0-5	5	5	5		
8	Proof of professional licenses required to complete contemplated services	0-5	5	5	5		
TOTAL		0-100	96	88	90		

Date completed: 2/1/2021

Evaluator's Name (print): JEFFREY W. BAUM

Evaluator's Signature: 



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**  
 1450 Gillette Boulevard · San Antonio, Texas 78224 · (210) 977-7000 · Fax (210) 977-7017

Request For Qualifications 2021-04: Financial Advisor Services

**Evaluation Matrix**

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

	Group/Individual Evaluation Criteria		Hilltop Securities	Specialized Public Finance	RBC Capital Markets		
Criteria	Description	Weighted Value					
1	Demonstrated abilities and firm experience acting as Financial Advisor for Texas School Districts	0-25	24	15	0		
2	References	0-10	9	5	0		
3	Experience and Qualifications of key personnel assigned to SSAISD	0-25	24	12	0		
4	Availability and accountability of the proposer's firm/team	0-20	19	10	0		
5	Financial stability	0-5	4	3	0		
6	Past Experience with SSAISD	0-5	0	0	0		
7	HUB status	0-5	5	3	0		
8	Proof of professional licenses required to complete contemplated services	0-5	5	5	0		
	<b>TOTAL</b>	<b>0-100</b>	<b>90</b>	<b>53</b>	<b>0</b>		

Date completed: 2/2/2021

Evaluator's Name (print): Gilbert F. Rodriguez

*Gilbert F. Rodriguez*

Evaluator's Signature: \_\_\_\_\_





**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

1450 Gillette Boulevard · San Antonio, Texas 78224 · (210) 977-7000 · Fax (210) 977-7017

Request For Qualifications 2021-05: Independent Financial Audit Services

Evaluation Summary

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

	Group/Individual Evaluation Criteria	Carr, Riggs & Ingram	Weaver Group	Garza Gonzalez
Criteria	Description			
1	Technical Component Criteria. The audit firm should demonstrate its understanding of the work to be performed as discussed in the RFQ, Proposal Format and Content, Section C – Technical Component.	20, 16, 12, 10 = 58	20, 19, 20, 20 = 79	20, 18, 18, 14 = 70
2	Management Component Criteria The audit firm will furnish satisfactory evidence of capability to provide in a professional and timely manner the services stated in the RFQ, Proposal Format and Content, Section D - Management Component. A. Technical experience of the firm: 1. Auditing experience in Texas public schools. 2. Customer Satisfaction - Are current or past customers of the firm satisfied with the level of service provided? B. Characteristics of the staff, including consultants to be assigned to the audit: 1. Size and structure of the firm, including audit staff positions. 2. Qualifications of supervisory personnel, consultants, and the field audit team (education, including continuing education courses taken during the past four years and the types and years of experience). C. General direction and supervision to be exercised over the audit team by the firm's management personnel.	17, 22, 17, 17 = 73	20, 25, 19, 25 = 89	20, 22, 17, 17 = 76

3	<p>Task / Activity Plan Approach the firm will take to complete the annual audit including staffing and time lines as discussed in the RFQ, Proposal Format and Content, Section E – Task / Activity Plan.</p> <p>Clear understanding of the work to be performed:</p> <ol style="list-style-type: none"> <li>1. Comprehensiveness of the audit work plan.</li> <li>2. Realistic time estimates of each major segment of the work plan, and the estimated number of hours for each staff level including consultants assigned.</li> </ol>	10, 20, 15, 10 = 55	15, 20, 24, 25 = 84	20, 19, 24, 15 = 78
4	Estimated Fee Estimated fee by position type, the estimated chargeable hours, and the additional year increase(s).	15, 17, 15, 15 = 62	12, 18, 16, 10 = 56	15, 20, 17, 10 = 62
5	Oral Presentation	0, 0, 0, 0 = 0	0, 0, 0, 0 = 0	0, 0, 0, 0 = 0
	TOTAL	248	308	286



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

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Request For Qualifications 2021-05: Independent Financial Audit Services

Evaluation Matrix

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Group/Individual Evaluation Criteria			Carr, Riggs & Ingram	Weaver Group	Garza Gonzalez
Criteria	Description	Weighted Value			
1	<p>Technical Component Criteria. The audit firm should demonstrate its understanding of the work to be performed as discussed in the RFQ, Proposal Format and Content, Section C – Technical Component.</p>	0-20	10	20	14
2	<p>Management Component Criteria The audit firm will furnish satisfactory evidence of capability to provide in a professional and timely manner the services stated in the RFQ, Proposal Format and Content, Section D - Management Component.</p> <p>A. Technical experience of the firm:</p> <ol style="list-style-type: none"> <li>1. Auditing experience in Texas public schools.</li> <li>2. Customer Satisfaction - Are current or past customers of the firm satisfied with the level of service provided?</li> </ol> <p>B. Characteristics of the staff, including consultants to be assigned to the audit:</p> <ol style="list-style-type: none"> <li>1. Size and structure of the firm, including audit staff positions.</li> <li>2. Qualifications of supervisory personnel, consultants, and the field audit team (education, including continuing education courses taken during the past four years and the types and years of experience).</li> </ol> <p>C. General direction and supervision to be exercised over the audit team by the firm's management personnel.</p>	0-25	17	25	17

3	Task / Activity Plan Approach the firm will take to complete the annual audit including staffing and time lines as discussed in the RFQ, Proposal Format and Content, Section E – Task / Activity Plan. Clear understanding of the work to be performed: 1. Comprehensiveness of the audit work plan. 2. Realistic time estimates of each major segment of the work plan, and the estimated number of hours for each staff level including consultants assigned.	0-25	10	25	15
4	Estimated Fee Estimated fee by position type, the estimated chargeable hours, and the additional year increase(s).	0-20	15	10	10
5	Oral Presentation	0-10	0	0	0
	TOTAL	0-100	52	80	56

Date completed: 2/1/2021

Evaluator's Name (print): Stacey E. Alderete

Evaluator's Signature: Stacey Alderete



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

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**Request For Qualifications 2021-05: Independent Financial Audit Services**

**Evaluation Matrix**

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Group/Individual Evaluation Criteria			Carr, Riggs & Ingram	Weaver Group	Garza Gonzalez
Criteria	Description	Weighted Value			
1	<p>Technical Component Criteria. The audit firm should demonstrate its understanding of the work to be performed as discussed in the RFQ, Proposal Format and Content, Section C – Technical Component.</p>	0-20	20	20	20
2	<p>Management Component Criteria The audit firm will furnish satisfactory evidence of capability to provide in a professional and timely manner the services stated in the RFQ, Proposal Format and Content, Section D - Management Component.</p> <p>A. Technical experience of the firm:            1. Auditing experience in Texas public schools.            2. Customer Satisfaction - Are current or past customers of the firm satisfied with the level of service provided?</p> <p>B. Characteristics of the staff, including consultants to be assigned to the audit:            1. Size and structure of the firm, including audit staff positions.            2. Qualifications of supervisory personnel, consultants, and the field audit team (education, including continuing education courses taken during the past four years and the types and years of experience).</p> <p>C. General direction and supervision to be exercised over the audit team by the firm's management personnel.</p>	0-25	17	20	20

60K      67K  
 4 yrs SSAISD

3	Task / Activity Plan Approach the firm will take to complete the annual audit including staffing and time lines as discussed in the RFQ, Proposal Format and Content, Section E – Task / Activity Plan. Clear understanding of the work to be performed: 1. Comprehensiveness of the audit work plan. 2. Realistic time estimates of each major segment of the work plan, and the estimated number of hours for each staff level including consultants assigned.	0-25	10	15	20
4	Estimated Fee Estimated fee by position type, the estimated chargeable hours, and the additional year increase(s).	0-20	15	12	15
5	Oral Presentation	0-10			
TOTAL		0-100	62	67	75

Date completed: 1/28/21

Evaluator's Name (print): Ernesto Arrellano, Jr.

Evaluator's Signature: 



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

1450 Gillette Boulevard · San Antonio, Texas 78224 · (210) 977-7000 · Fax (210) 977-7017

Request For Qualifications 2021-05: Independent Financial Audit Services

Evaluation Matrix

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFQ. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Group/Individual Evaluation Criteria			Carr, Riggs & Ingram	Weaver Group	Garza Gonzalez
Criteria	Description	Weighted Value			
1	Technical Component Criteria. The audit firm should demonstrate its understanding of the work to be performed as discussed in the RFQ, Proposal Format and Content, Section C – Technical Component.	0-20	14	14	18
2	Management Component Criteria The audit firm will furnish satisfactory evidence of capability to provide in a professional and timely manner the services stated in the RFQ, Proposal Format and Content, Section D - Management Component. A. Technical experience of the firm: 1. Auditing experience in Texas public schools. 2. Customer Satisfaction - Are current or past customers of the firm satisfied with the level of service provided? B. Characteristics of the staff, including consultants to be assigned to the audit: 1. Size and structure of the firm, including audit staff positions. 2. Qualifications of supervisory personnel, consultants, and the field audit team (education, including continuing education courses taken during the past four years and the types and years of experience). C. General direction and supervision to be exercised over the audit team by the firm's management personnel.	0-25	22	25	22

3	Task / Activity Plan Approach the firm will take to complete the annual audit including staffing and time lines as discussed in the RFQ, Proposal Format and Content, Section E – Task / Activity Plan. Clear understanding of the work to be performed: 1. Comprehensiveness of the audit work plan. 2. Realistic time estimates of each major segment of the work plan, and the estimated number of hours for each staff level including consultants assigned.	0-25	20	20	19
4	Estimated Fee Estimated fee by position type, the estimated chargeable hours, and the additional year increase(s).	0-20	17	18	20
5	Oral Presentation	0-10			
	TOTAL	0-100	75	82	79

Date completed: 2/1/2021

Evaluator's Name (print): JEFFREY W. BARNUM

Evaluator's Signature: 





**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

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Request For Qualifications 2021-05: Independent Financial Audit Services

Evaluation Matrix

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Group/Individual Evaluation Criteria			Carr, Riggs & Ingram	Weaver Group	Garza Gonzalez
Criteria	Description	Weighted Value			
1	<p>Technical Component Criteria. The audit firm should demonstrate its understanding of the work to be performed as discussed in the RFQ, Proposal Format and Content, Section C – Technical Component.</p>	0-20	12	20	18
2	<p>Management Component Criteria The audit firm will furnish satisfactory evidence of capability to provide in a professional and timely manner the services stated in the RFQ, Proposal Format and Content, Section D - Management Component.</p> <p>A. Technical experience of the firm:</p> <p>1. Auditing experience in Texas public schools.</p> <p>2. Customer Satisfaction - Are current or past customers of the firm satisfied with the level of service provided?</p> <p>B. Characteristics of the staff, including consultants to be assigned to the audit:</p> <p>1. Size and structure of the firm, including audit staff positions.</p> <p>2. Qualifications of supervisory personnel, consultants, and the field audit team (education, including continuing education courses taken during the past four years and the types and years of experience).</p> <p>C. General direction and supervision to be exercised over the audit team by the firm's management personnel.</p>	0-25	17	19	17

3	Task / Activity Plan Approach the firm will take to complete the annual audit including staffing and time lines as discussed in the RFQ, Proposal Format and Content, Section E – Task / Activity Plan. Clear understanding of the work to be performed: 1. Comprehensiveness of the audit work plan. 2. Realistic time estimates of each major segment of the work plan, and the estimated number of hours for each staff level including consultants assigned.	0-25	15	24	24
4	Estimated Fee Estimated fee by position type, the estimated chargeable hours, and the additional year increase(s).	0-20	15	16	17
5	Oral Presentation	0-10	0	0	0
	TOTAL	0-100	59	79	76

Date completed: 2/2/2021

Evaluator's Name (print): Gilbert F. Rodriguez

*Gilbert F. Rodriguez*

Evaluator's Signature: \_\_\_\_\_



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

1450 Gillette Boulevard · San Antonio, Texas 78224 · (210) 977-7000 · Fax (210) 977-7017

Request For Proposal 2021-07: Third Party Administrator for Workers Compensation Claims Administration

Evaluation Summary

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFP. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Group/Individual Evaluation Criteria		Claims Administrative Services- CAS	Sedgwick			
Criteria	Description					
1	Demonstrated abilities and firm experience providing services for Texas School Districts	18,24,23,25 = 90	18,25,15,17 = 75			
2	References	4,5,10,10 = 29	4,5,7,5 = 21			
3	Experience and Qualifications of key personnel assigned to SSAISD	0,20,17,20 = 57	10,20,17,0 = 47			
4	Availability and accountability of the respondents firm/team	13,20,15,5 = 53	13,20,15,5 = 53			
5	Financial stability	5,5,5,5 = 20	5,5,5,5 = 20			
6	Past experience with SSAISD	0,0,0,0 = 0	4,4,3,0 = 11			
7	HUB status	3,5,3,5 = 16	3,5,3,5 = 16			
8	Proof of professional licenses required to complete services.	3,5,5,5 = 18	3,5,5,5 = 18			
	TOTAL	283	261			



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

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Request For Qualifications 2021-07: Third Party Administrator for Workers Compensation Claims Administration

Evaluation Matrix

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			Claims Administrative Services- CAS	Sedgwick			
Criteria	Group/Individual Evaluation Criteria Description	Weighted Value					
1	Demonstrated abilities and firm experience providing services for Texas School Districts	0-25	25	17			
2	References	0-10	10	5			
3	Experience and Qualifications of key personnel assigned to SSAISD	0-25	20	0			
4	Availability and accountability of the respondents firm/team	0-20	5	5			
5	Financial stability	0-5	5	5			
6	Past experience with SSAISD	0-5	0	0			
7	HUB status	0-5	5	5			
8	Proof of professional licenses required to complete services.	0-5	5	5			
	TOTAL	0-100	75	42			

Date completed: 2/1/2021

Evaluator's Name (print): Stacey E. Alderete

Evaluator's Signature: Stacey Alderete



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

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**Request For Qualifications 2021-07: Third Party Administrator for Workers Compensation Claims Administration**

**Evaluation Matrix**

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFP. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Group/Individual Evaluation Criteria			Claims Administrative Services- CAS	Sedgwick			
Criteria	Description	Weighted Value					
1	Demonstrated abilities and firm experience providing services for Texas School Districts	0-25	18	<del>15</del>	18		
2	References	0-10	4	<del>8</del>	4		
3	Experience and Qualifications of key personnel assigned to SSAISD	0-25	10	<del>10</del>	10		
4	Availability and accountability of the respondents firm/team	0-20	13	<del>10</del>	13		
5	Financial stability	0-5	5	<del>5</del>	5		
6	Past experience with SSAISD	0-5	3	<del>3</del>	3		
7	HUB status	0-5	3	<del>3</del>	3		
8	Proof of professional licenses required to complete services.	0-5	3	<del>3</del>	4		
TOTAL		0-100	46	<del>46</del>	61		

Date completed: 1/28/21  
 Evaluator's Name (print): Ernesto Arrellano, Jr.

Evaluator's Signature:



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**

1450 Gillette Boulevard · San Antonio, Texas 78224 · (210) 977-7000 · Fax (210) 977-7017

Request For Qualifications 2021-07: Third Party Administrator for Workers Compensation Claims Administration

Evaluation Matrix

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Group/Individual Evaluation Criteria			Claims Administrative Services- CAS	Sedgwick			
Criteria	Description	Weighted Value					
1	Demonstrated abilities and firm experience providing services for Texas School Districts	0-25	24	25			
2	References	0-10	5	5			
3	Experience and Qualifications of key personnel assigned to SSAISD	0-25	20	20			
4	Availability and accountability of the respondents firm/team	0-20	20	20			
5	Financial stability	0-5	5	5			
6	Past experience with SSAISD	0-5	0	4			
7	HUB status	0-5	5	5			
8	Proof of professional licenses required to complete services.	0-5	5	5			
TOTAL		0-100	84	89			

Date completed: 2/3/2021

Evaluator's Name (print): JEFFREY W. BAUM

Evaluator's Signature: 



**SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT**  
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Request For Qualifications 2021-07: Third Party Administrator for Workers Compensation Claims Administration

**Evaluation Matrix**

The evaluations committee will conduct a comprehensive, fair and impartial evaluation of all proposals received in response to this RFP. Each proposal received will be analyzed to determine overall responsiveness and completeness as defined in the scope section and in the instructions on submitting a proposal. Failure to comply with the instructions or to submit a complete proposal may deem a proposal non-responsive and may at the discretion of the Evaluation Committee be eliminated from further evaluation.

Criteria	Group/Individual Evaluation Criteria Description	Weighted Value	Claims Administrative Services- CAS				
			Sedgwick				
1	Demonstrated abilities and firm experience providing services for Texas School Districts	0-25	23	15			
2	References	0-10	10	7			
3	Experience and Qualifications of key personnel assigned to SSAISD	0-25	17	17			
4	Availability and accountability of the respondents firm/team	0-20	15	15			
5	Financial stability	0-5	5	5			
6	Past experience with SSAISD	0-5	0	3			
7	HUB status	0-5	3	3			
8	Proof of professional licenses required to complete services.	0-5	5	5			
	<b>TOTAL</b>	<b>0-100</b>	<b>78</b>	<b>70</b>			

Date completed: 2/2/2021

Evaluator's Name (print): Gilbert F. Rodriguez

*Gilbert F. Rodriguez*

Evaluator's Signature: \_\_\_\_\_