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**To:**           Darin Crawford  
                  Assistant Superintendent for Support Services

**From:**       James Briscoe  
                  Director of Procurement Services

**Date:**        September 25, 2025

**Re:**          Financial Advisory Services  
                  Annual Contract #25-10-8952RFQ

The following proposals were received and opened at 10:00 am, Monday, September 22, 2025, as advertised and specified in documents concerning **Annual Contract #25-10-8952RFQ Financial Advisory Services**. The proposals received and the final evaluation summary is located on page 2-2.

**Recommendation:**           Post Oak Municipal Advisors LLC  
                                      ~~Nickel Hayden Advisors~~

**Estimated Expenditure:**       Cost is dependent on bond size, scope of work, and frequency of services

**Contract Term:**             October 6, 2025 - September 30, 2026

**Renewal:**                  5 years

JB

**25-10-8952RFQ (Financial Advisory Services)**

**TEAM SCORE SUMMARY**

<b>Company/Vendor Name</b>	<b>Evaluator 1</b>	<b>Evaluator 2</b>	<b>Evaluator 3</b>	<b>Average Score</b>	<b>Overall Ranking</b>
Nickel Hayden Advisors	59.80	62.00	76.00	65.93	3.00
PFM Financial Advisors LLC	84.20	92.00	96.20	90.80	2.00
Post Oak Municipal Advisors LLC	85.40	97.00	97.60	93.33	1.00



To: James Briscoe

From: Karen Smith

Date: September 25, 2025

Re: Financial Advisory Services Request for Qualifications #25-10-8952RFQ  
Contract Award Recommendation

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The District issued a Request for Qualifications (RFQ) to obtain qualified financial advisory services for the development of long-term financial plans, analyzing funding alternatives, and recommending debt financing strategies. The District received three responses to the RFQ.

Respondent's statement of qualifications was evaluated based on the following criteria:

- Overall demonstrated competence and qualifications in providing financial advisory services for mid-sized to large public entities;
- Overall experience and expertise as financial advisor to Texas public school districts, including CFISD, if applicable;
- Firm's overall reputation, size, structure and financial stability; and
- Firm's scope of financial advisory services available for consideration by the District and associated fees.

The financial advisory services committee is recommending Post Oak Municipal Advisors LLC (POMA) as the firm that will deliver the best overall value to the District based on the respondent's experience and expertise in providing financial advisory services. POMA has served as CFISD's financial advisor since 2018, where they have assisted the district in numerous successful diverse transactions as well as bond refunding transactions that reduced debt service payments.

Dr. Killian recommends adding a secondary financial advisor to support CFISD. Although PFM Financial Advisors LLC were ranked second by the financial advisory services committee, it is Dr. Killian's recommendation to select Nickel Hayden Advisors as the secondary financial advisor based on his excellent experience with Rudy Mejia in his prior district, with a prior firm, and Mr. Mejia's work with other Texas districts.

Feel free to contact me if you have any questions. Thank you.

Cc: Marney Collins Sims, Darin Crawford, Amanda Boles, Melissa McAnear