Board of Trustees

Background Information on Legal Counsel Services to South Texas College

Tuesday, October 6, 2015

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SOUTH TEXAS COLLEGE

Background Information on Legal Counsel Services
To South Texas College

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TAB 1. HISTORY OF LEGAL SERVICES – SEPT. 2000 TO CURRENT

MINUTES - SEPTEMBER 21, 2000 **.....1**

- The Board was asked to authorize the solicitation for legal counsel services.
- The Board declined to take action to authorize the solicitation for legal counsel services.
- Chair Benavidez appointed a committee comprised of Dr. Salinas and Mr. Gurwitz, along with the President and Legal Counsel (Jim Darling), to formulate recommendations to the Board.

MINUTES - OCTOBER 26, 2000 **.....2**

- Committee Chair Dr. Alejo Salinas, Jr. reported that the Committee asked three firms to submit proposals of interest for legal services to the College, but only one firm, Montalvo & Ramirez, L.L.P. responded.
- **General Counsel Proposal Received from Law Offices of Montalvo & Ramirez (Oct. 2000)..... 3 - 25**
- The Board Chair requested the Committee reconvene and select three firms for interviews then make a recommendation to the Board.

MINUTES - DECEMBER 14, 2000 **.....26**

- The Board approved the appointment of Law Offices of Montalvo & Ramirez as legal counsel, with compensation to be negotiated by Dr. Salinas, Mr. Gurwitz, and President Reed, who would report back to the Board on the outcome.

MINUTES - JANUARY 18, 2001 **.....27**

- The Board approved the retainer contract for Legal Services with Law Offices of Montalvo & Ramirez as recommended by the Committee.
- **Legal Services Agreement – Montalvo & Ramirez (Jan 2001).....28**

MINUTES – SEPTEMBER 15, 2005 **.....29 - 30**

- In June 2005 the College received a request from Law Offices of Montalvo & Ramirez to amend the agreement to reflect an increase in the hourly services fee from $125.00 per hour to $150.00 per hour.
- **Request for Amendment to Agreement (June 2005) 31**
- The Board approved an amendment to the agreement between the College and Montalvo and Ramirez Law Firm to reflect an increase in the hourly services fee from $125.00 per hour to $150.00 per hour.

MINUTES - FEBRUARY 21, 2008 **.....32 - 33**

- The Board approved a contract with Ramirez & Guerrero, LLP for legal services, identifying Jesus Ramirez and Jose Guerrero as attorneys formerly associated with Montalvo & Ramirez, LLP, and who served as legal counsel for the College.
- **Legal Services Agreement - Ramirez & Guerrero, L.L.P. (Feb. 2008) .....34 – 36**

Approval of Substantial Completion for Nursing and Allied Health Center

Upon a motion by Dr. Alejo Salinas, Jr., and a second by Mr. Roy De Leon, the Board of Trustees of South Texas Community College approved the substantial completion of the Nursing and Allied Health Center effective August 19, 2000, with sufficient funds held out from the retention amount to cover several derivative sub-payments as recommended.

Approval of Substantial Completion for CAAT Technology Center Renovation

Upon a motion by Dr. Alejo Salinas, Jr., and a second by Mr. Roy De Leon, the Board of Trustees of South Texas Community College approved the substantial completion of the CAAT Technology Center renovation project effective August 25, 2000 as recommended.

Approval of Institutional Awards

Upon a motion by Mr. Roy De Leon and a second by Mr. Jesse Villarreal, the Board of Trustees of South Texas Community College approved the institutional awards program in the Business Division for those students that meet the requirements in: Integrated Software Applications I, II, and III; in the Import/Export program; in Banking, Small Business Management and Word Processing; Culinary Arts; Web Page Design; Legal Assisting; and Public Service Administration.

Authorization to Solicit Proposals of Qualifications for Legal Counsel Services

The Board of Trustees of South Texas Community College did not take action on the request to authorize the solicitation of proposals for legal counsel services. Mr. Benavidez, Board Chair, appointed Dr. Alejo Salinas, Jr. and Mr. Gary Gurwitz as Board representatives to a committee, along with the President and Legal Counsel, to formulate recommendations to the Board for legal counsel services.

Authorization to Proceed With Legal Action for the Collection of Delinquent Student Loan Accounts

Upon a motion by Mr. Gary Gurwitz, and a second by Mr. Roy De Leon, the Board of Trustees of South Texas Community College authorized the STCC administration to proceed with legal action for the collection of delinquent student loan accounts as recommended.

Consideration and Action on Release of Checks and Financial Reports

Upon a motion by Mr. Glen Roney and a second by Mr. Roy De Leon, the Board of Trustees of South Texas Community College approved and authorized the release of the submitted checks and approved the financial reports submitted for the month of August 2000 as presented.

Informational Items

a) Legislative Priorities for 2001 Report

Dr. Reed informed the Trustees that a report on legislative priorities for 2001 had been forwarded by the Texas Association of Community Colleges and had been included in their Board packet for their information and review.

October 26, 2000

Approval of Resolution of Support for UTPA/STCC 2+2 Program

Upon a motion by Mrs. Irene Garcia and a second by Mr. Roy De Leon, the Board of Trustees of South Texas Community College approved the resolution in support of the proposed legislation submitted by Representative Robert Gutierrez for the development of a UTPA/STCC Starr County Teacher Preparation project.

Approval of Resolution to Participate in Texas Cooperative Purchasing Network

Upon a motion by Dr. Alejo Salinas, Jr., and a second by Mrs. Irene Garcia, the Board of Trustees of South Texas Community College authorized and approved the participation of the College in the Texas Cooperative Purchasing Network and approved the Resolution as presented.

Approval of Final Completion for CAAT Technology Center Renovation

The Board of Trustees of South Texas Community College took no action on final completion of the CAAT Technology Center renovation project.

Discussion and Action on Recommendation for Legal Services

Dr. Alejo Salinas, Jr. reported on the meeting held on Friday, October 13, 2000 by the Committee appointed by the Chair to discuss the issue of legal services for the College. Dr. Salinas reported that three (3) local legal firms had been recommended for consideration and that these firms were asked to submit proposals of interest for provision of legal services to STCC. Dr. Salinas noted that only one response had been received and asked for direction from the Chair on how to proceed.

Mr. Benavidez, Board Chair, requested that the Committee reconvene and select three firms for interviews and then make a recommendation to the Board.

Discussion and Action on Hunt Valley, LLC Proposal

Mr. Darling, Legal Counsel, raised the question of whether the Board was interested in revisiting the original proposal that had been presented by the Hunt Valley Group regarding a possible site on their property and donation of land contingent on building on site, etc. The Board of Trustees of South Texas Community College took no action on this item.

Approval of Policy on Delineation of Information to be Included in Dedication Plaques for New and Renovated Buildings

Upon a motion by Dr. Alejo Salinas, Jr. and a second by Mr. Roy De Leon, the Board of Trustees of South Texas Community College approved and adopted Policy 1900: Delineation of Information to be included in Dedication Plaques for New and Renovated Buildings, which supersedes any previously adopted or revised policy as revised. The revision follows: . . . . The Board members serving at the time of the project's inception will be included on the building plaque ~~inclusive of their title(s),~~ at the time the building is dedicated.

COPY

MONTALVO & RAMIREZ
Attorneys at Law
900 N. Main
McAllen, Texas 78501
Phone: (956) 631-1185
Fax: (956) 631-1187

Leo Montalvo
Jesus Ramirez
Eduardo Cantu

Jose R. Guerrero
Marcus Montalvo
Roxanna Salinas

October 17, 2000

Mr. Jim Darling
South Texas Community College District
3201 W. Pecan
McAllen, Texas 78501

Re: School Attorney

Dear Mr. Darling:

We are very pleased to submit to you our proposal to serve as general counsel to the South Texas Community College District.

We hope that you will find our proposal in order and look forward to an invitation to address the board of trustees should you so desire.

Very truly yours,

Jesus Ramirez

Cc: Ms. Diana Pena,
Vice President - STCC

SOUTH TEXAS COMMUNITY COLLEGE DISTRICT

General Counsel Proposal

from

Law Offices of
MONTALVO & RAMIREZ
Attorneys at Law

900 North Main
McAllen, Texas 78501
Phone: (956) 631-1185
Fax: (956) 631-1187

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Firm Qualifications

A resume of the law firm is enclosed.

Management Component

Montalvo & Ramirez is a local law firm located in McAllen, Texas. The firm has engaged in local government law including municipal and school law. It has most recently served as general counsel for the Pharr-San Juan-Alamo I.S.D., La Joya Independent School District and Region One Education Service. The firm also routinely serves as special counsel for school districts, assisting general counsel with legal matters ranging from employee terminations, tax matters, legal transactions, construction matters and other school law matters. Please refer to our resume for a listing of other and previous governmental clients.

The attorneys who will be primarily responsible for delivery of legal services to the district will be Mr. Jesus Ramirez and Mr. Jose R. Guerrero. Mr. Ramirez and Mr. Guerrero will be available to attend board meetings, and will be available for consultation and to assist administrative staff over the telephone or in person on a daily basis, if needed. Marcus Montalvo will round out the team.

Montalvo & Ramirez operates on state of the art computer hardware, software, optical scanner, and printer facilities. The firm's law library contains Texas Case Reporters, Texas Annotated Statutes, state and federal materials, numerous CLE materials and legal publications (including school law publications), law review materials and legal research compilations. Montalvo & Ramirez subscribes to Westlaw and has access to the Internet. The law firm has the capability to deliver and receive E-mail. The firm has a fully computerized system to handle billing.

Other Costs and Expenses

In addition to the legal fees Montalvo & Ramirez normally invoices for all actual costs and expenses such as:

3.	Telephonic document transfer (fax)	$1.00 first page, $0.25 each additional page
4.	Long distance telephone	Actual cost
5.	Copies	25¢ per copy
6.	Courier/delivery fees	$25.00 (local-RGV)
7.	Litigation expenses (filing fees, court reporters, etc.)	Actual cost
8.	Westlaw fee	2¢ per line download

MONTALVO & RAMIREZ
Attorneys at Law

900 North Main
McAllen, Texas 78501
Phone: (210) 631-1185
Fax: (210) 631-1187

OVERVIEW OF THE FIRM

MONTALVO & RAMIREZ was organized as a law partnership in 1984, and is currently composed of two general partners and two associate attorneys. The firm has made tentative commitments to engage two additional attorneys by August, 1998. The law firm is located at 900 North Main, McAllen, Texas and engages almost exclusively in civil practice. MONTALVO & RAMIREZ has recently expanded its office facilities to accommodate future staff growth; to increase library space; to add larger work areas for litigation preparation; to upgrade audio and video facilities for depositions and to accommodate business conferences and closing of commercial transactions. The firm operates on state of the art computer hardware, software, optical scanner, and printer facilities. The firm's law library contains Texas Case Reporters, Texas Annotated Statutes, state and federal materials, numerous CLE materials and legal publications, law review materials and legal research compilations. The firm also stays abreast of state administrative procedures in order to provide its clients with prompt representation before state administrative agencies and to work directly with the Attorney General's office on public finance matters. Additionally, the firm has a fully computerized system to handle billing as a major part on our firm's practice is in the nature of hourly work.

PRIMARY ATTORNEY

Jesus Ramirez, Partner, born Edinburg, Texas, 1951; admitted to Texas bar, 1983; admitted to bars of the U.S. District Courts, Southern and Northern District of Texas, the Fifth Circuit Court of Appeals and U.S. Supreme Court. Preparatory Education, University of Texas School of Law. Honors: Articles Editor, International Law Journal; Director, Legal Research Board; Invited to membership: the Criminal Law Journal; Semi-Finalist, Johnson-Swanson Mock Trial Competition. Mr. Ramirez served as a law clerk, Administrative Law Judges, Texas Comptroller's office in 1981-1982. His article, *Simpson-Mazzoli: Altering the Policy of Neglect of Undocumented Immigration from South of the Border* can be found at Vol. 18 No. 2, Texas International Law Journal (1983). He has also written on local government affairs: *Recent Developments in Public Finance & Proposed Amendment to Texas Civil Practice & Remedies Code Should Reduce Nuisance Lawsuits Against Governmental Units* presented to the Texas Municipal League Region 12 Membership Meeting South Padre Island, May 27, 1994; *Is there a Border Along the Rio Grande? Student Admissions: Toward A New Policy*, delivered to the Texas Association of School Boards, October 2, 1994, Dallas, Texas. He is also a member of the National Association of Bond Lawyers, the Texas Council of School Board Attorneys, and the Texas City Attorney's Association. Mr. Ramirez heads the firm's public finance practice which in 1998 was engaged as bond counsel in public finance transactions involving over $300 Million and in 2000 in excess of $500 Million. He also represents Texas Country Bank and Lone Star National Bank to review mortgage transactions on behalf of the bank. A former city manager, Mr. Ramirez has represented cities and school districts on a regular basis since 1983. Mr. Ramirez is not certified by the Texas Board of Legal Specialization.

ASSISTING ATTORNEY

JOSE R. GUERRERO. Mr. Guerrero joined MONTALVO & RAMIREZ in 1990. His practice encompasses school law, employment law, consumer law, appellate law, and municipal law. As a school law practitioner Mr. Guerrero counsels the governing bodies and administrative staff of the La Joya ISD, Weslaco ISD, and Region One Education Service Center in such matters as: teacher nonrenewals and terminations; employee terminations, suspensions, and grievance; employee benefits; the Texas Open Meetings Act; the Texas Open Records Act; competitive procurement procedures and procurement policies; construction contracts; student and employee constitutional issues, and EEOC complaints. Mr. Guerrero has served as the primary attorney for other school districts. Clients such as La Villa ISD and Monte Alto ISD. Mr. Guerrero is primarily responsible for the firm's municipal and school law defense practice. He has represented La Joya ISD in state and federal courts, and before the Texas Commissioner of Education in litigation matters involving: teacher contract terminations and nonrenewals; 42 U.S.C. § 1983; ERISA self-funded health care plan; and purchase contracts. In 1991, Mr. Guerrero defended the Pharr-San Juan-Alamo as co-counsel in a §1983 lawsuit challenging the school district's hair length code on religious grounds. In 1993, Mr. Guerrero drafted a student admissions policy together with an administrative appeals procedures which was adopted and implemented by the La Joya ISD. The admissions policy stringently applies the student residency requirements of the Texas Education Code. In 1994, Mr. Guerrero co-presented a paper on this admission policy at the Texas Association of School Board's 34th Annual Convention on October 2, 1994, Dallas, Texas entitled Is there a Border Along the Rio Grande? Student Admissions: Toward A New Policy. In 1993, Mr. Guerrero successfully defended the La Joya ISD board president and the superintendent against personal liability in §1983 lawsuit filed by a terminated administrator. Most recently Mr. Guerrero obtained a favorable settlement for the La Joya ISD in litigation against the district's third-party administrator and reinsurer of the district's self-funded employee health benefits plan. In 1995, Mr. Guerrero presented a paper entitled COMPETITIVE BIDDING: Recent Legislative Changes Impacting School Districts at a workshop sponsored by Region One Education Service Center for Valley school administrators on the topic of school construction. In July 1997, Mr. Guerrero presented a paper entitled RECOGNIZING AND DEALING WITH CONFLICT OF INTEREST at a seminar sponsored by the law firm for school and municipal officials in Monterrey, Mexico. Memberships: Mr. Guerrero is a member of the Employment Law, and of the Litigation Sections of the State Bar of Texas, the Council of School Attorneys and the National Association of School Board Attorneys. Educational Background: Pan American University, Edinburg, Texas, B.A., 1974, University of Texas at Austin, Austin, Texas 1976, M.S.W. in Administration; University of Houston Law Center, Houston, Texas 1989, J.D. Professional Licenses: Mr. Guerrero is licensed to practice law in the following jurisdictions: State of Texas Bar, 1990; U.S. District Court for the Southern District of Texas 1990; the U.S. District Court for the Northern District of Texas, 1995; the U.S. Court of Appeals for the Fifth Circuit, 1995.Mr. Guerrero is not certified by the Texas Board of Legal Specialization.

OTHER ATTORNEYS

Leo Montalvo, Partner, formerly an educator and assistant superintendent of the La Joya Independent School District in Hidalgo County, is a 1982 graduate of the University of Texas School of Law. Mr. Montalvo is a life-long resident of Hidalgo County, Texas. He was admitted to the State Bar of Texas in 1982. He completed his undergraduate education at Texas A & M University and holds an M.Ed degree. His public service includes currently serving as Mayor of the City of McAllen, Texas, a Director of the Texas Municipal League and as a Director of the McAllen Museum. Mr. Montalvo heads the firm's extensive real estate practice. In addition to a general practice, Mr. Montalvo has represented

school districts and water supply corporations (certificate of convenience and necessity issues) since 1983. Mr. Montalvo is not certified by the Texas Board of Legal Specialization.

Marcus Montalvo, Associate, born in Bryan, Texas, 1965; admitted to the Texas bar in 1993; admitted to the bars of the U.S. District Court, Northern District of Texas and the Fifth Circuit Court of Appeals. Mr. Montalvo graduated from Texas A & M University in 1987 with a B.B.A. in Business Analysis, after which he obtained employment with Mobil Oil Corp. and Price Waterhouse. He is a Texas Tech School of Law graduate, having completed his formal legal education in 1993. Mr. Montalvo served on the Texas Tech Law Review as an Associate Editor from 1991-1993. While in law school, Mr. Montalvo coordinated and conducted a seminar in conjunction with the Texas Tech School of Law and the Lubbock Chamber of Commerce on the topic of international business transactions, focusing on various forms of letters of credit. Mr. Montalvo's legal career has thus far centered around the Dallas/Ft. Worth area, where he has discharged legal work as an associate for the Dallas based firm of Haynes and Boone and the internationally recognized firm of Baker & McKenzie. While practicing in the areas of commercial litigation and labor and employment, Mr. Montalvo has provided legal services to clients such as American Airlines, Bank of America, ITT Corp., DFW International Airport, the City of Dallas, Sam & Libby, Inc., and Haggar Clothing Co. Mr. Montalvo has served on the Board of Directors for the Dallas County Adult Literacy Council and is currently a member of the Dallas Hispanic Chamber of Commerce. Mr. Montalvo is not certified by the Texas Board of Legal Specialization.

Roxanna Salinas, Associate, joined the firm in November 1998; admitted to the Texas bar in 1999. Ms. Salinas holds a J.D. degree from Southern Methodist University School of Law, 1997. Her undergraduate education includes a B.A. degree in Political Science with a minor in Biology from University of Texas-Pan American, 1992. Her primary responsibilities include projects involving local government transactions, including those of municipalities and school districts, research involving state and federal law, securities and tax law to assure compliance with the most current changes for tax-exempt obligations and drafting transaction documents.

Eduardo Cantu, Associate, joined the firm in May 1998; admitted to the Texas bar in 1999. Mr. Cantu holds a J.D. degree from the University of Texas School of Law, 1998. His undergraduate education includes a B.B.A. degree in Financial Services/Risk Management from Saint Mary's University, 1995. His primary responsibilities involve local government and commercial transactions involving construction leases, real estate, income tax law and estate planning.

LEGAL ASSISTANTS

Marie Vanessa Garcia,. Public Finance Legal Assistant, born McAllen, Texas, 1963. Ms. Garcia holds a B.A. degree in Political Science with a minor in English from Pan American University, April 1987. Ms. Garcia joined the firm in June, 1993. She is the legal assistant in the firm assigned to public finance matters and is involved in every public finance transaction. She has attended numerous seminars involving public finance law. In connection with a bond transaction, Ms. Garcia is in charge of the collection and distribution of materials to the finance team composed of the bond counsel, financial advisor, district staff and underwriter's counsel; printing all documents, including the bonds; obtaining proper signatures for documents, and distributing final transcripts. In her role as legal assistant. Ms. Garcia has developed the necessary knowledge and skills to obtain and transmit necessary information among the parties to the bond transaction. She maintains a good working relationship with the staffs of the paying agents and trustees, banks, financial advisors and underwriters, and most importantly with the staff of the issuer.

Patty Huerta, Ms. Huerta is a graduate of Pharr-San Juan-Alamo ISD and joined the firm in 1993 after working several years in the real estate section of a law firm. She serves as a real estate legal assistant and as such Ms. Huerta assists with the preparation of legal documents and assists with coordination of all real estate transactions.

Mari Flores, Ms. Flores is a graduate of Edinburg CISD 1983 and joined the firm in 1987. She serves as a real estate legal assistant and assists with the preparation of legal documents and assists with the coordination of all real estate transactions.

CIVIL LITIGATION

MONTALVO & RAMIREZ'S civil litigation practice has been concentrated in state courts in Hidalgo County and Cameron County, and in U.S. district courts in the McAllen and Brownsville divisions for the Southern District of Texas. MONTALVO & RAMIREZ attorney's have civil litigation experience in the following areas: personal injury-(premises defects), personal injury-(motor vehicle accidents), personal injury on the job, auto and property insurance (first party claims), Texas Tort Claims Act-(municipalities and school districts), wrongful discharge from public employment (constitutional claims under 42 U.S. §1983 against municipalities and school districts and their public officials), Texas Open Meetings Act, land boundary disputes, design professional negligence claims, construction defect claims, consumer claims under Texas Deceptive Trade Practices Act-(real estate, construction, and automobiles), municipal zoning, municipal land use regulation, municipal and school district bidding and procurement procedures, civil forfeiture, environmental contamination and ad valorem tax matters.

APPELLATE LAW

MONTALVO & RAMIREZ also maintains an appellate law practice: Lopez v. U.S., U.S. Fifth Circuit, No. 88-2681 (1989)(writ ref'd); Guzman v. Guzman, 827 S.W. 2d 445 (Tex.App.-- Corpus Christi 1992, writ dism'd improvidently granted); Garcia v. Andrews, 867 S.W.2d 409 (Tex.App-Corpus Christi 1993, no writ); Pan American Univ. v. Valdez, 869 S.W.2d 446 (Tex.App.--Corpus Christi 1993, writ denied); Luna v. H & A Investments, Inc., 900 S.W.2d 735, 738 (Tex.App.--Corpus Christi 1994, no writ); Carvajal v. Santa Rosa ISD, No. 13-94-00274-CV (Corpus Christi Court of Appeals)(dismissed by agreement); City of San Juan, Texas v. North Alamo Water Supply Corp., No. 95-40048, Garcia v. Guerra, No. 13-94-00090-CV (Corpus Christi Court of Appeals)(unpublished opinion); Palomera v. Palomera, No. 13-96-00018-CV (Corpus Christi Court of Appeals)(unpublished opinion). Perez v. Feffes, No. 13-98-00561-CV (pending); Dowelanco v. Rios, No. 13-97-0078-CV (unpublished opinion).

PUBLIC FINANCE

The public finance practice includes serving as bond counsel for the tax-exempt debt financing of local government entities in various types of tax-exempt debt financing. These transactions involve millions of dollars and encompass general obligation bonds, certificates of obligation, revenue bond financing, and tax and revenue anticipation notes. In addition, firm lawyers have litigated bond related issues for governmental clients including bond issue validations and ad valorem taxes.

MONTALVO & RAMIREZ is listed among the Municipal Bond Attorneys of the United States section of the "Redbook" (the Bond Buyer's Directory of Municipal Bond Dealers of the United States) and has been engaged in numerous debt financing transaction involving municipalities, school districts, special districts, and college and junior college districts during the past 6 years.

REAL ESTATE/CONSTRUCTION

Our real estate practice involves a variety of residential and commercial real estate transactions. We have participated in the acquisition, development, financing, and leasing of office buildings, residential and commercial subdivisions, and medical, and industrial facilities. This includes handling transactions that involve some complexity and require the innovative drafting of documents, including documents enforceable in international settings.

Our client base includes land developers, lenders, cities and school districts, water districts, financial institutions, architects and engineers, and contractors as well as foreign investors. We have been engaged to draft condominium regimes for offices and medical facilities, comprehensive construction management contracts, design-build contracts, design-warrant contracts, joint venture agreements and limited partnerships, LLPs, LLCs, environmental hazard provisions, indemnity and hold-harmless provisions, trust indentures and commercial lease agreements. In this connection we are familiar with the more technical drafting issues that arise in these transactions as a result of environmental regulations (CERCLA, RCRA, Aboveground and Underground Storage Tank provisions) and state and federal tax and securities laws.

We have litigated claims involving property title insurance coverage, claims involving breach of contract and fiduciary duties involving general and limited partnerships, subdivision regulations, restrictive covenants and zoning issues, easements, boundary disputes, eminent domain environmental issues, public nuisances, premises liability (personal injury and property damage), including claims against governmental units, private owners, contractors, subcontractors, and design professionals. mechanic's and materialmen's lien claims and payment and performance bonds disputes.

MONTALVO & RAMIREZ
900 North Main
McAllen, Texas 78501
Phone: (956) 631-1185
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www.montalvoramirezlaw.com

October 17, 2000

OVERVIEW OF THE FIRM

MONTALVO & RAMIREZ was organized as a partnership for the general practice of law in 1984, and is dedicated to providing our clients with legal representation on a responsive and efficient basis. The law firm's office for the general practice of law is located at 900 North Main, McAllen, Texas.

ATTORNEYS

Jesus Ramirez, Partner, born Edinburg, Texas, 1951; admitted to Texas bar, 1983; admitted to the bars of the U.S. District Courts, Southern and Northern District of Texas, the Fifth Circuit Court of Appeals and U.S. Supreme Court. Preparatory Education: University of Texas School of Law. Honors: Articles Editor, International Law Journal; Director, Legal Research Board; Invited to membership: the Criminal Law Journal; Semi-Finalist, Johnson-Swanson Mock Trial Competition. Mr. Ramirez served as a law clerk, Administrative Law Judges, Texas Comptroller's Tax Office in 1981-1982. His article, *Simpson-Mazzoli: Altering the Policy of Neglect of Undocumented Immigration from South of the Border* can be found at Vol. 18 No. 2, Texas International Law Journal (1983). He has also addressed legal developments on local government affairs: *Recent Developments in Public Finance* and *Proposed Amendment to Texas Civil Practice & Remedies Code Should Reduce Nuisance Lawsuits Against Governmental Units* presented to the Texas Municipal League Region 12 Membership Meeting South Padre Island, May 27, 1994; *Is there a Border Along the Rio Grande? Student Admissions: Toward A New Policy,* delivered to the Texas Association of School Boards, October 2, 1994, Dallas, Texas. On February 6, 1998, Mr. Ramirez led a seminar for school district, county and city officials entitled: *Continuing Disclosure* that covered the obligations of bond issuers under Rule15c2-12 of the Securities and Exchange Commission. He is a member of the National Association of Bond Lawyers, the Texas Council of School Board Attorneys, and the Texas City Attorney's Association. Mr. Ramirez heads the firm's public finance practice which in 1998 was engaged as bond counsel in public finance transactions involving over $300 million and in 2000 in excess of $500 Million. He is currently engaged by several banks in Hidalgo County to review real estate mortgages on behalf of the banks. A former city manager, Mr. Ramirez has also represented cities and school districts on a regular basis since 1983. He is not certified by the Texas Board of Legal Specialization.

Leo Montalvo, Partner, formerly an educator and assistant superintendent of the La Joya Independent School District in Hidalgo County, is a 1981 graduate of the University of Texas School of Law. Mr. Montalvo was admitted to the Texas bar in 1982. He completed his undergraduate education in mathematics at Texas A & M University and holds an M.Ed degree from University of Texas-Pan American. His public service includes serving 14 years as City Commissioner of the City of McAllen, Texas and currently as its Mayor. Mr. Montalvo heads the firm's real estate practice. Mr. Montalvo has represented school districts and water supply corporations since 1983. He is not certified by the Texas Board of Legal Specialization.

Jose R. Guerrero. Mr. Guerrero is a 1989 graduate of the University of Houston Law Center. *Educational Background*: Pan American University, Edinburg, Texas, B.A., 1974, University of Texas at

Austin, Austin, Texas 1976, M.S.W. in Administration. *Professional Licenses*: Mr. Guerrero is licensed to practice law in the following jurisdictions: State of Texas Bar, 1990; U.S. District Court for the Southern District of Texas 1990; the U.S. District Court for the Northern District of Texas, 1995; the U.S. Court of Appeals for the Fifth Circuit, 1995. His practice encompasses municipal law, school law, labor and employment law, consumer law, and appellate law. As a school law practitioner Mr. Guerrero counsels the governing bodies and administrative staffs of the La Joya ISD, Weslaco ISD and Region One Education Service Center in such matters as: teacher nonrenewals and terminations; employee terminations, suspensions, and grievance; employee benefits; the Texas Open Meetings Act; the Texas Open Records Act; competitive procurement procedures and procurement policies; construction contracts; student and employee constitutional issues, and EEOC complaints. Mr. Guerrero has served as the primary attorney for other school districts such as La Villa ISD and Monte Alto ISD. Mr. Guerrero is primarily responsible for the firm's municipal and school law defense practice. He has represented school districts in state and federal courts, and before the Texas Commissioner of Education in litigation matters involving: teacher contract terminations and nonrenewals; the Texas Open Meetings Act; 42 U.S.C. § 1983; ERISA self-funded health care plan, purchase contracts, and construction contracts. Mr. Guerrero also provides general counsel to the firm's municipal clients in such areas as zoning administration, land subdivision regulation, and employment matters. Mr. Guerrero also maintains an appellate law practice and has briefed and/or argued cases before the 13th Court of Appeals and the Texas Supreme Court on issues involving the division of community property, Texas Tort Claims Act, intentional infliction of emotional distress, premises liability, and Texas Open Meetings Act, default judgments, and temporary injunctions.

In 1994, Mr. Guerrero co-authored a paper with Mr. Jesus Ramirez entitled "*Is There A Border Along the Rio Grande? Student Admissions: Toward a New Policy*, which was presented at the annual meeting of the Texas Association of School Boards in Dallas, Texas. In 1995, Mr. Guerrero presented a paper entitled *COMPETITIVE BIDDING: Recent Legislative Changes Impacting School Districts* at a workshop sponsored by Region One Education Service Center for Valley school administrators on the topic of school construction. In July 1997 and July 1999, Mr. Guerrero presented a paper entitled *RECOGNIZING AND DEALING WITH CONFLICT OF INTEREST* at a seminar sponsored by the law firm for school and municipal officials in Monterrey, Mexico. *Memberships*: Mr. Guerrero is a member of the Employment Law, and the Litigation Sections of the State Bar of Texas and the National Association of School Board Attorneys. Mr. Guerrero is not certified by the Texas Board of Legal Specialization.

Marcus Montalvo, Associate, born in Bryan, Texas, 1965; admitted to the Texas bar in 1993; admitted to the bars of the U.S. District Court, Northern District of Texas and the Fifth Circuit Court of Appeals. Mr. Montalvo graduated from Texas A & M University in 1987 with a B.B.A. in Business Analysis, after which he obtained employment with Mobil Oil Corp. and Price Waterhouse. He is a Texas Tech School of Law graduate, having completed his formal legal education in 1993. Mr. Montalvo served on the Texas Tech Law Review as an Associate Editor from 1991-1993. While in law school, Mr. Montalvo coordinated and conducted a seminar in conjunction with the Texas Tech School of Law and the Lubbock Chamber of Commerce on the topic of international business transactions, focusing on various forms of letters of credit. Mr.Montalvo's legal career has thus far centered in the Dallas/Ft. Worth area, and McAllen, where he has discharged legal work as an associate for the Dallas based firms of Haynes and Boone and Baker & McKenzie. While practicing in the areas of commercial litigation and labor and employment, Mr. Montalvo has provided legal services to clients such as American Airlines, Bank of America, ITT Corp., DFW International Airport, the City of Dallas, Sam & Libby, Inc., and Haggar Clothing Co. At Montalvo & Ramirez Mr. Montalvo's practice focuses on commercial transactions, including construction agreements and leases. Mr. Montalvo is not certified by the Texas Board of Legal Specialization.

Roxanna Salinas, Associate, joined the firm in November 1998; admitted to the Texas bar in 1999.

Ms. Salinas holds a J.D. degree from Southern Methodist University School of Law, 1997. Her undergraduate education includes a B.A. degree in Political Science with a minor in Biology from University of Texas-Pan American, 1992. Her primary responsibilities include projects involving local government transactions, including those of municipalities and school districts, research involving state and federal law, securities and tax law to assure compliance with the most current changes for tax-exempt obligations and drafting transaction documents.

Eduardo Cantu, Associate, joined the firm in May 1998; admitted to the Texas bar in 1999. Mr. Cantu holds a J.D. degree from the University of Texas School of Law, 1998. His undergraduate education includes a B.B.A. degree in Financial Services/Risk Management from Saint Mary's University, 1995. His primary responsibilities involve local government and commercial transactions involving construction leases, real estate, income tax law and estate planning.

Marie Vanessa Garcia, Public Finance Legal Assistant, born McAllen, Texas, 1963. Ms. Garcia holds a B.A. degree in Political Science with a minor in English from Pan American University, August 1987. Ms. Garcia joined the firm in June, 1993. She is the legal assistant in the firm assigned to public finance matters and is involved in every public finance transaction. She has attended numerous seminars involving public finance law. In connection with a bond transaction, Ms. Garcia is in charge of the collection and distribution of materials for the finance team composed of the bond counsel, financial advisor, client staff and underwriter's counsel; printing all documents, including the bonds; obtaining proper signatures for documents, and distributing final transcripts. In her role as legal assistant, Ms. Garcia has developed the necessary knowledge and skills to obtain and transmit necessary information among the parties to the bond transaction. She maintains a good working relationship with the staffs of the paying agents and trustees, banks, financial advisors and underwriters, and, most importantly, with the staff of the issuer.

Patty Huerta, Ms. Huerta is a graduate of Pharr-San Juan-Alamo ISD and joined the firm in 1993 after working several years in the real estate section of a law firm. She serves as a real estate legal assistant and as such Ms. Huerta assists with the preparation of legal documents and assists with coordination of all real estate transactions.

Mari Flores. Ms. Flores is a graduate of Edinburg CISD 1983 and joined the firm in 1987. She serves as a real estate legal assistant and assists with the preparation of legal documents and assists with the coordination of all real estate transactions.

PUBLIC FINANCE

The public finance practice includes serving as bond counsel for the tax-exempt debt financing of local government entities in various types of tax-exempt debt financing. These transactions involve millions of dollars and encompass general obligation bonds, certificates of obligation, utility revenue bond financing, sales tax financing and tax and revenue anticipation notes.

MONTALVO & RAMIREZ is listed among the Municipal Bond Attorneys of the United States section of the "Redbook" (the Bond Buyer's Directory of Municipal Bond Dealers of the United States) and has been engaged as counsel in the following transactions:

ISSUER	SERIES-1987	AMOUNT
City of Austin, Texas Underwriter's Co-Counsel*	Certificates of Participation (Secured by lease)	$14,040,000
La Joya I.S.D. Co-Bond Counsel**	Refunding	$13,449,811

ISSUER		SERIES-1990	AMOUNT
San Benito C.I.S.D.	CBC	Bond Issue-New Monies Construction	$4,900,000
Pharr-San Juan-Alamo I.S.D.	CBC	Refunding	$4,095,000

ISSUER		SERIES-1991	AMOUNT
Edcouch-Elsa I.S.D.	CBC	Refunding	$1,849,988
San Benito C.I.S.D.	CBC	New Monies	$4,600,000

ISSUER		SERIES-1992	AMOUNT
City of San Juan, Texas		General Obligation Refunding Bonds & Certificates of Obligation (Tax & Revenues)	$1,810,000 $ 555,000
Hidalgo County Drainage District		Refunding	$5,209,944
La Villa I.S.D.	CBC	Refunding	$1,319,995
Hidalgo I.S.D.		New Money Construction	$1,400,000
Progreso I.S.D.	CBC	Refunding	$ 889,992
Pharr San Juan Alamo I.S.D.		Refunding	$8,775,000
Edinburg C.I.S.D.	CBC	$25 Million Bond Issue New Money Construction $8,619,940.60	$33,619,940
La Joya I.S.D.		Refunding	$7,543,169
Hidalgo County, Texas		Certificates of Obligation	$ 815,000

ISSUER	SERIES-1993	AMOUNT
City of Edinburg, Texas	Utility Revenue Refunding and Improvement Bonds	$ 6,205,000

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* Hereinafter referred as UC

** Hereinafter referred as a CBC, unless otherwise noted, the firm serves as Bound Counsel

ISSUER	SERIES-1993	AMOUNT
Alamo Community College District San Antonio, Texas CBC	Limited Tax General Obligation Refunding Bonds Underwriter's Co-Counsel	$46,000,000
City of Mission, Texas	Waterworks and Sewer System Revenue Refunding Bonds	$6,675,000
Pharr San Juan Alamo I.S.D. Pharr, Texas	Unlimited Tax School Refunding Bonds	$ 5,520,000
Harlingen C.I.S.D. Harlingen, Texas (U.C.)	Refunding	$ 7,750,000
Williamson County	General Obligation Refunding Bonds	$ 8,510,000
Point Isabel I.S.D. Cameron County, Texas CBC	Refunding Bonds	$ 5,585,000
La Joya I.S.D. Hidalgo County, Texas	Computer Lease-Purchase	$ 2,000,000
Edinburg C.I.S.D.	Unlimited Tax School Building And Refunding Bonds ($10 Million New Money and $11,619,856.50 (Refunding)	$21,619,856

ISSUER	SERIES-1994	AMOUNTS
City of Mission, Texas	Advance Refunding of Combination Tax and Revenue Certificates of Obligation	$3,645,000
La Joya I.S.D. Hidalgo County, Texas	Unlimited Tax Refunding Bonds	$ 7,244,982
Alamo Community College District Bexar County, Texas CBC	Combination Fee Revenue and Refunding Bonds	$42,865,000
Hidalgo County Housing Finance Corporation	Single Family Mortgage Revenue Bonds	$15,000,000
City of Mission, Texas CBC	Tax Anticipation Notes	$655,000

ISSUER	SERIES-1995	AMOUNTS
United Independent School District	Unlimited Tax School Building Bonds	$25,000,000
Mission Economic Development Corporation	Sales Tax Revenue Bonds	$2,635,000
City of San Juan, Texas	Certificates of Obligation, Series 1995	$ 400,000
City of Harlingen, Texas UC	Waterworks and Sanitary Sewer Revenue Bonds (Underwriter's Counsel)	$15,000,000

ISSUER	SERIES-1996	AMOUNTS
Sharyland C.I.S.D.	Unlimited Tax School Building Bonds, Series 1996	$8,500,000
San Benito C.I.S.D.	Unlimited Tax School Building & Refunding Bonds, Series 1996	$10,240,000
City of San Juan, Texas	Waterworks and Sewer Revenue and Refunding Bonds, Series 1996	$2,880,000
City of Mission, Texas	Water and Sewer System Revenue Bonds, Series 1996	$7,100,000
United Independent School District	Unlimited Tax School Building Bonds, Series 1996	$24,000,000
United Independent School District	Public Property Finance Contractual Obligations, Series 1996	$2,500,000
City of Pharr, Texas	Waterworks and Sewer System Revenue Bonds, Series 1996	$2,570,000
Weslaco Independent School District	Unlimited Tax School Building Bonds, Series 1996 (Underwriter's Counsel)	$27,050,000
Point Isabel Independent School District	Unlimited Tax School Building & Refunding Bonds, Series 1996 (Underwriter's Counsel)	$6,078,945.75
City of Pharr, Texas	Waterworks and Sewer System Revenue Bonds, Series 1996-A	$978,000

ISSUER	SERIES-1997	AMOUNTS
City of Weslaco, Texas	Waterworks and Sewer System Revenue Refunding Bonds, Series 1997 (Underwriters Counsel)	$3,025,000.00
Valley View I.S.D.	School Building Unlimited Tax Bonds, Series 1997	$4,000,000.00
City of Edinburg, Texas	General Obligation Series 1997 (Underwriters Counsel)	$3,000,000.00
City of San Antonio, Texas	General Improvement Forward Refunding Bonds, Series 1998(Co-Underwriters Counsel)	$53,950,000.00
United I.S.D.	Public Property Finance Contractual Obligations, Series 1997	$620,000.00
Laguna Madre Water District	Waterworks and Sewer System Revenue Refunding Bonds, Series 1997 (Underwriter's Counsel)	$5,740,000.00
City of Pharr, Texas	Tax Notes, Series 1997	$2,235,000.00

ISSUER	SERIES-1997	AMOUNTS
City of Pharr, Texas	Waterworks and Sewer System Revenue Bonds, Series 1997-C	$4,230,000.00
Los Fresnos C.I.S.D.	Unlimited Tax School Building Bonds, Series 1997	$8,380,000.00
Santa Rosa I.S.D.	Unlimited Tax School Building Bonds, Series 1997	$4,035,000.00
Progresso I.S.D.	Unlimited Tax School Building Bonds, Series 1997	$6,000,000.00
La Feria I.S.D.	Unlimited Tax School Building Bonds, Series 1997	$7,285,000.00
La Villa I.S.D.	Unlimited Tax School Building Bonds, Series 1997	$2,250,000.00
Hidalgo I.S.D.	Unlimited Tax School Building Bonds, Series 1997	$7,450,000.00
Pharr San Juan Alamo I.S.D.	Unlimited Tax School Building Bonds, Series 1997	$49,700,000.00
City of San Juan, Texas	Combination Tax and Waterworks and Sewer System Surplus Revenue Certificates of Obligation, Series 1997	$725,000.00
City of Pharr, Texas	Waterworks and Sewer System Revenue Current Refunding Bonds, Series 1997	$4,380,000.00
City of Hidalgo, Texas	Combination Tax and Revenue Certificates of Obligation, Series 1997	$3,500,000.00
Region One	Region One Education Service Center Technology Facility Project Lease Agreement	$4,975,000.00
Cameron County, Texas	International Toll Bridge System Revenue Bonds, Series 1997 (Underwriter's Counsel)	$6,315,000.00

ISSUER	SERIES-1998	AMOUNTS
Edinburg C.I.S.D.	Public Facilities Corporation Lease Revenue Bonds, Series 1998	$53,295,000.00
La Joya I.S.D.	Unlimited Tax School Building Bonds	$43,000,000.00
San Benito I.S.D.	Unlimited Tax School Building Bonds	$23,030,000.00

ISSUER	SERIES-1998	AMOUNTS
Donna I.S.D.	Unlimited Tax School Building Bonds	$27,000,000.00
Hidalgo/Willacy Housing Finance Corporation	Single Family Mortgage Revenue Bonds (GNMA and FNMA Mortgage-Backed Securities Program) Series 1998	$19,860,000.00
Los Fresnos C.I.S.D.	Public Property Finance Contractual Obligations, Series 1998	$545,000.00
Sharyland I.S.D.	Unlimited Tax Refunding Bonds, Series 1998	$4,359,997.40
Starr County, Texas	Tax Notes	$450,000.00
City of Pharr, Texas	Combination Tax and Limited Pledge Revenue Certificates of Obligation, Series 1998	$11,780,000.00
Mission C.I.S.D.	School Building Unlimited Tax Bonds, Series 1998	$ 34,000,000.00
City of Mission, Texas	Tax and Waterworks and Sewer System (Limited Pledge) Revenue Certificates of Obligation, Series 1998	$4,820,000.00
City of Mission, Texas	Public Property Finance Contractual Obligations, Series 1998	$3,420,000.00
Point Isabel I.S.D.	Unlimited Tax Refunding Bonds, Series 1998 (Underwriter's Counsel)	$1,859,988.00
City of Pharr, Texas	Waterworks and Sewer System Revenue Bonds, Series 1998	$1,651,000.00
City of Pharr, Texas	Waterworks and Sewer System Revenue Bonds, Series 1998-A	$2,160,000.00
County of Zapata I.S.D.	Unlimited Tax School Building Bonds, Series 1998	$14,000,000.00
City of Eagle Pass, Texas	Waterworks and Sewer System Revenue Bonds, Series 1998 (Underwriter's Counsel)	$1,810,000.00
La Feria I.S.D.	Unlimited Tax Refunding Bonds, Series 1998 (Underwriter's Counsel)	$2,899,980.30
City of Alamo, Texas	Combination Tax and Limited Pledge Revenue Certificates of Obligation, Series 1998	$1,500,000.00
Hidalgo County, Texas	Limited Tax Certificates of Obligation, Series 1998	$6,990,000.00
Hidalgo County, Texas	Limited Tax General Obligation Refunding Bonds, Series 1998	$5,845,000.00

ISSUER	SERIES-1998	AMOUNTS
City of Mercedes, Texas	General Obligation Refunding Bonds, Series 1998 (Underwriter's Counsel)	$3,350,000.00
City of Mercedes, Texas	Combination Tax and Limited Pledge Revenue Certificates of Obligation, Series 1998 (Underwriter's Counsel)	$1,725,000.00
City of Mercedes, Texas	Combination Tax and Revenue Certificates of Obligation, Series 1998-A (Underwriter's Counsel)	$1,795,000.00
City of La Feria, Texas	Public Property Finance Contractual Obligations, Series 1998 (Underwriter's Counsel)	$505,000.00
Brenham Independent School District	Unlimited Tax Refunding Bonds, Series 1998 (Underwriter's Counsel)	$9,014,992.00
City of Mission, Texas	Tax and Waterworks and Sewer System (Limited Pledge) Revenue Certificates of Obligation, Series 1998-A	$1,650,000.00

ISSUER	SERIES-1999	AMOUNTS
City of San Juan, Texas	Combination Tax and Limited Pledge Revenue Certificates of Obligation, Series 1999	$6,800,000.00
City of San Juan, Texas	General Obligation Refunding Bonds, Series 1999	$2,655,000.00
City of Weslaco, Texas	Tax and Waterworks and Sewer System (Limited Pledge) Revenue Certificates of Obligation, Series 1999 (Underwriter's Counsel)	$8,290,000.00
City of Robstown, Texas	General Obligation Refunding Bonds, Series 1999 (Underwriter's Counsel) Public Property Finance Contractual Obligations, Series 1999 (Underwriter's Counsel)	$1,835,000.00 $845,000.00
South Texas Community College District	Public Property Finance Contractual Obligations, Series 1999	$5,200,000.00
City of Roma, Texas	Combination Tax and Revenue Certificates of Obligation, Series 1999B Combination Tax & Revenue Certificates of Obligation, Series 1999C	$1,975,000.00 $3,035,000.00
City of Pharr, Texas	Combination Tax and Limited Pledge Revenue Certificates of Obligation, Series 1999	$2,165,000.00

ISSUER	SERIES-1999	AMOUNTS
City of Falfurrias, Texas	Utility System Revenue and Refunding Bonds, New Series 1999 (Underwriter's Counsel)	$1,545,000.00
Mission Economic Development Corporation	Mission Economic Development Corporation Subordinate Lien Sales Tax Revenue Bonds, Series 1999	$5,180,000.00
City of Mercedes, Texas	Combination Tax and Limited Pledge Revenue Certificates of Obligation, Series 1999 (Underwriter's Counsel)	$2,000,000.00
City of Mission, Texas	Waterworks and Sewer System Junior Lien Revenue Bonds, Series 1999	$1,438,000.00
	Waterworks and Sewer System Junior Lien Revenue Bonds, Series 1999-A	$2,200,000.00
City of Harlingen, Texas	Combination Tax & Revenue Certificates of Obligation, Series 1999 (Underwriter's Counsel)	$2,680,000.00
Edinburg C.I.S.D.	Public Property Finance Contractual Obligations, Series 1999	$5,720,000.00

ISSUER	SERIES-2000	AMOUNTS
City of Roma, Texas	Combination Tax & Revenue (No-Interest) Certificates of Obligation, Series 2000A	$2,327,000.00
City of San Benito, Texas	Combination Tax and Limited Pledge Revenue Certificates of Obligation, Series 2000	$2,500,000.00
Laguna Madre Water District	Unlimited Tax Refunding Bonds, Series 2000 (Underwriter's Counsel)	$1,245,769.45
City of Harlingen, Texas	Waterworks and Sewer System Revenue Bonds, Series 2000-A (Underwriter's Counsel)	$6,000,000.00
Hidalgo County, Texas	Combination Limited Tax and Limited Pledge Revenue Certificates of Obligation, Series 2000	$48,160,000.00
Weslaco I. S.D.	Unlimited Tax School Building Bonds, Series 2000	$20,000,000.00
La Joya I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$47,200,000.00
Valley View I. S.D.	Unlimited Tax School Building Bonds, Series 2000	$6,975,000.00
Los Fresnos C.I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$20,000,000.00
Hidalgo I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$7,700,000.00

ISSUER	SERIES-2000	AMOUNTS
Pharr San Juan Alamo I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$58,000,000.00
Cameron County, Texas	Combination Tax and Limited Pledge Revenue Certificates of Obligation, Series 2000	$23,860,000.00
Mission C.I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$38,000,000.00
Roma I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$18,630,000.00
Edinburg C.I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$60,000,000.00
Donna I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$29,000,000.00
San Benito C.I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$26,305,000.00
Santa Rosa I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$4,330,000.00
La Sara I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$1,250,000.00
La Villa I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$2,600,000.00
Sharyland I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$9,000,000.00
Rio Grande City I. S.D.	Unlimited Tax School Building Bonds; Series 2000	$27,000,000.00
Edcouch-Elsa I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$16,315,000.00
Monte Alto I.S.D.	Unlimited Tax School Building Bonds, Series 2000	$1,300,000.00
City of Mission, Texas	Public Property Finance Contractual Obligations, Series 2000	$2,165,000.00
City of Mission, Texas	Tax and Waterworks and Sewer System (Limited Pledge) Revenue Certificates of Obligation, Series 2000	$4,000,000.00
City of La Feria, Texas	Combination Tax and Limited Pledge Revenue Certificates of Obligation, Series 2000 (Underwriter's Counsel)	$710,000.00
Ben Bolt-Palito Blance CISD	Unlimited Tax School Building Bonds, Series 2000 (Special Tax Counsel)	$2,000,000.00
Taft I. S.D.	Unlimited Tax School Building Bonds, Series 2000 (Special Tax Counsel)	$5,125,000.00
San Diego I.S.D.	Unlimited Tax School Building Bonds, Series 2000 (Special Tax Counsel)	$5,625,000.00
Crystal City I.S.D.	Unlimited Tax School Building Bonds, Series 2000 (Special Tax Counsel)	$2,700,000.00

ISSUER	SERIES-2000	AMOUNTS
La Pryor I.S.D.	Unlimited Tax School Building Bonds, Series 2000 (Special Tax Counsel)	$1,400,000.00
Carrizo Springs C.I.S. D.	Unlimited Tax School Building Bonds, Series 2000 (Special Tax Counsel)	$8,000,000.00
City of San Juan, Texas	Waterworks and Sewer System Junior Lien Revenue Bonds, Series 2000	$649,000.00
Town of Combes, Texas	EDAP	(Pending)
La Joya Water Supply Corp.	EDAP	(Pending)

REAL ESTATE/CONSTRUCTION

Our real estate practice involves a variety of residential and commercial real estate transactions. We have participated in the acquisition, development, financing, and/or leasing of office buildings, residential and commercial subdivisions, small medical facilities, and industrial facilities. This includes handling transactions that involve some complexity and require the innovative drafting of documents, including documents enforceable in international settings.

Our client base includes home purchasers, land developers, lenders (banks and credit unions), cities and school districts, water utilities, financial institutions, architects and engineers, and contractors as well as foreign investors. We have been engaged to draft condominium regimes for residential area office and medical facilities, comprehensive construction management contracts, design-build contracts, joint venture agreements and limited partnerships and limited liability companies. In this connection we are familiar with the more technical drafting issues that arise in these transactions as a result of environmental regulations (CERCLA, RCRA, aboveground and underground storage tank provisions) and state and federal tax and securities laws. Furthermore, lawyers in the firm is well-versed in the federal and state tax issues that arise in connection with the transfer of real estate and other property, including federal tax implications on wealth transfer.

We have litigated claims involving property title insurance coverage, claims involving breach of contract and fiduciary duties involving general and limited partnerships, subdivision regulations, restrictive covenants and zoning issues, condemnations, easements, boundary disputes, environmental issues, public nuisances, premises liability (personal injury and property damage), as well as breach of contract, negligence and DTPA claims against governmental units, private owners, contractors, subcontractors, and design professionals, mechanic's and materialmen's lien claims and payment and performance bonds disputes. We have represented creditors and debtors in adverse proceedings in U.S. bankruptcy court and are often called to counsel our clients in connection with ad valorem tax matters.

LITIGATION

The firm's civil litigation practice is limited and is concentrated in Hidalgo and Cameron Counties in the state courts and in the McAllen and Brownsville divisions of the United States District Court, Southern District of Texas. The subject matter of the litigation handled by our firm in the tort area involves primarily premises liability (including claims under the Texas Tort Claims Act), design professional liability, construction, public employment (42 USC § 1983 cases, and municipal and school law), civil rights, personal injury and contractual and extra-contractual claims under the Texas Deceptive Trade Practices Act and the Texas Insurance Code. The firm is actively involved in defending business owners, employers and several cities and school districts and their public officials against the types of claims referred to.

CORPORATE

The firm has handled the incorporation and start-up of numerous close corporations (no publicly-traded securities) and partnerships (as well as PAs, PCs, LLCs and LTDs) engaged in special medical laboratories, medical care, trucking, land development and construction and fast food business, including franchises. We are engaged to advise our

clients on matters including asset acquisitions and dispositions, compliance with state administrative regulations, creative financing, employment contracts, non-competition agreements and tax and estate planning.

Approval of Appointment of Legal Counsel

Upon a motion by Dr. Alejo Salinas, Jr., and a second by Mr. Roy De Leon, the Board of Trustees approved the appointment of Montalvo and Ramirez as legal counsel with compensation to be negotiated by Dr. Alejo Salinas, Jr., Mr. Gary Gurwitz, and Dr. Reed who will report back to the Board on the outcome.

Consideration and Action on Release of Checks and Financial Reports

Upon a motion by Mrs. Irene Garcia and a second by Mr. Roy De Leon, the Board of Trustees of South Texas Community College approved and authorized the release of the submitted checks over $25,000 as presented; approved the checks that were released as authorized by Board Policy #5610, and approved the financial reports submitted for the month of November, 2000 as listed below.

1) Quarterly Investment Report for November, 2000
2) Summary of Revenues for November, 2000
3) Summary of State Appropriations Revenues for November, 2000
4) Summary of Property Tax Revenues for November, 2000
5) Summary of Expenditures by Classification for November, 2000
6) Summary of Expenditures by Function for November, 2000
7) Summary of Auxiliary Fund Revenues and Expenditures for November, 2000
8) Summary of Grant Revenues and Expenditures for November, 2000
9) Check Register for November, 2000
10) Summary of Bid Solicitations

Informational Items

a) ACCT – National Legislative Conference – Washington, D.C.

The Board received information on the National Legislative Conference to be held in Washington, D.C. on February 3 through February 7, 2001 in their Board packet and were informed that room reservations have been made at the J. T. Marriott for the Board members. It was requested that the Board members interested in attending the conference notify Ms. Clifford so that travel arrangements could be made and/or reservations at the hotel cancelled without penalty.

b) President's Report

The President's report for the past month's activities was enclosed for the Board's information and review.

There being no further business, the Board meeting was adjourned 6:20 p.m.

I certify that the foregoing are the true and correct Minutes of the December 14, 2000 Regular Meeting of the Board of Trustees.

Roy de Leon

Mr. Roy De Leon, Secretary

January 18, 2001

Approval of Revision of Board Policies

Upon a motion by Dr. Alejo Salinas, Jr. and a second by Mr. Roy De Leon, the Board of Trustees adopted the revision of Policies #4210: Immigration Reform and Control Act of 1986 and #4310: Sick Leave Pool as recommended by the Human Resources Committee and which supersede any previously adopted policy.

Approval of District-Wide Campus Master Development Plan

Upon a motion by Mr. Gary Gurwitz and a second by Mr. Roy De Leon, the Board of Trustees approved the district-wide campus master development plan as presented by Page Southerland Page.

Approval of Retainer Contract for Legal Services

Upon a motion by Mr. Gary Gurwitz and a second by Mr. Roy De Leon, the Board of Trustees authorized and approved the retainer contract for legal services with the firm of Montalvo and Ramirez as recommended by the Committee (Dr. Salinas, Mr. Gurwitz, Dr. Reed) appointed to negotiate the terms and conditions.

Approval of Resolution for Legal Counsel Service

Upon a motion by Mr. Roy De Leon and a second by Dr. Alejo Salinas, Jr., the Board of Trustees approved the resolution in honor of Jim Darling, College Counsel, as presented. The Board commended Mr. Darling for his commitment to the College and thanked him for his service to the College.

Approval of 2000 Tax Roll

Upon a motion by Dr. Alejo Salinas, Jr. and a second by Mr. Roy De Leon, the Board of Trustees approved the 2000 Tax Roll as presented to be in compliance with Section 26.09 Item (E) of the Property Tax Code and determined South Texas Community College's tax roll to be as follows: Hidalgo County ($11,694,086.06) and Starr County ($902,294.44).

Approval and Authorization of Budget Adjustments for Transfer of PPFCO Personal Expenditures and Necessary Budget Amendments

Upon a motion by Dr. Alejo Salinas, Jr. and a second by Mr. Roy De Leon, the Board of Trustees authorized the budget adjustments for transfer of PPFCO Personal Property Expenditures and necessary budget amendments for the Unexpended Plant Fund—Bond Series 1996 and Unexpended Plant Fund -- Mid-Valley Construction budgets in the amount of $11,550.86.

Approval and Authorization for Interlocal Agreement with Weslaco ISD and Weslaco Economic Development Commission

Upon a motion by Mr. Roy De Leon and a second by Mr. Gary Gurwitz, the Board of Trustees authorized Dr. Reed to negotiate the terms and conditions of Interlocal agreements for the proposed conveyance from STCC of five (5) acres of land adjacent to the Mid-Valley Campus to

$125
MTR
1st one

MONTALVO & RAMIREZ
Attorneys at Law
900 N. Main
McAllen, Texas 78501
Phone: (956) 631-1185
Fax: (956) 631-1187

LEO MONTALVO
JESUS RAMIREZ
JOSE R. GUERRERO

MARCUS MONTALVO
ROXANNA SALINAS
EDUARDO CANTU

January 8, 2001

Became Ramirez Guerrero 2/21/08

Dr. Shirley A. Reed, President
South Texas Community College
3201 West Pecan
McAllen, Texas 78501

Re: Legal Services Agreement

Dear Dr. Reed:

This is to serve as an agreement for general counsel services between the South Texas Community College and our firm. Our firm's services will generally encompass attending board meetings; providing legal counsel and guidance to administrative staff on such matters as employment law, personnel matters, procurement procedures and contracts, elections, Texas Open Meetings Act, Texas Open Records Act, construction contracts; representing the college in litigation; and providing other legal work authorized by the board directly or through its administrative staff.

Mr. Jesus Ramirez will be primary contact attorney and will also be the attorney attending the monthly board meetings. On occasion, Mr. Jose R. Guerrero may substitute for Mr. Ramirez at board meetings.

Our fees for general counsel services will be $125.00 per hour. Our fees for litigation services will be $150.00 per hour out-of-court work and $175.00 per hour for court appearances and trial work. Our firm will also expect reimbursement of out-of-pocket expenses at actual costs. Usual out-of-pocket expenses generally include photocopies, fax, long-distance telephone calls, postage, Westlaw on-line research and download fees, courier fees for deliveries to third parties on behalf of the college.

Please place this matter on the board's agenda for its next meeting. If the board approves this agreement, please signify the board's approval by signing in the space provided below. A signed copy for our files would be appreciated. We look forward to a successful working relationship with the college.

Please call me if you have any questions.

Sincerely,

Jesus Ramirez

APPROVED: _____
Dr. Shirley Reed, President

September 15, 2005

Approval of Final Completion for the Fence on the Pecan Campus North 40 Acres for Leased Property

Approval of final completion for the fence constructed on the Pecan Campus North 40 acres for leased property was requested.

As part of the purchase agreement for the Casso ten (10) acre tract, STC agreed to build a new fence on the north, east and west sides of the residence presently occupied by the Casso family. At the June 16, 2005 Board meeting, the STC Board of trustees awarded the contract for construction of the new fence to Construction Rent-A-Fence in the amount of $59,630. The contract amount was increased by $4,750 by a change order to allow the fence to be extended closer to the Pecan Boulevard road right of way. The final cost of the fence project is $64,380. No payments have been made on this project.

The STC Facilities Planning and Construction Department prepared the construction drawings for this project and also conducted the on-site inspections of the work. When the project was near completion, staff prepared a punch list and forwarded it to the contractor. A final inspection was done to confirm the status of the punch list and all items were found to be completed.

It was recommended that the Board of Trustees approve the final completion for the fence constructed on the Pecan Campus North 40 acres for the property leased to Dr. Casso and the release of final payment in the amount of $64,380.

Upon a motion by Mr. Manuel Benavidez, Jr., and a second by Mr. Gary Gurwitz, the Board of Trustees of South Texas College approved and authorized the final completion for the fence constructed on the Pecan Campus North 40 acres for the property leased to Dr. Casso and the release of final payment in the amount of $64,380. The motion carried.

Approval of Adjustment to Hourly Rate of Legal Counsel

Approval of an adjustment to the hourly rate of the College's Legal Counsel was requested.

On December 14, 2000, the Board of Trustees approved the appointment of the firm of Montalvo & Ramirez to serve as general counsel for the College. An agreement dated January 8, 2001 for services between the College and the law firm was signed and the fee for general counsel services was listed as $125 per hour.

In a letter dated June 20, 2005, Mr. Jesus Ramirez, the primary attorney representing the College, asked for the Board of Trustees to consider an amendment to the agreement to increase hourly services from $125 per hour to $150 per hour. A copy of the letter submitted by Mr. Jesus Ramirez and a copy of the Legal Services Agreement was included in the packet for the Board's information and review.

Payments for legal services to Montalvo & Ramirez were as follows:

- Fiscal Year 2003-2004 $86,436.15
- Fiscal Year 2004-2005 $44,725.88

The Finance and Human Resources Committee discussed the adjustment of the hourly rate for the College's legal counsel at their September 1, 2005 meeting and recommended approval.

It was recommended that the Board of Trustees of South Texas College approve and authorize an amendment to the agreement between the College and Montalvo and Ramirez law firm to increase the hourly services fee from $125.00 per hour to $150.00 per hour.

Upon a motion by Mr. Manuel Benavidez, Jr., and a second by Mr.Gary Gurwitz, the Board of Trustees of South Texas College approved and authorized an amendment to the agreement between the College and Montalvo and Ramirez law firm to reflect an increase in the hourly services fee from $125.00 per hour to $150.00 per hour as presented. The motion carried.

Approval to Expand Scope of Internal Auditing Services

Authorization was requested to expand the scope of internal auditing services.

Administration requested that internal auditor services be expanded to provide an adequate scope of auditing services as appropriate for the College's $83 million annual budget.

Previously, the Finance and Human Resources Committee considered the options of contracting for internal auditor services or establishing an internal auditor office on campus. At that time, the Committee agreed to revisit the issue upon renewal of the contract for internal auditor services.

Administration discussed the need to expand the scope of internal auditing services with the Finance and Human Resources Committee at their September 1, 2005 meeting. The current firm of Reyna & Garza, PLLC and Frank Rodriguez, CPA (A Joint Venture) is willing to expand the scope of their services. The present annual contract is for approximately $34,000. The total approximate annual cost to increase the scope and conduct an audit for at least one area per month is $60,000.

A copy of the proposed projects for the expanded scope of internal auditing services was enclosed in the packet for the Board's information.

The Finance and Human Resources Committee reviewed the expanded scope of internal auditing services at their September 1, 2005 meeting and recommended approval of the expanded scope and the proposed projects at the September 15, 2005 Board meeting.

It was recommended that the Board of Trustees approve and authorize the expanded scope of internal auditor services and the proposed projects provided by Reyna & Garza, PLLC and Frank Rodriguez, CPA (A Joint Venture) at an approximate cost of $60,000 per year.

Upon a motion by Dr. Alejo Salinas, Jr., and a second by Mr. Manuel Benavidez, Jr., the Board of Trustees of South Texas College approved and authorized the expanded scope of the internal auditor services and the proposed projects provided by Reyna & Garza, PLLC and Frank Rodriguez, CPA (A Joint Venture) at an approximate cost of $60,000 per year. The motion carried.

MONTALVO & RAMIREZ
Attorneys at Law

JESUS RAMIREZ
E-Mail jramirez@montalvoramirezlaw.com
Ana J. Briseño, Legal Asst.
E-Mail: aramos@montalvoramirezlaw.com

Ext. 106

RECEIVED
JUN 23 2005
By

June 20, 2005

VIA REGULAR MAIL
Mr. Roy De Leon
South Texas College
3600 North McColl Road
McAllen, Texas 78501

Dr. Shirley A. Reed
President
South Texas College
P. O. Box 9701
McAllen, Texas 78501-9701

M+R
$150

Dear Mr. De Leon:

This is a request for the board of trustees to consider our firm's contract with the College. The firm is asking for a contract amendment for hourly services from $125 per hour to $150 per hour.

Very truly yours,

MONTALVO & RAMIREZ

By: _____
Jesus Ramirez

900 North Main
McAllen, Texas 78501

Phone No. (956) 631-1185

Fax No. (956) 631-1187

Upon a motion by Mr. Mike Allen and a second by Dr. Alejo Salinas, Jr., the Board of Trustees of South Texas College authorized and accepted the submitted grant awards as presented. The motion carried.

Approval of Order Calling for the General Election of STC Trustees for District 5 and District 7

Approval of the Order Calling for the General Election of STC Trustees for District 5 and District 7 was requested for the May 10, 2008 election.

The South Texas College legal counsel, Mr. Jose Guerrero, prepared the Order Calling for the General Election of Board members for District 5 and District 7 and advised the administration that the election must be called by March 10, 2008 in order to proceed with the Saturday, May 10, 2008 election.

Upon a motion by Mr. Manuel Benavidez, Jr., and a second by Dr. Alejo Salinas, Jr., the Board of Trustees of South Texas College approved the Order Calling for the General Election for Trustees to represent District 5 and District 7 on Saturday, May 10, 2008 as recommended. The motion carried.

Approval of Agreement and Addendum to the Agreement for Election Services Between the County of Hidalgo and South Texas College

In order to proceed with the necessary election of Trustees for Districts 5 and District 7, Board approval was requested to approve the agreement with the County of Hidalgo to conduct and supervise the election. Ms. Teresa Navarro, Hidalgo County Elections Administrator, has been appointed as the Early Voting Clerk in the agreement.

The agreement to conduct and supervise the May 10, 2008 election has been reviewed by the College's legal counsel. The agreement is the same as previous agreements with Hidalgo County to conduct elections for STC. Legal counsel recommended the addendum be made part of the agreement to conduct the General Election. The agreement will not be binding until written approval from the Secretary of State of Texas is received.

Upon a motion by Mr. Mike Allen and a second by Dr. Alejo Salinas, Jr., the Board of Trustees of South Texas College approved the agreement and the addendum with the County of Hidalgo to conduct and supervise the General Election of Trustees for District 5 and District 7 to be held on May 10, 2008 as presented. The motion carried.

Approval of Contract with Ramirez & Guerrero, L.L.P. for Legal Services

Approval of a contract with Ramirez & Guerrero, L.L.P. for legal services was requested.

Mr. Jesus Ramirez and Mr. Jose Guerrero, attorneys formerly associated with Montalvo & Ramirez, L.L.P. and who currently serve as legal counsel for the College, now do business as Ramirez & Guerrero, L.L.P.

continued

Mr. Ramirez and Mr. Guerrero will continue to provide the same services they have provided in the past. Some services include attending Board meetings, providing legal counsel and guidance to administrative staff on such matters as employment law, personnel matters, procurement procedures and contracts, elections, Texas Open Meetings Act, Texas Open Records Act, construction contracts, litigation representation, and other work as authorized by the Board.

Upon a motion by Mr. Mike Allen and a second by Dr. Alejo Salinas, Jr., the Board of Trustees of South Texas College approved and authorized the contract with Ramirez & Guerrero, L.L.P. for legal services as presented. The motion carried.

Approval of Request for Sabbatical Leave

Approval was requested to authorize sabbatical leave for Mr. Cesar Garcia, EMT Instructor and Chair.

As per the Professional Development Plan, sabbatical leave may be granted to administrators, full-time faculty members, and professional-technical staff by the South Texas College Board of Trustees upon the recommendation of the respective Vice President and the President. Sabbatical leave may be granted for the purpose of self-improvement through study, through acquisition of new skills to stay abreast with new technologies and through research or community service.

Eligibility is based on service to the institution for six consecutive full-time years and an agreement in writing to serve South Texas College for a period of two times the length of the leave following the completion of the sabbatical.

The number of sabbatical leaves granted to full-time faculty is restricted to no more than two full-time faculty members for each year.

Juan E. Mejia, vice president for academic affairs, and Dr. Reed reviewed the sabbatical leave request and recommended Mr. Garcia be approved for sabbatical leave for the period of August 2008 to May 2009 to work towards the completion of a Bachelor's Degree in Nursing from the University of Texas at Brownsville.

Upon a motion by Mr. Manuel Benavidez, Jr., and a second by Dr. Alejo Salinas, Jr., the Board of Trustees of South Texas College approved and authorized sabbatical leave for Cesar Garcia for the period of August 2008 to May 2009 as presented. The motion carried.

RECEIVED
FEB 11 2008
By

RAMIREZ & GUERRERO, L.L.P.
Attorneys at Law
600 E. Nolana
McAllen, Texas 78504

JESUS RAMIREZ
Ext. 106
E-Mail jramirez@rg-legal.com
David Cepeda, Legal Asst.
Ext. 110
E-Mail dcepeda@rg-legal.com

Phone: (956) 664-0007
Fax: (956) 664-1770
Mobile : (956) 207-2443

February 1, 2008

Dr. Shirely A. Reed
President
South Texas College
3201 W. Pecan Blvd.
McAllen, Texas 78501

Re: Legal Services Agreement

Dear Dr. Reed:

I am enclosing a copy of our engagement agreement between the South Texas College and Ramirez & Guerrero, L.L.P.

Very truly yours,

Jesus Ramirez

RAMIREZ & GUERRERO, L.L.P.
Attorneys at Law
600 E. Nolana
McAllen, Texas 78504
Phone: (956) 664-0007
Fax: (956) 664-1770

February 21, 2008

Dr. Shirley A. Reed, President
South Texas College
3201 West Pecan
McAllen, Texas 78501

Re: Legal Services Agreement

Dear Dr. Reed:

This is to serve as an agreement for general counsel services between the South Texas College (the "College") and our firm. Our firm's services will generally encompass attending board meetings; providing legal counsel and guidance to administrative staff on such matters as employment law, personnel matters, procurement procedures and contracts, elections, Texas Open Meetings Act, Texas Open Records Act, construction contracts; representing the College in litigation; and providing other legal work authorized by the board directly or through its administrative staff.

Mr. Jesus Ramirez will be primary contact attorney and will also be the attorney attending the monthly board meetings. On occasion, Mr. Jose R. Guerrero may substitute for Mr. Ramirez at board meetings.

Our fees for general counsel services will be $150.00 per hour. Our fees for litigation services will be $175.00. Our firm will also expect reimbursement of out-of-pocket expenses at actual costs. Usual out-of-pocket expenses generally include photocopies, fax, long-distance telephone calls, postage, Westlaw on-line research and download fees, courier fees for deliveries to third parties on behalf of the College.

Please place this matter on the board's agenda for its next meeting. If the board approves this agreement, please signify the board's approval by signing in the space provided below. A signed copy for our files would be appreciated. We look forward to a successful working relationship with the College.

Please call me if you have any questions.

Very truly yours,

RAMIREZ & GUERRERO, L.L.P.

Jesus Ramirez

APPROVED:

SOUTH TEXAS COLLEGE

Dr. Shirley A. Reed, President

TAB 2. COMPENSATION FOR LEGAL SERVICES

- **Legal Services Compensation Summary – Fiscal Years 2012 through 2015.....37**
- **Compensation Report: FY 2014 – 2015 ..... 38 - 41**
- **Compensation Report: FY 2013 – 2014 ..... 42 - 46**
- **Compensation Report: FY 2012 – 2013 ..... 47 - 50**

Legal Services Summary

Fiscal Years 2012 through 2015

Categories	FY12 - FY13	FY13-FY14	FY14-FY15
Audit	$ 105.00	$ 225.00	$ -
Bank Depository	-	-	8,697.69
Bond	14,439.69	14,406.45	6,176.25
Claims	543.75	37.50	-
Construction	787.50	304.50	6,215.13
Contracts	3,555.00	2,213.50	2,070.00
Delta Issue	-	450.00	-
Employee Issues	27,000.00	17,422.96	19,757.28
Hailstorm Damage	2,212.50	6,975.00	23,204.51
Legal Research	3,097.50	5,122.50	-
LRGVDC - Metro	75.00	679.50	1,523.95
Meetings	5,070.00	5,168.00	7,750.50
Miscellaneous and Initial Inquiries	9,917.17	8,712.17	5,368.98
Patent Review	-	-	112.50
Policies	1,155.00	4,501.50	1,137.00
Property - Real Estate	1,832.50	75.00	1,917.36
Public Info	3,682.50	825.00	1,237.50
Rollback Elections	-	277.50	5,197.50
Student Issues	45.00	7,920.00	37.50
Tax Abatement	-	-	6,663.14
Trustee Election	-	3,022.50	-
Total	**$ 73,518.11**	**$ 78,338.58**	**$ 97,066.79**

LEGAL SERVICES

FY 2014 - 2015

[Invoices as of 09/01]

Row Labels		Sum of Amount
Bank Depository		
Bank Depository	$	8,622.69
Email - Bank depository and PFIA	$	37.50
Visit - with Ms. Elizondo comments to the Public Funds Investment Policy and Bank Depositoty	$	37.50
Bank Depository Sum	**$**	**8,697.69**
Bond		
Confer with Broaddus and STC facilities	$	49.50
Construction Management Contract (Bond Program)	$	5,101.50
Dell financial services, LLC, print opinion letter on bond paper	$	12.75
Emails with Gerry and Fernando on geo tech contract for bond program	$	37.50
Review - Tax code and election code	$	300.00
Review - US attorney and general opinions on tax rate	$	150.00
Review file on request for qualifications criteria, ceramic building	$	75.00
Review with Broaddus for bond program	$	37.50
Telecall with Mrs. Elizondo: criteria and weight factors for early completion on building construction	$	37.50
Visit with Mrs. Elizondo, Mr. Rodriguez and Mr. Lamas on architect selection process	$	375.00
Bond Sum	**$**	**6,176.25**
Construction		
Construction Management Contract (Bond Program)	$	5,652.63
Finalize research on professional services procurement act	$	75.00
Research on whether "testing" for STC constitutes a "professional" service or an "engineering" service	$	225.00
Teleconference - Mr.Rodriguez, certificate for architects and sub-consultants	$	37.50
Teleconference - with Dr. Reed on Construction Program Manager issues	$	112.50
Teleconference - with Mr. Rodriguez on rotation of architects and engineers	$	37.50
Teleconference - with Ms. Elizondo and Mr. Rodriguez on demand letter	$	37.50
Work - on initial Notice to Proceed, Suspension provisions and no damages	$	37.50
Construction Sum	**$**	**6,215.13**
Contracts		
Email - Correspondence with Mr. Llamas on sonogram issues	$	150.00
Finalize opinion for Dell lease for Mr. Lamas	$	75.00
La Joya ISD Inter-local Agreement	$	525.00
Receive - Materials from Mr. Llamas on changes to AIA contract	$	112.50
Research for limitation on damages in personal property and general contract cases	$	75.00
Respond to inquiry, advice regarding selection of contractor	$	37.50
Review - Contract negotiations	$	45.00
Review - Final review and draft of interlocal with STC	$	75.00
Review - Mutual Jr. College aid agreement	$	75.00
Review draft electronic contract proposed for faculty employees	$	150.00
Review the non-bond geo-tech contract	$	75.00
Tax exempt purchase of software	$	37.50
Teleconference - with Dr. Reed Miscellaneous, Metro, Broaddus	$	112.50
Teleconference - with Dr. Reed regarding Broaddus	$	112.50
Teleconference - with Ms. Elizondo and Mr. Rodriguez on architect contracts	$	112.50
Work - Draft of interlocal agreement	$	300.00
Contracts Sum	**$**	**2,070.00**
Employee Issues		
[redacted] Faculty	$	300.00
[redacted] - Legal research on academic freedom issues	$	202.50
[redacted] - Memo draft on academic freedom issues	$	450.00
[redacted] - Teleconference with Dr. Reed on academic freedom	$	75.00
[redacted] - Sexual Harrassment Research	$	1,522.18
Chefs & Cooks - Finalize, review on employee, statements and notes and send them to Ms. Requena	$	300.00
Chefs & Cooks - Review reports and statements by Ms. Requena on employee	$	300.00
Chefs & Cooks - Visit H.R., Review reports and statements from Chefs & Cooks	$	300.00
Chefs & Cooks, [redacted] and other employees	$	1,861.98
[redacted] - Email to [redacted], acknowledgements we need in [redacted] resignation letter	$	37.50
[redacted] - Employee [redacted], letter of resignation and respond to visit	$	25.50

Confidential Information redacted

LEGAL SERVICES

FY 2014 - 2015

[Invoices as of 09/01]

Row Labels	Sum of Amount
[redacted] - Employee [redacted] resignation by [redacted], telecall with legal assis for attorney	$ 37.50
[redacted] - Employee [redacted], review draft letter from Mrs. Requena to [redacted]	$ 49.50
Email - Mutual aid agreement with community college	$ 37.50
Employee Fundraising	$ 75.00
[redacted]	$ 700.50
FLSA, exempt/non-exempt employees	$ 2,291.25
[redacted]	$ 3,112.50
[redacted]	$ 1,438.44
[redacted]	$ 1,099.50
[redacted] - Email on [redacted] matter	$ 75.00
[redacted] - Email response to Dr. Reed on [redacted] request for agenda	$ 63.00
[redacted] - Teleconference with Ms. Requena on TWD unemployment claim hearing	$ 25.50
[redacted] - Televisit with Marcia at TWC on [redacted] mediation and lawsuit	$ 75.00
[redacted], [redacted], [redacted] - Sexual Harrassment Research	$ 431.94
[redacted] - Visit H.R., [redacted]	$ 300.00
[redacted] - Research, finalize the request for info from Ms. Balderaz on [redacted]	$ 150.00
Payments in excess of contract amt - Loc. Govt Code and employment contracts	$ 100.50
[redacted]/[redacted] - Title IX Police Department	$ 240.00
[redacted]	$ 805.99
[redacted]	$ 943.00
[redacted]	$ 819.00
[redacted], [redacted] and [redacted] - Teleconference with Ms. Balderaz and Ms. Requena	$ 75.00
Telecall with Mrs. Requena and Jim, on letter and termination	$ 49.50
Visit with Mrs. Requena on employee and sick leave issues	$ 337.50
[redacted], [redacted]	$ 1,050.00
Employee Issues Sum	**$ 19,757.28**
Hailstorm Damage	
Advise - Board on status of hailstorm discussions	$ 600.00
Call AGGM INC, regarding cost estimating services for Chubb Hail Storm Claim	$ 25.50
Hailstorm Damage	$ 22,354.01
Visit - with Mr. Rodriguez on miscellaneous issues, hailstorm language, etc	$ 225.00
Hailstorm Damage Sum	**$ 23,204.51**
LRGVDC - Metro	
Metro	$ 1,523.95
LRGVDC - Metro Sum	**$ 1,523.95**
Meetings	
Attend - 2nd Tax hearing	$ 337.50
Attend - Board meeting	$ 712.50
Attend - Facilities and Committee meetings	$ 337.50
Attend - Facilities meeting	$ 450.00
Attend - Facilities, Finance and Board meetings	$ 525.00
Attend - Special Board meeting	$ 262.50
Attend board meeting	$ 1,425.00
Attend facilities meeting	$ 300.00
Attend meetings	$ 1,200.00
Call - Mr. Rodriguez on getting opinions for meeting	$ 37.50
Email - Correspondence on agenda matters	$ 37.50
Facilities agenda	$ 75.00
Memo - Draft on open meeting act issues	$ 637.50
Posting items on agenda	$ 25.50
Research - Legal research open meetings act, statutes, case law, etc	$ 675.00
Review - Agenda and materials for meeting	$ 150.00
Review facilities committee meeting agenda	$ 412.50
Teleconference - with Dr. Reed on Board meeting	$ 37.50
Teleconference - with Mr. Gurwitz on Facilities meeting	$ 112.50
Meetings Sum	**$ 7,750.50**

Confidential Information redacted

LEGAL SERVICES

FY 2014 - 2015

[Invoices as of 09/01]

Row Labels	Sum of Amount
Miscellaneous and Initial Inquiries	
35 copies os RFQ investment advisory	$ 12.25
Conf. call on Mario R., STC sponsored event and other issues	$ 150.00
Conference with dual enrollment director on legal authority program	$ 150.00
Corrections on draft of STC's investment advisor contract	$ 112.50
Draft - on Dual Language	$ 150.00
Draft on new bank account resolutin to STC staff	$ 25.50
Drafting Memo on HB 382	$ 150.00
Email from STC, surplus lines insurance and review documents	$ 37.50
Esperanza Clinic, focus on state law issues research	$ 600.00
Esperanza, federal tax law research, leasing of real estate	$ 450.00
File - Answer on Lone Star National Bank vs STC case	$ 37.50
Finalize transmittal letter to Mr. Rodriguez for Mr. Ramirez' signature	$ 18.75
Follow up - on HB, legislative history	$ 75.00
Insurance and potential state right claims, whistleblower and federal claims for coverages and limits	$ 75.00
Investment advisory contract, non-material comments to front page	$ 37.50
Obtain - Copies from Texas Secretary of State	$ 20.00
Obtain - LLC records from Secretary of State and Texas State Comptroller	$ 37.50
Postage fee	$ 0.48
Print out 12 copies on surplus lines insurance	$ 75.00
Research - Internet research for sonogram imaging risks	$ 75.00
Research on special legislative bill	$ 450.00
Respond to Mr. Fish on procurement with deferral to local banks	$ 150.00
Review - Final petition for filling	$ 225.00
Review - Inquiry on HB and its effect on STC and contract employees	$ 225.00
Review - Legal memo	$ 75.00
Review - Research procurement by school district of professional services	$ 225.00
Review clinic documents	$ 202.50
Review file materials	$ 75.00
Review Military Veterans Preference	$ 75.00
Review MSRB G-17 memo and notice by college of its financial advisor	$ 75.00
Review PIA request	$ 202.50
Review subpoena and respond to STC request	$ 75.00
Revisit prior correspondence for Mrs. Elizondo	$ 37.50
RFQ investment advisory services	$ 112.50
Telecall from Dr. Reed on state changes in law: undocumented students	$ 37.50
Telecall with Dr. Reed on issues surrounding the Kayak project	$ 37.50
Telecall with Dr. Reed on special bill for Delta area	$ 75.00
Telecall with Dr. Reed on special campus in the Delta area	$ 225.00
Telecall with Mr. Fish on live streaming archiving issues	$ 49.50
Teleconference - with Dr. Reed Miscellaneous	$ 37.50
Teleconference - with Dr. Reed on miscellaneous	$ 75.00
Teleconference - with Mr. Fish and Mr. Gurwitz	$ 75.00
Teleconference - with Mr. Fish on records from Comptroller	$ 37.50
Visit with Dr. Reed on miscellaneous issue	$ 150.00
Visit with Mrs. Elizondo on insurance surplus lines	$ 75.00
Miscellaneous and Initial Inquiries Sum	**$ 5,368.98**
Patent Review	
Call - with Mr. Llamas on STC Salt Shaker	$ 37.50
Review - STC Salt Shaker	$ 75.00
Patent Review Sum	**$ 112.50**
Policies	
Proofreading, editing and emails on the volunteer policy	$ 112.50
Respondo to Mrs. Balderas on the BIT confidentiality form	$ 49.50
Review - Comments to STC policy and compare to PFIA statute	$ 225.00

Confidential Information redacted

LEGAL SERVICES

FY 2014 - 2015

[Invoices as of 09/01]

Row Labels	Sum of Amount	
Review - Policies on purchasing	$	75.00
Review and comment on STC discrimination policy	$	187.50
Review BIT policy	$	112.50
Review Volunteer Policy	$	75.00
Work on Campus-workplace violence policy	$	300.00
Policies Sum	**$**	**1,137.00**
Property - Real Estate		
Called Mr. Summers on contract status	$	18.75
Calls with Mr. Fish, agenda items, call seller on Weslaco property	$	37.50
City of Pharr/Real Estate	$	75.00
Estate of M. Narcissus Witmer, Lot 15 & 16, Block 9	$	153.75
Preparation of Quitclaim Deed	$	56.25
Review - Lease McAllen Tech and comments	$	225.00
Review - Matter of State eminent domain for Starr County	$	75.00
Starr County Property	$	451.11
Telecall with Mr. Elizondo on allocation of Starr County proceeds	$	75.00
TXDOT Eminent Domain	$	750.00
Property - Real Estate Sum	**$**	**1,917.36**
Public Info		
Open Records	$	1,237.50
Public Info Sum	**$**	**1,237.50**
Rollback Elections		
Call - from Dr. Reed on executive session for tax rollback election	$	75.00
Conference - with J. Ramirez on tax rate, rollback rate and election issues	$	52.50
Conference - with Mr. Scheil on potential legal issues on tax rollback	$	37.50
Draft - Memo on rollback election	$	112.50
Draft - Memo on school district vs junior college in rollback elections	$	262.50
Draft - Responses to STC questions on petition signatures, guide to disqualification	$	375.00
Email - Correspondence on rollback issues	$	52.50
Legal Research	$	840.00
Meeting - with Dr. Reed and OWLs on tax collector	$	300.00
Memo - Draft on rollback election issues	$	450.00
Research - Challenging petition on rollback election	$	75.00
Research - Legal research on Attorney Gen opinions on tax rate	$	412.50
Research - Legal research on rollback election issues	$	487.50
Research - Legal research on rollback issues	$	112.50
Research - Legal research on rollback tax issues	$	75.00
Research - Legal research on school district vs junior college issues	$	60.00
Research - Legal research on tax code, case law, etc	$	225.00
Research - Tax rollback election	$	150.00
Research - Tax rollback election and preparation for action and petition	$	75.00
Review - Attorney gen opinions on tax rate, rollback, etc.	$	262.50
Review - Memo from STC, questions on petition signatures	$	52.50
Review - Sampling methods for petitions on rollback	$	225.00
Review - STC policy on petition disqualification document	$	90.00
Teleconference - with Dr. Reed on maintenance tax issue, etc	$	112.50
Visit with Mrs. Elizondo and Mr. Llamas on roll back tax issues and investment agreement	$	225.00
Rollback Elections Sum	**$**	**5,197.50**
Student Issues		
Request - FERPA for student survey information	$	37.50
Student Issues Sum	**$**	**37.50**
Tax Abatement		
Drafting materials for tax abatement	$	487.50
Statutory review of tax abatement	$	375.00
Tax Abatement	$	5,800.64
Tax Abatement Sum	**$**	**6,663.14**
Grand Total	**$**	**97,066.79**

Confidential Information redacted

LEGAL SERVICES

Fiscal Year 2013 - 2014

Row Labels	Sum of Amount
Audit	
Audit letter	$ 37.50
Review - Draft response to State Auditor	$ 112.50
Teleconference - State Auditor's response	$ 75.00
Audit Sum	**$ 225.00**
Bond	
Bond - Proposition translation	$ 150.00
Bond Election - Conferences	$ 60.00
Bond Election - Receipt of documents	$ -
Construction Management Contract (Bond Program)	$ 14,196.45
Bond Sum	**$ 14,406.45**
Claims	
Claim - ADA regarding rejected contract	$ 37.50
Claims Sum	**$ 37.50**
Construction	
Conference - with Dr. Reed, process for CPM and designer selection	$ 90.00
Contact - Gerry Rodriguez on McAllen water tower project	$ 49.50
Email - Issues for CPM	$ 60.00
Email - Project Constr. Management	$ 52.50
Teleconference - with Gerry Rodriguez	$ 52.50
Construction Sum	**$ 304.50**
Contracts	
Address Mr. Llamas on question regarding jury trial issue on contracts	$ 52.50
Call - with Mr. Rodriguez and Mr. Lamas on CADD contracts	$ 49.50
Comments - Agreement	$ 112.50
Comments - Contractor Delay	$ 52.50
Conference - with Jesus Ramirez and Del Mar, changes on contract	$ 75.00
Conference - with Mr. Llamas on CADD contracts	$ 16.50
My Golden Years Tenancy/Lease Agreement	$ 190.00
Portable lease submitted for WBU	$ 75.00
Receive - Draft of agreement for GIS MOU with Del Mar College	$ 150.00
Respond - STC Del Mar	$ 75.00
Review - "Projecto Azteca" agreement	$ 52.50
Review - Correspondence and make changes to contract with Del Mar	$ 75.00
Review - Current and future metro contracts	$ 112.50
Review - Del Mar College draft agreement for GIS services	$ 375.00
Review - Del Mar College draft and return comments	$ 112.50
Review - Interlocal agreement, insurance documents	$ 75.00
Review - Letter and termination provisions of contract	$ 52.50
Review - Nursing testing site agreement	$ 75.00
Review - Terminate contract and suggest quick follow up	$ 45.00
Teleconference - Coca-cola disclosure	$ 52.50
Teleconference - Interlocal with PSJA, Legal Center	$ 75.00
Teleconference - with Mr. Llamas on CADD contracts	$ 37.50
Teleconference - with Mr. Llamas on indemnity issue with school district	$ 52.50
Teleconference- Delegating authority to financial staff to enter contracts	$ 60.00
Visit - Mary Elizondo, Dr. Reed and Gerry Rodriguez, review McAllen to STC agreement	$ 112.50
Contracts Sum	**$ 2,213.50**
Delta Issue	
Call - Regarding FOIA on Edcouch property	$ 75.00
Conference - Edcouch Elsa farmers market issue	$ 60.00
Email - Comments on "El Mercado"	$ 75.00
Email - Delta real estate and lien history	$ 52.50
Memo - Delta area mortgage	$ 75.00
Outline options available for farmer's market, open file and organize outline	$ 112.50
Delta Issue Sum	**$ 450.00**
Employee Issues	
Call - 1st amendment issues regarding Facebook	$ 52.50
Call - to Brenda	$ 52.50

Confidential Information redacted

LEGAL SERVICES

Fiscal Year 2013 - 2014

Row Labels	Sum of Amount
Email - Contracting with an employee for services	$ 112.50
Email - Former employee and D.A.'s office	$ 52.50
Employee Cases	$ 285.00
Review - Employee exit acknowledgement	$ 52.50
[redacted] - Teleconference with Mario R. on involuntary resignation question	$ 45.00
[redacted] - Prepare email regarding what would constitute resignation	$ 120.00
[redacted] - Review email regarding termination of [redacted], research NAAMREI program	$ 195.00
[redacted], [redacted], FLSA exempt/non exempt employees	$ 1,470.00
IS&P staff - Visit Jose Cruz on personnel issues	$ 52.50
[redacted] - Review employee FMLA and ADA issues	$ 75.00
[redacted], IS&P - Visit Ms. Balderas and Mr. Crum and attend the unemploment hearing	$ 375.00
A. Esmaeili - U-Teach grant, respond matter of UT-STC visiting professor	$ 52.50
[redacted] employment	$ 150.00
[redacted] - Review former dual program instructor	$ 75.00
[redacted] - Matter of Texas Human employee	$ -
[redacted] - Research age discrimination case, review complaint, TWC letter, etc	$ 300.00
[redacted] - Receive TWC regulations to prepare for mediation	$ 112.50
[redacted] - Lawsuit employee	$ 1,225.75
[redacted]	$ 1,035.00
Letters of appt - Electronic issuance - Mail delivery employees and professional employee appointment procedures	$ 112.50
[redacted] - Position statement TS EEOC Complaint	$ 4,477.50
Memo - Employee contracts, electronic issuance	$ 30.00
Rio Grande employee - Visit with HR, includes travel time	$ 225.00
[redacted] - Conference with HR staff and McCaleb	$ 202.50
FLSA Review - Work on wage rates practices	$ 112.50
FLSA Review - Email Ms. Balderas for update	$ 45.00
FLSA Review - Email Ms. Balderas on exempt employees	$ 45.00
CLE case - Visit Ms. Requena	$ 600.00
[redacted] - Interview, matter of P.D. employee and disciplinary action	$ 525.00
[redacted] - Setup appointment with Ms. Requena	$ 52.50
[redacted], [redacted], [redacted] - Employee Cases	$ 1,500.00
Robert Shell - Sexual Harrassment Research	$ 2,092.50
[redacted] - Employee Cases	$ 525.00
[redacted], [redacted] - Sexual Harrassment Research	$ 987.21
Employee Issues Sum	**$ 17,422.96**
Hailstorm Damage	
Hailstorm Damage	$ 6,772.50
Visit - Gerry Rodriguez on status on hailstorm damages	$ 202.50
Hailstorm Damage Sum	**$ 6,975.00**
Legal Research	
Follow up - Legal issues and questions, additional research and procedures memo	$ 600.00
Research - Legal issue of junior college liability under tort claims	$ 90.00
Research - Legal privileges as to school investigations, hearing, etc	$ 262.50
Research - Legal public information act, exceptions, confidential information	$ 412.50
Research - Legal research on ADA case law, policy changes, etc	$ 412.50
Research - Legal research on ADA in general, disability, reasonable accomodations, etc	$ 562.50
Research - Legal research on electioneering laws	$ 90.00
Research - Legal research on HB 12 requirements, Texas Govt. code	$ 150.00
Research - Legal research on immunity in credit cases issue	$ 112.50
Research - Legal research on issue of constitutional right to education	$ 225.00
Research - Legal research on junior college provisions in Education code	$ 675.00
Research - Legal research on metro issues affecting immunity, property functions, etc	$ 525.00
Research - Legal research on metro joint enterprise	$ 75.00
Research - Legal research on state and federal fair credit laws	$ 262.50
Research - Legal research on statutes of limitation, petitions, etc	$ 262.50
Research - Legal research on voting rights issue	$ 90.00
Research - Legal research, A.G. publications and site on internet broadcast	$ 112.50
Research - Legal research, deadline for notice of election deadline/posting requirements, etc.	$ 202.50
Legal Research Sum	**$ 5,122.50**

Confidential Information redacted

LEGAL SERVICES

Fiscal Year 2013 - 2014

Row Labels	Sum of Amount
LRGVDC - Metro	
Comments - Draft and teleconference agreement with LRGVDC	$ 112.50
Conference - Shuttle bus issue	$ 52.50
Conference - Transportation	$ 75.00
Letter - LRGVDC transportation	$ 112.50
Review - Document on metro transportation	$ 75.00
Review - File documents on metro	$ 52.50
Review - Interlocal between STC and LRGVDC regarding campus circulation	$ 150.00
Review - Transportation agreement	$ 49.50
LRGVDC - Metro Sum	**$ 679.50**
Meetings	
Attend - Board meeting	$ 1,327.50
Attend - Facilities and Finance meetings	$ 975.50
Attend - Facilities meeting	$ 1,140.00
Board meeting - Matter of election of officers	$ 112.50
Conference - STC meeting broadcast, issues with internet	$ 52.50
Email - Special meetings and broadcasting	$ 60.00
Email - Teleconferences, research and memo regarding open meetings	$ 225.00
Facilities meeting	$ 300.00
Meeting - Board of trustees	$ 300.00
Meeting - Procurement criteria and preparation for board workshop	$ 375.00
Responses - Board matters	$ 112.50
Review - Agenda of regular board meeting	$ 112.50
Teleconference - Matter of committees	$ 75.00
Meetings Sum	**$ 5,168.00**
Miscellaneous and Initial Inquiries	
Call - to Mary Elizondo	$ 75.00
Conference - with Dr. Reed	$ 52.50
Copyright Software - Mr. Crum	$ 75.00
Draft - Order	$ 52.50
Email - Letters to Berrios and Vanguard	$ 75.00
Email - Loans and Pell Grants	$ 52.50
Email - SEC MAS rule	$ 75.00
Email - Staff with recommendations	$ 52.50
Email - STC is immune from liability	$ 52.50
Email - Tickle for response	$ 75.00
General - Consumer issues	$ 75.00
IRS Inquiry	$ 1,912.50
Letter - Finalized letters to Ramon Garcia and John A. Millin IV	$ 56.25
Letter - Responses to Mr. Garcia and to Ortiz & Millin	$ 75.00
Memo - Copies, scanning from FCRA	$ 45.00
Memo - Draft on collection issues	$ 825.00
Memo - Draft on conflict issues, reviewing statutes	$ 412.50
Memo - Draft on conflict of interest issues	$ 525.00
Memo - Draft on credit reporting issues	$ 412.50
Memo - Draft on exceptions, confidential information, procedure	$ 562.50
Memo - Final credit reporting	$ 45.00
Memo - Finalize credit report	$ 52.50
Receive - Subpoena and documents produced for review, Hays County D.A.	$ 112.50
Regular Mail to Ramon Garcia and John A. Millin IV	$ 0.92
Research - Pell Grants	$ 225.00
Research - Supreme Court on Labor Code	$ 225.00
Review - Consumer division investigation letter	$ 60.00
Review - Documents with recommendations	$ 75.00
Review - Ethics survey, response and review guide to campaign law	$ 225.00
Review - File documents, report, request and emails	$ 75.00
Review - File materials	$ 60.00
Review - File materials, collection questions	$ 150.00
Review - HB 12 requirements	$ 52.50

Confidential Information redacted

LEGAL SERVICES

Fiscal Year 2013 - 2014

Row Labels	Sum of Amount
Review - Internet broadcast requirements	$ 112.50
Review - LOA changes and comments	$ 60.00
Review - Materials on conflict of interest	$ 112.50
Review - Packet for recommendations to I.T. and Dr. Reed	$ 112.50
Review - Public statement for Dr. Reed	$ 52.50
Review - Recommendations from FSW, SEC rule and FAQ	$ 225.00
Review - Subpoena, emails and telecalls	$ 150.00
Review - Texas Ethics Commission guidelines on finance reports	$ 225.00
RGV Document Delivery	$ 30.00
Teleconference - CCR comments to response	$ 112.50
Teleconference - Disclosure of references	$ 52.50
Teleconference - Fire department specimen	$ 52.50
Teleconference - with Dr. Reed	$ 120.00
Teleconference - with Dr. Reed on various issues	$ 75.00
Teleconference - with Rose Benavides	$ 82.50
Trouble shooting - with County and Andrew Fish	$ 75.00
Visit - Debt collection practices	$ 112.50
Visit - Nursing center, A.G. consumer division subpoena	$ 52.50
Miscellaneous and Initial Inquiries Sum	**$ 8,712.17**
Policies	
Comments - Personal Leave Policy	$ 60.00
FSLA Changes	$ 877.50
Memo - Draft on ADA issues	$ 375.00
Review - Conflict policy documents, comparising/contrasting with law, editing, etc.	$ 262.50
Review - Electioneering statute and policies on the same matter	$ 75.00
Review - Investment policy	$ 112.50
Review - Modifications to religious observance policy	$ 52.50
Review - Policy coverage details on metro	$ 150.00
Sick leave for employees, state law 480	$ 75.00
STC Board Policies	$ 2,175.00
Teleconference - Board conflict policy	$ 45.00
Visit - Mr. Gurwitz to discuss policy	$ 225.00
Work - HR written policies or procedures	$ 16.50
Policies Sum	**$ 4,501.50**
Property - Real Estate	
McAllen Water Tower	$ 75.00
Property - Real Estate Sum	**$ 75.00**
Public Info	
Freedom on information request and email responses	$ 60.00
Open Records - Electric contract	$ 607.50
Request - Open records	$ 52.50
Respond - Open records request Eberle	$ 52.50
Visit - Comprehensive memo on student privacy rights under Open Records Act and FIRPA	$ 52.50
Public Info Sum	**$ 825.00**
Rollback Elections	
Draft - Memo on rollback election issues	$ 52.50
Research - Legal research on rollback tax election	$ 75.00
Research - Tax code and education code, tax issues	$ 150.00
Rollback Elections Sum	**$ 277.50**
Student Issues	
Collections issue - Former student default on loan	$ 75.00
Conference - Bankruptcy matter and lawsuit	$ 60.00
Draft - Bankruptcy procedures	$ 300.00
Email - Student info request, response to matter of liability insurance for volunteers	$ 52.50
Lawsuit Employee - [redacted]	$ 600.00
Lawsuit Non employee - Mike Givilancz Bankruptcy	$ 4,125.00
Memo - Draft on student record issues	$ 412.50
Memo - Student loan/bankruptcy and research	$ 225.00
Mexican student recruitment estimates, address matter	$ 75.00

Confidential Information redacted

LEGAL SERVICES

Fiscal Year 2013 - 2014

Row Labels	Sum of Amount	
Provide - Student records	$	60.00
Research - Student records, FERPA, directory records, statuory law	$	262.50
Review - Bankruptcy code, procedure	$	112.50
Review - Bankruptcy materials	$	75.00
Review - Final and recommendations on student collection issues	$	75.00
Review - Memo for student info request	$	75.00
Review - Report USDA student issue and respond email	$	225.00
Review - Student financial responsibility documents	$	150.00
Review - Student financial responsibility documents and draft a memo for recommendations	$	202.50
Student exit confidentiality policy	$	52.50
Student grievances and dealing with instructors	$	52.50
Teleconference - Nursing testing issue and confidentiality	$	52.50
Visit - Bankruptcy issues to address in procedure	$	375.00
Visit - Student loans and benefits-bankruptcy issues	$	150.00
Work - Bankruptcy issues in student loan acknowledgements	$	75.00
Student Issues Sum	**$**	**7,920.00**
Trustee Election		
Bond Election - Review documents, emails and materials to County	$	225.00
Comment - To elections administrator contract	$	112.50
Draft - Election calendar	$	262.50
Draft - Election calendar, review of election code	$	112.50
Email - Trustee election write-in	$	52.50
Email - Trustee election, cancel	$	52.50
Finalize - Documents for cancellation of election	$	150.00
Research - Additional on election	$	75.00
Research - Cancelling election and certificate required	$	225.00
Research - Write-in candidacy	$	150.00
Review - Ballot	$	52.50
Review - Election code provisions applicable to upcoming trustee election	$	225.00
Review - Election code, Secretary of state site	$	75.00
Review - Election order, verifying early voting dates	$	60.00
Review - Statutes on trustee election, declaration of candicacy	$	112.50
Teleconference - Election order issues for trustees	$	52.50
Work - English and Spanish notices of the election	$	750.00
Work - Updating and redrafting bond election, early and temporary voting	$	150.00
Work - Updating draft notices of election	$	75.00
Write-in - Trustee election	$	52.50
Trustee Election Sum	**$**	**3,022.50**
Grand Total	**$**	**78,338.58**

Confidential Information redacted

LEGAL SERVICES

Fiscal Year 2012 - 2013

Row Labels		Sum of Amount
Audit		
Finalize - Audit letter	$	30.00
Prepare - Audit letter	$	75.00
Audit Sum	**$**	**105.00**
Bond		
Conference - with Mr. Ramirez on STC election issues	$	75.00
Conference - with Mr. Rodriguez and Mr. Lamas on use of bond proceeds for personal property acquisition	$	300.00
Draft - Letter to elections divisions	$	75.00
Emails - Bond election with Mr. Fish and teleconference with Dr. Reed	$	60.00
Finalize - Voting Rights letter	$	75.00
Finalize proposed bond election order	$	525.00
La Joya ISD/Leasehold with Bond Proceeds	$	7,562.19
Prepare - Voting Rights Division letter	$	112.50
Prepare a response on use of election precincts in distric-wide bond election	$	180.00
Respond to Mr. Fish on election day polling places	$	150.00
Review - Bond election emails, advertising, work on orders	$	150.00
Review - Election code, Hidalgo County Drainage District	$	300.00
Review - Election deadlines	$	52.50
Review - Non-partisan voter initiative from Mr. Fish	$	60.00
Review - Proposed ballot, order, documents in bond election file	$	75.00
Review - Proposition, relation to Govt code	$	150.00
Review email from Dr. Reed on proposed sample ballot	$	300.00
Review latest email on paraphrasing the SOS interpretation on early voting	$	187.50
Review letter to Starr County Election Administration	$	337.50
Review of agenda item for workshop on master plan and bond election	$	45.00
Review polling places and response	$	75.00
Review proposed joint election agreement with Weslaco	$	150.00
Review questions from Mr. Fish on hours and locations of branch early voting	$	187.50
Review SOS opinion request by Mr. Fish on early voting clerk	$	195.00
Send - Mr. Fish the bond election timeline	$	52.50
Teleconference - with Dr. Reed and Mr. Fish on ballot matters	$	75.00
Teleconference - with Dr. Reed on bond election	$	60.00
Teleconference - with Mr. Fish and J. Guerrero on election calendar and county sponsorship	$	75.00
Teleconference - with Mr. Fish on order, precincts and conference with Mr. Guerrero on county agreement	$	112.50
Teleconference - with Ms. Pena on bond issue and use of funds	$	60.00
Trustee Vacancy	$	52.50
Work - with Dr. Reed and Mr. Fish on granting authority to Pres. To amend election orders	$	112.50
Work on additional questions related to appointment of campaign treasurer	$	150.00
Work on additional questions related to appointment of campaign treasurer, research election code	$	525.00
Work on drafting a form of a proposed bond election order	$	300.00
Work on early voting clerks and polling places	$	570.00
Work on polling place questions	$	300.00
Work on preparing info for agenda items on bond election	$	75.00
Work on questions from Mr. Fish on provisional ballots	$	270.00
Work on three memos regarding early voting polling places	$	270.00
Bond Sum	**$**	**14,439.69**
Claims		
2013 Delay Claims	$	543.75
Claims Sum	**$**	**543.75**
Construction		
Pecan Campus: West Academic Building	$	435.00
Prepare - "Best Value" binders for Mr. Rodriguez and Mr. Lamas	$	75.00
Teleconference - with Mr. Rodriguez on job order contracting	$	52.50
Trip - to McAllen City Hall to visit with building staff, Mr. Rodriguez	$	225.00
Construction Sum	**$**	**787.50**
Contracts		
Comments - Fire department interlocal	$	75.00
Comments - on Sharyland interlocal	$	60.00
Contract Review '12	$	112.50

Confidential Information redacted

LEGAL SERVICES

Fiscal Year 2012 - 2013

Row Labels	Sum of Amount
Email - ERO contract comments	$ 45.00
MOU with Ms. Pena	$ 60.00
Request from Mr. Lamas on evaluation criteria for bids and use of rubric	$ 150.00
Review - Cases on liquidated damages	$ 225.00
Review - Government Code provisions, bidding requirements, etc	$ 150.00
Review - Lyford comments to ERO contract	$ 112.50
Review - Memo and liquidated damages limitations	$ 150.00
Review - Trust and agreement with STC and Edward Jones	$ 112.50
Review materials on procurement of marketing services, RFP vs FRQ	$ 375.00
Teleconference - with Mr. Rodriguez on firemen training agreement	$ 52.50
Teleconference - with Mr. Rodriguez on liquidated damages issues	$ 75.00
Teleconference - with Mr.Perez on BBVA - VISA agreement	$ 150.00
Teleconference - with Ms. Pena and Mr. Lamas on BBVA agreement	$ 75.00
Teleconference with Mr. Lamas on the evaluation criteria to award construction contracts	$ 112.50
Visit - Mr. Rodriguez and Mr. De La Garza on liquidated damages provisions	$ 150.00
Visit - with Mr. Rodriguez and Mr. Lamas on liquidated damages and print copies	$ 450.00
Visit - with STC Facilities staff on selection criteria for selecting contractors	$ 262.50
Work on legal memo to Mr. Lamas on procurement of services	$ 600.00
Contracts Sum	**$ 3,555.00**
Employee Issues	
Work on final draft of independent contractor agreement for off-duty police officers	$ 150.00
Work on nepotism questions relative to trustee	$ 150.00
[redacted] - Teleconference with Dr. Reed on anonymous complaints	$ 30.00
[redacted] - Review fraud hotline complaint, employee handbook	$ 187.50
[redacted] - Review other fraud hotline complaint	$ 45.00
[redacted] - Teleconference with Dr. Reed on proceeding with investigation of fraud complaints	$ 45.00
[redacted] - Call state auditor on more detail on fraud hotline complaint	$ 90.00
[redacted] - Employment/Student Matters '13	$ 435.00
IS&P (3 employees) - Conference with Mr. Crum on employee issues	$ 300.00
IS&P (3 employees) - Non-renewal letters with Mr. Cruz	$ 75.00
IS&P (3 employees) - Teleconference with Dr. Reed on procedure for employee non-renewals	$ 75.00
IS&P (3 employees) - Teleconference with Dr. Reed to finalize pres. Contract and matter of employee non-renewal	$ 52.50
Visa teacher for DE program	$ 832.50
[redacted] - Review responses by Dr. Reed to state auditor on complaint of unfair hiring practices	$ 375.00
[redacted] - Position Statement	$ 195.00
[redacted], [redacted] [redacted] - Religious discrimination	$ 5,122.50
[redacted] - Employment/Student Matters '13	$ 6,630.00
[redacted] - Prepare for meeting with Buhidar and Bischoff to discuss response to EEOC	$ 225.00
[redacted] - Meeting with Buhidar and Bischoff to discuss response to EEOC	$ 375.00
Student directory information	$ 60.00
Dean for HR - Legal counsel on job description	$ 600.00
[redacted] - Employment/Student Matters '13	$ 105.00
[redacted] - Work on [redacted] complaint matter	$ 75.00
[redacted] - Work on [redacted] complaint, review materials	$ 187.50
Discrimination grievance by adjunct	$ 120.00
(blank)	$ 2,625.00
[redacted], [redacted] - Employment/Student Matters '12	$ 6,487.50
Employment of peace officer - Employment/Student Matters '12	$ 975.00
Contract services - Review independent contractor form agreement for off-duty peace officer as security personnel2	$ 375.00
Employee Issues Sum	**$ 27,000.00**
Hailstorm Damage	
Hailstorm Damage	$ 2,212.50
Hailstorm Damage Sum	**$ 2,212.50**
Legal Research	
Research - Legal research on attorney gen opinions, HB 2668, definition of "meeting"	$ 412.50
Research - Legal research on authorization forms and emailes to Mr. Ramires for review	$ 75.00
Research - Legal research on ballot form	$ 60.00
Research - Legal research on case law, A.G. opinions	$ 150.00
Research - Legal research on designation of treasurer issues	$ 375.00

Confidential Information redacted

LEGAL SERVICES

Fiscal Year 2012 - 2013

Row Labels	Sum of Amount
Research - Legal research on education, election code	$ 262.50
Research - Legal research on election code	$ 225.00
Research - Legal research on election code, prepare memo and deadlines	$ 412.50
Research - Legal research on legislative history	$ 75.00
Research - Legal research on school authority, case law, etc	$ 675.00
Research - Legal research on walkway issue, education code, etc	$ 375.00
Legal Research Sum	**$ 3,097.50**
LRGVDC - Metro	
Work - on MOU for LRGVDC	$ 75.00
LRGVDC - Metro Sum	**$ 75.00**
Meetings	
Address - Open meeting question to Mr. Fish	$ 52.50
Attend - Board meeting	$ 847.50
Attend - Facilities and Finance meetings	$ 525.00
Attend - Facilities meeting	$ 450.00
Attend board meeting	$ 375.00
Attend meeting with facilities and purchasing staff	$ 262.50
Email - with Mr. Fish on meeting	$ 52.50
Meeting with elections administrator for Hidalgo and Starr County	$ 375.00
Prepare a draft of opinion on response to the certified agenda and board minutes	$ 300.00
Research open meetings on standing items in meeting agendas	$ 150.00
Response email on agenda item question	$ 75.00
Review - agenda for Board meeting	$ 300.00
Review - Agenda materials	$ 112.50
Review - Agenda packet	$ 60.00
Review - HB open meetings amendment	$ 150.00
Review - Meeting packet	$ 112.50
Review agenda for aboard meeting	$ 120.00
Review the certified agenda and board minutes questions submitted by Mr. Fish	$ 150.00
Teleconference with Dr. Reed on open meetings question	$ 30.00
Work on legal opinion for Andrew regarding internet broadcast of meetings	$ 270.00
Work on memo regarding question by trustee	$ 300.00
Meetings Sum	**$ 5,070.00**
Miscellaneous and Initial Inquiries	
Comments to solicitation for marketing survey services	$ 375.00
Copy fee	$ 4.20
Copyright	$ 1,530.00
Copyright - Computer program copyright, license agreement, Ellucian contract	$ 2,540.00
Email - on Alternative certification referred by Ms. Pena	$ 52.50
Email to Mrs. Cavazos on question about impact of HB 3038 on auctioneer contract	$ 75.00
Follow up - City of McAllen objections, title issues, etc	$ 210.00
Legislative update review	$ 150.00
Memo - Draft email to Mr. Ramirez	$ 60.00
Memo - Draft on research	$ 75.00
Memo - Draft to Mr. Ramirez	$ 375.00
Postage fee	$ 7.97
Prepare response on research trademark law for SWAG	$ 75.00
Procurement	$ 903.75
Proposal on workforce solutions	$ 450.00
Request - from Mr. Fish research on state preservation rules for districts	$ 150.00
Request for qualifications for market researchers	$ 150.00
Review - Class action document and prepare recommendations	$ 150.00
Review - Letter and materials from Aleem	$ 112.50
Review - Prior VRD pre-approval and finalize letter	$ 112.50
Review - Subpoena from Travis County D.A.	$ 75.00
Review additional information provided at meeting	$ 300.00
Review agreement with Pearson	$ 75.00
Review emal from Mrs. Cavazos on impact of HB 3038 on auctioneer contract	$ 195.00
Review HB 2668	$ 75.00

Confidential Information redacted

LEGAL SERVICES

Fiscal Year 2012 - 2013

Row Labels	Sum of Amount
Review of agreement with Pearson for TAB competency	$ 90.00
Review proposed contract with Pearson Learning Solutions	$ 112.50
Review solicitation document, research on felony conviction	$ 150.00
Reviewing correspondence	$ 45.00
Scanned return green card to Chief	$ 18.75
Teleconference - with Dr. Reed on miscellaneous	$ 127.50
Teleconference - with U.S. attorney's office	$ 52.50
Teleconference regarding the Pearson contract for B.A. degree curriculum	$ 112.50
Teleconference with Dr. Reed on employment of market surveyor	$ 30.00
Teleconference with Foundation, UT, Pearson rep on agreement	$ 75.00
UTPA Public Survey	$ 112.50
Work on copyright question from Yoli	$ 225.00
Work on HB 2668 per Mr. Fish request	$ 187.50
Work on review of agreement for educational materials	$ 300.00
Miscellaneous and Initial Inquiries Sum	**$ 9,917.17**
Policies	
Finalizing draft of policy 6311 and 6312	$ 405.00
Review agenda material for meeting, recommendation for policy 6310 and 6311	$ 75.00
Review policy 4922 to recommend language to strenghten policy	$ 300.00
Review surplus property policy	$ 225.00
Work on final drafts of policy 6310, 6311 and 6312	$ 150.00
Policies Sum	**$ 1,155.00**
Property - Real Estate	
Call - on La Joya ISD property	$ 60.00
Copy - Affidavit on military highway property to Mr. Rodriguez	$ 52.50
McArchville Property	$ 30.00
Memo - Draft to Mr. Ramirez on school authority to build walkway	$ 750.00
Prepare documentation report on STC eminent domain authority	$ 225.00
Review - Affidavit on military highway property	$ 52.50
Review - Eminent domain lawsuit and recommend waiver of citation	$ 75.00
Review agenda item on auction of personal property security in lease with My Golden Years	$ 120.00
Teleconference on judgment against My golden Years	$ 75.00
Teleconference on report to comptroller regarding eminent domain authority	$ 75.00
United States of America vs 1.52 acres of land	$ 167.50
Work on researching eminent domain authority for STC	$ 150.00
Property - Real Estate Sum	**$ 1,832.50**
Public Info	
Public Info '12	$ 1,582.50
Public Info '13	$ 1,807.50
Respond - Earlier open records request to Ms. Pena	$ 45.00
Respond - Open record request from Mr. Fish	$ 52.50
Respond - Open record request to Mr. Fish	$ 52.50
Review - Open records policy	$ 112.50
Teleconference with Mr. Aguirre on open records	$ 30.00
Public Info Sum	**$ 3,682.50**
Student Issues	
Review email from Brenda on follow-up on student complaint on [redacted]	$ 45.00
Student Issues Sum	**$ 45.00**
Grand Total	**$ 73,518.11**

Confidential Information redacted