



INVITATION TO BID

FINANCIAL ADVISOR

**Due: May 20th, 2019
2:00 P.M. MST**

**Canyon Grove Academy
Attention: Joshua Daniels, Board President
Email: josh@canyongrove.com**

Invitation to Bid Charter School Financial Advisor

I. GENERAL

A. Intent of Invitation to Bid

The purpose of this Invitation to Bid is to solicit bids from financial advisors that have been prequalified by the Utah Charter School Finance Authority (UCSFA) to advise and assist Canyon Grove Academy on the purchasing of tax exempt bonds through the UCSFA.

In connection with this proposed financing, the school may submit an RFP for an underwriter and borrower's counsel.

The school plans to submit an application to the UCSFA as soon as possible. The financial advisor selected must be able to accommodate the school's schedule and proceed without delay.

B. School Background

Canyon Grove Academy is a public charter school in Pleasant Grove, Utah, currently serving about 650 students in grades K-8.

C. Requirements

1. Bids Submitted on a Timely Basis

All bids must be submitted by: Monday May 20, 2019, at 2:00 p.m.

2. Submission of Bids

All bids should be submitted electronically to Josh Daniels, Board President, Kim Goates, Executive Director at the following e-mail addresses:

josh@canyongrove.com

kim.goates@canyongrove.com

All bids should be limited to no more than five pages and must include a completed UCSFA Invitation for Bid Form provided with this Invitation.

3. Late Bids Unacceptable

Any bid received after the deadline will be deemed non-responsive and will not be considered for evaluation.

4. Faxed Bids Unacceptable

Faxed copies of the bid will not be accepted.

D. Written Agreement

The school and the financial advisor will enter into a written agreement documenting the terms of the relationship.

E. Clarification of Bid

The school may request formal written clarification of any item at any time.

F. School Contacts

1. Inquiries

All inquiries relative to this Invitation to Bid must be directed to: Kim Goates, Executive Director at kim.goates@canyongrove.com

2. Interviews

The school may choose to interview any bidders.

3. Other Contacts Prohibited

No other school employee, Board Member, or Committee member should be contacted concerning this Invitation during the selection process. Failure to comply with this requirement may result in disqualification.

G. Right of Rejection

The school reserves the right to reject any and all bids or to waive any non- statutory informality. The school further reserves the right to make the contract award deemed by the Committee to be in the best interests of the school. The Board's decision to accept or reject the contract shall be final.

H. Firm Bid

Conditions must be firm for a period of sixty (60) days from the due date of this Invitation.

II. SCOPE OF WORK

The school seeks bids from financial advisors to provide consulting. It is the intention of Canyon Grove Academy to obtain the best service at the most competitive price. The scope of services expected to be performed are to be those chosen by Canyon Grove Academy from the list set forth in the RFQ issued by the UCSFA in 2013.