



REQUEST FOR PROPOSAL (RFP)
FINANCIAL ADVISOR AND DEVELOPMENT SERVICES

3083 E 2890 S Circle
St. George, Utah 84790

SECTION I

Key Dates

Notice of RFP:	November 3, 2025 – November 10, 2025
Submission Deadline:	November 10, 2025 by 5:00 pm Mountain Time to Custom Class info@customclass.org . Proposals must be submitted in compliance with Section IV of this RFP.
Questions/Inquiries	November 3, 2025 – November 7, 2025 (please submit directly to email above). Inquiries and answers may be distributed to the entire group of responders.
Review of proposals:	November 11, 2025 – November 12, 2025
Recommendation to Board:	November 13, 2025
Anticipated Award Date:	November 14, 2025

SECTION II

General Information

- A. BACKGROUND: Custom Class Charter School (CCCS), slated to open in August 2026 in St. George, Utah, is a statewide online K–12 charter school with a focus on customizable, competency-based learning tailored to each student’s path. In its inaugural year the school projects serving up to 400 students, growing to roughly 920 students by 2028. As part of the school’s curriculum, CCCS will be constructing an approximately 40,000 square foot Family Service Center in St. George for families of the students and other members of the community. The facility will include classroom space, indoor courts, and more.
- B. PURPOSE OF RFP: The school desires to hire a qualified Financial Advisor and Development consultant to oversee the development, financing, construction and successful occupancy of the facility.
- C. TERM OF CONTRACT: CCCS is seeking financial advisory and development services for the scope of services described herein until such time as CCCS has improved and successfully occupies its new service center. The financial advisor and development services contract is contemplated to last 1 year, or until the new space is occupied.
- D. AWARD OF CONTRACT: The contract will be awarded to the offeror whose proposal is determined to be the most advantageous to CCCS, taking into consideration the price and the evaluation factors set forth in this RFP.

SECTION III

Proposal Information

- A. Proposals must be submitted in compliance with Section IV of this RFP.
- B. The services required and offered in a proposal should meet the needs described below. Only one proposal from each offeror may be submitted and considered. Offerors may include any special or unique services they plan to provide.
- C. Proposals will be evaluated by a committee appointed by the school. CCCS will cooperate with all potential offerors, to the extent that is reasonably possible, in their attempt to obtain information. Discussions may be conducted with offerors who submit proposals for the purpose of assuring full understanding of, and responsiveness to, the solicitation requirements.
- D. It is understood that CCCS's issuance of this RFP does not obligate the school to accept any of the proposals submitted in response to this RFP, nor does it guarantee that the school will in fact accept any of the said proposals. No agreement exists on the part of the school and any offeror until a written contract is approved and executed by CCCS's governing board.
- E. This RFP does not obligate CCCS to pay for any costs of any kind whatsoever that may be incurred by an offeror or any third parties in connection with a proposal. All proposals, responses and supporting documentation shall become property of the school.
- F. At any time during the evaluation process the evaluation committee may, with appropriate approval, request best and final offers as provided for in Section 63G-6a-707.5, from responsible offerors who submit responsive proposals that meet any minimum qualifications, evaluation criteria, or score thresholds identified in this RFP.

SECTION IV

Proposal Information

- A. Proposals must contain a cover letter, which shall include the following:
 - 1. The legal company name of Offeror
 - 2. Complete company address
 - 3. Company authorized representative, phone number and email address
 - 4. Company website address
 - 5. Signature and position/title of company's authorized representative
 - 6. The date of submission
- B. Proposals must address the Proposal Specifications set forth in Section V below.
- C. Proposals must be emailed to Custom Class info@customclass.org. Proposals should be in a PDF format. **All Cost information provided by the offeror must be contained in a separate pdf file and clearly identified as cost information. One separate pdf for the qualifications Section and one separate pdf for your cost proposal.**
- D. Proposals must be signed by the offeror.

SECTION V

Scope and Specifications

Offerors are expected to address the following key elements in their proposal:

- A. Experience, Qualifications and Track Record. Provide your experience in business management, financing, design and construction of public charter schools, or similar projects, including your experience within the state of Utah. Special consideration will be given to firms with experience in both charter school finance AND charter school facility development. Firms must hold appropriate licensure, including being licensed as a Financial Advisor.
- B. Financial advisement and feasibility. Describe your proposed services related to assisting CCCS in the decision-making process. Describe how your firm's expertise in understanding charter school operations and conducting feasibility studies will guide CCCS towards the best, most feasible, and most sustainable decision related to consolidation, upgrade or expansion of facilities.
- C. Pre-construction. Describe your proposed services related to pre-construction and pre-finance, including, site analysis, site entitlements, total project budget creation, construction team selection, design and permitting.
- D. Financing. Describe your proposed services related to the financing of the project, including refinancing through the credit enhancement program, ratings, consideration of existing bond covenants, assembling underwriters, assembling legal counsel, selection and application of conduit issuer, term structuring and successful closing of needed financing.
- E. Project Management. Describe your typical model regarding management of the project after financing, including construction monitoring, acting as owners rep, acting as CCCS's Charter School Board Building Officer (CSBBO), general admin of the project, change orders, pay applications, punch list items, occupancy and warranties.
- F. Other Information. Provide any other information you feel would be beneficial to supporting your firm's qualification and experience for this project.

G. Cost Proposal – **separate PDF to include**

1. Describe your proposed fee structure for financial advisory services.
2. Describe your proposed fee structure for providing development and facility-related services.
3. Describe any other proposed fees associated with the scope of services described herein.

SECTION VI

Evaluation Criteria

Criteria Unrelated to Cost

- A. Experience and qualifications of offeror (30 points)
- B. Scope of services (40 points). This is an evaluation of how the proposed scope of services fits the needs of school.

Criteria Related to Cost*

This criterion is based on the total fees proposed for the scope outlined section V above (30 Points). The points assigned to each offeror's cost proposal will be based on the lowest proposal pricing, taking into consideration the scope of work that is included in that pricing. So be specific regarding what is included in the fee calculation.

Total points available based on Evaluation Criteria: 100 points.

Custom Class Charter School reserves the right to determine which proposed offer would be the best fit for the school. While CCCS is committed to an unbiased and non-conflicted evaluation of all proposals and while the scoring criteria will be the largest determining factor for selection, the final approving decision will be made by the governing board of the school based on recommendations from the selection committee. The Governing Board of CCCS has a fiduciary to make all final decisions related to policy and obligatory contracts.

****NOTE: Cost is evaluated and scored independently.***