

March 6, 2019

Dear Colorado School District Official:

Pursuant to the Colorado Open Records Act § 24-72-201 et seq. I request that I be provided electronic copies of records that contain documents set forth below.

Please note that I am not seeking documents related to any retirement plan(s), or for accounts that are used by the District as checking/disbursement accounts. Additionally, if your District has a contract with a firm assisting solely on raising funds via bond issues, I am not requesting those documents. Simply, if your District is provided either discretionary or non-discretionary investment advice on the management of its financial assets I am interested in those documents and if not, how the District invests its financial assets. Finally, please feel free to redact any account numbers from the responsive records.

Requested Documents:

1. If your District has an external firm providing either discretionary or non-discretionary advice in the management of its financial assets, please provide a copy of:
  - a. The most recent statement received from the firm(s);
  - b. The most recent invoice received from the firm(s);
2. If your District is not under any such agreement detailed in item no. 1 above, please provide a document that details how the financial assets of the District are invested. Please note that I am not requesting a copy of the District's annual report / CAFR, but rather a detailed listing of how the financial assets are deployed;
3. If your District participates in a local government investment pool, please provide a copy of the first page of the statement(s) or simply acknowledge which fund and the amount invested;
4. If your District performed an RFP for the above referenced service providers, please provide any document detailing the list of respondents, scoring, evaluation of the responses received.

If you are not the custodian of records for this request, please kindly forward this request to the appropriate person and/or let me know which person(s) has custody of these records.

I am requesting these records be emailed to [OpenGovBookCO@gmail.com](mailto:OpenGovBookCO@gmail.com) and please direct any questions to that email address as well.

Due to the narrow scope of this request, I am politely asking for a waiver of all fees for searching and emailing the requested responsive documents.

Colorado Open Records Act mandates a response within three working days following receipt of this letter, but please accept my offer to extend that to ten business days upon confirmation of receipt. Should the records not be provided within that time frame, please cite the extenuating circumstances and let me know when I should expect to be in receipt of the requested responsive records.

If you deny any portion, or all, of this request, please provide me with a written explanation of the reason(s) for your denial, including a citation to each specific statutory exemption you feel justifies the refusal to release the information and notify me of the appeal procedures available to me under the law.

If you conclude that portions of the records that I request are exempt from disclosure, please release the remainder of such records with redacting only the portion or portions that you claim are exempt.

Please contact me with any questions about my request. Thank you for your time.

Joseph

Joseph Nelson

OpenGovBook by b2g Data Advisory Group

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