

## Operation Money Wise: Financial Education Opportunity Grant

### **ATTACHMENT A. REQUIRED PROGRAM DESCRIPTION AND APPLICANT RESPONSE QUESTIONS**

*The responses to Attachment A must be uploaded to the online form along with the other documents and information specified in Section IV – Application Instructions of the Operation Money Wise Program Summary.*

**Responses are acceptable to be in bullet point format, please limit each response to 5 paragraphs. Please submit this Program Description via word document on the Formstack application, alongside all other application materials, by June 7<sup>th</sup>, 2024 at 5:00 P.M.**

Complete the following sections to describe your company and your program.

1. Company information: List company name, address, contact person for application.
2. Bidder Profile: Tell us about your organization, including the following:
  - a. A brief history;
  - b. Number of years in business;
  - c. Where is organization located;
  - d. How many employees you have;

Additional information that evidences applicant's qualifications and capabilities to perform the services sought by this grant opportunity.

3. Provide information that evidences applicant's qualifications and capabilities to perform the services sought by this RFP. A complete response will include, but not be limited to, responses to the following:
  - a. Summary of the proposed program, including major project elements, goals and how applicant will achieve such goals;
  - b. Description of the target audience to be served and percentage of low- to moderate-income served;
  - c. Marketing and outreach plan for the program to the target population;
  - d. Whether the applicant organization's financial education initiative serves a gateway city;
  - e. Anticipated number of participants;
  - f. Proposed teaching materials (e.g., supplies, curriculum, etc.) and content descriptions;
  - g. Timeline for program development and implementation;
  - h. Expected duration of the program;
  - i. Proposed date(s) of the program;

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- j. Identify the number of years that the applicant has provided these services;
  - k. Describe the applicant's previous experience in successfully delivering the program model;
  - l. In the past, have you evaluated your program's success? If so, please describe your evaluation method. **Optional:** include a copy of your evaluation method (questionnaire, survey, evaluation form, etc.).
4. Describe one specific financial subject matter of focus (e.g., budgeting, credit, etc.) and an explanation of why that topic is needed and how it will be delivered.
  5. Partnerships. Provide a list of what organizations and/or individuals are involved in the program, including a description of the partners' roles, contributions and added value to proposed program. Please indicate if entities are donating planning time, volunteers, funding, etc. Some examples of these organizations are: non-profit organizations; financial institutions; colleges; parent-teacher organizations/associations; alumni associations; local businesses.
  6. Describe the role and added value for any individual compensated using grant monies.