STATE OF TENNESSEE
DEPARTMENT OF TREASURY

REQUEST FOR INFORMATION
FOR
FINANCIAL LITERACY EDUCATIONAL PRODUCTS AND SERVICES

RFI # 30901-47621
July 31, 2020

1. STATEMENT OF PURPOSE:

The State of Tennessee, Department of Treasury, issues this Request for Information ("RFI") for the purpose of requesting information about financial literacy educational technology products and related services. We appreciate your input and participation in this process.

2. BACKGROUND:

The Tennessee Financial Literacy Commission (the "TNFLC"), a 501(c)(3) nonprofit corporation, was created by state statute in 2010 and is administratively attached to the Department of Treasury. The TNFLC's mission is to improve and promote the financial literacy of Tennesseans, primarily through educational programs. These programs include, but are not limited to, teacher training summits and providing educational technology learning platforms directly in elementary and middle school classrooms. In addition to providing such educational technology products, the TNFLC also provides, through a contractor, on-site training at the schools on how to use the products and incorporate them into curricula.

3. COMMUNICATIONS:

3.1.   Please submit your response via email to this RFI to:

Dawn Rochelle
Procurement Coordinator
Tennessee Department of Treasury
Telephone: (615) 253-8770
Email: Dawn.Rochelle@tn.gov

3.2.   Please feel free to contact the Tennessee Department of Treasury with any questions regarding this RFI. The main point of contact will be:

Dawn Rochelle
Procurement Coordinator
Tennessee Department of Treasury

Telephone: (615) 253-8770
Email: Dawn.Rochelle@tn.gov

3.3. Please reference RFI # 30901-47621 with all communications to this RFI.

4. RFI SCHEDULE OF EVENTS:

	EVENT	TIME (Central Time Zone)	DATE (all dates are State business days)
1.	RFI Issued		July 31, 2020
2.	Written "Questions and Comments" Deadline		August 12, 2020
3.	State Response to Written "Questions and Comments"		August 21, 2020
4.	RFI Response Deadline		August 28, 2020
5.	Presentations (via Web Ex)		Week of September 7, 2020

5. GENERAL INFORMATION:

5.1. Please note that responding to this RFI is not a prerequisite for responding to any future solicitations related to this project and a response to this RFI will not create any contract rights. Responses to this RFI will become property of the State.

5.2. The information gathered during this RFI is part of an ongoing procurement. In order to prevent an unfair advantage among potential respondents, the RFI responses will not be available until after the completion of evaluation of any responses, proposals, or bids resulting from a Request for Qualifications, Request for Proposals, Invitation to Bid or other procurement method. In the event that the state chooses not to go further in the procurement process and responses are never evaluated, the responses to the procurement including the responses to the RFI, will be considered confidential by the State.

5.3. The State will not pay for any costs associated with responding to this RFI.

6. INFORMATIONAL FORMS:

The State is requesting the following information from all interested parties. Please fill out the following forms:

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TECHNICAL INFORMATIONAL FORM	

1. RESPONDENT LEGAL ENTITY NAME:
2. RESPONDENT CONTACT PERSON: Name, Title: Address: Phone Number: Email:
3. Please provide a brief description of the services/products your organization provides which may meet the needs of the TNFLC, including but not limited to K-12 and adult financial educational technology services/products. Please include the ages/grade levels of the target audience for each service/product mentioned.
4. Please describe your product development process and methodology.
5. Provide examples of how you have entered into similar partnerships with states, non-profit entities, or other sponsors for this particular service/product. Please describe the length of these partnerships and whether you are still currently under contract with the stated organizations.
6. Describe the ways in which your organization highlights the sponsor of service/product to the users. Please provide examples of branding opportunities, including promotional materials for any partnerships identified in question 5.
7. Describe your ability to and the process for entering into an exclusive statewide partnership for this service/product in Tennessee.
8. How does your organization define success?
9. Describe your ability to produce monthly, quarterly, annual and ad hoc reports for various metrics relative to your organizations outreach efforts and key performance indicators. This should include examples of the typical reports you produce and the various data elements you track and include.
10. Does your product/service meet any Tennessee K-12 academic standards as outlined by the Tennessee Department of Education at the following link? Please describe which standards are met and how your service/product meets them. https://www.tn.gov/education/instruction/academic-standards.html
11. Describe the process your organization employs to engage new users of your service/product. Please include information regarding your outreach structure and ability to commit staff to increase utilization of your service/product.
12. Once a user commits to using the service/product, what does the onboarding process entail?
13. Describe how your organization has adapted in order to continue serving the end user's needs during the COVID-19 pandemic.
14. Please explain your organization's ability to share contact information for any person (district official, teacher, etc.) described in Question 9.
15. Describe how the service/product is supported when a user is having technical difficulties or

needs some other form of assistance relative to the service/product.
16. Please explain your policies and procedures for data security and protecting the confidentiality and integrity of the data.

COST INFORMATIONAL FORM
1. Describe what pricing units you typically utilize for similar services or goods (e.g., per hour, each, per year, etc.). If multiple services/products are included, please itemize by service/product:
2. Describe the typical price range for similar services or goods

ADDITIONAL CONSIDERATIONS
1. Please provide input on alternative approaches or additional things to consider that might benefit the State: