

## Questions from Potential Bidder 9/25/19

1. What are the professional development requirements (if any) for educators/teachers to be able to help/support students in accessing the financial wellness program? Is the financial wellness program supplemented with in-class teaching? If so, who is expected to provide those materials – the provider or Nebraska State?

There are no mandatory professional development requirements beyond basic demonstrations of the online platform. Providers may propose supplementing the Programs with in-class teaching. Such deviations from the RFP's requirements should be noted in the Provider's Proposal. The costs for materials required for professional development or supplemental teaching should be provided in the Proposal and the Provider will be the response for production and distribution.

### 2. Transition

- a. Will there be any transitional efforts between Nebraska State and/or the incumbent and the new provider (if a new provider is tapped)?

The scope of any transitional efforts will be determined by the Treasurer's office following the award of a contract and in conjunction with the contract parties.

- b. Will we be provided a list of schools that have implemented incumbent's financial education program? (either from incumbent or from the State of Nebraska?)

The Treasurer will provide a list of Program-participant schools.

- c. When does the incumbent's contract end?

The current incumbent's contract ends May 7, 2020.

3. "Other than in connection with the provision of the Services, Providers shall refrain from any direct communication with the participants" — this is assumed to mean customer service communication, but to confirm, services might also entail email "check ins" or "progress reports" which are sent to users to give them a weekly or monthly snapshot of their progress or alert them to new quizzes or modules in the financial education system (likely, adult users – not youth). Are communications within the scope of providing the financial education solution, such as these, authorized?

Yes, communications relating to participant progress or new materials associated with the Program(s) are authorized.

4. Can Nebraska State provide a link to its state-level curriculum guideline?

<https://www.education.ne.gov/contentareastandards/>

5. How often do students (or how often are students) expected to interact with the financial literacy platform? Is the financial literacy program taught year-round, is it taught during a special financial literacy week, etc. how often are students re-engaging with the platform?

Students and teachers need to have the ability to interact with the platform year-round. The State of Nebraska does not have mandatory financial literacy education, but it is important that students and teachers have the ability to access and use the platform at any time.

6. In including branding strategies for joint marketing efforts, is the provider beholden to the incumbent's name/brand for the current financial literacy initiative? (i.e. NEST Financial Scholars, VAULT, etc.)

Branding strategies will be determined in conjunction with the Treasurer's office and may result in "rebranding" of current initiatives.

7. Is the provider responsible for paying the government affairs specialist, or will that be an employee of Nebraska State?

Yes, the provider is responsible for paying for or contracting with a government affairs specialist. It will not be an employee of the state but must be approved by the Treasurer.