**ATTACHMENT E**

**OFFER SUBMISSION FORM**

Please return all submission documents to [dcbs.opportunity@oregon.gov](mailto:dcbs.opportunity@oregon.gov).

Offeror Organization Information

|  |  |
| --- | --- |
| Organization Name: |  |
| DBA: |  |
| Street Address: |  |
| Mailing Address: |  |
| Executive Director: |  |
| Phone #: |  |
| Website: |  |
| Mission Statement: |  |

Offeror Contact Information:

|  |  |
| --- | --- |
| Name: |  |
| Title: |  |
| Phone: |  |
| Email: |  |

**Minimum Offer Requirements:**

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| --- | --- | --- | --- |
| RFP Section 3.1:  To be considered for evaluation, Offeror must indicate that Offeror meets all of the following business requirements: | | Yes | No |
| 1. | Is your organization located in Oregon? |  |  |
| 2. | Are you currently conducting financial empowerment work in Oregon? |  |  |
| 3. | Are you actively serving underserved communities? |  |  |
| 4. | Do you have at least three years of experience conducting financial empowerment work with underserved communities? |  |  |
| 5. | Do you have a current evaluation plan for measuring the effectiveness of your financial empowerment work? |  |  |

**Offers will be evaluated on the following items:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Preference Points** | | | | **100 Points** |
| **1.** | Please indicate below if your organization qualifies as one of the following: | | | |
|  | Nonprofit entity |  | Public school | |
|  | Public charter school |  | Tribal entity | |

Please answer the following questions.

We value brevity, so unless indicated, answers should be short and to the point. Each answer must be 300 words or less. Answers over that limit will result in a point deduction of 5 points per occurrence.

|  |  |  |
| --- | --- | --- |
| **Financial Empowerment Work** | | **150 Points** |
| **2.** | Briefly describe your organization’s financial empowerment work. What kind of activities are undertaken? | | |
| *Insert text here* | | |
| **3.** | If insurance or financial education classes are part of your financial empowerment work, please submit **one** lesson plan as an example of your curriculum. If you have a lesson on insurance, please send that as your example. | | |
| **4.** | Describe how your organization evaluates the effectiveness of your financial empowerment work. | | |
| *Insert text here* | | |

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| **Who Do You Serve?** | | **285 Points** |
| **5.** | Describe your organization’s geographic service area. Include population size and the demographics of the area. | |
| *Insert text here* | |
| **6.** | How many people did your financial empowerment program serve per year in 2020, 2021, 2022, and 2023? | |
| *Insert text here* | |
| **7.** | Describe the demographics of the people your financial empowerment program serves. | |
| *Insert text here* | |
| **8.** | If your organization’s program has an emphasis on women, please describe. | |
| *Insert text here* | |
| **9.** | Describe your organization’s approach to diversity, equity, and inclusion in your financial empowerment work. | |
| *Insert text here* | |

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| **Proposed Program Activities** | | **310 Points** |
| Please note the word limit of 300 words does not apply to your proposed program description.  If awarded a contract, the activities proposed in this section will be the foundation of what will be written into the contract. | | |
| **10.** | Describe the specific financial empowerment activities and events that will be funded by the Program. Indicate which of the activities or events you are willing to have DFR participate in.  The description should include:   * Quantifiable indicators of activities, such as number of classes, number of participants, or number of events * Time period for the activities (e.g., 1st trimester, 2nd trimester, or 3rd trimester)   The description should include how the Agency can sponsor and/or participate in the activity or event.  Below is a list of examples. Please note, there can be no political advocacy, candidate endorsements, or politicking allowed at any event the Agency sponsors.  *Examples:*   * *Facilitating financial education classes, especially on the topic of insurance* * *Presenting DFR’s insurance information and resources at financial empowerment events and resource fairs* * *Tabling at events to promote insurance information and other topics related to the financial services the division regulates* * *Serving as a panelist or guest speaker to discuss insurance and other topics related to the financial services the division regulates* * *Amplifying DFR’s messages, including linking your website to the DFR website, share DFR social media posts, and stream DFR classes and events*   *Below is an example of how activities could be listed. This example is based off the Sample Reporting Template, Appendix A-2:*  *1st Trimester Activities:*   1. *Disaster Preparation Class – Estimated 50 attendees*   *This event will discuss insurance related topics*  *Request DFR to present*  *Provide DFR publications for distribution*  *Conduct DFR pre & post surveys*  *Social media advertising*   1. *Resource Fair Tabling Event – Estimated 200 attendees*   *DFR publications to be distributed*  *List DFR as a sponsor*  *Social media advertising*  *2nd Trimester Activities:*   1. *Spring Conference – Estimated 100 attendees*   *Guest speakers on climate and economic empowerment*  *Request DFR to present for a breakout or roundtable session*  *Provide DFR publications for distribution*  *Social media advertising*   1. *Resource Fair Tabling Event– Estimated 150 attendees*   *DFR publications to be distributed*  *List DFR as a sponsor*  *Social media advertising* | |
| *Insert text here* | |
| **11.** | If provided virtually, or at no cost, is your staff able to: 1) attend annual training of trainers by Agency staff to expand your staff’s capacities to train on topics of insurance, financial services, and the Agency’s role in consumer protection; and 2) participate in consumer roundtable discussions on finance and insurance on an annual basis? | |
| *Insert text here* | |

Note, the packet you submit should include the following:

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| --- | --- |
| **12.** | **Eligibility Confirmation for Preference Points**   1. If you are a nonprofit, provide your 501(c)(3) determination letter and your most recent CT-12 filing with the Oregon Department of Justice. 2. If you are a public school, provide the name of your school district and affirm that you are in good standing with the Oregon Department of Education. 3. If you are a public charter school, affirm that you have a current contract with your local board of education that will not expire during the sponsorship period. 4. If you are a tribal entity, affirm that you are part of one of the nine federally recognized tribes based in Oregon. |
| **13.** | Lesson plan as attachment:   1. One insurance curriculum lesson plan, if applicable, or 2. One financial education lesson plan, if applicable |
| **14.** | Attachment C, Certified Disadvantaged Business Outreach Plan |
| **15.** | Attachment D, Offeror Information and Certification Sheet |

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Offeror Signature Date