

CONNECTICUT STATE DEPARTMENT OF EDUCATION
Career and Technical Education (CTE)



2015-2016 Competitive Application
for
Investing and Personal Finance Education Programs
in the Public Secondary Schools

Purpose: To develop an investing and personal finance education course to provide students with basic financial skills that will enable them to apply effective financial decision making as they make the transition into postsecondary education or the workforce. In addition, the grant will provide opportunities for students to explore career options in the financial field.

Applications Due: May 1, 2015

Published: March 2015

RFP #992

Academic Office
Hartford, Connecticut

CONNECTICUT STATE DEPARTMENT OF EDUCATION

Commissioner of Education

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Levy Gillespie
Equal Employment Opportunity Director
State of Connecticut Department of Education
25 Industrial Park Road
Middletown, CT 06457
860-807-2101
Levy.Gillespie@ct.gov

AN EQUAL OPPORTUNITY/AFFIRMATIVE ACTION EMPLOYER.

**Investing and Personal Finance Education Programs
In the Public Secondary Schools**

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INVESTING AND PERSONAL FINANCE EDUCATION PROGRAMS IN THE PUBLIC SECONDARY SCHOOLS

I. Introduction:

Growing evidence suggests that many students who graduate from high school lack basic skills in the management of personal finance affairs. Many students are unable to balance a checkbook and lack insight into the basic principles involved with earning, spending, saving and investing. Many young people fail in the management of their first consumer credit experience, establish bad financial management habits and stumble through life learning by trial and error. For more information about personal finance education, please go to the JumpStart Coalition Web site at <http://www.jumpstartcoalition.org>.

II. Purpose of Grant:

Pursuant to the Connecticut General Statutes Subsection (d) of Section 10-16b, the State Board of Education shall assist local and regional boards of education in developing instructional programs in personal financial management.

This grant is intended to provide local and regional boards of education with an opportunity to develop an investing and personal finance education course. This course shall be designed to provide students with investing and financial skills that will enable them to apply effective financial decision making as they transition into postsecondary education and/or the workforce.

Investing and Personal Finance Education grants are intended for the sole purpose of promoting financial literacy, including, but not limited to, knowledge of banking, investing and saving and handling personal finance matters, in accordance with the Connecticut Personal Finance Framework and Competencies and the Connecticut Mathematics Common Core Standards (see [Personal Finance](#)). Students will have the opportunity to learn personal finance education through the above-mentioned standards.

III. Grant Period:

July 1, 2015, to June 30, 2016.

All funds must be obligated by June 30, 2016. There are no exceptions to, or waivers from, this requirement.

IV. Eligible Applicants:

All local and regional boards of education, the Connecticut Technical High School System, secondary charter and magnet schools, endowed academies and adult education programs are eligible.

V. Funding Level:

Total funds available: \$500,000 for the grant period with grants ranging from \$15,000 to \$25,000 per school for a 12-month period.

VI. Use of Funds:

The funds must be used to develop an investing and personal finance education course to provide students with financial skills that will enable them to apply effective financial decision making as they transition into postsecondary education and/or the workforce.

To be considered for this grant award, a school district must submit a plan that:

- develops a rigorous investing and personal finance curriculum that follows the state Personal Finance Framework and the Connecticut Mathematics Common Core Standards (see Web site link on page 1) and then shares the new course plan with the Connecticut State Department of Education (CSDE);
- establishes an investing and personal finance education course for students in Grades 11-12 taught by either certified business and finance technology education teachers or family consumer science teachers;
- provides students with a work-based and/or mentorship opportunity;
- develops and provides a public relations component and plan for marketing the course;
- provides a plan for the integration of technology;
- includes participation in professional development directly related to personal finance;
- consists of an advisory board that includes school representatives, business and industry representatives and higher education representatives; and
- includes opportunities for postsecondary collaboration.

VII. Ineligible Use of Funds:

Funding cannot be used for any other program initiatives.

VIII. Application Deadline:

All proposals, with electronic signatures, should be e-mailed to lee.marcoux@ct.gov and must be received by 5 p.m. on Friday, May 1, 2015. Only proposals with electronic signatures will be accepted as timely. Extensions will not be given.

IX. Management Control of the Program and Grant Consultation Role of the State:

The grantee has overall management control of the grant. While state agency staff may be consulted for their expertise, they will not be directly responsible for the selection of subgrantees or vendors, nor will they be directly involved in the expenditure and payment of funds obligated by the grantee or subgrantee.

X. Disclaimer:

The CSDE reserves the right to make grant awards under this program without discussion with the applicants. Therefore, proposals should represent the applicant's best effort from both a technical and cost standpoint. The CSDE reserves the right to reject all proposals and to conduct a more extensive proposal solicitation, or to reject a lower cost proposal if it believes that a higher cost proposal more appropriately meets the stated objectives. In order to promote a broad distribution of funds, the CSDE reserves the right to limit the number of grant awards per applicant and/or per geographic area. All awards are subject to the availability of state funds. Grants are not final until the Grant Award Notification letter has been executed.

XI. Proposal Review and Evaluation:

A team of evaluators will review each submitted proposal based on criteria in the rubric located in Appendix A.

XII. Bidders' Conference:

The CSDE will hold a bidders' conference on Tuesday, April 7, 2015, 1:30-3 p.m., at the Capitol Region Education Council (CREC) Central Office, 111 Charter Oak Avenue, 2nd floor, Room 202, Hartford, Connecticut.

XIII. Grant Contact:

Any questions regarding the request for proposal (RFP) may be directed to Lee C. Marcoux, Program Manager, at 860-713-6768 or lee.marcoux@ct.gov.

XIV. E-mail Address:

All proposals containing electronic signatures sent to: lee.marcoux@ct.gov.

XV. Grant Requirements:

Applicants must complete and submit the following:

1. Application Checklist:

Complete application checklist and include in the grant application.

2. Application Narrative:

Provide a narrative of no more than two pages that includes a plan to incorporate the purposes of the grant and the use of funds that meet the established criteria. The narrative must include:

- a description of the **new** personal finance course or a second personal finance course for students in Grades 11-12;
- a description of performance-based student activities;
- samples of assessments of activities;
- a description of how the proposed course meets the intent of the grant;
- a description of how the course links to standards (see Web site link on page 1);
- a description of how the course will directly and indirectly benefit students and how it will be sustained;
- an explanation of how your budget was determined; and
- a copy of the local board minutes approving the personal finance course.

3. Budget Narrative:

Provide a detailed description of the uses of funds that includes all the elements of the ED 114 budget form.

4. Budget (ED 114) Form:

Using the ED 114 (see page 9), prepare a budget for project costs covering the period of July 1, 2015, to June 30, 2016. Administrative costs should not exceed 5 percent and technology equipment should not exceed 15 percent. Budget code descriptions are provided to ensure that applicants appropriately allocate the funds within the ED 114.

5. Assurances:

All signed assurances should be included with the application.

COVER PAGE

CONNECTICUT STATE DEPARTMENT OF EDUCATION
Academic Office
2015 Competitive Application for
State Funds to Provide for
Investing and Personal Finance Education Programs
in the Public Secondary Schools

RFP #992

GRANT PERIOD
July 1, 2015, to June 30, 2016

GRANT COVER PAGE - To Be Completed and Submitted with the Grant Application

Applicant Agency: <i>(Name, Address, Telephone, Fax)</i>	Local Program Title:
Agency Contact Person: <i>(Name, Address, Telephone, Fax, E-mail)</i>	Funding Request:

Signature:
(Superintendent of Schools)

Name: (typed)

Date

APPLICATION CHECKLIST

GRANT REQUIREMENTS AND DOCUMENTS TO BE SUBMITTED

- Application Checklist:** Please complete and include in the grant application.
- Application Narrative:** Provide a narrative of no more than two pages that describes how the applicant meets the established criteria, including a plan to incorporate the purpose of the grant and the use of funds.
- Budget Narrative:** Provide a detailed description of the uses of funds that includes all the elements of the ED 114 budget form.
- Budget (ED 114) Form:** Prepare a budget for project costs covering the period of **July 1, 2015, to June 30, 2016.** Administrative costs should not exceed 5 percent and technology equipment should not exceed 15 percent. Budget code descriptions are provided to ensure that applicants appropriately allocate the funds within the ED 114.
- Assurances:** All signed assurances should be included with the application.

APPLICATION NARRATIVE

Application Narrative:

Provide a narrative of no more than two pages that describes how the applicant meets the established criteria. This should include a plan to incorporate the purpose of the grant and the use of funds.

Please use the following table:

1. Description of the <u>new</u> personal finance course or second personal finance course for students in Grades 11-12:
2. Description of performance-based student activities:
3. Samples of assessments activities:
4. Description of how the proposed course meets the intent of the grant:
5. Description of how the course links to standards
6. Description of how the course will directly and indirectly benefit students and how it will be sustained:
7. An explanation of the budget process:
8. Copy of board minutes approving the personal finance course:

ED 114 BUDGET NARRATIVE FORM – FY 2016
(Provide details on the cost factors included in each line item)

LINE ITEMS	NARRATIVE	LINE ITEM TOTALS \$
111A	NON-INSTRUCTIONAL	
111B	INSTRUCTIONAL	
322	IN-SERVICE	
323	PUPIL SERVICES	
324	FIELD TRIPS	
330	EMPLOYEE TRAINING AND DEVELOPMENT SERVICES	
510	STUDENT TRANSPORTATION SERVICES	
580	TRAVEL	
600	SUPPLIES	
700	PROPERTY	

BUDGET (ED 114) FORM

ED 114 FISCAL YEAR 2016

BUDGET FORM

FUNDING STATUS:

GRANTEE NAME:		VENDOR CODE:
GRANT TITLE:		
PROJECT TITLE:		
CORE-CT CLASSIFICATION:		FUND: 12060 SPID: PROGRAM: 84013
BUDGET REFERENCE: 2007		CHARTFIELD1: 170003 CHARTFIELD2:
GRANT PERIOD: 07/01/15- 06/30/16		AUTHORIZED AMOUNT: \$
CODES	DESCRIPTIONS	BUDGET AMOUNT
111A*	NON-INSTRUCTIONAL	
111B	INSTRUCTIONAL	
322	IN-SERVICE	
323	PUPIL SERVICES	
324	FIELD TRIPS	
330	EMPLOYEE TRAINING AND DEVELOPMENT SERVICES	
510	STUDENT TRANSPORTATION SERVICES	
580	TRAVEL	
600	SUPPLIES	
700**	PROPERTY (EQUIPMENT ONLY)	
	TOTAL	

***5 PERCENT OF TOTAL GRANT AMOUNT ALLOWED ON LINE 111A**

****15 PERCENT OF TOTAL GRANT AMOUNT ALLOWED ON LINE 700**

_____ ORIGINAL REQUEST DATE

_____ STATE DEPARTMENT OF EDUCATION

_____ DATE OF

_____ DATE OF REVISED REQUEST DATE

_____ PROGRAM MANAGER AUTHORIZATION

_____ APPROVAL

ED 114 Budget Form Object Code Descriptions and Budget Narrative

Code	Object	Amount
111A	<p>Non-Instructional</p> <p>Amounts paid to administrative employees of the grantee not involved in providing direct services to pupils/clients. Include all gross salary payments for these individuals while they are on the grantee payroll, including overtime salaries or salaries paid to employees of a temporary nature.</p>	
111B	<p>Instructional</p> <p>Salaries for employees providing direct instruction/counseling to pupils/clients. This category is used for both counselors and teachers. Include all salaries for these individuals while they are <u>on the grantee payroll</u>, including overtime salaries or salaries of temporary employees. Substitute teachers or teachers hired on a temporary basis to perform work in positions of either a temporary or permanent nature are also reported here. Tutors or individuals whose services are acquired through a contract are not included in the category. A general rule of thumb is that a person for whom the grantee is paying employee benefits, and who is on the grantee payroll, is included; a person who is paid a fee with no grantee obligation for benefits is not.</p>	
322	<p>In-service (Instructional Program Improvement Services)</p> <p>Payments for services performed by persons qualified to assist teachers and supervisors to enhance the quality of the teaching process. This category includes curriculum consultants, in-service training specialists, etc., who are not on the grantee payroll.</p>	
323	<p>Pupil Services (Non-Payroll Services)</p> <p>Expense for certified or licensed individuals who are not on the grantee payroll and who assist in solving pupils' mental and physical problems. This category includes medical doctors, therapists, audiologists, neurologists, psychologists, psychiatrists, contracted guidance counselors, etc.</p>	
324	<p>Field Trips</p> <p>Expenditures for student field trips (registration fees, meals and other costs) related to personal finance education.</p>	
330	<p>Employee Training and Development Services</p> <p>Services supporting the professional and technical development of school district personnel, including instructional, administrative, and service employees. Included are course registration fees (that are not tuition reimbursement), charges from external vendors to conduct training courses (at either school district facilities or off-site), and other expenditures associated with training or professional development by third-party vendors.</p>	
510	<p>Student Transportation Services</p> <p>Expenditures for transporting pupils to and from school and other activities. Included are such items as bus rentals for field trips and payments to drivers for transporting handicapped children.</p>	
580	<p>Travel</p> <p>Expenditures for transportation, meals, hotel and other expenses associated with <u>staff</u> travel. Per diem payments to staff in lieu of reimbursement for subsistence (room and board) are also included.</p>	
600	<p>Supplies</p> <p>Amounts paid for items that are consumed, worn out, or deteriorated through use, or items that lose their identity through fabrication or incorporation into different or more complex units or substances.</p>	

700	<p>Property</p> <p>Expenditures for acquiring fixed assets, including land or existing buildings, improvements of grounds, initial equipment, additional equipment and replacement of equipment. For most grants, only equipment such as computers, duplicating machines, furniture and fixtures is allowable, and the line item description on the budget will read Property/Equipment only. Other items which could be included in this category, if allowable under grant legislation, are expenditures for the acquisition <u>but not the rental</u> of buildings and land.</p> <p>In accordance with the Connecticut State Comptroller's definition of equipment, included in this category are all items of equipment (machinery, tools, furniture, vehicles, apparatus, etc.) with a value of over <u>\$1,000</u> and the useful life of more than one year.</p> <p>Please note: Grantees are allowed 5 percent of total grant amount on line 111A and 15 percent on line 700.</p>	
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STATEMENT OF ASSURANCES

CONNECTICUT STATE DEPARTMENT OF EDUCATION
STANDARD STATEMENT OF ASSURANCES
GRANT PROGRAMS

PROJECT TITLE:

THE APPLICANT:

HEREBY ASSURES THAT:

(insert Agency/School/CBO Name)

- A.** The applicant has the necessary legal authority to apply for and receive the proposed grant;
- B.** The filing of this application has been authorized by the applicant's governing body, and the undersigned official has been duly authorized to file this application for and on behalf of said applicant, and otherwise to act as the authorized representative of the applicant in connection with this application;
- C.** The activities and services for which assistance is sought under this grant will be administered by or under the supervision and control of the applicant;
- D.** The project will be operated in compliance with all applicable state and federal laws and in compliance with regulations and other policies and administrative directives of the State Board of Education and the Connecticut State Department of Education;
- E.** Grant funds shall not be used to supplant funds normally budgeted by the agency;
- F.** Fiscal control and accounting procedures will be used to ensure proper disbursement of all funds awarded;
- G.** The applicant will submit a final project report (within 60 days of the project completion) and such other reports, as specified, to the Connecticut State Department of Education, including information relating to the project records and access thereto as the Connecticut State Department of Education may find necessary;
- H.** The Connecticut State Department of Education reserves the exclusive right to use and grant the right to use and/or publish any part or parts of any summary, abstract, reports, publications, records and materials resulting from this project and this grant;
- I.** If the project achieves the specified objectives, every reasonable effort will be made to continue the project and/or implement the results after the termination of state/federal funding;
- J.** The applicant will protect and save harmless the State Board of Education from financial loss and expense, including legal fees and costs, if any, arising out of any breach of the duties, in whole or part, described in the application for the grant;

K. At the conclusion of each grant period, the applicant will provide for an independent audit report acceptable to the grantor in accordance with Sections 7-394a and 7-396a of the Connecticut General Statutes, and the applicant shall return to the Connecticut State Department of Education any moneys not expended in accordance with the approved program/operation budget as determined by the audit;

L. REQUIRED LANGUAGE (NON-DISCRIMINATION)

References in this section to “contract” shall mean this grant agreement and to “contractor” shall mean the Grantee.

(a) For purposes of this Section, the following terms are defined as follows:

- i. "Commission" means the Commission on Human Rights and Opportunities;
- ii. "Contract" and “contract” include any extension or modification of the Contract or contract;
- iii. "Contractor" and “contractor” include any successors or assigns of the Contractor or contractor;
- iv. "Gender identity or expression" means a person's gender-related identity, appearance or behavior, whether or not that gender-related identity, appearance or behavior is different from that traditionally associated with the person's physiology or assigned sex at birth, which gender-related identity can be shown by providing evidence including, but not limited to, medical history, care or treatment of the gender-related identity, consistent and uniform assertion of the gender-related identity or any other evidence that the gender-related identity is sincerely held, part of a person's core identity or not being asserted for an improper purpose;
- v. “good faith" means that degree of diligence which a reasonable person would exercise in the performance of legal duties and obligations;
- vi. "good faith efforts" shall include, but not be limited to, those reasonable initial efforts necessary to comply with statutory or regulatory requirements and additional or substituted efforts when it is determined that such initial efforts will not be sufficient to comply with such requirements;
- vii. "marital status" means being single, married as recognized by the state of Connecticut, widowed, separated or divorced;
- viii. "mental disability" means one or more mental disorders, as defined in the most recent edition of the American Psychiatric Association's "Diagnostic and Statistical Manual of Mental Disorders", or a record of or regarding a person as having one or more such disorders;
- ix. "minority business enterprise" means any small contractor or supplier of materials fifty-one percent or more of the capital stock, if any, or assets of which is owned by a person or persons: (1) who are active in the daily affairs of the enterprise, (2) who have the power to direct the management and policies of the enterprise, and (3) who are members of a minority, as such term is defined in subsection (a) of Connecticut General Statutes § 32-9n; and
- x. "public works contract" means any agreement between any individual, firm or corporation and the State or any political subdivision of the State other than a municipality for construction, rehabilitation, conversion, extension, demolition or repair of a public building, highway or other changes or improvements in real property, or which is financed in whole or in part by the State, including, but not limited to, matching expenditures, grants, loans, insurance or guarantees.

For purposes of this Section, the terms "Contract" and "contract" do not include a contract where each contractor is (1) a political subdivision of the state, including, but not limited to, a municipality, (2) a quasi-public agency, as defined in Conn. Gen. Stat. Section 1-120, (3) any other state, including but not limited to any federally recognized Indian tribal governments, as defined in Conn. Gen. Stat. Section 1-267, (4) the federal government, (5) a foreign government, or (6) an agency of a subdivision, agency, state or government described in the immediately preceding enumerated items (1), (2), (3), (4) or (5).

- (b) (1) The Contractor agrees and warrants that in the performance of the Contract such Contractor will not discriminate or permit discrimination against any person or group of persons on the grounds of race, color, religious creed, age, marital status, national origin, ancestry, sex, gender identity or expression, mental retardation, mental disability or physical disability, including, but not limited to, blindness, unless it is shown by such Contractor that such disability prevents performance of the work involved, in any manner prohibited by the laws of the United States or of the State of Connecticut; and the Contractor further agrees to take affirmative action to insure that applicants with job-related qualifications are employed and that employees are treated when employed without regard to their race, color, religious creed, age, marital status, national origin, ancestry, sex, gender identity or expression, mental retardation, mental disability or physical disability, including, but not limited to, blindness, unless it is shown by the Contractor that such disability prevents performance of the work involved; (2) the Contractor agrees, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, to state that it is an "affirmative action-equal opportunity employer" in accordance with regulations adopted by the Commission; (3) the Contractor agrees to provide each labor union or representative of workers with which the Contractor has a collective bargaining Agreement or other contract or understanding and each vendor with which the Contractor has a contract or understanding, a notice to be provided by the Commission, advising the labor union or workers' representative of the Contractor's commitments under this section and to post copies of the notice in conspicuous places available to employees and applicants for employment; (4) the Contractor agrees to comply with each provision of this Section and Connecticut General Statutes §§ 46a-68e and 46a-68f and with each regulation or relevant order issued by said Commission pursuant to Connecticut General Statutes §§ 46a-56, 46a-68e and 46a-68f; and (5) the Contractor agrees to provide the Commission on Human Rights and Opportunities with such information requested by the Commission, and permit access to pertinent books, records and accounts, concerning the employment practices and procedures of the Contractor as relate to the provisions of this Section and Connecticut General Statutes § 46a-56. If the contract is a public works contract, the Contractor agrees and warrants that he will make good faith efforts to employ minority business enterprises as subcontractors and suppliers of materials on such public works projects.
- (c) Determination of the Contractor's good faith efforts shall include, but shall not be limited to, the following factors: The Contractor's employment and subcontracting policies, patterns and practices; affirmative advertising, recruitment and training; technical assistance activities and such other reasonable activities or efforts as the Commission may prescribe that are designed to ensure the participation of minority business enterprises in public works projects.
- (d) The Contractor shall develop and maintain adequate documentation, in a manner prescribed by the Commission, of its good faith efforts.

- (e) The Contractor shall include the provisions of subsection (b) of this Section in every subcontract or purchase order entered into in order to fulfill any obligation of a contract with the State and such provisions shall be binding on a subcontractor, vendor or manufacturer unless exempted by regulations or orders of the Commission. The Contractor shall take such action with respect to any such subcontract or purchase order as the Commission may direct as a means of enforcing such provisions including sanctions for noncompliance in accordance with Connecticut General Statutes §46a-56; provided if such Contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the Commission, the Contractor may request the State of Connecticut to enter into any such litigation or negotiation prior thereto to protect the interests of the State and the State may so enter.
 - (f) The Contractor agrees to comply with the regulations referred to in this Section as they exist on the date of this Contract and as they may be adopted or amended from time to time during the term of this Contract and any amendments thereto.
 - (g) (1) The Contractor agrees and warrants that in the performance of the Contract such Contractor will not discriminate or permit discrimination against any person or group of persons on the grounds of sexual orientation, in any manner prohibited by the laws of the United States or the State of Connecticut, and that employees are treated when employed without regard to their sexual orientation; (2) the Contractor agrees to provide each labor union or representative of workers with which such Contractor has a collective bargaining Agreement or other contract or understanding and each vendor with which such Contractor has a contract or understanding, a notice to be provided by the Commission on Human Rights and Opportunities advising the labor union or workers' representative of the Contractor's commitments under this section, and to post copies of the notice in conspicuous places available to employees and applicants for employment; (3) the Contractor agrees to comply with each provision of this section and with each regulation or relevant order issued by said Commission pursuant to Connecticut General Statutes § 46a-56; and (4) the Contractor agrees to provide the Commission on Human Rights and Opportunities with such information requested by the Commission, and permit access to pertinent books, records and accounts, concerning the employment practices and procedures of the Contractor which relate to the provisions of this Section and Connecticut General Statutes § 46a-56.
 - (h) The Contractor shall include the provisions of the foregoing paragraph in every subcontract or purchase order entered into in order to fulfill any obligation of a contract with the State and such provisions shall be binding on a subcontractor, vendor or manufacturer unless exempted by regulations or orders of the Commission. The Contractor shall take such action with respect to any such subcontract or purchase order as the Commission may direct as a means of enforcing such provisions including sanctions for noncompliance in accordance with Connecticut General Statutes § 46a-56; provided, if such Contractor becomes involved in, or is threatened with, litigation with a subcontractor or vendor as a result of such direction by the Commission, the Contractor may request the State of Connecticut to enter into any such litigation or negotiation prior thereto to protect the interests of the State and the State may so enter.
- M.** The grant award is subject to approval of the Connecticut State Department of Education and availability of state or federal funds.

N. The applicant agrees and warrants that Sections 4-190 to 4-197, inclusive, of the Connecticut General Statutes concerning the Personal Data Act and Sections 10-4-8 to 10-4-10, inclusive, of the Regulations of Connecticut State Agencies promulgated there under are hereby incorporated by reference.

I, the undersigned authorized official; hereby certify that these assurances shall be fully implemented.

Superintendent Signature: _____

Name: *(typed)* _____

Title: *(typed)* _____

Date: _____

APPENDIX A

EVALUATION CRITERIA BASED ON GRANT REQUIREMENTS

Section	Points	Section Score	Comments
1. Application Narrative			
<ul style="list-style-type: none"> • description of new personal finance course or second personal finance course for students in Grades 11-12 that follows State Personal Finance Standards and the Connecticut Mathematics Common Core Standards; 	10		
<ul style="list-style-type: none"> • description of a rigorous investing and personal finance curriculum taught by business and finance technology education teachers and family consumer science teachers; 	10		
<ul style="list-style-type: none"> • description of how the proposed course provides students with the opportunity to acquire responsible life-long investing and personal finance decision-making skills; 	10		
<ul style="list-style-type: none"> • description of how the course provides students with a work-based and /or mentorship opportunity; 	10		
<ul style="list-style-type: none"> • description of a plan for the integration of technology; 	10		
<ul style="list-style-type: none"> • description of an advisory board that includes school representatives, business and industry representatives and higher education; 	10		
<ul style="list-style-type: none"> • description of a plan that would include opportunities for postsecondary collaboration; 	10		
<ul style="list-style-type: none"> • description of professional development opportunities directly related to personal finance; and 	10		
<ul style="list-style-type: none"> • Copy of board minutes approving the personal finance course. 	10		
2. Budget Narrative	5		
3. Budget—ED 114 Form	5		
Total Points:	100		

Evaluator's Signature: _____ **Date:** _____

Evaluator's Name: _____

APPENDIX B

ANNIE E. CASEY FOUNDATION

All RFPs for competitive grants related to at risk youth must contain the uniform language that follows:

Applicants that are part of a collaborative effort funded in whole or in part by the Annie E. Casey Foundation must submit documentation that;

- The collaborative oversight entity has been provided the opportunity to review and comment on the grant application or proposal prior to submission to the CSDE;
- The proposal or application submitted provides information detailing the activities, which ensure priority access to services to children, youth and families referred by the collaborative oversight entity; and
- The application shall designate someone to act as liaison for the referral process.