



---

**TSET SUCCESSFUL FUTURES PROGRAM**  
**A YOUTH CHARACTER DEVELOPMENT INITIATIVE**  
**FUNDING OPPORTUNITY NUMBER RFP092-YCD23**

---

Oklahoma Tobacco Settlement Endowment Trust  
2800 N. Lincoln, Suite 202  
Oklahoma City, OK 73105

## **About this Document**

This document is intended for informational purposes and reflects current planning; it does not obligate TSET to make any specific number of awards. Awards are contingent upon the availability of funds, satisfactory performance by the contractor, and approval by the TSET Board of Directors. If there is any inconsistency between the information contained in this guide and the terms of any resulting contract, the terms of the contract are controlling.

This guide may be amended by TSET. Amendments can be found on TSET's website under the section [Other Funding Opportunities](#). It is the responsibility of the applicant to review any such amendments and make necessary changes in the application to meet the amended requirements.

## **Ceremonial Use of Tobacco in Native American Culture**

The TSET acknowledges the spiritual and ceremonial value that tobacco has in Native American culture. Phrases such as "tobacco-free," "tobacco control," and "tobacco use" mentioned in this document refer to commercially produced tobacco products and non-ceremonial use of tobacco.

## **Required Software**

This guide must be viewed and associated forms completed at no cost to the applicant by using [Adobe Reader](#). The full version of Adobe Acrobat Professional is not required to complete any of the application forms, but the guidelines must be fully downloaded, not opened within an internet browser. Prerequisites and proposals must be submitted via Smartsheet web form, which requires no account to utilize.

## **Key Dates**

9/2/22: Prerequisite policy submission deadline

9/19/22: Proposals due

11/17/22: Applicant notified of award decisions

1/1/23: Targeted contract start date

## Contents

Proposal Guidelines.....	4
Purpose.....	4
Background.....	5
Character Development in Health.....	7
Scope of Work .....	8
Program Deliverables .....	8
Grantee Alignment and Collaboration with Other Health Initiatives.....	9
Staffing.....	9
Funding and Grant Period .....	9
Funding Limitations .....	10
Service Area .....	11
Eligibility .....	11
Tobacco-free and Worksite Wellness Policies.....	11
Proposal Preparation.....	12
Proposal Sections and Required Documentation.....	13
Proposal Submission.....	16
Proposal Review .....	17
Awards.....	19
Post-Award Processes .....	20
Payments .....	20
Reporting .....	20
Required Activities to Support TSET State Goals.....	21
Project Evaluation.....	21
Publicity .....	21
Release of Information .....	21
Questions.....	21
Appendices and Attachments .....	21



## Oklahoma Tobacco Settlement Endowment Trust

### TSET SUCCESSFUL FUTURES PROGRAM

#### A YOUTH CHARACTER DEVELOPMENT INITIATIVE

### Proposal Guidelines

#### Purpose

The Tobacco Settlement Endowment Trust (TSET) is interested in building character and strengthening leadership and service-learning skills for students in grades three through eight statewide. TSET seeks to enter into a cooperative agreement with an entity that 1) possesses the skills, experience, and resources to implement a statewide program of youth character development in multiple in-school or out-of-school sites, and 2) has a successful track record of working with diverse and underserved children and youth.

There are approximately 325,000 children and youth who are 9-14 years old residing in Oklahoma. Positive character development builds and strengthens assets that enable children and youth to grow and flourish throughout life. Services to children in third through eighth grade will provide education and opportunities for building character, increasing protective factors, and strengthening leadership and service-learning skills for students relevant to TSET's mission to reduce tobacco use and obesity among children. TSET's overall goals are to prevent and reduce tobacco use and vaping among Oklahoma's young people as well as reducing obesity later in life by consistently engaging children and youth in their younger years in healthy behaviors and experiences that lead to healthy lifestyles in high school and adult life.

This Request for Proposals is intended for use by prospective applicants with the capacity to provide character building activities statewide to children and youth in grades three through eight. Included in the curricula or program will be sections on being tobacco-free, engaging in physical activity, and eating healthy. The curricula that are used must have tools such as pre- and post-tests that measure changes in knowledge and/or attitudes among the participants. The objective is to fund 35-50 sites across Oklahoma devoted to character development and education for students in grades three through eight.

Applicants are expected to have a character development education curriculum or program already in the applicant agency's portfolio of services. If necessary, the applicant's existing curriculum or program must be augmented to include tobacco use prevention, physical activity, nutrition, and healthy eating as part of the TSET-funded youth character development program. Some examples of evidence-based and promising curricula can be found in [Youth.gov's Program Directory](#). Please note that not all curricula listed in the Program Directory are associated with tobacco use prevention, physical activity, nutrition and/or healthy eating. The applicant must submit the proposed curriculum and associated education and instruction materials for TSET approval as part of the application.

The applicant must demonstrate knowledge and experience in two areas: 1) the skills, experience, and resources to implement a statewide program of youth character development in multiple in-school or out-of-school sites, and 2) a successful track record of working with diverse and underserved children and youth. The applicant must:

- As the fiscal agent for the grant, assign a financial officer to the grant, have a proven record of being fiscally responsible, and prior experience in managing cost reimbursement grant programs.
- Demonstrate knowledge and experience in guidance and character building for children and youth that teaches leadership, fairness, teamwork, and service to others.
- Propose a detailed scope of work, including program deliverables.
- Agree to align their character development activities and education scope of work with the three areas of focus (tobacco control, physical activity, and healthy eating) of TSET's community-based work. Doing so ensures the work of youth members contributes and complements statewide goals to improve health behaviors and create environments that support healthy choices.
- Ensure the agency's independent audit schedule includes the grant program.

The applicant may subcontract with other organizations with capacity to address one or more aspects of the program, as needed and appropriate. The applicant must have experience and show success in effectively managing subcontracts.

## Background

Beginning in FY20, TSET launched the TSET Healthy Youth Initiative (HYI), a three-part initiative aimed at specifically addressing Oklahoma youth. The first phase of the TSET Healthy Youth Initiative is a statewide public education campaign for teens ages 13-18 and focused on preventing and reducing tobacco use and obesity. The campaign promotes healthy lifestyle choices for youth and gives parents resources to support their children in maintaining or developing healthy habits for a lifetime. The public health education campaigns incorporated under the TSET HYI include:

- [Behind the Haze](#)
- [Down and Dirty](#)
- [My Life, My Quit](#)
- [Quit the Hit](#)
- [Swap Up](#)

In FY21, TSET launched the second phase of the HYI, Youth Action for Health Leadership (YAHL). YAHL is a statewide youth-led initiative for youth in 9th through 12th grades that promotes a healthier Oklahoma free of tobacco addiction and obesity. Youth in the program participate in the Elevate Student Health

campaign, which aims to improve the health of Oklahoma youth through comprehensive wellness policies in Oklahoma schools. Another campaign promoted by YAHL youth is CounterAct Tobacco, which is a statewide policy campaign aimed to modernize Oklahoma’s youth access to tobacco laws.

This RFP seeks to fund the third phase in the suite of youth initiatives.

Best practices in youth development suggest that comprehensive, high quality character education not only effectively promotes the development of good character—possessing honesty, integrity, responsibility, for example—but is a promising approach to the prevention of a wide range of social problems. These include aggressive and antisocial behaviors, drug use, precocious sexual activity, criminal activities, academic under-achievement, and elevated school dropout rates.<sup>1</sup>

Children and youth who experience trauma, discrimination, violence, or other negative experiences during early development are more likely to develop mental health and substance use issues as adults. However, positive opportunities and experiences have the potential to redirect developmental pathways. Adequate support and services during this time have the potential to set young people up for long-term success.

Oklahoma ranks among the lowest on nearly every measure of child well-being: 42<sup>nd</sup> in health, 33<sup>rd</sup> in economic well-being, 45<sup>th</sup> in education, and 41<sup>st</sup> for positive family and community supports. The state also ranks 5<sup>th</sup> in the nation for children impacted by Adverse Childhood Experiences (ACEs), with 20% of Oklahoma children under the age of 17 having experienced two or more ACEs. ACEs are divided into three categories: abuse, household challenges, and neglect. Adults with higher ACE scores are more likely to experience depression, suicide, and chronic health behaviors.

Character development education and activities can help in reducing the harm of ACEs by promoting social norms that protect against violence and adversity, ensuring a strong start for children, connecting children with caring adults and activities, and intervening in challenging home situations to lessen

---

<sup>1</sup> Research indicates that young people who are surrounded by a variety of opportunities for positive encounters engage in less risky behavior and ultimately show evidence of higher rates of successful transitions into adulthood. (Studies by Alberts, et al.2006; Bandy & Moore, 2009; Eccles & Gootman, 2002; Roth & Brooks-Gunn, 2000; Pittman, Irby, & Ferber, 2001; Pittman, 1999; Lerner, 2004; Lerner et al., 2012; Lerner & Lerner, 2013; Catalano, Berglund, Ryan, Lonczack, & Hawkins, 2004)

A comprehensive study that looked at more than 200 school-based social-emotional learning programs found that program participants showed significant improvement in social and emotional skills, attitudes, and academic performance and reductions in internalizing symptoms and risky behaviors. (Durlak, et al., 2011)

Social-Emotional Competence: An Essential Factor for Promoting Positive Adjustment and Reducing Risk in School Children. Authors: Celene E. Domitrovich, Joseph A .Durlak, Katherine C. Staley and Roger P. Weissberg. Published February 2017, Society for Research and Development.

Positive Youth, Healthy Adults: Does Positive Well-being in Adolescence Predict Better Perceived Health and Fewer Risky Health Behaviors in Young Adulthood? Authors: Lindsay T. Hoyt, M.A.; P. Lindsay Chase-Lansdale, Ph.D.; Thomas W. McDade, Ph.D.; and Emma K. Adam, Ph.D. Published July 2011, Journal of Adolescent Health.

immediate as well as long-term harms.

Sixty-five percent of all deaths in Oklahoma are attributable to three modifiable risk factor behaviors—tobacco-use, poor nutrition, and sedentary lifestyle—that contribute to four chronic diseases: cardiovascular disease, cancer, diabetes, and lung disease. Since its inception, TSET has strategically invested in comprehensive, evidence-based programs, such as public education campaigns, which move knowledge, attitudes, behaviors, and policies forward supporting the ability for Oklahomans to eat better, move more, and be tobacco-free. TSET is the state’s leading funder of prevention, creating the environment for Oklahoma’s youth to learn healthy habits that will benefit them throughout their lifetime. If not already included as components of the standard curriculum, the applicant funded under this Request for Proposals will be required to augment its current youth character development curriculum to incorporate tobacco use prevention, physical activity, nutrition, and healthy eating into the program.

TSET also funds several initiatives that work together to support the goals of preventing tobacco use and improving physical activity and nutrition, including community grants, statewide health systems initiative grants, incentive grants for communities and schools, health communications campaigns, the Oklahoma Tobacco Helpline, research centers and others. All TSET grantees work together to leverage resources, coordinate strategies, and participate in a learning community that encourages innovation and sustainable systems change.

For more information about TSET’s other programs and initiatives, see the TSET website at <https://oklahoma.gov/tset/tset-programs.html>.

### Character Development in Health

Good character includes attitudes such as the desire to do one’s best and being concerned about the welfare of others; intellectual capacities such as critical thinking and moral reasoning; behaviors such as being honest and responsible, and standing up for moral principles in the face of injustice; interpersonal and emotional skills for effective social interaction with others in a variety of circumstances; and the commitment to contribute to one’s community and society.

Our research on character building programs identified 11 vital program elements found in a successful character-building program. They include:

- Promote core ethical values as the basis of good character.
- Define character comprehensively to include thinking, feeling, and behavior.
- Create a caring environment.
- Provide participants with opportunities to engage.
- Provide a meaningful and challenging curriculum that helps all participants to succeed.
- Foster participants’ intrinsic motivation to learn and engage in positive, healthy behaviors.
- Engage staff and mentors as professionals in a learning community.
- Foster shared leadership and long-term support for character education.

- Engage families and community members as partners in character education.
- Engage participants in service-learning activities that teach personal as well as group responsibility.
- Provide achievable and measurable milestones for youth.

### Scope of Work

TSET intends to fund a statewide program for students in grades three through eight that provides students with guidance and opportunities that build character, increase protective factors, and strengthen leadership and service learning (learning by doing) skills. These character development skills can be provided through wellness and character-building education implemented in schools as well as in out-of-school programs. An applicant must:

- Agree to use the existing infrastructure of school-based instruction and out-of-school clubs to engage children and youth throughout the state in character building education activities and service-learning projects.
- Develop program milestones and measures of progress to track every youth's volunteer and service contributions to their communities in meaningful ways.
- Provide teachable moments that promote and educate on the importance of a healthy lifestyle, gratitude, integrity, perseverance, courage, self-control, self-awareness, empathy, humility, kindness, compassion, teamwork, visioning and goal setting, resourcefulness, creativity, respectful language, and sharing.
- Instill in children and youth a strong sense of self-worth, the capacity to contribute meaningfully, a belief they can make a difference.
- Provide service-learning activities for youth that give youth a voice, a meaningful role in planning and implementing projects, and opportunities to view themselves as agents of change in improving the health of their communities and the state, and opportunities to practice and exhibit good and wholesome character.
- Support children and youth with adult mentors as well as a system of peer-to-peer mentoring.
- Ensure all children and youth character development activities and service-learning projects have achievable measures of progress, milestones, and goals.
- Implement children and youth activities that encourage teamwork, decision making leadership in learning and implementing projects.

### Program Deliverables

A successful youth character development program will:

- Engage students in grades three through eight in 30-50 sites across Oklahoma in character development and education activities;



- Implement youth character development curriculum that incorporates tobacco use prevention, physical activity, nutrition, and healthy eating into the program and includes tool(s) to measure changes in participant knowledge and/or attitudes;
- Be able to fully manage the entire program with dedicated staff on the ground in Oklahoma (locally based), contracted or hired, to organize, manage and direct efforts, and to recruit, train, equip and support children and youth in achieving the goals of the program;
- Agree to use the existing infrastructure of school-based instruction and out-of-school clubs to engage children and youth throughout the state in character building education activities and service-learning projects;
- Develop program milestones and measures of progress to track every child's and youth's volunteer and service contributions to their communities in meaningful ways;
- Instill in children and youth a strong sense of self-worth, the capacity to contribute meaningfully, a belief they can make a difference;
- Provide service-learning activities for youth that give youth a voice, a meaningful role in planning and implementing projects, and opportunities to view themselves as agents of change in improving the health of their schools and communities;
- Support children and youth with youth mentors as well as a system of peer-to-peer mentoring;
- Ensure all children and youth character development activities and service-learning projects have achievable measures of progress, milestones, and goals; and
- Implement children and youth activities that encourage teamwork, decision making leadership in learning and implementing projects.

### Grantee Alignment and Collaboration with Other Health Initiatives

The grant program must have flexibility to engage in collaborations with other agencies on major events that leverage the combined actions of several agencies toward local and state comprehensive health improvements.

The grant program is encouraged to combine its active living, healthy eating, and tobacco control efforts with other health-related issues when significant opportunities to do so arise, while keeping their focus and priority on wellness as defined by TSET.

### Staffing

Applicants must be able to fully manage the entire youth program with dedicated staff on the ground in Oklahoma (locally based), contracted or hired, to organize, manage and direct efforts, and to recruit, train, equip, and support youth in achieving the goals of the program. Funding requests for staffing are allowable in the budget.

### Funding and Grant Period

The funds available through this Request for Proposals are up to \$1 million per full year over 4.5 years

for a total up to \$4 million. The initial contract period is anticipated to be used for program start-up and will be in effect from January 1, 2023, through June 30, 2023. Applicants are eligible to request up to \$500,000 for this initial six-month agreement period. At the end of the initial six-month agreement, the first full-year agreement will begin. All full-year agreements will follow the state's fiscal year calendar of July 1 through June 30.

All grants are contingent upon the availability of funding. Subsequent year funding allocations will be managed through submission of a work plan proposal from the grantee, with final approval of the work plan by TSET. Each year of the grant shall be governed by a cooperative agreement, which will be eligible annually for renewal consideration based on grantee performance, funds available to award, and approval by the TSET Board of Directors.

### Funding Limitations

TSET funds cannot be used either in support of or opposition to any measure that is being referred to a vote of the people by means of the initiative or referendum, or that citizens of this state are attempting to have referred to a vote of the people by the initiative or referendum. In addition, funds cannot be used to influence elections or an official's duties, nor will TSET funds be used directly or indirectly to advance or promote a grantee's religious beliefs or to inhibit or discriminate against the religious beliefs of others and will not be used to benefit or support any priest, preacher, minister, or other religious teacher.

Awarded funds may not create an asset for a private entity or non-profit organization. An asset is defined as an IT purchase of \$500 or more, and as an item with a cost of \$2,500 or more for non-IT purchases. Public entities that propose to purchase items above \$2,500 must ensure that the asset is entered into and tracked by the agency's asset management system.

Overhead, administrative, or indirect costs may be allowable on a funded project, but those costs must be justified and may not exceed 10% of the total award amount.

Specific unallowable budget items include:

- Endowments
- Hiring of lobbyists
- Capital campaigns
- Operating deficits or retirement of debt
- Real estate, which includes facility fees if the building is owned by the applicant organization
- Items for which third-party reimbursement is available
- Entertainment costs for amusement or diversion
- Individual professional memberships
- Staff time for fundraising efforts
- Cash/prize donations for fundraisers or events

- Expenses related to the development of a proposal or application for funding from any organization

This list is not exhaustive. Although all budgets will undergo review prior to issuance of a cooperative agreement, applicants with questions about potential budget items are encouraged to submit their questions to TSET according to the process detailed in these guidelines prior to submitting a proposal. TSET reserves the right to deny funding for any budget items that are unallowable, inappropriate, or unrelated to the project.

### Service Area

Services rendered under an agreement resulting from this funding opportunity must be offered at various sites across the entire state of Oklahoma.

### Eligibility

Awards will not be made to individuals. The following types of entities are eligible to apply:

- Institutions of common and higher education
- Public entities, such as agencies of state government
- Tribal entities
- 501 (c)(3) non-profit organizations

All applicant organizations must be registered with the Oklahoma Secretary of State and eligible to do business within the state. Although the applicant organization is not required to be headquartered in Oklahoma, the organization must have locally based staff housed within Oklahoma for the duration of the agreement.

If multiple partners are involved in the funded project, the applicant organization will serve as the contractor and fiscal agent responsible for all aspects of the contract and payment.

To be eligible for award, the applicant must have the capability in all respects to perform fully the contract requirements and the integrity and reliability that will assure good faith performance.

### Tobacco-free and Worksite Wellness Policies

Because TSET's primary goal is to reduce the rates of cancer and cardiovascular disease in Oklahoma, the agency desires to fund organizations that have adopted and implemented a comprehensive tobacco-free policy for all properties under the organization's control. To this end, TSET requires that each potential applicant organization submit a signed copy of their tobacco-free policy as a required prerequisite prior to submitting a full proposal. Because tobacco-free policy requirements vary between private, non-profit 501(c)3 organizations, school districts, tribal nations, and municipalities, sample policies and checklists that outline required elements of a tobacco-free policy for different types of organizations are provided in [Appendix B](#). Applicant organization tobacco-free policies must align with the provided checklist that most closely matches their organization type, which includes:

- City/Town/County;
- Community Organization (including civic organizations, county health departments, and non-profit 501(c)3 organizations);

- Higher Education Institution (including universities and technology centers);
- School District;
- Tribal Nation/Government; and
- Other Worksites.

**For a proposal to be eligible for submission, one prerequisite tobacco-free policy document must be submitted before 4 p.m. on September 2, 2022.** The prerequisite shall be submitted via Smartsheet form here: [TSET’s Successful Futures Funding Opportunity Prerequisite Document Submission Form](#). Prerequisites will not be accepted via any other method and potential applicants do not have to register with Smartsheet to access or use this form.

The policy must be uploaded in .pdf format. The prerequisite document includes a **signed and dated** copy of the applicant organization’s adopted and implemented tobacco-free policy. Applicants must review the policy guidance document carefully, as the tobacco-free policy submitted must meet the checklist standard set in the sample policy chosen from [Appendix B](#) to be approved for proposal submission.

Within four business days of submission of the prerequisite policy, TSET Grants Management will email the contact person on the prerequisite submission form to inform them of the results of the policy review. If the policy meets **all** requirements as stated in the sample policy guidelines, the applicant will be provided with a link to submit their proposal. If the policy does not meet all requirements the applicant will be informed of the deficiencies. Applicants may resubmit their policy as many times as they wish before the September 2 policy submission deadline. **No policies will be accepted after 4 p.m. on September 2, 2022.** Potential applicants whose prerequisite policy does not meet all requirements will not be eligible to apply for this funding opportunity.

### Proposal Preparation

Each application shall be submitted as two separate documents: a single proposal containing all required documents and information stated in these guidelines, and a proposed budget in Excel format ([Attachment D](#)). All documents must be submitted at the same time and no additional information will be accepted after submission.

#### *File Naming Convention*

While TSET sets no specific file naming convention, applicants should limit file names to no more than 30 characters and are strongly encouraged to include the applicant organization and application section name in the file name.

#### *Paper Size, Margins, and Fonts*

Applications should utilize standard letter size paper and 1” margins. Document font size must be 11 points or larger. Smaller text in figures, graphs, diagrams, and charts is acceptable if it is legible when the page is viewed at 100%. Line spacing must be set at 1.5 or 2. Text must be black in color and preferred fonts are Times New Roman, Arial, Palatino Linotype, and Calibri.

#### *Headers and Footers*

The applicant organization’s name and the funding opportunity number (092-SEOK22) should be included in the upper right corner of the header on each page of the application package. Each page

should also be numbered in the bottom right corner, beginning with Page 1 for the first page of the narrative section.

### *Page Limits*

Applicants must adhere to the page limits stated in the Proposal Sections guidance below. Section page limits include text, inserted graphics, charts, and figures; required forms are not counted toward the page limit. Proposals will be reviewed only on the content included within the allowable page limits. Information that exceeds the stated page limits will not be reviewed. Similarly, external information to which the reviewer is directed by hyperlinks included in the application text shall not be considered.

### *Required Forms*

Any forms referenced as required within this document are contained as attachments in the document. To view and access required attachments, applicants **must** download this guide and open it in a version of Adobe. Once the guidelines are downloaded—not opened within a browser window—applicants will be able to access the Attachments pane on the left side of the .PDF document as indicated by a paperclip icon.

## Proposal Sections and Required Documentation

These instructions describe the format of the proposal and are designed to ensure the submission of necessary information to provide for the understanding and comprehensive appraisal of the program. Applicants shall follow the detailed instructions fully and carefully as stated herein.

The applicant must specifically address, in numerical order, and respond in writing to each item.

Unless specified as optional, **each item listed below is required**. If an attachment is indicated in below (denoted as Attachment A, B, C, or D) then the required form is included in these guidelines and must be used. Applicant-created forms that are not the TSET-approved forms may not count as meeting the requirement. Applications submitted without all required sections may be deemed unresponsive and may not be eligible for review.

### **Cover Page**

The Cover Page ([Attachment A](#)) must be completed and included as the first page of the response.

### **Table of Contents**

The Table of Contents should itemize the contents by section, subsection, and page numbers for facilitation of the evaluators reading the proposal. The table of contents should follow the cover page.

### **Narrative**

Each section A through H below must be included in the narrative. If not applicable, do not skip the section. Instead, list the section header and indicate N/A below it before proceeding to the next section. Proposals that exceed any stated page limits will not be eligible for review.

**A. Objections to Terms and Conditions** (*Not counted toward page limit*)

If the applicant organization objects to any of the terms and conditions listed in [Appendix A](#) they must be listed in section A.

**B. Applicant's Tobacco-free Policy**, which has been adopted and implemented, must be included in its entirety. (*Not counted toward page limit*)

**C. Applicant Organization's Background and Qualifications** (*three pages max*)

The TSET Board of Directors seeks a proposal for a program that will successfully serve the state of Oklahoma effectively and efficiently, taking into consideration the unique political, geographic, and population features of the state. As such, the applicant should clearly identify previous experience working in Oklahoma, if applicable, and should provide information to show that this program would take into consideration the unique populations and characteristics of Oklahoma.

If a national program or model will be utilized, please clearly demonstrate how it can be tailored to meet the unique needs of Oklahoma. This section should provide a concise summary of the applicant's relevant background and qualification as they pertain to the proposed work. Provide a brief history of the agency including mission and philosophy, form of organization, location of offices, and a list of your present directors or partners. Discuss relevant statewide experience working with grades three through eight.

**D. Applicant's Approach to Youth Character Development** (*seven pages max*)

The proposal should specify the applicant's plan and approach for meeting the objectives of the contract. **The focus of this section should be on plans for planning, coordination, and implementation of this program, not on previous experience.** The response should include the following:

- specifically, how the requirements described in the Scope of Work and Program Deliverables sections will be met;
- prior evaluation results indicating success with the target population using the proposed approach;
- specific examples of how the unique characteristics of and environment in Oklahoma will be addressed;
- specific geographic service areas where the program(s) will be implemented; and
- plan to engage a large number of children and youth over the course of the funding agreement.

The applicant must also describe the proposed curricula or program to be implemented, including the following details:

- Evidence Rating (effective, evidence-based, promising, no rating, etc.)
- Program Summary
- Target Population
- Program Goals
- Summary of Evaluation Outcomes
- Applicant's Years of Experience Implementing Proposed Curricula

The proposed curriculum and associated instruction materials for should be included in the appendix for TSET approval.

A work plan should also be included in the appendix, detailing by whom, when, with what, why, where, to what degree, etc., the requirements will be satisfied as well as listing any limitations or

constraints pertaining to the product(s), service(s), capabilities, and other offerings.

Include a timeline chart for each year of funding, including a schedule of deliverables. In the work plan concisely identify and describe each element of program development and each implementation task, detailing whether the applicant or a subcontractor will complete the task. Include the names of these subcontractors and provide a description of their responsibilities and budgets. Award of the contract to applicant does not imply approval of proposed subcontractors.

The timeline, work plan, and curriculum and instructional materials should be included in the appendices and do not count toward to the seven-page maximum for this section.

**E. Project Management and Staffing** (*three pages max*)

The Bidder shall include a section in its proposal that details the proposed program organization and staffing. This shall include organization charts showing all proposed personnel by job title and lines of supervision. The respondent's proposal shall identify key personnel as required in the RFP as well as all staff proposed (including proposed subcontractors) to meet the requirements of the RFP. Provide details of their intended program management and program control methods. These should clearly explain how the applicant proposes to manage the program, control program activities, report progress, how the program will be staffed, relate and report to TSET, respond to requests by TSET, and interact and coordinate with other involved parties. Describe the capabilities and relevant experience of key staff and any major subcontractors who will be involved in the contract. List the names of staff to be assigned to this program with a description of their role and responsibilities, the percentage of time they would be committed to this program, their qualifications, and experience working with the public sector. Include clear and concise job descriptions and resumes. Each resume should be no more than two pages long and included as the first appendix in your response.

**F. Evaluation and Outcomes** (*three pages max*)

Briefly describe the applicant agency's experience in evaluating programs as part of a standard operating procedure. The applicant must propose an evaluation plan for TSET review and, if deemed necessary by TSET, participate in any mandatory evaluation activities, including the submission of prescribed reports and other various types of information requested by TSET or TSET-funded external evaluators. The evaluation plan must include how changes in student knowledge, behaviors and/or attitudes will be evaluated annually, and explain how the metrics in the Youth Initiative Metrics section will be addressed. If deemed necessary by TSET, the applicant must agree to work collaboratively with an assigned external evaluator in meeting the evaluation plan requirements.

**G. Appendices** (*no page limit*)

Include staff resumes, references, subcontractor agreements, and other appendices as necessary. Required appendices include:

1. Program work plan
2. Program timeline
3. Curriculum and instructional materials

**H. Additional Required Forms**

In addition to the Cover Page ([Attachment A](#)) included as the first page of the proposal submission and the Budget form ([Attachment D](#)) included as a separate document, the following TSET-provided forms must be submitted:

1. Non-acceptance of Tobacco Funds Form ([Attachment B](#))
2. Worker's Compensation Form ([Attachment C](#)), including an explanation of exemption from Oklahoma sales tax laws or rules, exemption from registration with the Oklahoma Secretary of State, and/or exemption from the Oklahoma Worker's Comp Act as required by the Responding Bidder Information Cover Page. If exemption from the Oklahoma Worker's Comp Act is not requested, then a copy of the applicant's certificate of insurance must be included.

**Proposed Budget** (*uploaded as a separate Excel document, [Attachment D](#)*)

Prepare a budget that details the expenses expected for TSET to incur over each year of funding. The initial six-month budget must include a full budget justification, while each subsequent year of funding requires a summary budget estimate. Budgets are approved for one year at a time and although budget requests are required for each year of funding in the proposal, funding for years after FY23 (ending June 30, 2023) will be reviewed, negotiated, and approved on an annual basis.

Budgets that exceed \$1 million annually cannot be considered. Up to 10% of the total annual budget may be allocated for administrative costs and must be clearly identified in the submitted budget/price list. The purpose of this funding opportunity is to make an award to an organization that already has a youth character development curriculum in place and not to fund the development of new curriculum. Accordingly, the focus of the budget should be placed on costs necessary to implement the curriculum in 35-50 sites across Oklahoma.

In accordance with Title 74, Section 85.40 all Vendor (once awarded, the applicant will become the "Contractor" or "Vendor") travel expenses to be incurred by the Vendor that are part of a service contract shall be included in the total price proposal. The Vendor shall pay for all travel-related expenses incurred by their staff in meetings with or on behalf of TSET at any location within the state of Oklahoma. It is anticipated that there will be routine meetings/presentations, most of which will take place in Oklahoma City. The Vendor will not be reimbursed for such travel.

Costs for preparing a response to this solicitation are solely the responsibility of the applicant. TSET will provide no reimbursement for such costs. Any costs associated with presentations to TSET will be the responsibility of the applicant and will not be billed to TSET. See [Appendix C](#) for guidance regarding preparing your TSET budget request.

**Proposal Submission**

Applications must be submitted via Smartsheet before **4 p.m. Central Time (CT) on September 19, 2022**. The submission form link will be sent by TSET Grants Management to eligible potential applicants upon approval of a comprehensive tobacco-free policy. **Proposals submitted without approval of a comprehensive tobacco-free policy will not be eligible for review.**

Applicants must upload all documents in a single submission no later than 4 p.m. CT on September 19, 2022. Proposals submitted by mail, hand delivery, fax, email, or other non-authorized means will not be accepted.



No additional documentation or information may be submitted after the deadline. However, if, after submission but before the deadline, an applicant realizes a mistake in or omission from their proposal, the applicant may notify TSET in writing of the desire to withdraw the submitted application. An email stating the intent to withdraw a submitted application must be sent to the TSET Director of Grants Management at [tessan@tset.ok.gov](mailto:tessan@tset.ok.gov). The previous submission will then be removed from funding consideration and the applicant may resubmit the entire application package if the submission deadline has not passed. Resubmissions must be received before 4 p.m. on September 19, 2022.

Applicants are encouraged to submit their proposals well ahead of the deadline as technical support cannot be guaranteed close to the deadline and TSET will not be held responsible for submission-related issues outside of the agency’s control.

**Proposal Review**

*Review Process*

Each proposal submitted for funding consideration will be reviewed for adherence to the basic requirements listed in these guidelines. Applicant organizations who have not met the eligibility or proposal requirements will not be eligible for funding consideration. It is the applicant’s responsibility to ensure adherence to all eligibility and application requirements. **Proposals submitted without a document indicated in these guidelines as required may be ineligible for funding consideration.** Proposals that are ineligible for review shall be notified after the TSET Board of Directors meets to make funding decisions.

All eligible proposals will be presented to the TSET Board of Directors for funding consideration. As only one award will be made per service area, if multiple proposals are received for a service area the proposal that scores the highest will be eligible for funding consideration, provided the proposal meets the minimum score requirement. Applicants are advised that TSET may receive more proposals than this program can support.

*Review Criteria*

Eligible proposals will next be reviewed to determine how well the proposal meets the established criteria included in this guide. Eligible proposals shall undergo further review in accordance with the criteria below. Proposals will be scored in the following areas: applicant organization background and qualifications, approach to youth character development, project management and staffing, evaluation and outcomes, and appropriateness of the budget. **Applicants should ensure that they answer every question below in each section as they prepare their proposal.**

Criterion	Application Section(s) Used for Evaluation	Points Scale
<p><b>A. Organization’s Background and Qualifications</b></p> <ol style="list-style-type: none"> <li>1. <i>Are the organization’s mission, portfolio of services and geographic service area aligned with the proposed work in the application?</i></li> <li>2. <i>To what extent does the applicant organization have a history of successfully operating/implementing statewide services and/or programs that align with the proposed</i></li> </ol>	<p>Proposal section C</p>	<p>0-3 points per question</p>

<p><i>work and population of focus (grades three through eight)?</i></p> <p>3. <i>Does the applicant organization describe any currently operating services and programs that are <b>directly</b> related to the proposed work?</i></p>		
<p><b>B. Applicant’s Approach to Youth Character Development</b></p> <p>1. <i>To what extent does the proposed overall approach address the scope of work and program deliverables required?</i></p> <p>2. <i>To what extent do the submitted curriculum and associated education and instruction materials align with the scope of work and program deliverables required?</i></p> <p>3. <i>How well does the work plan meet the requirements stated in the RFP?</i></p> <p>4. <i>How well does the applicant address the unique characteristics of and environment in Oklahoma?</i></p> <p>5. <i>How well does the applicant identify the problems and needs of the children and youth population to be addressed by the proposed program?</i></p> <p>6. <i>How well does the applicant describe their plan to engage a large number of children and youth to be part of the proposed program over the course of the funding agreement?</i></p> <p>7. <i>Does the applicant clearly delineate the proposed service areas to be engaged across Oklahoma?</i></p>	<p>Proposal section D</p>	<p>0-3 points per question</p>
<p><b>C. Project Management and Staffing</b></p> <p>1. <i>How well does the proposed staffing structure align with the proposed program? (Consider the organization chart, staff's chain of command and any subcontractors (if applicable) that may be needed to help support the work).</i></p> <p>2. <i>To what extent does the applicant address how the program will manage and control program activities, report progress, how the program relates and reports to TSET, responds to requests by TSET, and interacts and coordinates with other involved parties, such as subcontractors?</i></p>	<p>Proposal section E</p>	<p>0-3 points per question</p>

<p>3. <i>How well does the applicant clearly demonstrate organizational and staffing readiness for the proposed program? (Describes the capabilities and relevant experience of key staff and any major subcontractors to be involved. List the names of staff (including subcontractors, if applicable) to be assigned to this program with a description of their role and responsibilities, the percentage of time they would be committed to this program, their qualifications, and experience in working with the public sector. Includes clear and concise job descriptions and resumes.</i></p>		
<p><b>E. Evaluation and Outcomes</b></p> <ol style="list-style-type: none"> <li>1. <i>Is program evaluation part of the organization's standard operating procedures?</i></li> <li>2. <i>Does the application describe a clear plan for programmatic evaluation inclusive of metrics to be achieved and how changes in student knowledge, behavior and/or attitudes will be measured as a result of the program?</i></li> <li>3. <i>Is there a reasonable plan for obtaining evaluation data?</i></li> <li>4. <i>Are the outcomes expected meaningful, affecting positive change for the population(s) and/or service area proposed?</i></li> <li>5. <i>Does the plan indicate how the evaluation results will be used and reported to TSET?</i></li> </ol>	<p>Proposal section F</p>	<p>0-3 points per question</p>
<p><b>F. Proposed Budget</b></p> <ol style="list-style-type: none"> <li>1. <i>Is the budget complete and accurate?</i></li> <li>2. <i>Is there a direct relationship between the amount of funds requested and the proposed work?</i></li> </ol>	<p>Budget Document</p>	<p>0-3 points per question</p>
<p><b>Maximum Points Possible:</b></p>		<p><b>60 points</b></p>

## Awards

TSET anticipates making one award to a single applicant under this funding opportunity. All awards are made at the sole discretion of the TSET Board of Directors and are subject to the availability of funds.

Typically, award decisions are made during a [meeting of the TSET Board of Directors](#), which are open to the public. All applicants will receive email notification of the TSET Board of Directors' funding decisions within two business days of the decision. Awarded applicants will then work with TSET to develop a cooperative agreement. The agreement must be fully executed by both parties prior to the performance

of any work under the grant.

## Post-Award Processes

### *Discussions and Negotiations*

TSET will review each proposal based on the documents submitted but may engage the awardee in negotiations of the work plan and/or budget prior to issuing a cooperative agreement. Negotiations may be conducted in writing, by phone, or by virtual meeting. Terms, conditions, budgets, methodology, or other features of the applicant's proposal may be subject to negotiation and subsequent revision. The mandatory requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless TSET determines that a change in such requirements is in the best interest of the State of Oklahoma.

### *Cooperative Agreement and Terms and Conditions*

Upon award, a cooperative agreement will be developed between TSET and the awarded grantee. This guide, all documents included in the grantee's proposal, any negotiated revisions to the proposal, and an agreed upon set of terms and conditions shall comprise the cooperative agreement. It is the sole responsibility of the awarded grantee to review the agreement's terms and conditions prior to signing the agreement. Awarded organizations will be expected to return all required cooperative agreements to TSET within two weeks of receipt of the agreement for signature.

### *Vendor Registration*

The awarded grantee must complete the State of Oklahoma's vendor registration process upon notification of award. TSET will inform the awarded grantee of the requirements of that process upon notification of award.

### *Electronic Funds Transfer Registration*

The State of Oklahoma requires that vendors receive payments via electronic funds transfer (EFT). The Office of Management and Enterprise Services (OMES) will instruct the awarded applicant on the appropriate steps to take to ensure registration for EFT payments.

## Payments

Payments are made on a cost reimbursement basis. Items are billed to TSET based on the actual cost for the good or service and only after the awarded grantee has received and paid for the good or service. Only costs incurred for work completed during an active contract period are eligible for reimbursement work; work conducted outside of the dates of the cooperative agreement cannot be reimbursed.

Claims for reimbursement must be submitted to TSET monthly. Monthly claims are due by the 30<sup>th</sup> day of the following month during which costs were incurred. Failure to submit monthly claims for reimbursement within 30 days of the end of the month may result in a reduction of funding or termination of the grant agreement.

## Reporting

At a minimum, awarded grantees will submit to TSET an annual report to include project, financial, and evaluation information. Additional information may be required and will be requested on a case-by-case basis. Grantees may be required to submit all program and evaluation reports provided to or from other funding sources.

## Required Activities to Support TSET State Goals

Throughout the project period, the funding recipient will be expected to actively engage with local public officials to promote the TSET mission. During the project, funding recipient may be asked to support other TSET initiatives and programs that align with strategic goals for improving health. Additional guidance on how to support and collaborate will be provided at the appropriate time to ensure consistent implementation.

## Project Evaluation

Awarded grantees must participate in all mandatory evaluation activities, including the submission of prescribed reports and other types of relevant information requested by TSET or TSET-funded contractors, and must work collaboratively with the assigned external evaluator in meeting the evaluation plan requirements. Evaluation of the project will be conducted annually.

## Publicity

During the grant period, TSET will periodically work with the grantee to issue press releases, op-eds, social media posts, and other communications regarding the TSET-funded project. Should the grantee wish to publicize its own work, the grantee shall not publish any comments or quotes from TSET employees or include TSET in either news releases or a published list of customers without the prior written approval of TSET. Any promotional or media materials created for the program or services provided herein, including, but not limited to, award submissions, notices, informational pamphlets, press releases, research, reports, signs, and similar public notices prepared by or for the grantee, shall identify TSET as the sponsor and shall not be released prior to receiving written approval by TSET.


## Release of Information

Pursuant to Title 62 O.S. § 2309(D)(4), any application, proposal, bid, or any other document to obtain funding responsive to any solicitation of the Board of Directors under grant programs developed under this subsection shall be confidential until the date and time of award of the grant or contract, at which point all such documents and information shall be subject to the Oklahoma Open Records Act and Oklahoma Open Meeting Act.

## Questions

Questions about this funding opportunity must be submitted in writing via the TSET website at <https://tset.ok.gov/content/other-funding-opportunities>. Technical assistance questions—including accessing forms—may be submitted directly to [grantsmanagement@tset.ok.gov](mailto:grantsmanagement@tset.ok.gov).

## Appendices and Attachments

Appendices and attachment forms provided in this RFP are listed below and can be accessed by clicking the paperclip icon  on the left navigation pane in Adobe. If you cannot see a paperclip icon in Adobe please ensure that you have fully downloaded this guide and have opened it from your desktop rather than from within your internet browser.

Appendices:

- A. [Terms and Conditions](#)

- B. [Policy Samples](#)
- C. [Budget Tips and Tools](#)

Attachments:

- A. [Cover Sheet](#)
- B. [Non-acceptance of Tobacco Funds form](#)
- C. [Worker's Comp form](#)
- D. [Budget](#)