



## SOLICITATION ADDENDUM

Solicitation Number: RFQu-22-EDU/BWDD-70, Addendum #1  
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Offer Due Date: December 2, 2022 at 3:00 p.m. Phoenix Local Time

CITY OF PHOENIX  
Human Services Department  
Procurement Section  
200 W. Washington Street  
18th Floor  
Phoenix, AZ 85003-1611

### Financial Literacy Training and Coaching

The following questions were submitted:

Question	Answer
1. Does our organization need to be authorized training provider for WIOA in Arizona?	No.
2. Regarding training delivery method – Is it up to the Organization? (In-Person, Virtual, or Hybrid Training Sessions).	Each Division requesting the services will determine the delivery method based on the needs and availability of their program staff. It could be any of the 3 methods mentioned.  We would like the opportunity to leave this open to ensure we are offering what is best for our participants.
3. What are the minimum number of hours required for each of the courses requested ?	<b><u>Education Division</u></b> The Education Division would like training to be at least one hour.  <b><u>Business &amp; Workforce Development Division</u></b> To be determined based on proposals. Vendor must submit a schedule and courses offered and time related to specified training.
4. How many firms will be selected? The request states award(s) but wanted to better understand if the goal is multiple awards, or one award.	The goal is multiple awards to create a Qualified Vendors List of trainers and coaches.
5. The qualifications of consultant section states that the consultant will possess "professional Financial Coach Certification". There are many certifications in the field, could you elaborate on acceptable credentials? I hold a PhD and Master's degree in Personal Financial Planning, and Graduate Certificate in Financial and Housing Counseling and wanted to understand if these credentials are acceptable.	Vendor should provide professional certifications that align with the financial literacy they are presenting. They need to have experience within the field of training they are proposing to provide.  We will accept an Education Degree or Certification in Financial Coaching/Training. Your credentials are acceptable.
6. What financial certificate(s) is acceptable?	See the response to question 5.



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7. Is the City open to a collaborative approach?	We would need more information on what type of collaborative approach you are suggesting.
8. Will the City select only one vendor?	Refer to the response to Question 4.
9. Is there a budget for the RFQ?	This is a Request for Qualifications. Price is not a determining factor.
10. Who is the current vendor?	This is a new service. No current vendor.
11. May we receive a link the Head Start Centers?	We will not be giving links to our Head Start Centers. Training would be on a referral basis.
12. Is there on-site technology available for learning?	<b><u>Education Division</u></b> It depends on what type of on-site technology you are inquiring about. <b><u>Business &amp; Workforce Development Division</u></b> No. Vendor must provide.
13. Potentially yes, depending on the area needing the training.	<b><u>Education Division</u></b> Potentially yes, depending on the area needing the training. <b><u>Business &amp; Workforce Development Division</u></b> No. Vendor must provide.
14. If we have content which covers the subject but not the same title, is it acceptable for use?	Yes, as long as the focus is financial coaching and/or training.
15. Will only one vendor be selected?	Refer to the response to Question 4.
16. There are two divisions with a certain number of families from each. Should we assume one family member from each would attend the training or there could be more. How many members from each family are expected to participate in the session?	<b><u>Education Division</u></b> Our training will be open to all of our enrolled families. We are still determining how many will be interested in attending. There could be more than just one family member from our enrolled household interested in attending. <b><u>Business &amp; Workforce Development Division</u></b> Depending on need, up to 3 individuals per family.



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The balance of the specifications and instructions remain the same. Offeror must acknowledge receipt and acceptance of this addendum by **signing** and **returning** the entire addendum with their offer submittal.

Name of Organization: \_\_\_\_\_

Address: \_\_\_\_\_

Authorized Signature: \_\_\_\_\_

Print Name and Title: \_\_\_\_\_