

Sourcing Event ID 000008693
Questions and Answers
OFE Financial Counseling 2024-2029
Q&A Posted 10/20/2023

	Question	Answer
1	We use our attorney staff to provide financial coaching services who are licensed to practice law in California but do not have the coaching certification the RFP requires. Can we still apply?	Yes, we encourage organizations with existing financial counseling services to apply. Once contracted, organizations need to ensure each financial counselor completes the Financial Counselor Certification through the National Association of Certified Credit Counselors (NACCC) prior to working with their own clients.
2	What types of certification do counselors need? I see NACCC offers different certifications. Please kindly provide guidance.	Organizations will need to ensure that each financial counselor is a Certified Financial Counselor through the National Association of Certified Credit Counselors (NACCC), meaning that each financial counselor must complete the Financial Counselor Certification through NACCC, prior to working with their own clients.
3	We looked through the RFP but did not see the explanation of the budget and what percentage and item we can include in the budget plan. Below is some of the budget items we would like to confirm: <ul style="list-style-type: none"> • HR & Finance cost (benefit, PTO, FMLA, sick leave, payroll, EAP, etc.) • Computer and related equipment expenses, including any license software licensing • Office Space (since some of the clients might be from our training program) • Outreach/Advertising expenses. 	Overhead costs, including those listed in your question, should be calculated into the hourly base rate that you submit with your proposal.

	<ul style="list-style-type: none">• Management support – Coaching and development, Monitoring, Manager take over, etc.	
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