**Sourcing Event: 0000008693**

**Attachment 4**

**Minimum Qualifications**

|  |  |  |
| --- | --- | --- |
| **Description** | **Yes** | **No** |
| 1. A minimum of three (3) years of delivering financial education, one-on-one financial counseling, or similar or related service, particularly to those from BIPOC, low-income and at-risk communities inequitable economic opportunity and successfully supporting them to resolve financial barriers and achieve positive financial outcomes |  |  |
| 1. Agreement to use data tracking and reporting system as required by the City to track, manage and report on critical data points for each client. |  |  |
| 1. Ability to provide financial counseling both virtually and in-person, with Bay Area-based staff available as needed for in-person outreach and financial counseling. No physical office is required and Bay Area-based staff may be Proposer’s staff or subcontracted. |  |  |
| 1. Current certified vendor or the ability to become a certified vendor with the City and County of San Francisco within thirty (30) days of notice of award. |  |  |