



GOVERNMENT OF PUERTO RICO
PUERTO RICO FISCAL AGENCY AND FINANCIAL ADVISORY AUTHORITY

REQUEST FOR PROPOSALS

seeking

21ST CENTURY TECHNICAL AND BUSINESS EDUCATION FUND GRANT ADMINISTRATOR SERVICES

for

**The Puerto Rico Fiscal Agency and
Financial Advisory Authority**

RFP Deadline: May 17th, 2021

www.aafaf.pr.gov

April 21, 2021

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REQUEST FOR PROPOSALS

The Puerto Rico Fiscal Agency and Financial Advisory Authority (“AAFAF”) is seeking proposals from duly qualified firms to assist AAFAF and the Government of Puerto Rico (“Government”; together with AAFAF, the “Government Entities”) to provide professional services (the “Services” or “Grant Administrator Services and the Technical Assessment and Educational Services”), as further defined in Section 1.3 of this request for proposals (“RFP”).

This RFP seeks responses from firms capable of providing and delivering Grant Administrator Services and the Technical Assessment and Educational Services as described in this RFP, (“Proponents”) Proponents should demonstrate their capacity to complete the required tasks and develop a productive relationship with the Government Entities and the relevant stakeholders.

This RFP does not commit nor obligate the Government Entities to award a contract nor to pay any costs incurred in the preparation of a proposal in response to this request. The Government Entities reserve the right to award contracts to more than one qualified firm, to accept or reject any or all proposals received as a result of this RFP, to negotiate with any qualified firm or to modify or cancel the RFP in part or in its entirety. See Section 8.1 for further disclaimers and reservation of rights by the Government Entities.

The Proponent selected under this RFP (the “Selected Proponent”) shall be required to be free of any real or perceived conflict of interest.

RFP Due Date: May 17th, 2021

Please submit one (1) electronic copy to the following address:

Electronic copies via email

rfp@aafaf.pr.gov

Please refrain from submitting general marketing materials that do not explicitly respond to the content and questions contained in this RFP



1 INTRODUCTION

1.1 Puerto Rico Fiscal Agency and Financial Advisory Authority

AAFAF is an independent public corporation and governmental instrumentality with separate legal existence, fiscal and administrative autonomy, and independence from the Government. Pursuant to Act No. 2 of 2017 (the “Organic Act”), AAFAF was created, among other things, to act as fiscal agent, financial advisor and reporting agent of the Government, its agencies, instrumentalities, subdivisions, public corporations and/or municipalities, including Covered Entities as defined under the Puerto Rico Oversight, Management and Economic Stability Act of 2016, Public Law No. 114-187, 130 Stat. 549 (“PROMESA”), and to assist said entities in confronting the grave fiscal and economic emergency that Puerto Rico is currently experiencing. AAFAF has assumed the majority of the fiscal agency and financial advisory responsibilities previously performed by the Government Development Bank for Puerto Rico.

In light of the Organic Act, AAFAF is the agency responsible for coordinating the Government’s sustainable use of resources, while presenting a global and coordinated view of the Government’s capital needs. As such, AAFAF has authority to monitor compliance with the budget certifications approved under PROMESA and to review matters such as, but not limited to, contracts, transactions and regulations of agencies and instrumentalities of the Government. The Organic Act authorizes AAFAF to enter into professional service agreements that are necessary or convenient to assist in the proper execution of its ministerial duties.

1.2 Certified Fiscal Plan and Budget

PROMESA was enacted, among other things, to provide a mechanism to manage the Government’s - and certain other public corporations and instrumentalities considered as Covered Entities thereunder - revenues and expenditures, and to restructure their respective obligations. For these purposes, PROMESA established the Financial Oversight and Management Board for Puerto Rico (“FOMB”), as further defined herein.

PROMESA established a procedure for the Government and/or Covered Entities to develop and submit to the FOMB a fiscal plan and budget for certain fiscal year(s), for the FOMB’s review, comments, approval and certification; for certification purposes, subsequently the FOMB may proceed within the purviews of PROMESA. Once a fiscal plan and budget are certified, PROMESA also provides procedures to monitor compliance accordingly. On May 27, 2020, the FOMB certified the Government’s fiscal plan for Fiscal Year 2020-2021; subsequently, on June 30, 2020, the corresponding budget for Fiscal Year 2020-2021 was certified (collectively referred to as the “Certified Fiscal Plan & Budget” or the “Fiscal Plan”).

As custodian of the Fiscal Plan, FOMB is tasked with providing oversight and support for key measures under the Fiscal Plan, including the 21st Century Technical and Business Education Fund defined in Section 1.3.

1.3 21st Century Technical and Business Education Fund

The Fiscal Plan included several multi-year strategic investment programs “to improve government services, increase competitiveness, and create the conditions for growth that can benefit all residents”. In total, the Fiscal Plan proposed investing \$5.5bn over five years in healthcare, public safety, education, manufacturing and technology programs.



Amongst these programs, the Fiscal Plan allocated \$50m (the “21st century Technical and Business Education Fund” or the “Fund”), to provide education in technical and business skills through a grant program (“Education Grant Program” or the “Grant Program”) and ensure that residents benefit from better and more equal access to education. With this Fund and the Grant Program, the Government recognizes the importance of investing in people’s technical capabilities, such as digital skills to close technological core skill gaps and ensure that the people of Puerto Rico are able to compete and thrive in the global economy.

This Fund has become more significant with the onset of the COVID-19 pandemic and the resulting economic damage. Education in technical and business skills provides numerous socio-economic benefits to communities and individuals, including improving labor market outcomes and increasing business productivity.

The 2020 Fiscal Plan requires AAFAF to conduct a transparent, competitive procurement process as reviewed and approved by the FOMB to select an organization to serve as the administrator of the Grant Program (“Grant Administrator”). The Grant Administrator will be tasked with developing a plan for 21st century skills for the entire workforce pipeline in Puerto Rico, the plan will identify the priority technical and business areas/skills to focus on (“Skills Development Plan”). Scholarships would be made available for educational programs certified by the Grant Administrator, which would do so in alignment with the Skills Development Plan.

To support these efforts, the Grant Administrator must first establish a skills assessment that will create the supporting infrastructure for the scholarship program and put in place a regular monitoring and evaluation process. Furthermore, the Skills Development Plan will allow universities and private education providers to develop and open programs in anticipation of fees from scholars’ enrollment. Given the importance of online learning, the plan should also encourage programs to be offered in multiple formats, be it online, on campus, or a hybrid of the two.

The Government Parties will establish a committee (the “Grant Committee”), including the development of its rules, bylaws and procedures, which will oversee and provide guidance to the Grant Administrator as it relates to the Services and Grant Program, and will approve of any monies to be used to fund education programs (“Grants”) by selected grantees (“Grantee”). The Grant Committee members shall be designated following the same parameters as those for the Evaluation Committee, as further defined in Section 7.1.

It is critical to note there are other Government Entities and existing programs that address technical and business education program funding in Puerto Rico, such as the Puerto Rico Department of Education (“PRDE”), the Office of Career, Technical & Adult Education, and the Workforce Innovation and Opportunity Act (“WIOA”). PRDE, in line with the Carl D. Perkins Career and Technical Education Act of 2006 and The Strengthening Career and Technical Education for the 21st Century Act of 2018, will receive approximately \$19 million annually to ensure all students, who attend a high school or a technical institute, have access to high-quality career and technical education (“CTE”) programs of study, which are fully aligned with its economic and workforce priorities. Puerto Rico also receives approximately \$2.4 million from WIOA, which is a demand driven workforce development system designed to make United States workers more competitive in the 21st century. The WIOA Act is much broader in its workforce development scope, addressing all in demand skills with technical and business education skills just one component of the plan.



2 DESCRIPTION OF THE ENGAGEMENT

2.1 Description of Proposed Contracting Opportunity

AAFAF intends, through this procurement, to enter into a Grant Administration Agreement (“GAA”), which will result in best-value completion of all the elements of the project.

The GAA will set forth the terms of the Grant Administrator compensation, which shall not exceed \$500,000, unless additional consideration is proposed by the Selected Proponent and approved by the Government Parties and FOMB. It is expected that the payment mechanism will be based on time and material fees, themselves based on actual cost of resources and expenses, which should be described in the Financial Proposal. Accordingly, cost will not be a factor in the evaluation criteria, but (i) the Proponent’s budget breakdown will be evaluated for its reasonableness as it relates to the Proponent’s Technical Approach; and (ii) the Proponent’s rates and budget will be approved upon execution of the GAA. Upon detailed evaluation of technical proposals by the Evaluation Committee, the Government Parties shall select one firm, the Selected Proponent, for contract negotiations, including final approval of the Proponent’s rates and budget (as described in Proponent’s Section B of the Financial Proposal). The funding provided under the GAA shall be used to fund the costs of the contract between AAFAF and the Selected Proponent to perform the Scope of Work, including procurement and retention of any additional professional services required to perform the Scope of Work.

The Proponent understands and acknowledges that the GAA, or any amendment to the GAA shall be approved by FOMB.

2.2 Further Contract Conditions

The contents of the proposal prepared by the Selected Proponent, with any amendment approved by AAFAF, will become part of the GAA, which will be executed with such Proponent as a result of this RFP process and is subject to FOMB’s review and approval.

The final GAA will include clauses required when contracting for similar services to those procured under this RFP and those included in contracts with the Government, such as contractual provisions requiring:

- Original certifications evidencing that the Proponent has complied with its responsibility in the filing of tax returns and payment of its taxes, including sale and use tax as applicable, to the Commonwealth of Puerto Rico, to the Federal Government, and to the state or jurisdiction where its base of operations resides.
- Commercial Registration Certification issued by the Department of Treasury.
- Certification of Compliance issued by the Child Support Administration (“ASUME”). Corporations must file their request for said certification with the Employer Unit of ASUME. The same indicates that the employer complies with the orders issued in its name as employer to retain the salary of employees as a result of amounts owed for child support.
- Sworn statement, signed by the Proponent’s president or chief executive authorized to represent the Proponent, indicating that the Proponent, its subsidiaries, affiliates and/or parent companies, and their respective shareholders, directors, partners, officers, executives, or principals have not been convicted, probable cause for arrest has not been found against any of them, nor are they being investigated under any administrative, judicial or legislative procedure, whether within or outside of Puerto Rico, as a result of any crime constituting fraud, embezzlement or



misappropriation of public funds, as provided in Act No. 2 of January 4, 2018, as amended, or any other legal provision penalizing crimes against the treasury and the public trust, and that the person signing the statement has not been investigated, arrested, convicted, or found guilty or sentenced as a result of said criminal conduct.

- Certification of Employer Registration and of Debt with Respect of Unemployment Insurance and Disability Insurance issued by the Workplace Safety Bureau, Tax Division, Collection Unit of the Department of Labor and Human Resources. The same shall indicate that the Proponent does not have a debt with the Disability Insurance and Unemployment Insurance Programs. If the Proponent is not an employer, it shall indicate that the person is not registered as an employer and therefore does not have any debt.
- Certification of Employer Registration and of Debt in Respect of Driver's Insurance issued by the Persons with Non-Occupational Disabilities and Driver's Insurance Bureau of the Department of Labor and Human Resources. The same shall indicate that the Proponent does not have a debt with the Non-Occupational Disability Insurance and Driver's Insurance Programs. If the Proponent is not an employer, it shall indicate that the Proponent is not registered as an employer and therefore does not have any debt.
- No debt Certification and copy of current policy issued by the State Insurance Fund.
- Certification of Existence or Certification of Authorization to do business in Puerto Rico. The Certification of Existence indicates that the applicant is incorporated under the laws of Puerto Rico and is issued by Puerto Rico's State Department. The Certification of authorization to do business in Puerto Rico applies to foreign companies. It indicates that the applicant is authorized to do business in Puerto Rico and is issued by the Puerto Rico State Department. The certification indicates the date of issuance and authorization to do business in Puerto Rico.
- The Proponent agrees to maintain books, records and other documents relating to the GAA and any grantee contracts adequate to demonstrate implementation of its responsibilities under the GAA, including the selection of grantees, receipt and approval of grantee reporting requirements and approval or disapproval of grantee disbursements. Such books, records and other documents shall be separately maintained for a period of three (3) years after the date of the close of the GAA term. The Proponent shall afford AAFAF and FOMB or its authorized representatives the opportunity at reasonable times to review such books, records and other documents relating to the GAA, grantee contracts, and grantee monitoring.

All certifications, including those of all Team Members, must be current, that is, issued within thirty (30) days from the date the Selected Proponent executes the contract with the Government Entities. The Proponent can be composed of a Lead Team Member (as defined in Section 5.1.1) and one or more Team Members (as defined herein). In areas where the Lead Team Member does not currently have the in-house capacity to carry out the Scope of Work as detailed in the following sub-section, it is understood that the Lead Team Member, will either team with other firms, subcontract other firms or persons, and/or retain professional services (e.g. legal, technical, or financial advisors; collectively the "Team Members") as required to fulfill the Scope of Work.

The Selected Proponent will be contractually required to abide the laws of Puerto Rico as governing laws under the agreement. The courts of Puerto Rico shall have exclusive jurisdiction over any controversy arising under this agreement.

The Government Entities shall reserve the right to terminate any contract entered into as a result of this RFP at any time, provided that written notice has been given at least thirty (30) days prior to such proposed termination date.



Furthermore, the Selected Proponent shall:

- Work with the Government Entities and any other personnel on all matters that may arise in connection with the engagement as per the terms of this RFP and the contract to be executed between the parties;
- Assume sole responsibility for the complete effort required to provide the services;
- Refrain from assigning, transferring, conveying, or otherwise disposing of the contract, or its rights, titles or interest therein, or its power to execute such agreement, to any other person, firm, partnership, company or corporation without the prior consent and approval in writing of the Government Entities; and
- Comply with applicable federal, state, Commonwealth and foreign laws and regulations governing projects initiated or supported by the Government of Puerto Rico.
- The term of the GAA will be for three years since the execution date, with the possibility of two 1-year extensions. The Grant Administrator, or any successor entity, shall advise FOMB as to the status of the project at least one (1) time per year over the course of the contract (including any extensions) and for a period of three (3) years after completion of the Grant Administrator Services.

2.3 Scope of Work

The Government Entities seek proposals from organizations to provide Grant Administrator Services and the Technical Assessment and Educational Services (the “Services”). The Services shall include, but are not limited to, the following two key areas:

- Skills Assessment and Development Planning
- Grant Administration

2.3.1 Skills Assessment and Development Planning

- Conduct an assessment of the workforce of Puerto Rico and analyze real time labor-market information to identify and prioritize industry-recognized, high-demand, high-wage, high-growth technical and business skills to help the Puerto Rico workforce compete in the global economy and align with future workforce needs (the “Skills Assessment”).
- Guided by the findings and goals from the Skills Assessment, identify the priority technical and business areas/skills to focus on and develop a plan that will strengthen these skills for the entire workforce pipeline in Puerto Rico (“Skills Development Plan”).
- Develop the Skills Development Plan for the workforce of Puerto Rico to close the skills gaps as determined by the Skills Assessment report for business, technical, and/or digital skills including but not limited to (i) Artificial Intelligence, (ii) Machine Learning, (iii) Blockchain, (iv) Internet of Things, (v) Robotics Process Automation, (vi) Cyber Security, (viii) Coding and Programming, (ix) Cloud Infrastructure, (x) Server Administration, (xi) Web Design, (xii) Business Intelligence, (xiii) Bioscience Manufacturing, (xiv) Airplane Services and others.
- Include recommendations for goals of the Skills Development Plan and Grant Administrative Services, based on the Skills Assessment, no later than 90 days from commencement of said assessment to AAFAF for their review and alignment on the conclusions of the assessment and goals of future deliverables. Other parties that will be involved in reviewing and aligning of these



findings may include FOMB, Workforce Development stakeholders, PRDE, the University system of Puerto Rico and other interested parties.

- Milestone feedback and recommendations will be collected by AAFAF and submitted back to the Grant Administrator within 30 days of receipt of the Skills Assessment and Skills Development Plan. The organization will provide corrective actions based on the feedback received and recommendations made and will continue to work under the required timeline of this RFP.
- Publish the results of the Skills Assessment and the Skills Development Plan.

2.3.2 Grant Administration

- In collaboration with the Grant Committee, put in place a competitive process for the Grant Program; public and private organizations shall be able propose programs in the competitive process, which must be aligned with the Skills Development Plan.
- Develop marketing and outreach programs to (i) encourage public and private institutions to develop and open technical and business education programs in anticipation of fees from student enrollment, and (ii) attract students to pursue these programs in anticipation of free enrollment, through social media outlets, newspapers, websites, and other media outlets.
- Develop communication strategy for the Grant Program and implement communication plans for all stakeholders including but not limited to (i) implementing a help desk to support email and phone inquiries from relevant stakeholders, and (ii) developing a program to disseminate information to public and private institutions.
- Formulate and establish clear, standardized grant management procedures to ensure ongoing regulatory compliance, monitoring and performance management in accordance with the government parties' specific regulations. Procedures should include a robust monitoring and evaluation plan based on key performance indicators as well as a plan for non-compliance and should be appropriately structured to allow for milestone and/or service level-based disbursement.
- Develop a template contract for selected Grantees, specifying (as applicable) key terms including contract length, performance standards, construction and service rollout schedules, permitted ownership structure(s), competitive access requirements, regulatory compliance requirements, environmental controls, grant reporting and data sharing requirements, monitoring and oversight procedures, and hand-back provisions. Given that the finalized template contract will require FOMB approval, review, and approval from the FOMB should also be incorporated at this stage.
- Establish a process for receipt and evaluation of Grant applications, including both financial evaluation of proposed projects as well as non-financial evaluation based on alignment with established goals and evaluation criteria.
- Administer the Grant application process, including but not limited to: (i) registration procedures, (ii) establishment and administration of a centralized electronic data room of all applications, (iii) assistance in eligibility determinations and approval process, (iv) evaluation of Grant applications based on determined qualitative and quantitative metrics; (v) ensuring that Grant applicants are fully capable and qualified to perform the described work and have obtained all requisite licenses and permits to perform such obligations.
- Develop a performance-based disbursement plan and support the Government Parties in disbursing Grants to selected grantees pursuant to the Grant Committee's established guidelines and regulations applicable to the grant program, as well as any disbursement guidelines



established by the Grant Administrator. Disbursement of funds will be made only after FOMB approval of the GAA. Any work performed by the Grantees or any subcontractor in connection with the Grant Program prior to FOMB's approval of the contract will be at the Grantee's risk.

- Lead the contracting process for selected grantees based on the established template contract, including (i) finalizing technically sound and enforceable performance standards, (ii) finalizing realistic schedules for required rollout of grantee projects, including, as applicable, timing of milestone payments and binding performance targets for each phase, (iii) finalizing an integrated monitoring and disbursement regime to incentivize grantees to meet performance standards in accordance with the established schedule, (iv) acting as counterpart to grantee contracts, (v) leading contract negotiations, and (vi) establishing training and hand-off procedures for oversight, monitoring, and disbursement roles at the close of the Grant Administrator contract term.
- Conduct and coordinate ongoing monitoring of grantee projects to ensure contract and regulatory compliance, including levying of established penalties for non-compliance with construction and service milestones. Conduct handoff procedures for performance-based disbursement agreements as established in grant contracts, including, as necessary, technical training and legal transfer of oversight responsibility to the successor entity.
- Monitor ongoing grant reporting, data collection and other accountability measures to ensure that funded projects deliver the promised services (key performance indicators) as well as evaluate overall progress towards identified goals. The Grant Administrator, and any successor entities, shall advise FOMB as to the status of funded projects at least one (1) time per year after grantee selection is completed and for a period of at least three (3) years after completion of the grantee selection.
- Develop dashboards and/or reports illustrating key results and progress towards identified goals.
- Retain all records, documents, and communications of any kind (including electronic disk or print form) that relates in any manner to grant awards and project procurement and performance.
- Support the Government Parties in the establishment of Grant Administration closeout procedures and execute Grant Administration closeout.
- Any other incidental or related service(s) needed regarding the Grant Program, within the boundaries of the Scope of Work described herein.



3 DESCRIPTION OF THE PROCUREMENT PROCESS

3.1 Procurement Process

AAFAF reserves the right, in its sole discretion, to modify the following procurement process to comply with applicable law or to address the best interests of AAFAF and the Commonwealth of Puerto Rico, including canceling the procurement.

AAFAF will evaluate the proposals it receives in response to this RFP and will select, according to criteria generally outlined herein, the Selected Proponent.

3.2 Schedule

A summary schedule of the major activities associated with the procurement process is presented below, through the completion of this RFP process. The post-proposal schedule may vary from the schedule indicated below. In such case, Proponents shall be notified to their email of record.

Date	Activity
April 26, 2021**	Issue RFP
May 3, 2021**	Last date for submission of questions or requests for clarifications to the RFP
May 10, 2021**	Last addendum to RFP issued
May 17, 2021**	Proposals due to AAFAF
June 1, 2021**	Complete evaluation of Proposals and Issue notices to Selected Proponent

**Subject to change.

3.3 Communications Protocol

The Government Entities are committed to a fair, open process for interested parties to receive information about the competitive solicitation process. As such, communications shall be conducted in accordance with this RFP.

No interpretation or clarification of the meaning of any part of the RFP shall be made orally by the Government Entities to any potential Proponent. All questions and communications concerning this procurement process must be directed in writing to the Government Entities, via email (contact person and email address shown below), no later than the date specified in the RFP schedule.

All questions concerning this RFP should be directed **IN WRITING** to:

Puerto Rico Fiscal Agency and Financial Advisory Authority

Attention: Manuel J. González, Esq.

Fiscal Agency Director

manuel.gonzalez@aafaf.pr.gov



Where appropriate, responses to formal questions will be distributed by email to all Proponents on our record as having received a copy of this RFP. In each case, the Government Entities will determine whether a response is appropriate or necessary.

3.4 Conflicts of Interest

By submitting their respective proposals, Proponents acknowledge that in the event they are selected under this RFP, potential services rendered thereunder are to be provided exhibiting complete loyalty towards the government parties, including, but not limited to, having no adverse interest to the government parties.

Consequently, as part of the contracting process, the selected proponents shall certify that they are not currently aware of any relationship, which would create a conflict of interest with the government parties, or those parties in interest, according to the applicable government's contracting requirements.



4 PROPOSAL SUBMITTAL REQUIREMENTS

4.1 General

AAFAF expects proposals submitted in response to this RFP to provide enough information about the requested items to allow AAFAF to evaluate and competitively rank and select a preferred Proponent based on the criteria set forth herein. Except for original documents expressly required in a different language, proposals shall be submitted exclusively in the English language, inclusive of English units of measure and cost terms in United States of America dollar denominations.

4.2 Format

All proposals must meet the requirements stated in this RFP.

4.2.1 Digital Copy

Each responding Proponent shall submit digital copies of its Technical and Financial Proposals in two separate, searchable Adobe Acrobat PDF documents, bookmarked for ease of navigation. The Proponent's name must be clearly marked on the name of each file. The files shall be labeled, respectively "Education Grant Administrator [Name of Team] Proposal_Technical.pdf" and "Education Grant Administrator [Name of Team] Proposal_Financial.pdf".

None of the digital files shall contain any files other than the aforementioned files. Individual electronic files may not exceed 10 MB without prior AAFAF approval.

General Format Requirements

Proposals must be set up on 8-1/2" x 11" sized pages, 11" x 17" pages are allowed for schematics, maps, organizational charts, drawings, tables and schedules. However, narrative text cannot be included on such 11" x 17" pages, except for brief captions necessary to title or describe graphics. Any other narrative text included on an 11" x 17" page may be disregarded by AAFAF. Each 11" x 17" page will be counted as a single page. Printed lines may be single-spaced.

Forms shall not be modified other than to include requested information. If AAFAF issues any Addenda to the RFP that does not change a form except for noting the Addendum number and date in the footer, AAFAF will accept an earlier version of the form so long as the earlier version of the form submitted with the proposal is otherwise the most up-to-date version of the form.

The proposal shall have all pages numbered consecutively within each section, other than required forms which shall be individually numbered, including any 11" x 17" pages and must conform to the page limitations identified in this proposal.

The proposal must be presented in Arial (not Arial Narrow), 12-point font, including in diagrams, organizational charts and other such graphics.

Standard corporate brochures, awards, and marketing materials shall not be included in the proposal, and AAFAF does not commit to review any materials included in a proposal, which are not specifically required by the RFP.

4.3 Contents and Organization

Proponents must organize their proposal in the order set forth in Section 5. Each section may be subdivided as needed; dividers do not count as pages subject to page limitations noted herein, but content on any dividers will not be evaluated.



Figure 1. Proposal Organization

Section of Proposal		Maximum Number of Pages Allowed	Applicable Form	Firm or Person Responsible for Completing Form
TECHNICAL PROPOSAL				
Section A General	Transmittal Letter	N/A	Form-1	Proponent
	Executive Summary	3	NFP See section 5.1.2	Proponent
Section B Proponent Information	Proponent Information	N/A	Form-2	Proponent
	Proponent Team Members Information	N/A	Form-2	Proponent, Team Members
Section C Certification and Legal Qualifications	Non-Collusion Affidavit	N/A	Appendix I	Proponent, Team Members
	Eligibility Affidavit	N/A	Appendix II	Proponent, Team Members
	Certification	N/A	Appendix III	Proponent, Team Members
Section D Proponent Description	Team Structure	5 (including any figures)	NFP See section 5.4.1	Proponent
	Proponent Capabilities		NFP See section 5.4.2	
	Proponent Experience		NFP See section 5.4.3	
Section E Qualifications	Grant Administration Experience - Summary of Projects	N/A	Form-3	Proponent
	Grant Administration Experience - Project Narratives	5	Form-5	
	Education Experience - Summary of Projects	N/A	Form-4	
	Education Experience - Project Narratives	5	Form-6	
	Proponent References	N/A	Form-7	
Section F Statement of Technical Approach	Organization Structure	10 (including any figures)	NFP See section 5.6.1	Proponent
	Summary of Approach		NFP See section 5.6.2	
	Work Plan		NFP See section 5.6.3	
	Local engagement approach		NFP See section 5.6.4	
	Compliance and transparency approach		NFP See section 5.6.5	



	Approach to Project risks		NFP See section 5.6.6	
	Improvements and modifications		NFP See section 5.6.7	
Section G Key Personnel	Resumes and signed Statements of Availability	5	NFP See section 5.7	Proponent
	Key Personnel References	N/A	Form-8	

Section of Proposal		Maximum Number of Pages Allowed	Applicable Form	Firm or Person Responsible for Completing Form
FINANCIAL PROPOSAL				
Section A Financial Capacity	Financial Statements	N/A	NFP See section 6.1.1	Proponent
	Material changes in Financial Condition	N/A	NFP See section 6.1.2	Proponent
Section B Budget Breakdown	Budget Breakdown	N/A	NFP See section 6.2	Proponent

A proposal from any Proponent that fails to pass AAFAF's determination regarding no conflict of interest, shall be deemed unacceptable and unresponsive, and shall be disqualified without further evaluation.

4.4 Proposal Submittal Requirements

The proposal shall be submitted electronically via e-mail to the addresses set forth below:

rfp@aafaf.pr.gov

The subject on the electronic submittal shall read: [Proposal for the 21st Century Technical and Business Education Fund Administrator Services – [Name of Team]]

The proposal shall be submitted no later than **May 17, 2021**, Atlantic Standard Time (“Proposal Due Date”).

Any proposal that is sent after the Proposal Due Date shall be considered late, rejected and returned unopened to the Proponent.

PROPOSALS SHALL BE VALID FOR A PERIOD OF NINETY (90) DAYS AFTER THE PROPOSAL DUE DATE.

The proposal shall be prepared in English. All fees shall be quoted in United States dollars. The Government Entities shall not accept any proposal or modification of a proposal delivered by telephonic, electronic or facsimile means, except as provided herein.



The Technical Proposal shall contain the following:

5.1 Section A – General

5.1.1 Transmittal Letter

A duly authorized official of the Proponent or lead Team Member must execute the transmittal letter on **Form-1**. For Proponents that are joint ventures, partnerships, limited liability companies or other associations, the transmittal letter shall have appended to it letters on the letterhead stationery of each Team Member, executed by authorized officials of each Team Member, stating that representations, statements and commitments made by the a lead Team Member (the “Lead Team Member”) on behalf of the Team Member’s firm that have been authorized by such Team Member, are correct, and accurately represent the role of the Team Member’s firm in the Proponent team.

5.1.2 Executive Summary

An Executive Summary, not exceeding five pages. The Executive Summary shall be written in a nontechnical style and shall contain sufficient information for reviewers with both technical and nontechnical backgrounds to become familiar with the proposal and its ability to satisfy the financial and technical requirements of the project.

5.2 Section B – Proponent Information

5.2.1 Proponent Information

Submit originals of completed and executed **Form-2** on behalf of the Proponent.

5.2.2 Proponent Team Members’ Information

If Proponent is a joint venture or newly formed entity, complete a separate **Form-2** for each member of or partner in such joint venture or newly formed entity.

Proponent and Proponent Team Members are advised that **Form-2** may be released to the public and media.

5.3 Section C – Certification and Legal Qualifications

5.3.1 Non-Collusion Affidavit

Submit a completed Appendix I Non-Collusion Affidavit.

5.3.2 Eligibility Affidavit

Submit a completed Appendix II Eligibility Affidavit.

5.3.3 Certification

Appendix III (Certification) completed and executed on behalf of each of the following: the Proponent and each Team Member. If the Proponent or a Team Member is a joint venture or newly formed entity, complete a separate Appendix III for each member of or partner in such joint venture or newly formed entity.



5.4 Section D – Proponent Description

5.4.1 Team Structure

Provide an introduction to the Proponent, Lead Team Member and Team Members (if applicable), and describe any teaming and sub-contracting arrangements, existing or anticipated, including any technical, legal, and financial advisors/consultants that the Proponent anticipates retaining to assist in performance of the Grant Administration Services (or such other support anticipated to be required during the term of the agreement).

5.4.2 Proponent Capabilities

Proponents are required to demonstrate that they possess all grant administration, experience in business and technology education programs to allow the proper and successful execution of the services. Proponents must show effective and substantive experience (relative to proposed Scope of Work) in the provision of similar services under consideration in this RFP. Proponents must display strong leadership, accountability, continuity and willingness to work with a broad range of entities, both within the public and private sectors. Hence, proponents must demonstrate that they rely on a staff of experienced professionals and a dynamic collaborators' network, which include a broad range of private and public organizations.

5.4.3 Proponent Experience

5.4.3.1 Grant Administration Experience

- Provide a brief overview of the Proponent's experience in planning, launching and administering large grant programs.
- Provide a brief overview of the Proponent's experience in procuring, managing and coordinating technical, financial, and legal advisors to manage grant programs.
- Describe the Proponent's capability and experience in grant administration as applicable under the requirements and standards outlined by the Office of Management and Budget, 2 CFR Chapter II, Parts 200: Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards.
- Describe any needs assessment and/or stakeholder engagement processes undertaken by the Proponent in prior experience in a grant administrator capacity as discussed in the RFP.
- Describe the Proponent's capability and experience in drafting and administration of complex and technically detailed contracts.
- Demonstrate the Proponent has a dynamic collaborators network that includes a broad range of private and public organizations relevant to the scope of work and to implementing the Grant Administration Services.

5.4.3.2 Business & Technology Education Experience

- Describe the proponent's experience in developing business and technology education programs and in identifying priority technical and business areas/skills to focus on.
- Provide a brief overview of the Proponent's experience in developing, promoting and/or fostering innovative and technology-driven solutions, which focus on technical and business areas/skills.



- Provide a description of the proponent's experience in procuring, managing, coordinating, and leading technical teams (including technical, financial, and legal advisors) to manage business education and technology-driven grant programs.
- Describe any needs assessment and/or stakeholder engagement processes undertaken by the Proponent in prior experience in a business education and technologically innovative capacity.

5.5 Section E - Qualifications

5.5.1 Grant Administration Qualifications

5.5.1.1 Summary of Projects - Grant Administration Qualifications

Submit a completed **Form-3** - Provide a summary of Grant Administration Experience with a maximum of ten (10) projects per Proponent in compliance with the instructions and requirements set forth in **Form-3** and best meeting the evaluation criteria set forth in Section 7.4.

5.5.1.2 Project Narratives - Grant Administration Qualifications

Submit detailed project narratives using **Form-5** - Provide project narratives detailing Grant Administration Experience including a minimum of three (3) and maximum of five (5) projects per Proponent in compliance with the instructions and requirements set forth in **Form-3** and best meeting the evaluation criteria set forth in Section 7.4.

For each project narrative, provide a reference contact using the Proponent Reference **Form-7**.

5.5.2 Skills Assessment and Development Planning Qualifications

5.5.2.1 Summary of Projects – Skills Assessment and Development Planning Qualifications

Submit a complete **Form-4** - Provide a summary of Skills Assessment and Development Planning experience with a maximum of ten (10) projects per Proponent in compliance with the instruction and requirements set forth in Form 4 and best meeting the evaluation criteria set forth in Section 7.4.

5.5.2.2 Project Narratives - Skills Assessment and Development Planning Qualifications

Submit detailed project narratives using **Form-6** - Provide project narratives detailing Skills Assessment and Development Planning experience, including a minimum of three (3) and maximum of five (5) projects per Proponent in compliance with the instructions and requirements set forth in **Form 4** and best meeting the evaluation criteria set forth in Section 7.4.

For each project narrative, provide a reference contact using the Proponent Reference **Form-7**.

5.5.3 Proponent References

In accordance with Project Narrative section 5.5.1.2 above submit a completed **Form-7**.

5.6 Section F – Technical Approach

Provide a narrative statement, not to exceed 10 pages, detailing the Proponent’s technical approach to the project and outlining a proposed work plan to fulfill the Scope of Work (Section 2.3).

Proponent’s narrative statement shall include:

5.6.1 Organization Structure

- Provide an organizational chart indicating the key personnel and the relationships between their respective roles.



- Provide details as to the structure to channel communications with the government parties, AAFAF and the Grant Committee.
- Indicate reporting structure with the grant applicants and grantees.
- Provide any additional personnel expected to be contracted or subcontracted if the Proponent is selected and indicate reporting structure.
- Note key personnel’s previous experience (if any) working together in such roles.

5.6.2 Summary of Approach

- Describe the approach the Proponent will undertake in carrying out a skills assessment and development plan to identify the technical and business skills needed to help the Puerto Rico workforce compete in the global economy and align with future workforce needs in line with the Scope of Work identified in Section 2.3 above.
- Provide a high-level summary of how the Proponent expects to achieve the goals, objectives, tasks, and deliverables outlined in the Scope of Work for this RFP. Specifically address how the Proponent will effectively communicate with the government parties regarding governance and organizational procedures for tasks identified in Section 2.3 above.
- Provide a brief summary of how the integration and coordination of Proponent team capabilities described in Section 5.6.1: Organization Structure, will facilitate the satisfactory fulfillment of the Scope of Work detailed in Section 2.3.

5.6.3 Work Plan

- Provide a detailed work plan indicating how the Proponent will execute the projected Scope of Work and meet the objectives stated in this RFP. The work plan shall include, at a minimum, a detailed list and description of (i) primary workstreams and work phases, (ii) key deliverables for each phase, (iii) key activities for each phase, and (iv) projected touch points for collaboration with government parties and/or the Grant Committee. As a high-level example, phasing and key activities for the Scope of Work could follow the outline below. Improvements to and divergence from the proposed outline in order to better fulfill the Scope of Work, is permitted and encouraged.

Phase 1: Skills Assessment including analysis and formulation of recommendations based on findings.

Phase 2: Presentation of Skills Assessment findings and recommendations to address gaps and opportunities

Phase 3: Develop Skills Assessment Plan to address gaps and achieve goals

Phase 4: Develop a competitive process for the Education Grant Program; public and private organizations shall propose programs in the competitive process, which must be aligned with the Skills Development Plan.

Phase 5: Formulate and establish clear, standardized grant management procedures to ensure ongoing regulatory compliance, monitoring and performance management in accordance with the government parties’ specific regulations.

Phase 6: Grant application process.



Phase 7: Education programs launched and Grant Program closeout.

- Parallel workstreams, as well as critical path dependencies, should be indicated and the Proponent's approach to managing multiple and/or interdependent workstreams discussed.
- Indicate and discuss any proposed divergence from the RFP timeline.
- The work plan should be detailed on at least a quarterly basis.
- Discuss turnover of Grant Administration responsibility to the government parties at the close of the contract term, including (as applicable) proposed term extension options.

5.6.4 Local engagement approach

- Describe Proponent's approach to stakeholder engagement, including community engagement and local stakeholder partnerships (including but not limited to anchor institutions throughout Puerto Rico).

5.6.5 Compliance and transparency approach

- Describe Proponent's approach to ensuring overall financial and legal compliance and transparency.

5.6.6 Approach to Project Risks

- Identify and describe key project risks at each phase of each proposed workstream throughout the project timeline.
- Demonstrate Proponent's understanding of and approach to managing the identified project risks and potential solutions to address the risks.

5.6.7 Improvements and modifications

- Improvements and modifications to the activities specified in the Scope of Work are permitted; however, please discuss any proposed revisions and include justification for the proposed changes.
- Identify any gaps in the information provided in this RFP and/or publicly available that would require additional information or outreach by the Proponent and provide a summary of a proposed plan for identifying and rectifying any information gaps should the Proponent be engaged for this scope.

5.7 Section G – Key Personnel

5.7.1 Resumes

- Provide a resume of not more than two (2) pages for each of the following Key Personnel, and
- Provide a resume of not more than one (1) page for each of Additional Resources proposed (as applicable)



Key Personnel		
(Shall be committed to the project on a full-time basis.)		
Position	Role	Minimum Requirements
Grants Administration Lead	Shall be responsible for the execution of the Grant Administration Services.	Must have a minimum of 5 years of experience in leading the administration of grant programs including the management of at least one (1) program with an annual value in excess of \$2.5 million and experience in managing technical, legal and financial advisors/consultants.
Education Lead	Shall be responsible for design, execution, analysis, and recommendations related to the Skills Assessment and the Skills Plan	Must have a minimum of 5 years of experience in leading business education skills assessments and managing programs to address assessment findings.
Additional Resources		
Additional Resource Member ***(not part of the Key Personnel Evaluation - but supporting the Tech Approach)***	Is one of the firms forming the Proponent, either as a sub or lead firm. Or if the Proponent is a joint venture, one of the joint venture members.	Each Team Member must have a minimum of 2 years working experience in the area of expertise that is relevant to the fulfillment of this RFP.

*It is understood and permitted that the Proponent may not have one of the Key Personnel on staff at the time of submittal. In the case that the Proponent plans to contract one of the Key Personnel only if selected, this should be indicated. The Statement of Availability must be signed by the proposed candidate in either case.

5.7.1.1 Resume Specifications

Each resume must specify the following:

- The role that each person will fulfill for the project as Key Personnel or Additional Resource,
- An overview of relevant experience demonstrating how such experience will add value to the execution of the Grant Administration Services,
- Language skills

5.7.1.2 Grants Administration Lead

The Grant Administration Lead resumes shall:

- Demonstrate a minimum of 5 years of experience in leading the administration of grant programs including the management of at least one (1) program with an annual value in excess of \$2.5 million,



- Indicate which projects are being counted towards the minimum 5 years of experience as specified,
- Indicate and describe any needs assessment and community engagement processes undertaken in prior experience in a grant administration capacity including engagement with underserved communities,
- Demonstrate experience in managing technical, legal and financial advisors/consultants.

5.7.1.3 Education Lead

The Education Lead’s resume shall:

- Demonstrate a minimum of five (5) years of experience in leading/advising design and implementation of large business education and technical skills centered education programs including the management of at least one (1) project involving an assessment in a territory with a population of at least one (1) million inhabitants.
- Indicate and describe any needs assessment and community engagement processes undertaken in prior experience in implementing such programs.
- Demonstrate experience in managing technical, legal, and financial advisors/consultants.

5.7.1.4 Availability of Resources

Proponents are urged to designate and proffer only those individuals they reasonably believe will be available for a given role. Proponents are advised that the Selected Proponent personnel changes must be requested in writing and will be subject to the Government Entities’ approval. Key Personnel changes without the Government Entities’ prior approval may result in disqualification or removal of the Selected Proponent.

Each resume submitted is required to sign and attach to the end of the resume the following Statement of Availability:

STATEMENT OF AVAILABILITY		
<p>I, the undersigned, certify that to the best of my knowledge and belief, this resume correctly describes myself, my qualifications, and my experience, and I am available and willing to undertake the assignment in case of an award. I understand that any misstatement or misrepresentation described herein may lead to my disqualification or dismissal, and/or sanctions.</p> <p>Further, I certify that I have been informed of the inclusion of my resume in this Proposal to provide Grant Administration Services. I confirm that I will be available and willing to carry out the assignment for which my resume has been submitted in accordance with the implementation arrangements and schedule set out in the [Agreement].</p>		
<hr style="border: 0; border-top: 1px solid black; margin-bottom: 5px;"/> <p>Name</p>	<hr style="border: 0; border-top: 1px solid black; margin-bottom: 5px;"/> <p>Signature</p>	<hr style="border: 0; border-top: 1px solid black; margin-bottom: 5px;"/> <p>Date <i>(Month/Day/Year)</i></p>



5.7.2 Key Personnel References

Provide Key Personnel references using **Form-8** as described below:

- Three (3) references must be supplied for each of the Key Personnel, and one (1) reference must be supplied for each other Additional Resource, (if applicable) in each case from projects during the past five (5) years; where a Key Personnel has only worked on two (2) or less projects during the past five (5) years, the Proponent shall (i) affirmatively state that the Key Personnel has only worked on two or less projects during the past five (5) years, (ii) include references from each such project and (iii) include references from projects before such five (5) year period such that the total number of references is three (3).
- References shall be provided by previous clients with whom the Key Personnel or Additional Resources (if applicable) have worked, and shall include the reference's name, position, company or agency, and current contact details (including current address, email and telephone).
- Proponents are requested to verify the accuracy of the references' contact details and are advised that if the contact details are not correct, the Government Entities may elect to exclude the experience represented by such reference in determining the Key Personnel's qualifications.



The Financial Proposal shall contain the following:

6.1 Section A - Financial Capacity

6.1.1 Financial Statements

The Proponent and each Proponent Team Member, if any, must provide financial statements for the three (3) most recent completed fiscal years, showing how it manages its resources and demonstrating that it has the financial capability to carry out the Grant Administration Services, as determined by AAFAF.

Information for each organization should include a cover sheet identifying the name of the organization and its role as Proponent or Team Member (if applicable).

Financial statement information must include:

- Opinion Letter (Auditor's Report)
- Balance Sheet
- Income Statement
- Statement of Changes in Cash Flow
- Footnotes

In addition, financial statements must meet the following requirements:

GAAP/IFRS – Financial statements must be prepared in accordance with U.S. Generally Accepted Accounting Principles (“U.S. GAAP”) or International Financial Reporting Standards (“IFRS”).

U.S. Dollars – Financial statements must be provided in U.S. dollars. If financial statements are not available in U.S. dollars, the Proponent and Team Members, must include summaries of the income statements and balance sheets for the applicable time periods converted to U.S. dollars by a certified public accountant.

Audited – Financial statements must be audited by an independent party qualified to render audit opinions (e.g., a certified public accountant). If audited financials are not available, the Proposal shall include unaudited financial statements for such entity, certified as true, correct and accurate by the chief financial officer (“CFO”), treasurer or equivalent officer of the entity.

English – Financial statement information must be prepared in English. If audited financial statements are prepared in a language other than English, translations of all financial statement information must be provided with the original financial statement information.

6.1.2 Material Changes in Financial Condition

Information regarding any material changes in the financial condition of Proponent and each Team Member (if applicable) during its respective past three (3) fiscal years and anticipated for the next reporting period, must be provided. If no material change has occurred and none is pending, the Proponent and Team Member, as applicable, shall provide a signed letter from its CFO, treasurer or equivalent officer so certifying. The letter must be dated not earlier than seven calendar days prior to the Proposal Due Date.



At the discretion of AAFAF, any failure to disclose a prior or pending material change may result in disqualification from further participation in the selection process. In instances where a material change has occurred, or is anticipated, the affected entity shall provide a statement describing each material change in detail, the likelihood that the developments will continue during the period of performance of the Project, and the projected full extent of the changes likely to be experienced in the periods ahead.

References to the notes in the financial statements are not sufficient to address the requirement to discuss the impact of material changes.

Where a material change will have a negative impact, the affected entity shall also provide a discussion of measures that would be undertaken to insulate the Project from any recent material changes, and those currently in progress or reasonably anticipated in the future.

Set forth below is a representative list of events intended to provide examples of what AAFAF considers a material change in financial condition. This list is intended to be non-exhaustive.

List of Representative Material Changes:

- An event of default or bankruptcy involving the affected entity.
- A change in credit rating (if applicable) for the affected entity.
- Inability to meet conditions of loan or debt covenants by the affected entity.
- The financial statements of the affected entity indicate that expenses and losses exceed income (i.e. negative net income excluding earnings from noncontrolling interests);
- The affected entity incurred a net operating loss (i.e. negative income before taxes, or negative earnings before taxes); or
- The affected entity sustained negative cashflows from operating activities; in at least one of the last three fiscal periods, the affected entity shall provide a discussion of measures that will be undertaken to make the entity profitable in the future and an estimate of when the entity will be profitable.
- Other events known to the affected entity, or parent organization of the affected entity which represent a material change in its financial condition over the past three years or that may be pending for the next reporting period.

6.2 Section B - Budget Breakdown

- Provide a full explanation of the pricing structure, as well as sufficient information regarding performance metrics built into this structure.
- Proponents should also show a breakdown of their fees depending on sections of the engagement or the fees for conducting specific tasks. Include a breakdown of (i) Grant Administration fees, and (ii) any additional fees anticipated
- Based on the Work Plan described in Section 5.6.3, provide an estimated budget outlining the cost breakdown and fee structure anticipated to fulfill the RFP scope, including both Grant Administration activities as well as any technical, financial, legal or other additional advisory services that the Proponent plans to procure.



7 EVALUATION PROCESS AND CRITERIA

7.1 Evaluation Committee

The Government Entities have appointed an Evaluation Committee to review and evaluate all of the proposals submitted in accordance with the RFP, (the “Evaluation Committee”) The Evaluation Committee shall have five (5) members including two (2) AAFAF representatives, one (1) PRITS representative, and two (2) Government of Puerto Rico representatives from other relevant agencies or offices as selected by the Government Parties. The Evaluation Committee shall have one (1) ex-officio and non-voting member from the FOMB.

All proposals, evaluations and the content of any discussions shall be kept strictly confidential throughout the evaluation and award process. Only the Executive Director of the Government Entities, FOMB, members of the Evaluation Committee, consultants, attorneys and employees of the Government Entities approved by the above and with a legitimate need to know, shall have access to the proposals and the evaluation results. The Evaluation Committee shall obtain technical and legal support from Government Entities employees, its consultants and attorneys, as needed. The contract shall be awarded to the Proponent whose proposal is found to be technically sufficient, acceptable and most advantageous to the Government Entities and FOMB as per the Fiscal Plan.

The Government Entities, by means of the Evaluation Committee, may request a Proponent to clarify a proposal in the event that ambiguities or uncertainties are presented in the proposal or to obtain more information necessary for the Evaluation Committee to make a comprehensive evaluation.

Cost of the service is only one of the criteria to be considered and the Government Entities are not legally bound to award to the lowest priced proposal. The Government Entities may enter into simultaneous or subsequent negotiations with Proponents to determine the final selection of the awardee. The Government Entities reserve the right to interview key personnel of the Proponent before the award of the contract. The Government Entities reserve the right to conduct discussions with each and every Proponent and to request that Proponents submit a revised experience and technical proposal and/or price proposal.

The Evaluation Committee shall report its findings and make its recommendations to the Government Entities. The Government Entities, however, may accept the recommendation of the Evaluation Committee, award the contract to another Proponent or Proponents, or exercise any of the rights reserved by the Government Entities.

Proposals that are not disqualified will be evaluated as to their substantive material, *provided however that*, in addition to the rights reserved in Section 8.1, the Government Entities reserve the right to waive any defect or technicality in any proposals received, and modify or postpone or terminate the RFP process in its entirety or with respect to any Proponent, at any time, for any reason or no reason.

7.2 Responsiveness

The Evaluation Committee shall first review and determine if each proposal completed all requirements as to format and content.

Each proposal will be reviewed for:

- conformance to the RFP instructions regarding organization and format; and
- responsiveness to the requirements set forth in this RFP.



Those proposals not responsive to this RFP may be excluded from further consideration, and the Proponent will be so advised. AAFAF may also exclude from consideration any Proponent whose proposal contains a material misrepresentation.

A proposal from any Proponent that fails to pass Government Parties' determination regarding no conflict of interest (as per Section 3.4), shall be deemed unacceptable and unresponsive, and shall be disqualified without further evaluation.

7.3 Interviews

Oral interviews may be conducted with Proponents to aid in the selection of a preferred Proponent, or to clarify, or expand upon specific items included in the proposals.

7.4 Selection

Proposals will be evaluated by the Government Entities taking into consideration the following factors:

- Financial Capacity - Capability to establish and provide administration services with the grant in an accelerated schedule, and resources to be dedicated to the management and administration of the Grants, including accounting, financial advisory and investment management capabilities), including:
 - Proposed fee and fee structure
 - Timeliness and resources
- Experience - Technical capabilities in skills development planning and grant administration capacity to evaluate technically and operationally complex proposals; capability to coordinate and negotiate with a large number of public and private-sector stakeholders).
- Qualifications - Experience with similar projects and proven track record in grant administration
- Technical Approach - Approach to the engagement (e.g. initial work plan and services proposal, effective fiduciary compliance department organization of team and functions, etc.); reasonableness, timeliness and staffing of resources (i.e. capability to establish and administer the Grant Administration Services in an accelerated schedule, and with the dedicated resources); reasonableness of Proponent's budget breakdown (Financial Proposal Section B Budget Breakdown) as it relates to its capacity to deliver the Scope of Work, timeliness and staffing of its resources, as described in Section 5.6, Technical Approach.
- Key Personnel – Experience with similar projects, proven track record and qualifications; capability to coordinate and negotiate with a large number of public and private-sector stakeholders; and technical capabilities in skills assessment and development planning and grant administration.



The Evaluation Criteria for this RFP will be as follows:

Evaluation Criteria	Technical Proposal Submittal Sections	Weighting
Experience	Section D	[20%]
Grant Administration Experience	Section 5.4.3.1	
Business & Technology Education Experience Qualifications	Section 5.4.3.2	
Qualifications	Section E	[20%]
Grant Administration Qualifications	Section 5.5.1	
Skills Assessment and Development Planning Experience	Section 5.5.2	
Technical Approach	Section F	[30%]
Summary of Approach	Section 5.6.2	
Work Plan	Section 5.6.3	
Local Engagement Approach	Section 5.6.4	
Other Elements of Approach	Sections 5.6.1, 5.6.5-5.6.7	
Key Personnel	Section G	[20%]
Grant Administration Lead	Sections 5.7.1, 5.7.1.2	
Education Lead	Sections 5.7.1, 5.7.1.3	
	Financial Proposal Submittal Sections	
Financial Capacity	Section 6	[10%]
TOTAL		100%



8 DISCLOSURES

8.1 General Disclosures, Rights, Options and Disclaimers

The issuance of this RFP, submission of a response by any organization, and the acceptance of such response by the Government Entities does not obligate the Government Entities. Proponent shall only be bound by its proposal for the period of 90 days required in this RFP. Legal obligations will only arise upon the execution of a formal agreement between the Government Entities and the selected firm/team.

By responding to this RFP, Proponents acknowledge and consent to the following conditions relative to the procurement process. The Government Entities are not bound to accept any proposals if Proponents do not meet the Government Entities' requirements. Without limitation and in addition to other rights reserved by the Government Entities in this RFP, the Government Entities reserve and hold, at their sole discretion, the following rights and options:

- To accept or reject any and all submittals, in whole or in part.
- To discuss, with any or all Proponents, different or additional terms to those included in this RFP or received in any response.
- To cancel this RFP in whole or in part, at any time, with or without substitution of another RFP if such cancellation is determined to be in the best interest of the Government Entities.
- To supplement, amend, or otherwise modify this RFP prior to the date of submission of the proposals.
- To receive written questions concerning this RFP from Proponents and to provide such questions, and Government Entities responses, to all Proponents that received a copy of the RFP.
- To require additional information from one or more Proponents to supplement or clarify the proposals submitted.
- To conduct further investigations with respect to the qualifications and experience of each Proponent.
- To visit and contact the Proponent's client in any of the projects or engagements referenced in the proposals to obtain direct information regarding Proponent's performance in such engagements.
- To waive any defect or technicality in any proposals received.
- To eliminate any Proponents that submits a nonconforming, non-responsive, incomplete, inadequate, or conditional proposal.
- To investigate the technical and financial qualifications of Proponents using sources in addition to what was included in the proposals.

All costs and expenses incurred by the Proponents in the preparation and delivery of a proposal will be the sole responsibility of the Proponents. The Government Entities will not be liable for any amounts to any Proponent in any manner, under any circumstances, including without limitation, as a result of a cancellation of the RFP process. The Proponents cannot make any claims whatsoever for reimbursement from the Government Entities for the costs and expenses associated with the process.

Proponents should submit their best proposals initially, since negotiations may not take place.



The laws of Puerto Rico shall govern this RFP process. Any disputes relating to this RFP must be resolved accordingly. Exclusive venue for a judicial challenge is the Appeals Court of Puerto Rico as provided for by the laws of Puerto Rico.

8.2 Accuracy of RFP and Related Documents

The Government Entities assume no responsibility for the completeness, or the accuracy of specified technical and background information presented in this RFP, or otherwise distributed or made available during this RFP process. Without limiting the generality of the foregoing, the Government Entities will not be bound by or be responsible for any explanation or interpretation of the RFP documents other than those given by it in writing. In no event may a Proponent to this RFP rely on any oral statement by the Government Entities' agents, advisors, or consultants.

8.3 Confidential or Proprietary Information

One copy of each proposal will be retained for the Government Entities' files and will not be returned. If a Proponent considers that its proposal contains material that is confidential and/or proprietary, the Proponent must clearly note or mark each section of material as confidential and/or proprietary. The Government Entities will determine whether such material meets the requirements for an exemption from disclosure. If so, that information will not be disclosed pursuant to a request for public documents. If the Government Entities do not consider such material to meet the requirements for exemption from disclosure, the material will be made available to the public, regardless of the notation or markings. It is the responsibility of Proponents to be thoroughly informed and familiar with the requirements of disclosure of public documents.

Furthermore, by responding to this RFP, Proponents acknowledge and agree that the Government Entities will not be responsible or liable in any way for any losses that the Proponent may suffer from the disclosure of information or materials to third parties. It is the responsibility of the Proponent, as the real party in interest, to object any disclosure and defend any action that may be necessary to protect its confidential information.



9 APPENDICES



Appendix I Non-Collusion Affidavit

NON-COLLUSION AFFIDAVIT

I, _____, of legal age and resident of _____, certify for myself and for my organization _____, under oath and subject to the consequences and penalties or perjury, that to the best of my knowledge and belief:

i. The fees presented in this proposal have been arrived at independently without collusion, consultation, communication, or agreement with any other Proponent or with any competitor for the purpose of restricting competition.

ii. No attempt has been made or will be made by myself or any member of my organization or associates to induce any other person or organization to submit or not to submit a proposal for the Project, or otherwise take any action in restraint of free competitive proposals for the Project.

Proponent Contact Signature

Proponent Contact Name and Title

AFFIDAVIT NO.

Sworn and subscribed before me by _____, of the personal circumstances set forth above, personally known to me, in _____, Puerto Rico, on this ___ day of _____, 2021.

Notary Public

Note: Providing false information may result in immediate disqualification of Proponent criminal prosecution or administrative sanctions.



Appendix II – Eligibility Affidavit

ELIGIBILITY AFFIDAVIT

I, _____ (Proponent Contact), of legal age, civil status: _____, profession: _____ and a resident of _____ (City, State), in my capacity as _____ (officer) of _____ (the “Proponent”), do hereby certify under penalty of perjury, that, except as noted below, the Proponent and Proponent’s owners, shareholders, partners, directors, officers, principals and managers (“Proponent’s Related Parties”):

- a. are not currently under suspension, debarment, voluntary exclusion or determination of ineligibility by any state or federal court of agency;
- b. have not been suspended, debarred, voluntarily excluded or determined ineligible by any state or federal court or agency within the past three (3) years;
- c. do not have a proposed debarment pending;
- d. will not use any subcontractors who are so debarred;
- e. have not been convicted or plead guilty in federal or state court, for the commission of misappropriation; extortion; construction fraud; fraud in the delivery of goods; undue intervention in public procurement processes; bribery; offer to bribe; undue influence; crimes against public funds; or preparation, presentation, possession or transfer of forged documents. The prohibition set forth herein shall also apply to convictions for other crimes equivalent to those of the above stated crimes;
- f. are not under investigation in federal, state, foreign or local jurisdictions, at any legislative, judicial or administrative level for the alleged commission of the abovementioned crimes; and
- g. I am a duly authorized representative of the Proponent and the Proponent Related Parties, with knowledge and authority to execute this sworn statement.

Exceptions to the above are set forth in an attachment to this Appendix II, providing the name of the initiating agency, number of the complaint, names of all parties and dates of action.

Proponent Contact Signature Proponent Contact Name and Title

AFFIDAVIT NO.

Sworn and subscribed before me by _____, of the personal circumstances set forth above, personally known to me, in _____, Puerto Rico, on this ___ day of _____, 2021.

Notary Public

Note: Providing false information may result in immediate disqualification of Proponent criminal prosecution or administrative sanctions.



Appendix III – Certification

CERTIFICATION

Name of Proponent: _____

Name of Firm (if a member of a team): _____

The term “affiliate” as used in this certification includes parent company(ies), subsidiaries, organizations under common ownership, joint ventures, partners, and other financially liable parties for that entity.

- (1) Has the firm or any affiliate or any **current** officer thereof, been indicted or convicted of bid (i.e., fraud, bribery, collusion, conspiracy, antitrust, etc.) or other contract related crimes or violations or any other felony or serious misdemeanor within the past five years?

Yes No

If yes, please explain:

- (2) Has the firm or any affiliate ever sought protection under any provision of any bankruptcy act?

Yes No

If yes, please explain:

- (3) Has the firm or any affiliate ever been disqualified, removed, debarred or suspended from performing work for the federal government, any state or local government, or any foreign governmental entity?

Yes No

If yes, please explain:

- (4) Has the firm or any affiliate ever been found liable in a civil suit or found guilty in a criminal action for making any false claim or other material misrepresentation to a public entity?

Yes No

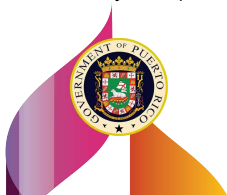
If yes, as to each such inquiry, state the name of the public agency, the date of the inquiry, the grounds on which the public agency based the inquiry, and the result of the inquiry.

- (5) Within the last five years, has any grant administration services or related services provided or managed by the firm or any affiliate involved repeated or multiple failures to comply with [xxx] rules, regulations, or requirements during the term of service?

Yes No

If yes, please identify the firm or affiliate and the project(s), provide an explanation of the circumstances, and provide client contact information, including e-mail and current telephone number.

- (6) Within the last ten years, has the firm or any affiliate been found, adjudicated or determined by any federal or state court or agency (including, but not limited to, the Equal Employment Opportunity Commission, the Office of Federal Contract Compliance Programs and any applicable governmental agency of Puerto Rico) to have violated any laws or Executive Orders relating to employment discrimination or affirmative action, including but not limited to Title VII of the Civil Rights Act of 1964, as amended (42 U.S.C. Sections 2000 et seq.); the Equal Pay Act (29 U.S.C. Section 206(d)); and any applicable or similar law of Puerto Rico?



Yes No

If yes, please explain:

- (7) Within the last ten years, has the firm or any affiliate been found, adjudicated, or determined by any state court, state administrative agency, including, but not limited to, the Department of Labor of Puerto Rico (or its equivalent), federal court or federal agency, to have violated or failed to comply with any law or regulation of the United States or any state governing prevailing wages (including but not limited to payment for health and welfare, pension, vacation, travel time, subsistence, apprenticeship or other training, or other fringe benefits) or overtime compensation?

Yes No

If yes, please explain:

- (8) Has the firm or any affiliate been determined, pursuant to a final determination in a court of law, arbitration proceeding or other dispute resolution proceeding, to be liable for a material breach of contract during the last five years with respect to a grant administration program?

Yes No

If yes, please identify (for each instance) the entity determined liable and the project name, provide an explanation of the circumstances and provide client contact information, including email address and telephone number.

- (9) Has the firm or any affiliate been terminated for cause during the last five years with respect to a grant administration program?

Yes No

If yes, please identify (for each instance) the entity terminated for cause and the program name, provide an explanation of the circumstances and provide owner contact information, including email address and telephone number.

- (10) Has the firm or any affiliate been involved in any arbitration, litigation, dispute review board or other dispute resolution proceeding occurring during the last ten years involving an amount in excess of \$500,000 related to performance on a grant administration program?

Yes No

If yes, please provide a brief description (including the resolution) of each qualifying arbitration, litigation, dispute review board or other dispute resolution proceeding. For each instance, identify the counter parties' representative with a current email address and telephone number.

- (11) With respect to each of Questions 1-11 above, if not previously answered or included in a prior response on this form, is any proceeding, claim, matter, suit, indictment, etc. currently pending against the firm or any affiliate that could result in the firm or affiliate being found liable, guilty or in violation of the matters referenced in Questions 1-11 above and/or subject to debarment, suspension, removal or disqualification by the federal government, any state or local government, or any foreign governmental entity?

Yes No

If yes, please explain and provide the information requested as to such similar items set forth in Questions 1-11 above.



Under penalty of perjury, I certify that the foregoing is true and correct, and that I am the firm's Official Representative:

By: _____

Print Name: _____

Title: _____

Date: _____



10 FORMS



FORM-1
TRANSMITTAL LETTER

Instructions:

- a) The Proponent’s Authorized Representative must sign the Transmittal Letter on behalf of the Respondent.
- b) An authorized representative of each teaming entity must sign the certification set out at the end of the Transmittal Letter.
- c) All signature blocks on this Form may be modified to properly reflect the authority of the person signing.

Transmittal Letter

Respondent Name: _____

SOQ Submission Date: _____

Recipient:

Puerto Rico Fiscal Agency and Financial Advisory Authority
Attention: Manuel J. González, Esq.
Fiscal Agency Director
manuel.gonzalez@aafaf.pr.gov

1. Introduction

[Proponent Name] ("Proponent") submits this Proposal (this "Proposal") in response to the Request for Proposals dated as of May 17th, 2021. Capitalized terms not otherwise defined in this Proposal shall have the meanings given in the RFP.

2. Enclosures

Enclosed, and together forming this Proposal, are the following:

Technical Proposal	
Section A – General	Transmittal Letter
	Executive Summary
Section B – Proponent Information	Proponent Information
	Proponent Team Members Information
Section C – Certification and Legal Qualifications	Non-Collusion Affidavit
	Eligibility Affidavit
	Certification
Section D – Proponent Description	Proponent Capabilities
	Proponent Experience
	Team Structure



Technical Proposal	
Section E - Qualifications	Grant Administration Experience - Summary of Projects
	Grant Administration Experience - Project Narratives
	Proponent References
Section F – Statement of Technical Approach	Organization Structure
	Summary of Approach
	Work Plan
	Local engagement approach
	Compliance and transparency approach
	Approach to Project risks
	Improvements and modifications
Section G – Key Personnel	Resumes and signed Statements of Availability
	Key Personnel References

Financial Proposal	
Section A – Financial Capacity	Financial Statements
	Material Changes in Financial Condition
Section B – Budget Breakdown	Budget Breakdown

3. Acknowledgements, Representations and Warranties

Proponent represents and warrants that it has read the RFP, including any amendments, and agrees to comply with the contents and terms of the RFP.

Proponent understands that the Government Parties are not bound to shortlist any Respondent and may reject each Proposal received.

Proponent further understands that, except as provided in the RFP, all costs and expenses incurred by it in preparing this Proposal and participating in the Project procurement process will be borne solely by the Proponent.

Respondent agrees that the Government Parties will not be responsible for any errors, omissions, inaccuracies, or incomplete statements in the RFP.

4. Governing Law

This SOQ shall be governed by and construed in all respects according to the laws of the Puerto Rico.

5. Authorized Representative

Authorized Representative of Proponent: _____

Authorized Representative's contact information, including title, firm name, telephone number, facsimile number and email address:



By executing this form, the Proponent confirms that the representative named above is authorized to act as agent on behalf of the Proponent and each of the teaming entities, as applicable.

Proponent's business address:

(No.) (Street) (Floor or Suite)

(City) (State or Province) (ZIP or Postal Code) (Country)

State or Country of Incorporation/Formation/Organization:

[Insert appropriate signature block from the following]

Sample signature block for corporation or limited liability company:

[Insert Proponent's name]

By: _____

Print Name: _____

Title: _____

Sample signature block for partnership or joint venture:

[Insert Proponent's name]

By: *[Insert general partner's or members name]*

By: _____

Print Name: _____

Title: _____

[Add signatures of additional general partners or members as appropriate]

Sample signature block for attorney in fact:

[Insert Proponent's name]

By: _____

Print Name: _____

Attorney in Fact

6. Teaming Entities

Under penalty of perjury, each of the undersigned, certifies on behalf of the entity for which he or she signs that:



- a) The Proponent's Authorized Representative named above is authorized by the relevant entity to sign this Transmittal Letter on behalf of the Proponent; and
- b) The representations, certifications, statements, disclosures, authorizations and commitments made, and information contained, in the Proposal (including all Forms) in respect of such entity have been authorized by such entity, and is or are correct, complete and not materially misleading; and
- c) He or she is authorized to act on behalf of the entity for which he or she signs and acknowledges that the Government Parties are relying on his or her representation to this effect:

[Role of team member]

[Teaming entity name]

By: _____

Print Name: _____

Title: _____



Form-2 Proponent Information

**FORM-2
PROPONENT INFORMATION**

Name of Proponent:		
Team Member Firm (If applicable)		
Year Established:		
Organization's Leadership (Executive Director/ CEO/Chairman):	Name:	
	Email:	
	Telephone Number:	
Headquarters Address:		
Address of Office Performing Work (If different from Headquarters):		
Proponent Contact Details (if someone other than Organizations Leadership)		
Name of contact:		
Title:		
Address:		
Telephone:		
Email:		
Federal Tax ID No. (if applicable):		
North American Industry Classification Code:		
Business Organization (check one):		
<input type="checkbox"/> Corporation, <input type="checkbox"/> Unincorporated Association, <input type="checkbox"/> Partnership, <input type="checkbox"/> Foundation, or <input type="checkbox"/> Other (Describe): _____		
Not-for-profit Status:		
<p>If the Proponent is responding as a team - a Consortium, Partnership, Joint Venture or Limited Liability Company - state the type of arrangement and structure between the firms, indicate the name and role of each member firm in the space below. Complete a separate Information form (Form-2) for each member firm and attach it to the proposal.</p>		
Team Arrangement and Structure:		



<u>Name of Member Firms</u>	<u>Role</u>
Under penalty of perjury, I certify that the foregoing is true and correct, and that I am the firm's Official Representative:	
By:	Print Name:
Title:	Date:
[Please make additional copies of this form as needed.]	



Form-3 Summary of Projects - Grant Administration Experience Form

SUMMARY OF PROJECT - GRANT ADMINISTRATION EXPERIENCE FORM-3

ONLY PROPONENT MEMBER(S) PROVIDING GRANT ADMINISTRATION SERVICES SHOULD COMPLETE THIS GRANT ADMINISTRATION QUALIFICATION FORM

INSTRUCTIONS:

- 1) List the experience of the Proponent member providing Grant Administration Services.
- 2) List no more than ten (10) projects in FORM-3 per Proponent. AAFAF will not consider any projects listed above this cap.

PROponent NAME	PROJECT NAME	CLIENT NAME	LOCATION AND SECTOR	GRANT VALUE MANAGED (Total and ANNUAL) (US \$m)	START/END DATES	PROponent ROLE (1)	PERCENTAGE OF RESPONSIBILITY
Example Entry: Non-profit.org	K-12 Grants Administration	AAFAF	Puerto Rico, Education	Total: \$50m 2015: \$5m 2016: \$15m 2017: \$20m 2018: \$5m 2019: \$5m	Start Date: 07/01/15 End Date: 12/31/19	Grant Administrator: Administered Grants to K-12 schools	% of Work: 100%
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							

(1) Provide the role and a brief summary of the role the company played



Form-4 Summary of Projects – Skills Assessment and Development Planning Experience Form

SUMMARY OF PROJECT – SKILLS ASSESSMENT AND DEVELOPMENT PLANNING EXPERIENCE FORM-4
 ONLY PROPONENT MEMBER(S) PROVIDING SKILLS ASSESSMENT AND DEVELOPMENT PLANNING SHOULD COMPLETE THIS
 QUALIFICATION FORM

INSTRUCTIONS:

- 1) List the experience of the Proponent member providing Skills Assessment and Development Planning.
- 2) List no more than ten (10) projects in FORM-4 per Proponent. AAFAF will not consider any projects listed above this cap.

PROponent NAME	PROJECT NAME	CLIENT NAME	LOCATION AND SECTOR	GRANT VALUE MANAGED (Total and ANNUAL) (US \$m)	START/END DATES	PROponent ROLE (1)	PERCENTAGE OF RESPONSIBILITY
Example Entry: Non-profit.org	K-12 Skills Assessment and Development Planning	AAFAF	Puerto Rico, Education	Total: \$50m 2015: \$5m 2016: \$15m 2017: \$20m 2018: \$5m 2019: \$5m	Start Date: 07/01/15 End Date: 12/31/19	Skills Assessment and Development Planning Grants to K-12 schools	% of Work: 100%
1.							
2.							
3.							
4.							
5.							
6.							
7.							
8.							
9.							
10.							

Provide the role and a brief summary of the role the company played



PROJECT NARRATIVE - GRANT ADMINISTRATION QUALIFICATIONS FORM

INSTRUCTIONS:

- 1) Using **Form-5** below, provide a narrative description for no less than three (3) and no more than five (5) of the projects listed in **Form-3** that are most relevant to the RFP scope of work and best indicate the Proponent's Grant Administration qualifications and experience.
- 2) Please provide AT LEAST one (1) project with an annual grant value managed greater than \$2.5 million.
- 3) Please provide AT LEAST one (1) project located in Puerto Rico
- 4) The project narrative description must include:
 - a) the responding entity's role in this project, (i) the nature of the grant management arrangement, (ii) the grant allocation methodology applied and (iii) any monitoring procedures created and/or implemented.
 - b) for each project, (as applicable), (i) what technical, legal and/or financial technical expertise was integrated in the grant management process, (ii) how teaming entities were organized, and (iii) the Proponent's role in managing and/or coordinating technical, legal and/or financial advisors.
 - c) for each project, the intent of the program, any challenges and the outcome/results.
 - d) the name(s) of Key Personnel and Additional Resources proposed in response to this RFP that participated in each project and the functions they performed.
 - e) for each project narrative, please provide a reference contact (including Name, Title, Organization, Address, E-mail, Telephone Number) using the Proponent Reference Form (**Form-7**) below.



PROJECT NARRATIVES - GRANT ADMINISTRATION EXPERIENCE

CLIENT NAME:	PROJECT NAME:	
PROPONENT NAME:	LOCATION:	SECTOR:
GRANT VALUE MANAGED (ANNUAL) (US \$M):	START DATE:	END DATE:

NARRATIVE DESCRIPTION OF PROJECT AS PER INSTRUCTION NUMBER 3) a-d (above):



Form-6 Project Narratives – Skills Assessment and Development Planning Qualifications Form

PROJECT NARRATIVE – SKILLS ASSESSMENT AND DEVELOPMENT PLANNING QUALIFICATIONS FORM

INSTRUCTIONS:

- 5) Using **Form-6** below, provide a narrative description for no less than three (3) and no more than five (5) of the projects listed in **Form-4** that are most relevant to the RFP scope of work and best indicate the Proponent's Skills Assessment and Development Planning qualifications and experience.
- 6) Please provide AT LEAST one (1) project with an annual grant value managed greater than \$2.5 million.
- 7) Please provide AT LEAST one (1) project located in Puerto Rico
- 8) The project narrative description must include:
 - a) the responding entity's role in this project, (i) the nature of the grant management arrangement, (ii) the grant allocation methodology applied and (iii) any monitoring procedures created and/or implemented.
 - b) for each project, (as applicable), (i) what technical, legal and/or financial technical expertise was integrated in the grant management process, (ii) how teaming entities were organized, and (iii) the Proponent's role in managing and/or coordinating technical, legal and/or financial advisors.
 - c) for each project, the intent of the program, any challenges and the outcome/results.
 - d) the name(s) of Key Personnel and Additional Resources proposed in response to this RFP that participated in each project and the functions they performed.
 - e) for each project narrative, please provide a reference contact (including Name, Title, Organization, Address, E-mail, Telephone Number) using the Proponent Reference Form (**Form-7**) below.



FORM 6
PROJECT NARRATIVES – SKILLS ASSESSMENT AND DEVELOPMENT PLANNING
EXPERIENCE

CLIENT NAME:	PROJECT NAME:	
PROPONENT NAME:	LOCATION:	SECTOR:
GRANT VALUE MANAGED (ANNUAL) (US \$M):	START DATE:	END DATE:

NARRATIVE DESCRIPTION OF PROJECT AS PER INSTRUCTION NUMBER 3) a-d (above):



Form-7 Proponent References Form

FORM-7

PROPONENT REFERENCES FORM

Proponent References	
REFERENCE 1	
Proponent (or Team Member, as applicable)	
Name of the project in which the reference hired or worked with the referee	
Name of reference	
Reference's title/position	
Reference's organization	
Reference's office phone and/or cell numbers (2)	
Reference E-mail address	
Reference's address	
REFERENCE 2	
Proponent (or Team Member, as applicable)	
Name of the project in which the reference hired or worked with the referee	
Name of reference	
Reference's title/position	
Reference's organization	
Reference's office phone and/or cell numbers (2)	
Reference E-mail address	
Reference's address	
REFERENCE 3	
Proponent (or Team Member, as applicable)	
Name of the project in which the reference hired or worked with the referee	
Name of reference	
Reference's title/position	
Reference's organization	
Reference's office phone and/or cell numbers (2)	
Reference E-mail address	
Reference's address	
REFERENCE 4	
Proponent (or Team Member, as applicable)	



Name of the project in which the reference hired or worked with the referee	
Name of reference	
Reference's title/position	
Reference's organization	
Reference's office phone and/or cell numbers (2)	
Reference E-mail address	
Reference's address	
REFERENCE 5	
Proponent (or Team Member, as applicable)	
Name of the project in which the reference hired or worked with the referee	
Name of reference	
Reference's title/position	
Reference's organization	
Reference's office phone and/or cell numbers (2)	
Reference E-mail address	
Reference's address	

Notes:

- (2) For international phone numbers, include the full dialing code for calling from the United States.



Form-8 Key Personnel References Form

FORM-8

KEY PERSONNEL REFERENCES FORM

References for Key Personnel and Additional Resources	
Name and Role of Key Personnel or Additional Resource:	
REFERENCE 1	
Name of the project in which the reference worked with the individual (1)	
Name of reference	
Reference's organization	
Reference's title/position	
Reference's office phone and/or cell numbers (2)	
Reference's address and email	
REFERENCE 2	
Name of the project in which the reference worked with the individual (1)	
Name of reference	
Reference's organization	
Reference's title/position	
Reference's office phone and/or cell numbers (2)	
Reference's address and email	
REFERENCE 3	
Name of the project in which the reference worked with the individual (1)	
Name of reference	
Reference's organization	
Reference's title/position	
Reference's office phone and/or cell numbers (2)	
Reference's address and email	

Notes:

- (1) This reference must meet the requirements of Section 5.7.2 in the RFP
- (2) For international phone numbers, include the full dialing code for calling from the United States.

