

RFP-DDEC-2026-10
Financial Planning Workshops Services

Publication of Addenda / Responses¹

ID	Question Received	Response
Mandatory Documentation, Evaluation and Proposal Submission		
1	The Sworn Statement of Compliance with Act No. 2-2018 requires the RFP number to be entered on its header and must be signed and notarized. Given that our firm may be submitting proposals in response to multiple concurrent PRDEDC or Government of Puerto Rico solicitations, we would like to confirm: may a single notarized Sworn Statement be submitted covering multiple RFP numbers, or must a separate, individually notarized Sworn Statement be executed and submitted for each RFP to which we respond?	A separate notarized Sworn Statement must be submitted for each RFP and must identify the corresponding RFP number.

¹ The questions answered are those received while the question period was open. Questions received after the July 22, 2026, deadline were not answered. Related questions were grouped together to avoid repetitive answers. The questions in this document were not edited by our team, unless necessary for spelling and/or translation.

ID	Question Received	Response
2	Could PRDEDC confirm that a CPA-prepared Statement of Financial Condition under ASC 274, together with accompanying notes, satisfies this requirement for individual owners, given that a Statement of Operations and Statement of Cash Flows do not apply under the governing standard for personal financial statements?	Yes. For individual owners, a CPA-prepared Statement of Financial Condition and accompanying notes under ASC 274 will satisfy the financial-statement component.
3	Could PRDEDC confirm whether the "Institutional Experience and Past Performance" evaluation criterion under Section 6.2, together with the professional references required under Part 6, may be satisfied through the demonstrated professional experience of the firm's principal(s) and proposed key personnel — including prior resume preparation, workforce development, and Rapid Response-related experience obtained in their individual professional capacities or through prior organizations — rather than requiring such experience to be attributable exclusively to the proposing entity itself?	Yes. The Evaluation Committee will consider the relevant experience and past performance of both the proposing entity and its proposed key personnel, including experience obtained individually or through prior organizations.
4	Are nonprofit organizations recognized under Section 501(c)(3) eligible to submit proposals under this RFP, or is eligibility limited to professional services firms and public entities?	Yes. Nonprofit organizations recognized under Section 501(c)(3) are eligible to submit proposals.

ID	Question Received	Response
Mandatory Documentation, Evaluation and Proposal Submission (continued)		
5	Must the proposal be submitted exclusively in English, or may it be submitted in Spanish?	The proposal may be submitted in Spanish.
6	Annex A was not sent separately from the RFP and contains information from the preceding section. Annex A must be available separately so that it can be completed and included in the proposal, as indicated in Part 1 (Mandatory Requirements) of Section 7.2 on page 22.	Annex A is included in Section 10 of the RFP and may be reproduced or extracted for completion. A separately issued file is not required.
7	The “Criminal and Ethical Background Declaration” requires a sworn statement that neither the proposer nor its principals have any criminal record or pending ethical proceedings. We understand that this information is contained in the “Sworn Statement of Compliance with Act No. 2-2018,” requested at the beginning of Table 2. If this is a different document, we would appreciate receiving it so that we may complete it.	The Criminal and Ethical Background Declaration is a separate sworn statement from the Sworn Statement of Compliance with Act No. 2-2018, and both must be submitted. No separate PRDEDC form is required for the Criminal and Ethical Background Declaration.
8	The Mandatory Requirements request the Sales and Use Tax (IVU) Debt Certification — Model SC-2927 — issued by the Puerto Rico Department of Treasury. Since 2020, the Department of Treasury no longer generates this certification through SURI because it was consolidated with the Debt Certification — Model SC-6096. Therefore, Model SC-2927 cannot be included as indicated.	A current Model SC-6096 that includes the proposer’s IVU debt status will satisfy this requirement. A separate Model SC-2927 will not be required.

ID	Question Received	Response
9	The Mandatory Requirements request a “Municipal Tax (CRIM) Certification” showing filing and debt status for both personal and real property taxes. Is this document the CRIM Tax Return Filing Certification? If not, what is the exact name of the certification that must be requested? Does this requirement refer to the corporation that is the proposer or personally to the corporation’s president?	The proposer must submit CRIM certifications showing tax-return filing and debt status for personal and real property. The certifications must correspond to the proposing entity; personal certifications for the corporation’s president are required only when that individual is the proposer, such as a sole proprietor.

ID	Question Received	Response
Pricing, Service Demand, Delivery Logistics and Staffing		
10	Could PRDEDC confirm whether proposers should define their own pricing structure (e.g., per-session, hourly, or per-event rates) for these three domains, or whether PRDEDC intends for all four service domains to be priced using the same participant-tier/duration table format?	Proposers should use the participant-tier and duration table for group workshops and define a clear pricing unit for each of the other three service domains, such as per session, hour, engagement, or event. All rates, assumptions, personnel costs, and totals must be separately identified by service domain in the Cost Plan.
11	Could PRDEDC provide an estimate of the anticipated volume of activities over the one-year contract term—specifically, the expected number of financial planning workshops, individual counseling sessions, credit analysis engagements, and service fairs/outreach events, along with the average number of participants per activity and the anticipated geographic distribution of these activities across Puerto Rico?	PRDEDC anticipates approximately 8–10 recruitment or service fairs during each year, generally involving 500–2,000 attendees per activity. Rapid Response events vary and may involve approximately 50–600+ affected workers. No fixed volume is established for workshops, individual counseling sessions, or credit analysis engagements; demand and geographic distribution will be event-driven across Puerto Rico.
12	(a) Is the contractor responsible for providing the physical venue, audiovisual equipment, and related on-site infrastructure for in-person workshops and service fairs, or will PRDEDC/SUDWE and the local workforce areas provide such space and equipment at each activity location? (b) Is the contractor expected to supply its own virtual meeting platform and licensing for virtual service delivery, or will PRDEDC provide access to an existing platform?	PRDEDC/SUDWE and the local workforce areas will provide the venue, audiovisual equipment, and related on-site infrastructure for in-person activities. PRDEDC will also provide access to the virtual platform required for virtual service delivery. The contractor will be responsible for providing the qualified personnel and delivering the services.

ID	Question Received	Response
Pricing, Service Demand, Delivery Logistics and Staffing (continued)		
13	Does PRDEDC require a standard-duration financial education curriculum—for example, 80 hours—to be delivered in full to every participant, or may a modular approach be used in which participants select specific modules according to their needs?	A standard 80-hour curriculum is not required. Proposers may use a modular approach tailored to participant needs, provided the workshop model addresses the core financial education topics required by the RFP and can be delivered within the proposed workshop durations.
14	Can PRDEDC provide an approximate estimate of the annual volume of workshops, groups, or participants for technical and staffing-planning purposes?	See Response 11.
15	Must all listed roles be included on a permanent basis across all four service domains, or may the proposer adjust its staffing structure according to the nature and actual volume of each domain—for example, individual counseling versus group workshops?	The selected contractor must designate a Project Manager. The remaining required functions must be covered, but the corresponding personnel do not need to be assigned full-time or permanently to every service domain. Proposers may combine or scale roles based on the nature and volume of the services, provided the staffing plan demonstrates the qualifications and capacity required to deliver all four domains.