

RFP-DDEC-FY2026-003

PRDEDC Intelligent Conversational Chatbot for All Service Offerings

Clarifications for Vendors: Chatbot Project Master Questions Answered

Please find below the answers to the questions for which PRDEDC has definitive guidance. These have been consolidated using a Master Questions (MQ) approach, which groups similar or overlapping inquiries and provides a single comprehensive response for each topic,

All official documentation, addenda, clarifications, and announcements will be published exclusively on our official website: <http://www.desarrollo.pr.gov>, under the 'Public Notices and RFPs' section on the homepage. No other channels will be used for official communications.

Master Questions

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MQ1 - Baseline Information

What baseline information does PRDEDC have regarding current user traffic, interaction volumes, service performance, satisfaction metrics (e.g., Net Promoter Score), and error rates across existing platforms, and how will these baselines be used to inform chatbot design, capacity sizing, and success measurement?

Coverage Notes:

Traffic, load, NPS, error rates, current platforms, permit process baselines

Answer:

PRDEDC will provide aggregated baseline metrics from its main platforms; the PRDEDC website, the Single Business Portal (SBP), and the Incentives Portal. These metrics will guide chatbot design and measurement success during the initial assessment phase.

The chatbot will run on **PRDEDC's AI Hub (Azure)**. Vendors do not need to manage flow but must ensure timely responses and meet performance SLAs. Providers must:

- Consume services via secure APIs.
- Declare the LLM(s) they intend to use.
- Open-source AI models are permitted as long as they comply with security, governance, and regulatory standards (NIST, PR Law 40, ISO/IEC 42001).

Known pain points during user navigation of our platforms that may lead to errors (as highlighted in public reports):

- Bottlenecks during initial guidance.
- Requirement validation.
- Document upload.

Data on SBP (Permits) experience and NPS:

Mejoras Sistema de Permisos ([hyperlink](#))

2025-11-21-Informe de Permisos-FINAL DDEC.pdf ([hyperlink](#))

Metrics to be supplied by PRDEDC to chosen provider (if available):

- Monthly traffic per platform (Website / SBP / Incentives); including visits, unique users, sessions, and peak concurrency, will be provided for reference only. Capacity and scaling will be fully managed by PRDEDC.

- Interaction volumes: most frequent pages/tasks, average session duration, drop-off points.
- Satisfaction metrics: NPS/CSAT, comment themes.
- Operational performance: average response times, system availability, queue/abandon rates (where applicable).
- Error rates in submissions: % of incorrect/incomplete applications (where data exists).
- Top user types per platform: SMBs, permit professionals, citizens, investors, etc.

Pending parameters: Clarity is needed on projected monthly interaction volumes and peak concurrent users. These will be defined collaboratively with the selected provider after the initial assessment phase. For now, we are sharing baseline metrics.

How these baselines will be used:

- Content focus: prioritize top tasks, address recurring errors, and resolve documented pain points.
- Success measurement: track deflection, task completion, factual correctness, time to resolution, and CSAT/NPS against pre-launch baselines.

Traffic:

Metric	Value
Monthly traffic on average – Website	~29,800
Traffic source breakdown – Website	Direct ~48.3%, Organic Search ~42.4%, others smaller percentages

Suggestions for proposals:

- Method to ingest baseline metrics into monitoring dashboards
- Content gap analysis tied to baseline pain points
- KPI plan aligned to baselines

MQ2 - Personas, Audiences & Scope

Which user personas, audiences, and business processes are in scope for the chatbot, and how does the chatbot fit within PRDEDC's current end-to-end service delivery model and user experience?

Coverage Notes:

Personas, priority audiences, UX, services, case management, appointments

Answer:

The chatbot will serve as the front-door triage and guidance layer within PRDEDC's end-to-end service delivery model. It will clarify processes, capture non-PII context, route users to SBP or Incentives platforms for authenticated actions, and escalate complex cases to human teams with structured handoffs. Appointment scheduling will be supported through TurnosPR or an alternative integrated platform, which will be confirmed during project execution.

Some audiences in scope include:

- Small and Medium Businesses (SMBs) seek creation, expansion, and compliance support.
- Entrepreneurs formalizing operations and securing first permits.
- Investors and enterprises exploring incentives and conducting due diligence.
- Permit professionals such as architects, engineers, and consultants.
- Citizens seeking general program information.
- Authorized representatives for incentives, such as lawyers, accountants, and similar professionals.

Processes in scope:

- Informational guidance on permits and programs (steps, prerequisites, timelines).
- Eligibility assistance and document checklists.
- Status queries via existing platforms (API-enabled, authenticated).
- Appointment scheduling and case creation for human support escalation.

User Personas:

Persona Name	Example	Context	Goals	Pain Points	Platform Interaction
SMB Owner	Local Bakery in Canóvanas	Wants to expand operations and	Obtain construction permits and	Confusing permit requirements,	SBP Portal, CUS-TurnosPR for

		add a small café area.	explore incentives for equipment purchase.	multiple government portals.	appointment booking, telephone directory routes to BrainHi
Startup Founder	Early-stage tech startup developing a new software	Developing an app for logistics and needs to formalize the business.	Register the company, secure first permits, and understand tax benefits.	Unclear eligibility for incentives, technical jargon in documentation.	Website, SBP, Incentives Portal, CUS
Investor	Investor Group exploring renewable energy projects	Evaluating incentives for solar energy installations in Ponce.	Understand available tax credits and compliance requirements.	Scattered information across multiple agencies, complex due diligence.	Website and Incentives Portal
Manufacturing Plant	Enterprise manufacturer planning a line expansion in PR	Needs to modify facilities, add equipment, and confirm regulatory/permit steps before capital investment	Understand permit prerequisites and timelines; verify incentive eligibility for capital expenditures and job creation; schedule appointments for complex cases	Fragmented guidance across agencies; uncertainty about which permit applies; unclear document checklists; delays in status updates	SBP for permit steps and status, Incentives Portal for program exploration, and TurnosPR for appointments
Permit Consultant	Consulting firm	Handles permits for commercial developments in Toa Baja.	Quickly access requirements and check status for multiple clients.	Delays in responses, lack of integration between systems.	Website and SBP
Citizen	Resident of Caguas interested in PRDEDC programs for training or job opportunities	Wants information on entrepreneurship programs and training.	Learn about available workforce programs and other entrepreneurship related grants.	Difficulty finding eligibility criteria.	Website

Additional Clarifications:

- Existing user journey maps, service blueprints, and conversation flows:** To be created under Domain 2 – Documentation & Knowledge Enablement.

- **Priority MVP use cases and UAT criteria:** To be defined collaboratively; likely include permit guidance, incentive eligibility, application assistance, and status checks.
- **Common procedures per user type:** Validating eligibility, understanding requirements, starting applications, checking status, uploading documents, and scheduling appointments.
- **Availability of documented user stories or functional requirements:** Guidance provided on the persona table.
- **Current case/ticketing tracking:** None currently; to be defined by PRDEDC and may require provider support.
- **Status exposure:** Expected through existing PRDEDC platforms.
- **Sample queries, historical tickets, and FAQs for training:** PRDEDC will provide during Month 1 in collaboration with the task force.
- **Some pain points:** Unclear requirements, fragmented information, and delays in responses.
- **User identification:** Mix of anonymous guidance and authenticated profiles for transactions within SBP and Incentives Portal.

Suggestions for proposals:

- Persona-based journey maps and conversation flow drafts (ES/EN).
- UX design showing on-ramp → triage → guidance → handoff.
- Accessibility features aligned to public-sector standards.

MQ3 - Channels, Setup & Access

Through which channels will the chatbot be available (e.g., web, messaging platforms such as WhatsApp, or embedded within existing applications), who will be responsible for channel setup and ownership, and what access model is envisioned, including anonymous access, authentication, or single sign-on (SSO)?

Coverage Notes:

WhatsApp, channels, login vs no login, one vs multiple bots.

Answer:

The chatbot will launch across multiple channels to maximize accessibility and user engagement. At go-live, it will be embedded on the PRDEDC website, integrated within the Single Business Portal (SBP) and Incentives Portal, and available via WhatsApp using an official PRDEDC number supporting text and voice interactions. The architecture must remain channel-agnostic to allow future expansion to additional platforms.

- Website: <https://www.desarrollo.pr.gov/>
- Single Business Portal: <https://www.sbp.pr.gov/>
- Incentives Portal: <https://incentives.ddec.pr.gov/>

Channel Setup & Ownership:

PRDEDC defines channel setup and long-term administration, while the selected vendor will handle technical implementation, initial configurations, and provide full documentation for handover. Source code is part of deliverables to provide at production stage. PRDEDC PMO/IT will own access governance, DNS, WhatsApp number provisioning, and security approvals.

Access Model:

- Anonymous browsing for general informational flows.
- Authentication required for SBP/Incentives transactions using existing login flows.
- Single Sign-On (SSO) for external users is not in scope at launch; the chatbot must reuse current login patterns.

Technical Expectations:

- REST/JSON APIs, JWT/OAuth2 where applicable.
- Rate limiting and error handling per channel.
- Telemetry (channel, intent, resolution) with clear PII boundaries.

Additional Clarifications:

- **Integration with telephony systems (SIP, PBX, Twilio):** Not required at launch. Potential integration with the telephone directory using AI capabilities.
- **Multiplatform compatibility:** Yes, desktop, mobile, and tablet across major browsers.
- **Platform approach:** Configurable platform preferred; hybrid approach acceptable.
- **Multilingual Support:** If the selected LLM supports multiple languages, the chatbot must also support them. PRDEDC's preference is to avoid restricting the model's multilingual capabilities, ensuring continuous updates and improvements as the model evolves.
- **Existing chatbot initiatives:** None currently active; this will be a new implementation.
- **Language detection:** Automatic detection preferred; manual selection as fallback.
- **Cross-channel continuity (omnichannel):** Not required at launch; each channel will operate independently.
- **Existing integrations:** Expected to leverage SBP and Incentives APIs; clarity needed for additional systems.
- **Status exposure:** Through existing PRDEDC platforms; no new interface required initially.
- **Default language:** Auto-detect and respond in user's preferred language when possible.

Suggestions for proposals:

- Detailed channel implementation plan (web widget specs, WhatsApp setup steps, fallback behavior).
- Authentication boundary design (anonymous vs authenticated flows, consent screens).
- Load model per channel with test plan for peak events.

MQ4 - Content Creation, Governance & Policies

How will chatbot content be created, governed, approved, maintained, and updated over time, and what existing guidelines, terminology standards, policies, or brand requirements must be followed?

Coverage Notes:

Content ownership, approvals, brand book, terminology.

Answer:

Chatbot content will be authored by the selected vendor under PRDEDC product ownership, with final approval by the designated Task Force. PRDEDC will provide documentation and access to subject matter experts (SMEs) to support knowledge base development, and existing regulations, procedures, eligibility criteria, and FAQs will be shared in structured format where available. If source documentation is incomplete or conflicting, responsibility for resolution will be shared collaboratively, with PRDEDC validating institutional responses. Updates will follow a case-by-case SLA, with an expectation of completion within 10 business days. The PRDEDC website will serve as the authoritative source of truth; chatbot content must mirror website updates in real time. All changes will be versioned, and audit logs retained for two years to ensure compliance and traceability.

Creation & Validation Workflow:

1. **Draft:** The provider prepares content using PRDEDC-approved sources and standardized terminology lists, program descriptions, disclaimers, and brand guidelines.
2. **Review:** The Task Force validates accuracy, tone, and compliance with institutional policies and PRDEDC's Brand Book.
3. **Publish:** Approved content is published through the admin portal with version control and audit trail.
4. **Monitor:** Post-publication analytics will identify gaps and inform continuous improvement.

Guardrails & Standards:

- Controlled responses, curated sources, and safe defaults for ambiguous inquiries.
- Mandatory disclaimers will be collaboratively established during chatbot development, under the guidance and approval of the Task Force.

- PRDEDC will provide a glossary of preferred terminology.
- Compliance with PRITS architecture, security and accessibility guidelines:
<https://www.prits.pr.gov/documentos-guias>

Knowledge Transfer & Training:

PRDEDC requires formal knowledge transfer for agency staff, including admin portal usage, content governance, and QA processes. Duration, modality, and materials will be defined collaboratively. PRDEDC resources will also be available for interviews and workshops to capture tacit knowledge.

Scope & Complexity:

The content will encompass all permit types, incentive programs/decrees, and distinct user journeys, with planned inclusion of process variations by municipality, sector, and economic activity. Policies and incentive rules change frequently, so the solution must support agile updates. PRDEDC will provide sample queries, historical tickets, and FAQs as available during Month 1 for training and testing. A “Golden Set” of verified Q/A pairs for UAT will be defined collaboratively; vendors may propose an initial evaluation set for PRDEDC approval.

Suggestions for proposals:

- Content style guide and response policy (including disallowed topics and escalation triggers).
- Admin workflow (roles, SLAs, versioning, rollback).
- QA plan for factual correctness and source citation.

MQ5 - Operating Model (Steering Team & Inter-Agency)

What operating model is envisioned for managing the chatbot on an ongoing basis, including the roles and responsibilities of PRDEDC's program management office (PMO), subject-matter experts (SMEs), internal teams, and any required collaboration with other government agencies or external stakeholders?

Coverage Notes:

PMO, SMEs, internal capacity, inter-agency collaboration.

Answer:

PRDEDC will establish a **Chatbot Steering Team** as the single governance and operational body, assuming all responsibilities across program management, technical oversight, and compliance. This unified structure will streamline decision-making and accountability while ensuring coordination with internal teams and external stakeholders, including SBP platform owners and TurnosPR administrators.

Steering Team Responsibilities:

- **Governance & Delivery:** Manage scope, milestones, risks, and change control.
- **Vendor Coordination & Integration:** Act as the primary interface for technical implementation and inter-agency collaboration.
- **Quality & Compliance:** Ensure accuracy of content, brand alignment, security reviews, and adherence to PRITS standards.
- **Testing & Validation:** Coordinate SME input for discovery, UAT, and quality sign-off.
- **Reporting & Transparency:** Track the SLA dashboards, audit-ready documentation, and structured decision logs.

Cadence & Transparency:

Weekly working sessions and monthly steering meetings will be held, with decisions tracked in shared logs and audit-ready documentation. KPI and SLA dashboards should be reported monthly.

Source Code & IP Ownership:

Providers must deliver the complete source code to **PRDEDC's Azure DevOps repository** at the time of production handover. All intellectual property rights belong to PRDEDC.

Delivery must include:

- **Full technical documentation**, covering:

- Environment setup and configuration.
- Dependencies and versioning.
- Build and deployment steps.
- Runbooks for operations and maintenance.
- Clear instructions for future updates and troubleshooting.

This requirement ensures transparency, maintainability, and compliance with PRDEDC's governance standards.

Additional Clarifications:

- **Average response time for deliverable reviews:** PRDEDC will target 3–10 business days for technical approvals to maintain the 6-month deployment timeline.
- **Continuous operation:** This is yet to be determined based on final planning and agreements in the RFP process. The vendor will provide hypercare and knowledge transfer during stabilization, and the long-term operating model will be defined collaboratively.
- **Testing and validation:** PRDEDC staff will actively participate in UAT, with SMEs engaged in scenario validation and quality sign-off. Internal capacity for chatbot updates will be built through training beyond long-term maintenance requirements.
- **SME involvement:** This is yet to be determined based on final planning, but PRDEDC will find the time to ensure proper engagement. Current estimates suggest 4–6 hours/week during discovery, 3–4 hours/week during development/testing, and 5–6 hours/week during UAT, subject to adjustment during detailed planning.
- **Project team composition:** PRDEDC will assign a dedicated Project Manager and Product Owner within the Task Force to ensure alignment, governance, and timely decision-making throughout the project.
- **On-site vs remote work:** The project is primarily remote; hybrid participation may be requested for key workshops or go-live support, with on-site presence defined collaboratively.

Suggestions for proposals:

- Staffing plan (project manager, solution architect, integration engineer, content lead, QA).
- Engagement cadence recommendations (ceremonies, artifacts, acceptance gates).

MQ6 - Technical Architecture, Cloud & Residency

Full Question:

What is the target technical architecture for the chatbot solution, including cloud environment preferences, integration approach with existing systems, alignment with current PRDEDC platforms, and any requirements related to data residency or talent residency (U.S.-based versus non-U.S.)?

Coverage Notes:

Architecture, cloud, integrations, data & talent residency.

Answer:

The chatbot solution will run within **PRDEDC's AI Hub on Microsoft Azure**, leveraging its scalability, security, and observability features. Providers must adhere to AI Hub services via secure APIs and disclose the Large Language Model(s) (LLM) utilized, including safety features and evaluation plans.

All DevOps activities, including deployment, CI/CD, and ongoing maintenance, will occur within PRDEDC's AI Hub after vendor handover. Providers must deliver source code and documentation to PRDEDC's Azure DevOps repository as part of the final deliverables.

Target Architecture:

The logical architecture will include the following layers:

- **Frontend Channels:** Web widget embedded on PRDEDC.pr.gov, SBP, and Incentives Portal; WhatsApp endpoint(s).
- **Orchestration Layer:** Bot framework, dialog management, and policy enforcement.
- **Knowledge & Tools:** Content knowledge base, retrieval-augmented generation (RAG), and guardrails for accuracy and bias mitigation.
- **Integration Layer:** Secure APIs to SBP, Incentives Portal, TurnosPR, and telemetry systems for analytics.
- **Admin Portal:** Content workflow, approvals, analytics, and case routing for escalation.

Cloud & Residency Requirements:

- **Data Residency:** All data must reside in PRDEDC Azure, in compliance with PRITS and applicable legal requirements.

- **Talent Residency:** Providers must meet Commonwealth/U.S. compliance requirements, including background checks where applicable.

Integration Approach:

The chatbot will integrate with existing PRDEDC platforms via secure REST/JSON APIs using token-based systems. Rate limiting, error handling, and telemetry (channel, intent, resolution) will be implemented with strict PII boundaries.

Additional Clarification:

- **Status Tracking:** If a user requests a status update, the system must retrieve and display the latest information in real time through backend integration with existing PRDEDC platforms.

Suggestions for proposals:

- Architecture diagrams.
- LLM selection rationale, safety features, and evaluation plan.
- API catalog (endpoints, authentication, schemas), plus non-functional requirements (NFRs).

MQ7 - Data Handling, PII, Retention & Security

Full Question:

How will user data, chatbot conversations, and any personally identifiable information (PII) be handled, including storage location, retention periods, access controls, security safeguards, and compliance with applicable Commonwealth of Puerto Rico and federal laws and regulations?

Coverage Notes:

PII, data retention, security, where conversations live.

Answer:

User data, chatbot conversations, and any personally identifiable information (PII) will be handled in strict compliance with Commonwealth of Puerto Rico and U.S. federal laws, as well as PRITS security and accessibility guidelines. The solution will follow a **privacy-first design**, ensuring minimal data collection and robust security safeguards.

Data Residency & Storage:

- All data will reside in U.S./Puerto Rico-based Azure regions within PRDEDC's AI Hub.
- Chat logs and telemetry will be stored in **Azure CosmosDB**, accessible only through secure APIs; providers will not have direct database access.

Privacy & Minimization:

- Anonymous-first approach: authentication required only for user-specific tasks (e.g., status checks, submissions).
- Collect only the minimum data necessary and display clear notices and consent prompts where applicable.

Security Controls:

- Encryption in transit (TLS 1.2+) and at rest (AES-256).
- Role-Based Access Control (RBAC) with least privilege principles and MFA for all administrative roles.
- Audit trails for admin actions, content changes, and data access.

Retention & User Rights:

- Configurable retention period at discretion of PRDEDC's defined policies.

- Mechanisms for opt-out, data access, and deletion requests in compliance with applicable laws.

Compliance & Incident Response:

- Full alignment with NIST, PRITS, and PR Ley 40 standards.
- Security incidents will follow PRDEDC's Incident Response Plan, including 24-hour initial notification for any breach or anomaly.

Additional Clarification:

- **Penetration Testing & Red Team Activities:** Pre-production security validation will include vulnerability scanning and penetration testing. Red team exercises may be required based on PRDEDC's final security review and will be defined collaboratively during planning.

Suggestions for proposals:

- Data classification and handling matrix (PII vs non-PII).
- Retention settings, purge workflows, and privacy UX examples.
- Security testing plans, including vulnerability scanning, penetration testing, and incident response protocols.

MQ8 - Functional Capabilities & Admin Tools

What functional capabilities are expected from the chatbot (e.g., informational guidance, document handling, case or permit status, appointment scheduling), and what administrative or management tools (such as an admin portal, content management, or analytics tools) are required for PRDEDC users?

Coverage Notes:

Admin portal, uploads, execution vs guidance, scheduling.

Answer:

The chatbot will serve as a **primary digital resource hub**, providing both informational guidance and limited transactional support, with escalation for complex cases. It should deliver multilingual assistance across all user-facing channels and include robust administrative tools for PRDEDC staff.

User-Facing Capabilities:

- **Guidance:** Step-by-step instructions for permits and programs, including contextual help during form completion.
- **Document Handling:** Support for uploads and verification guidance (PRDEDC will supply verification guides for encoding).
- **Status Lookups:** Real-time integration with SBP and Incentives APIs for authenticated users.
- **Appointment Scheduling:** Integration with TurnosPR ([TurnosPR PWA](#)) or another appointment platform (to be defined) to enable booking and rescheduling.
- **Case Creation & Routing:** Structured handoff into queues with full conversation context for human follow-up.

Administrative Tools:

- **Admin Portal:** Role-based access for defined users.
- **Content Management:** Workflow for drafting, approvals, versioning, and rollback.
- **Analytics Dashboard:** Metrics for usage, accuracy/factual correctness, deflection rates, and CSAT/NPS trends.
- **Case/Ticketing:** Escalation flows, SLA tracking, and audit histories for compliance.

Additional Clarifications:

- **Transactional vs Guidance:** The chatbot will primarily guide users and pre-screen eligibility but will not execute full transactional actions at launch.
- **Application Handling:** Users will initiate applications through the chatbot and be guided step-by-step, but final submission will occur in existing systems (SBP/Incentives).
- **Eligibility Determination:** The chatbot will perform basic pre-screening and program matching based on user input; full eligibility logic remains in PRDEDC systems.
- **End-to-End Workflow Support:** The chatbot will guide users through applications, provide contextual help, and enable status checks, but complex exceptions will escalate to human agents.
- **Edge Cases & Exceptions:** Escalation by default for ambiguous or high-risk scenarios.
- **Definition of “Primary Digital Resource Hub”:** A hybrid model combining informational guidance, decision-support, and limited transactional capabilities, with future extensibility for deeper integration.

Suggestions for proposals:

- Capability roadmap distinguishing MVP features from phased enhancements.
- Admin portal feature list with sample screens.
- Analytics schema and definitions for key metrics.

MQ9 - Timeline, Milestones, Sandbox & Budget Parameters

What is the expected implementation timeline, key milestones, and high-level budget parameters of the chatbot initiative, and are sandbox or demo environments required to support evaluation, testing, or phased rollout?

Coverage Notes:

Timeline, milestones, budget guidance, sandbox.

Answer:

The target implementation timeline for the chatbot initiative is **approximately six (6) months** from kickoff to public launch. This schedule is designed to ensure structured progress, iterative validation, and readiness for production deployment.

PRDEDC will co-own the product launch alongside the selected provider, ensuring joint governance, approvals, and readiness at each phase. The timeline below reflects shared responsibilities:

- **Months 1–2:** Documentation, requirements gathering, content inventory, governance workflow setup, sandbox environment configuration, and initial non-functional testing.
- **Month 3:** Develop and validate a Proof of Concept (POC) for the initial incentives use case within the sandbox environment, followed by stakeholder demos and feedback integration.
- **Month 4:** POC for permits; initial API integrations and authentication boundary testing.
- **Month 5:** Integrated POC (permits + additional programs); user acceptance testing (UAT), performance tuning, security reviews, and content hardening.
- **Month 6:** Production launch followed by hypercare (stabilization, fixes, and optimization).

Sandbox/Demo Requirements:

A sandbox environment is **mandatory throughout the project** to validate functionality, performance, and guardrails prior to production deployment. This environment will support stakeholder demos, iterative testing, and phased rollout.

For the in-person meeting, the vendor will select the most effective method to demonstrate their capabilities.

Budget Parameters:

Providers must submit **transparent pricing** that covers:

- Implementation services and integration work.
- Licensing/subscriptions (if applicable).
- Support and maintenance tiers.
- Security and compliance costs.

The project does not impose predefined financial limits and does not provide a specific cost template. However, the proposal must include all cost details as outlined in the RFP. It is the proponent's responsibility to structure and present this information clearly and comprehensively.

Proposals must prioritize cost-effectiveness and functionality. Additionally, the proponent is required to provide well-reasoned recommendations for LLMs and other resources that best support the required tasks, ensuring functionality, scalability, and cost-efficiency to maximize value.

Clarification: Compute/runtime costs will be covered by PRDEDC given that it will be all managed under PRDEDC Azure AI Hub.

Additional Clarifications:

- **Post-deployment support duration:** Minimum duration will be defined collaboratively; vendors should propose options for hypercare and ongoing maintenance.
- **Pricing assumptions:** Proposals should include the full anticipated contract duration, including any optional renewal periods, not just the initial base term.
- **Milestone rigidity:** The deployment target of ≤6 months is firm, with internal go/no-go checkpoints aligned to the milestones above.
- **Successful MVP criteria:** Demonstrated ability to handle priority use cases (permit guidance, eligibility pre-screening, status checks) with validated accuracy, security compliance, and positive stakeholder feedback in sandbox.
- **Post-deployment support level:** To be defined collaboratively; vendors should propose options ranging from business-hours support to 24/7 monitoring.
- **Multiple contract awards:** PRDEDC reserves the right to award more than one contract if it serves the public interest or accelerates delivery of critical components.
- **Anticipated contract start date:** Following the March 20, 2026 award notice, with immediate onboarding and planning.

- **Intellectual property ownership:** PRDEDC expects full ownership of all deliverables; vendors may propose shared IP for proprietary tools subject to approval.
- **Innovation criteria (5% weighting):** Evaluated based on demonstrable enhancements beyond baseline requirements, such as advanced analytics, proactive guidance, or multilingual expansion.
- **Clarifying questions during evaluation:** Communication after submission will follow RFP rules; typically, all clarifications must occur before the deadline, with no post-submission dialogue unless initiated by PRDEDC.

Suggestions for proposals:

- Detailed project plan with deliverables per milestone.
- Risk register and mitigation strategies.
- Acceptance criteria per phase (functional, security, performance).

MQ10 - SLAs, KPIs, Reporting & Escalation

What service levels, key performance indicators (KPIs), reporting mechanisms, monitoring tools, and escalation processes will be used to evaluate chatbot performance, user satisfaction, operational impact, and continuous improvement over time?

Coverage Notes:

SLAs, KPIs, reporting, metrics.

Answer:

PRDEDC retains full ownership and governance of the AI Hub, including all operational, security, and compliance controls. Vendors will operate within PRDEDC-defined frameworks and provide recommendations as required.

Chatbot responses must meet a **≥90% factual correctness threshold**; this is the minimum quality baseline during UAT prior to production and will continue as an operational KPI post-launch.

Service Level Agreements (SLAs) (specific targets; to be refined during planning)

- **Availability:** $\geq 99.5\%$ monthly uptime in production.
- **Response Time:** P50 $< 2\text{s}$, P95 $< 5\text{s}$ per chatbot reply.
- **Accuracy:** Maintain $\geq 90\%$ factual correctness across supported topics.
- **Incident Response:** P1 issues acknowledged within 30 minutes; resolution per jointly agreed severity matrix.
- **Security & Compliance:** Continuous alignment with NIST/PRITS/PR Ley 40; monthly compliance dashboards.

Key Performance Indicators (KPIs)

- **Accuracy/Factual Correctness:** % of validated responses (target $\geq 90\%$).
- **Containment/Deflection:** % of inquiries resolved without human handoff; reduction vs. pre-launch baseline.
- **Task Success Rate:** % of users completing intended steps (permit guidance, document upload, scheduling, status check).
- **User Satisfaction:** CSAT/NPS post-interaction and trend over time.
- **Operational Impact:** Ticket volume by severity, backlog aging, and time-to-resolution trends.

Reporting & Monitoring

- **Admin Portal Dashboards:** Live views for KPIs/SLAs; monthly compliance reports and audit trails.
- **Observability:** Real-time system health (availability, latency, error rates), intent resolution, and guardrail triggers, with strict PII boundaries.
- **Continuous Improvement:** Quarterly improvement plans based on KPI trends, UAT findings, and user feedback; “Golden Set” of Q/A pairs maintained for regression testing. *(Golden Set to be defined)*

Escalation Process

- **Tiered Support:**
 - **Tier 1:** Chatbot/content operations (responses, KB, guardrails).
 - **Tier 2:** Technical/integration support (APIs, auth flows, environments).
 - **Tier 3:** Platform/security escalation (cloud services, compliance incidents).

PRDEDC retains ownership of Tier 3 escalations (platform and security). Vendors are responsible for Tier 1 and Tier 2 support and must integrate their ticketing workflows with PRDEDC’s admin portal for full auditability.

- **Ticketing:** Integrated with the admin portal for SLA tracking and audit trails; operational impact measured by ticket volume and resolution times.

Additional Clarifications

- **Languages for Accuracy & Bias Testing:** Testing will cover Spanish and English at minimum; expansion to additional languages may be staged post-launch.
- **Measuring ≥90% Accuracy in UAT:** A jointly defined evaluation protocol will be used, including: a curated Golden Set of Q/A pairs, source-backed answers, and guardrail checks. Vendors may propose the initial set; PRDEDC will approve. *(sample size and scenario mix to be defined collaboratively)*
- **Post-Deployment Accuracy Measurement:** Continue periodic audits using refreshed Golden Set plus random sampling from live conversations; discrepancies trigger content updates or guardrail tuning.
- **Availability Criticality & DR:** 99.5% monthly uptime is the operational target; cross-region disaster recovery and failover to be determined collaboratively (define RPO/RTO and failover drills during planning).
- **Continuous Improvement & Optimization:** Tracked through trends in accuracy, deflection, task success, CSAT/NPS, and ticket MTTR; quarterly plans must demonstrate measurable uplift vs. baseline.

- **Methodology for Measuring Factual Correctness:** the approach will be defined collaboratively during planning. It will include agreement on sample size, evaluation roles (PRDEDC SMEs and vendor QA), and a scoring rubric approved by PRDEDC. The rubric will distinguish correct, partially correct, and incorrect responses, with clear handling for “I don’t know” cases when guardrails apply. All specifics; such as sample size, evaluator mix, and scoring rules, will be finalized together to ensure transparency and consistency.
- **Incident Response Plan for AI Systems:** PRDEDC will provide a risk register and incident response playbook.
- **Validation of ≥90% Accuracy:** Documented UAT acceptance criteria and sign-off from PRDEDC Task Force; post-launch, monthly compliance dashboards and quarterly re-validation against the Golden Set.

Suggestions for proposals:

- **Measurement Protocol:** Provide a detailed plan for accuracy and bias testing (Spanish and English), including sample sizes, evaluator roles, and a scoring rubric.
- **SLA/KPI Commitments:** Define targets for availability, latency, accuracy, and incident response; include a disaster recovery strategy with proposed RPO/RTO (if applicable).
- **Reporting Mechanisms:** Include admin portal dashboard mockups, compliance report formats, and Power BI/analytics schemas.
- **Continuous Improvement Plan:** Outline a quarterly optimization framework tied to KPI trends, including content governance and guardrail tuning.
- **Escalation Playbooks:** Detail tiering, handoff procedures, MTTR/MTTA targets, and audit trail examples aligned with PRDEDC governance.

MQ11 - Assumptions, Constraints, Dependencies & Exclusions

What assumptions, constraints, dependencies, or exclusions apply to the chatbot initiative that vendors should consider when designing and proposing their solutions?

Coverage Notes:

Out of scope, constraints, assumptions

Answer:

This section defines the assumptions, constraints, dependencies, and exclusions for the chatbot initiative. Vendors must address these factors in their proposals, as this is a high-priority project for PRDEDC. We are seeking the best partner to deliver a solution that supports our strategic objectives.

Assumptions

- Proposers must bring all necessary materials and information to the in-person meeting. PRDEDC will not communicate or engage with any proposer before that meeting. It is the proposer's responsibility to decide whether the demonstration represents a proof of concept, a minimum viable product, or a production-ready solution, and whether to use a live prototype or a simulated use case; provided it effectively demonstrates functionality and integration feasibility.
- Proposers may use a sandbox environment, provided it does not require API testing, integrations, or real data from our systems.
- All documents and deliverables required under the RFP must be submitted in full; no exceptions. Compliance is mandatory.
- API and data access will be provided to the selected vendor for SBP, Incentives Portal, Turnos.pr, and any other relevant platforms.
- SMEs will be available for content validation and document verification standards.

Constraints

- SSO is not available for general external users; existing SBP/Incentives login flows must be reused.
- Website-first updates: chatbot content will synchronize only after website changes.
- Compliance approvals (PRITS and Task Force) and security reviews may impact timelines; however, PRDEDC will take all measures within its control to minimize any delays.

- Data residency requirements are subject to PRITS/Legal guidance.

Dependencies

- Inter-agency coordination (SBP team, Turnos.pr admins) through the Task Force.
- Availability of baseline analytics and reporting.
- Task Force governance and approval cadence.

Exclusions (initial scope)

- Complex case adjudication within the chatbot.
- Final submissions in chat without identity verification.
- Building new back-office systems beyond the scoped chatbot, admin tools, and integrations.

Suggestions for proposals:

- **Dependency Map and Access Plan:** Cover systems, people, and approval processes.
- **Compliance Checklist and Schedule:** Include PRITS requirements.
- **Scope Controls:** Define change management processes and guardrails for out-of-scope requests.