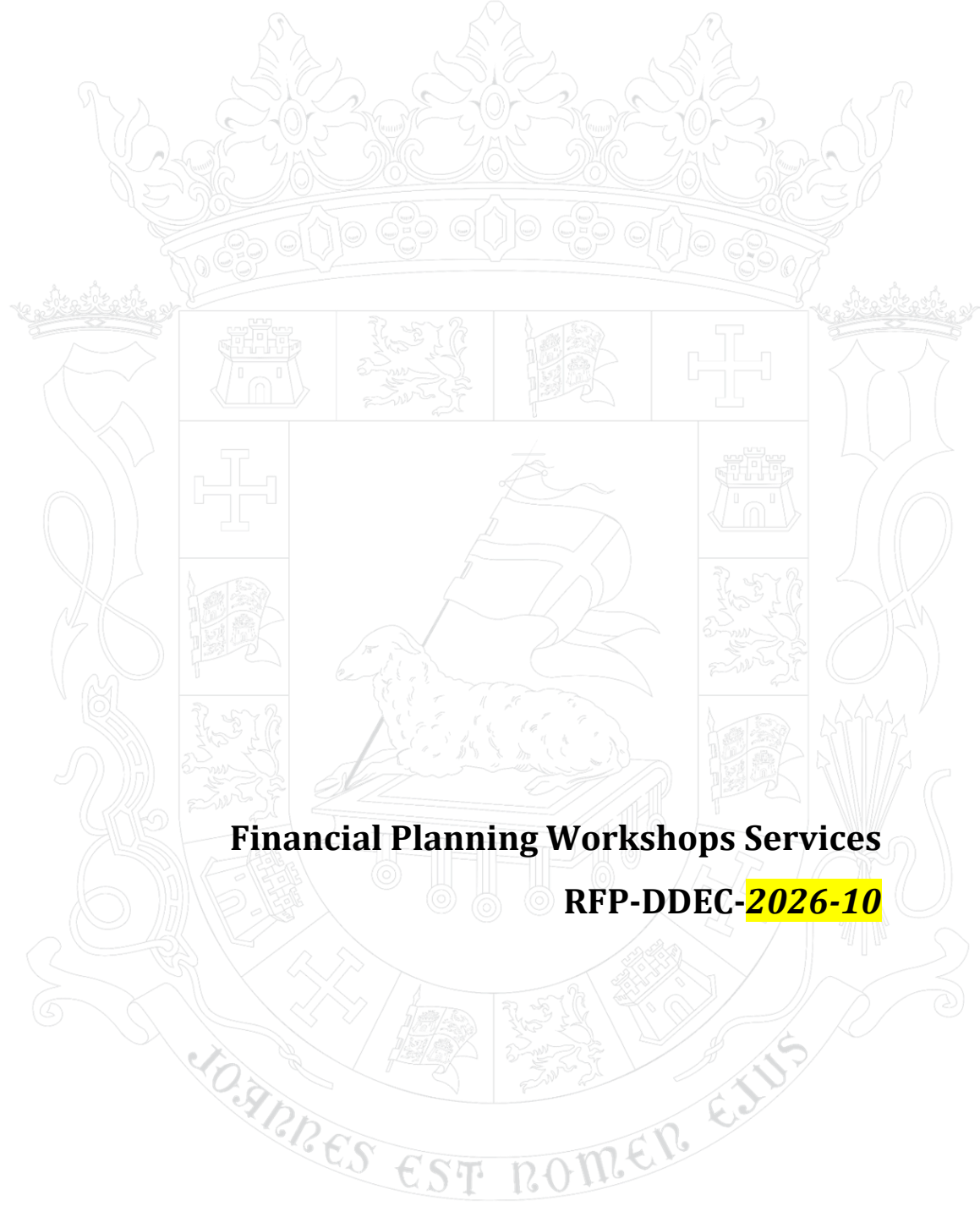




Financial Planning Workshops Services

RFP-DDEC-2026-10



DEPARTAMENTO DE

**DESARROLLO
ECONÓMICO Y COMERCIO**

GOBIERNO DE PUERTO RICO

Table of Contents

1	Introduction and Background.....	3
1.1	Overview of the Puerto Rico Department of Economic Development and Commerce	3
1.2	Legal Basis and Authority	4
1.3	Institutional Context and Strategic Transformation.....	4
1.4	Alignment with PRDEDC’s Priorities.....	5
1.5	Purpose of this RFP.....	5
2	Purpose and Strategic Objectives	6
2.1	Purpose.....	6
2.2	Strategic Objectives	6
2.3	Expected Outcomes	7
2.4	Guiding Principles for Implementation.....	8
3	Scope of Work / Statement of Work.....	9
3.1	General Description.....	9
3.2	Service Domains (Work Areas)	10
3.2.1	Financial Planning Workshops (Group Sessions).....	10
3.2.2	Individual Financial Counseling and Budget Development.....	11
3.2.3	Credit Analysis and Financial Guidance.....	11
3.2.4	Participation in Service Fairs and Outreach Activities	12
3.3	Integration Requirement.....	12
3.4	Project Management and Coordination Requirement	13
4	Principles of Execution and Service Standards.....	13
4.1	Performance and Coordination Principles.....	13
4.2	Service Standards and Availability.....	14
4.3	Transparency and Accountability.....	14
4.4	Deliverable Review and Continuous Improvement	14
5	Mandatory Requirements and Proposal Submission	14
5.1	Mandatory Requirements	14
6	Proposal Evaluation and Scoring Criteria.....	16
6.1	Evaluation Process Overview	16
6.2	Evaluation Criteria and Weighting.....	17

6.3	Cost Plan Evaluation.....	18
6.4	Final Selection and Award.....	18
7	Proposal Format and Submission Requirements	21
7.1	General Instructions.....	21
7.2	Proposal Organization and Structure.....	21
7.3	Cost Plan – Budget breakdown and pricing structure	23
7.4	Submission Method and Deadline	24
7.5	Receipt of Proposals.....	26
7.6	Errors and Omissions in Proposals.....	26
7.7	Clarifications and Modifications.....	26
7.8	Confidentiality and Proprietary Information.....	26
8	RFP Acquisition and Questions Procedure.....	27
8.1	RFP Documents Acquisition.....	27
8.2	Submission of Questions and Requests for Clarification	27
8.3	Allowed and Prohibited Communications	28
9	Contact & Schedule.....	28
9.1	Official Contact.....	28
9.2	RFP Schedule and Key Dates.....	28
10	Annex A	29

1 Introduction and Background

1.1 Overview of the Puerto Rico Department of Economic Development and Commerce

The Puerto Rico Department of Economic Development and Commerce (PRDEDC) is the principal executive branch agency responsible for promoting and facilitating economic growth, competitiveness, and innovation throughout Puerto Rico. Established under Reorganization Plan No. 4 of 1994, as amended, the PRDEDC leads the Government of Puerto Rico's economic development strategy through its integrated programs, incentives, and initiatives designed to attract investment, foster entrepreneurship, and strengthen local industries.

Through its various divisions and affiliated entities, the PRDEDC serves as the central coordinating body for economic transformation, overseeing industrial promotion, commercial development, incentives management, and strategic policy implementation to advance Puerto Rico's long-term prosperity.

The PRDEDC is the entity designated by Law No. 171-2014 as the state administering agency of federal funds received under Title I of the Workforce Innovation and Opportunity Act (WIOA), through the Workforce Development Program (WDP).

The WDP has the mission to implement an integrated system for workforce development that provides access to employment and training services and joint efforts with the private sector to promote the economic development of Puerto Rico. The WDP leads workforce strategies that contribute to the economic competitiveness for businesses and workers.

The purpose of the Title I of WIOA is to provide workforce investment activities through statewide and local workforce development systems that increase participants' employment, retention, and earnings and raise the attainment of recognized postsecondary credentials by participants. As a result, WIOA helps improve the quality of the workforce, reduce welfare dependency, increase economic self-sufficiency, meet the skill requirements of employers, and enhance the productivity and competitiveness of the Nation.

As part of the WDP, the State Unit for Dislocated Workers and Employers (SUDWE) was created to provide dislocated workers with "Required and Permissible Statewide Rapid Response Activities," in accordance with Section 134(a)(3)(A) of WIOA. As part of its responsibilities, SUDWE coordinates and implements a range of support services for workers affected by permanent business closures or mass layoffs in Puerto Rico. To reach dislocated workers across the Island and expand the delivery of in-person Rapid Response services, the WDP is planning to incorporate additional tools to align with current technological trends through various virtual platforms. This will, in turn, provide participants with an alternative means of accessing services via the Internet.

1.2 Legal Basis and Authority

This Request for Proposals (RFP No. DDEC-2026-10) is issued under the authority granted by Reorganization Plan No. 4 of 1994, as amended, which establishes the organizational and operational framework of the Puerto Rico Department of Economic Development and Commerce (PRDEDC). It is also consistent with the policy framework established under Act No. 60-2019, known as the Puerto Rico Incentives Code, which consolidates and regulates the island's economic development initiatives.

The procurement process shall comply with all applicable Puerto Rico laws, regulations, and executive instruments governing the contracting of professional services by public entities, including Executive Order 2021-029, Circular Letter No. 013-2021 issued by the Office of the Comptroller of Puerto Rico and the *“Procedimiento Interno para la Evaluación y Selección de Proveedores de Servicios Profesionales cuya cuantía sea de \$250,000 o más, y aquellos de menor cuantía cuando así se determine por el Departamento de Desarrollo Económico y Comercio (DDEC) y sus Entidades Operacionales y Adscritas Oficina de Asesoramiento Legal”*.

1.3 Institutional Context and Strategic Transformation

The Puerto Rico Department of Economic Development and Commerce (PRDEDC), through its Workforce Development Program (WDP), is undergoing a strategic transformation aimed at strengthening the delivery of integrated workforce services, enhancing responsiveness to labor market disruptions, and promoting economic resilience across Puerto Rico. This transformation aligns with the public policy that prioritizes the development of workforce talent, the promotion of employment opportunities, and the implementation of innovative training and support services that respond to evolving economic conditions.

As part of this initiative, the Department seeks to enhance and expand Rapid Response services provided through the State Unit for Dislocated Workers and Employers (SUDWE), particularly by incorporating structured financial education interventions that equip affected workers with practical tools to manage financial uncertainty, stabilize their economic conditions, and facilitate their transition back into the workforce.

The PRDEDC seeks to project its role as a catalyst for economic resilience and workforce empowerment, reinforcing its mission to promote equitable access to employment opportunities, strengthen individual financial capability, and support long-term socioeconomic stability. This effort is consistent with the broader objectives of the Workforce Development Program, including improving employability, fostering adaptability to labor market changes, and supporting displaced workers in regaining economic self-sufficiency.

In this context, the Financial Planning Workshops initiative serves as a strategic mechanism for delivering timely, relevant, and impactful support services to dislocated workers. Through coordinated outreach, educational interventions, and individualized guidance, this

initiative contributes to improving financial literacy, strengthening decision-making capabilities, and fostering collaboration among public, private, and community stakeholders involved in workforce development and economic recovery efforts.

1.4 Alignment with PRDEDC's Priorities

The strategy resulting from this RFP must align with PRDEDC's key strategic priorities, which include:

- **Workforce development and upskilling:** Strengthening the skills, adaptability, and employability of Puerto Rico's workforce by providing targeted interventions that support dislocated workers in navigating economic transitions and reentering the labor market.
- **Economic resilience and worker transition support:** Enhancing the capacity of individuals and communities to withstand economic disruptions by delivering Rapid Response services through the State Unit for Dislocated Workers and Employers (SUDWE), including financial education tools that promote stability and informed decision-making during periods of unemployment or job displacement.
- **Integration of workforce and economic development strategies:** Aligning workforce services with broader economic development efforts by ensuring that participants are equipped not only with employment-related skills, but also with financial capabilities that support long-term economic self-sufficiency and productivity.
- **Access to equitable and inclusive services:** Expanding access to high-quality, culturally relevant, and accessible services across Puerto Rico, including virtual and in-person delivery models, to ensure that all eligible participants, particularly dislocated workers, can benefit from financial planning education and support services.
- **Innovation in service delivery:** Promoting the use of technology and interactive methodologies to modernize the delivery of workforce services, including virtual workshops, digital tools, and practical learning approaches that enhance participant engagement and outcomes.

1.5 Purpose of this RFP

Through this RFP, the PRDEDC seeks to establish a strategic partnership with a qualified and experienced professional services firm or entity to design, coordinate, and deliver financial planning workshops and related support services for dislocated workers served through the State Unit for Dislocated Workers and Employers (SUDWE), spanning a period of one (1) year, with the option to renew based on performance and programmatic needs.

The selected firm shall present a comprehensive, integrated, and results-oriented proposal that effectively addresses all required service components described in this document, including financial education workshops, individual budget counseling, credit analysis and guidance, and participation in service fairs. The proposal must demonstrate the proposer's

capacity to deliver dynamic, accessible, and high-quality services across Puerto Rico, both in-person and through virtual platforms, as required.

Partial or fragmented proposals that do not demonstrate full compliance with all RFP requirements, including scope, methodology, staffing, and service delivery expectations, will not be considered responsive.

2 Purpose and Strategic Objectives

2.1 Purpose

As stated above, this RFP seeks qualified firms that provide professional services in financial education, financial planning, and workforce support services that will enable PRDEDC to strengthen program delivery and enhance the effectiveness of Rapid Response interventions for dislocated workers.

Thus, the selected contractor shall work in close collaboration with PRDEDC's Workforce Development Program (WDP), specifically the State Unit for Dislocated Workers and Employers (SUDWE), and any related partners or local workforce development areas, as applicable, to design, coordinate, and deliver financial planning workshops and related services that support dislocated workers during periods of economic transition.

The contractor shall be responsible for implementing a comprehensive service delivery approach that includes financial education workshops, individualized budget counseling, credit analysis and guidance, and participation in service fairs, ensuring that all activities contribute to improving participants' financial literacy, stability, and readiness to reenter the workforce.

2.2 Strategic Objectives

PRDEDC's strategic efforts shall be guided by the following core objectives:

1. Strengthen financial capability and resilience of dislocated workers
 - Provide practical financial education that enables participants to manage reduced or unstable income during periods of unemployment or transition.
 - Promote informed financial decision-making through tools such as budgeting, expense prioritization, and debt management.
 - Support participants in developing short- and medium-term financial strategies that enhance economic stability.
2. Enhance the effectiveness of Rapid Response services
 - Integrate financial planning services as a core component of Rapid Response activities delivered through the State Unit for Dislocated Workers and Employers (SUDWE).

- Ensure timely deployment of services in response to layoffs, closures, or workforce disruptions across Puerto Rico.
 - Deliver consistent, high-quality services aligned with program standards and participant needs.
3. Promote workforce reentry and economic self-sufficiency
 - Equip participants with financial tools that facilitate their transition back into employment.
 - Reduce financial stressors that may hinder job search, training participation, or employment retention.
 - Encourage long-term financial behaviors that support sustained participation in the labor market.
 4. Ensure accessibility and quality of service delivery
 - Provide services through both in-person and virtual platforms to maximize reach and accessibility.
 - Deliver dynamic, interactive, and culturally relevant workshops tailored to the needs of dislocated workers.
 - Maintain qualified personnel with strong communication and facilitation skills.
 5. Support integrated workforce and economic development outcomes
 - Align financial education services with broader workforce development strategies and program goals.
 - Foster coordination with local workforce areas and partner entities to ensure comprehensive service delivery.
 - Contribute to improved participant outcomes, including financial stability and successful workforce reintegration.

2.3 Expected Outcomes

The successful implementation of this RFP is expected to result in measurable outcomes, including but not limited to:

- Increased financial literacy among participants, demonstrated through improved understanding of budgeting, credit management, and financial planning concepts.
- Development of individualized household budgets for participating dislocated workers, enabling better management of reduced or transitional income.
- Improved participant capacity to make informed financial decisions during periods of unemployment or job transition.
- Increased awareness and understanding of credit reports, including participants' ability to interpret, monitor, and take corrective actions to improve their credit standing.

- Effective delivery of Rapid Response financial education services through the State Unit for Dislocated Workers and Employers (SUDWE), ensuring timely and consistent service provision across events.
- High levels of participant engagement and satisfaction with workshops, counseling sessions, and service fair interactions.
- Expanded access to services through both in-person and virtual delivery methods, increasing participation across different regions of Puerto Rico.
- Strengthened alignment between financial education services and workforce development goals, contributing to participants' readiness to reenter the labor market.
- Improved overall financial stability of participants, as evidenced by the adoption of sound financial practices, and reduced financial vulnerability.

2.4 Guiding Principles for Implementation

All activities implemented under this RFP shall adhere to the following guiding principles:

- **Integration:** All tasks, services, and deliverables shall form part of a unified and cohesive service delivery framework aligned with the objectives of the Workforce Development Program (WDP) and the Rapid Response services provided through the State Unit for Dislocated Workers and Employers (SUDWE).
- **Transparency:** All activities shall reflect the highest ethical and professional standards, ensuring clarity, accuracy, and accountability in service delivery, participant interactions, and reporting.
- **Data-Driven Decision Making:** Service delivery and reporting shall be grounded in measurable indicators, including participant outcomes, service utilization, and performance metrics, to support continuous evaluation and improvement.
- **Accessibility and Inclusion:** All services shall be designed to ensure equitable access and inclusion for all eligible participants, considering cultural, linguistic, geographic, and socioeconomic diversity, including the provision of both in-person and virtual service delivery options.
- **Participant-Centered Approach:** Services shall be tailored to the specific needs of dislocated workers, ensuring that content is practical, relevant, and responsive to real-life financial challenges faced during periods of job displacement or economic transition.
- **Quality and Consistency:** All services shall be delivered by qualified personnel using standardized methodologies to ensure consistency, reliability, and high-quality participant experiences across all service locations and modalities.
- **Innovation:** The proposal shall demonstrate the application of innovative tools and methodologies, including interactive learning techniques, digital platforms, and practical exercises that enhance participant engagement and knowledge retention.

- **Collaboration:** The contractor shall promote coordination and collaboration with PRDEDC, SUDWE, and local workforce partners to ensure seamless service delivery and alignment with broader workforce development efforts.
- **Continuous Improvement:** The contractor shall incorporate feedback mechanisms and performance monitoring processes to continuously refine and enhance service delivery and participant outcomes.

3 Scope of Work / Statement of Work

3.1 General Description

The selected contractor shall provide comprehensive professional services in financial education, financial planning, and workforce support services to support PRDEDC's institutional objectives. The services shall be delivered through an integrated and collaborative approach that ensures consistency, efficiency in resource utilization, and full alignment with PRDEDC's Priorities, as articulated in Section 1.4 of this RFP.

The contractor is expected to design, coordinate, and deliver financial planning workshops, individualized counseling services, and related financial guidance activities that directly support dislocated workers during periods of economic transition. These services shall be implemented as part of the Rapid Response framework administered through the State Unit for Dislocated Workers and Employers (SUDWE), and shall contribute to improving participants' financial literacy, stability, and readiness to reenter the workforce.

To ensure consistency and strategic coherence, each service domain described in this Scope of Work shall explicitly incorporate the core economic and workforce priorities of the Government of Puerto Rico and the PRDEDC, which include:

- **Strengthening workforce readiness and employability:** Enhancing participants' ability to successfully transition into employment through the development of financial management skills that support job search and retention.
- **Promoting economic resilience and self-sufficiency:** Equipping dislocated workers with the knowledge and tools necessary to manage financial challenges, reduce economic vulnerability, and achieve long-term stability.
- **Enhancing service delivery and program effectiveness:** Supporting the continuous improvement of workforce services through structured, high-quality, and responsive financial education interventions.

All project activities, deliverables, and outputs shall integrate one or more of these strategic priorities in a manner that is measurable, data-informed, and aligned with Puerto Rico's broader economic and workforce development vision.

Proposers must demonstrate their capacity, resources, and technical expertise to coordinate effectively across PRDEDC's Workforce Development Program (WDP), the State Unit for Dislocated Workers and Employers (SUDWE), local workforce development areas, and other relevant partners, ensuring full alignment and collaboration with public entities and stakeholders involved in service delivery.

Each proposal shall clearly describe its approach, integration framework, methodology, staffing plan, and measurable impact indicators for each of the service domains outlined below.

3.2 Service Domains (Work Areas)

The Scope of Work is organized into four (4) primary service domains. Each domain includes:

- A description of required services,
- The expected deliverables, and
- A Bidder Response Guide to orient the structure of the proposer's submission.

Note: The deliverables listed under each service domain are provided for reference and expectation setting purposes only. They illustrate the type and scope of outputs that PRDEDC anticipates after contract award. **Proposers are not required to submit these deliverables as part of their proposal.** Instead, their technical submission should focus on demonstrating the capacity, methodology, and organizational approach to effectively produce such outputs once engaged by PRDEDC.

Proposers must clearly indicate how service domains will integrate with one another to ensure narrative and operational consistency across the project's overall objectives.

Proposers must also describe how activities under each domain will align with related initiatives led by PRDEDC's Workforce Development Program (WDP), the State Unit for Dislocated Workers and Employers (SUDWE), and local workforce development areas.

3.2.1 Financial Planning Workshops (Group Sessions)

The contractor shall design and deliver structured financial education workshops aimed at equipping dislocated workers with essential knowledge and tools to manage their finances during periods of economic transition.

a. Required Services:

- Develop and deliver financial planning workshops covering core topics such as budgeting, financial adjustments during unemployment, credit management, identity theft protection, and housing-related financial challenges.
- Customize workshop content to address the needs of dislocated workers in transition scenarios.
- Deliver workshops in both in-person and virtual formats, as required.

- Incorporate interactive methodologies, including practical exercises and real-life scenarios.
- b. Expected Deliverables:
 - Workshop materials (e.g., presentations, participant handouts, exercises).
 - Schedule and delivery of workshops across designated locations or platforms.
 - Attendance records and summary of participant engagement.
- c. Bidder Response Guide:
Proposers shall:
 1. Describe their experience delivering financial education or similar workforce-related training services.
 2. Provide at least two (2) examples of comparable workshops or training initiatives.
 3. Explain the methodology and tools to be used to ensure participant engagement and knowledge retention.
 4. Demonstrate understanding of the needs of dislocated workers and workforce transition environments.

3.2.2 Individual Financial Counseling and Budget Development

The contractor shall provide individualized financial counseling services to assist participants in developing practical and personalized financial strategies.

- a. Required Services:
 - Conduct one-on-one counseling sessions focused on household budget development.
 - Assist participants in identifying income, expenses, and financial priorities.
 - Provide guidance on financial decision-making during periods of reduced or unstable income.
- b. Expected Deliverables:
 - Individualized household budgets prepared for participants.
 - Documentation of counseling sessions and participant progress (as applicable).
- c. Bidder Response Guide:
Proposers shall:
 1. Describe their experience providing individualized financial counseling services.
 2. Provide examples of similar services delivered to individuals or vulnerable populations.
 3. Explain their approach to developing practical and participant-centered financial plans.

3.2.3 Credit Analysis and Financial Guidance

The contractor shall provide education and guidance related to credit management and financial health.

a. Required Services:

- Educate participants on how to obtain and interpret credit reports.
- Provide guidance on improving and maintaining a healthy credit profile.
- Inform participants about their rights related to credit reporting and financial protections.

b. Expected Deliverables:

- Educational materials on credit analysis and financial health.
- Summary of services provided and participant engagement.

c. Bidder Response Guide:

Proposers shall:

1. Describe their expertise in credit education and financial advisory services.
2. Provide examples of similar services delivered.
3. Explain the tools and resources that will be used to support participants.

3.2.4 Participation in Service Fairs and Outreach Activities

The contractor shall participate in service fairs and outreach activities to provide financial education and guidance to participants.

a. Required Services:

- Provide financial orientation services during service fairs and outreach events across Puerto Rico.
- Deliver group or individual guidance, as required.
- Coordinate with WDP and SUDWE to support event-based service delivery.

b. Expected Deliverables:

- Participation in scheduled service fairs and outreach events.
- Summary of participants served, and services provided.

c. Bidder Response Guide:

Proposers shall:

1. Describe their experience participating in outreach events or service fairs.
2. Provide examples of similar engagements.
3. Explain their approach to delivering effective services in event-based environments.

3.3 Integration Requirement

All proposals must address the four (4) primary service domains described above and present an integrated strategy demonstrating how these services will operate cohesively to support PRDEDC's priorities.

Proposals that do not clearly demonstrate inter-domain integration, measurable outcomes, and narrative alignment with the PRDEDC's priorities may receive lower technical evaluation scores.

3.4 Project Management and Coordination Requirement

The selected contractor shall designate a Project Manager who will serve as the primary point of contact PRDEDC's WDP Director and SUDWE designated contact. This individual will be responsible for ensuring timely coordination, quality control, and the delivery of all required reports and materials under this contract.

The Project Manager shall:

- Oversee planning, execution, and performance monitoring across all service domains.
- Maintain continuous communication with WDP Director and SUDWE designated contact.
- Facilitate approval workflows, ensuring compliance with PRDEDC's internal review protocols.
- Coordinate subcontracted partners and vendors as necessary to meet established timelines.

The Project Manager must possess demonstrable experience managing Financial Planning Workshops Services projects of similar scale and complexity, preferably within the public or economic development sectors.

4 Principles of Execution and Service Standards

All services under this RFP are expected to be delivered within a framework of excellence, transparency, and full regulatory compliance, in accordance with the laws and regulations of the Government of Puerto Rico and applicable federal provisions. Proposals should demonstrate how the proposer's approach will uphold these principles and ensure effective coordination with PRDEDC.

4.1 Performance and Coordination Principles

Proposers are expected to design their service approach around the following principles:

- Performance reporting: Clear, daily, weekly, and/or monthly performance reports that include measurable progress indicators and documented outcomes.
- Continuous coordination: Ongoing communication mechanisms with PRDEDC's WDP, SUDWE and local areas ensuring consistency and alignment across all initiatives.
- Flexibility and adaptability: Ability to adjust priorities, timelines, and tactics in response to economic developments, emerging opportunities, or changes in public policy.
- Capacity & knowledge transfer: Commitment to strengthening PRDEDC's internal capabilities through manuals, operational guides, and knowledge transfer.

4.2 Service Standards and Availability

Proposals should clearly outline how service delivery will meet the following standards:

- **Availability:** Regular business hour coverage with extended availability to address urgent or time-sensitive matters when required.
- **Responsiveness:** Prompt acknowledgment and handling of PRDEDC requests or feedback.
- **Coordination:** Structured internal processes to ensure timely communication, document sharing, and approvals.

4.3 Transparency and Accountability

Proposers should describe how transparency and accountability will be embedded in all aspects of project management and reporting. This includes documentation of deliverables, progress tracking, and internal mechanisms that ensure traceability and integrity throughout execution.

4.4 Deliverable Review and Continuous Improvement

Proposals should describe how expected deliverables will be reviewed, approved, and tracked for quality assurance. PRDEDC encourages proposers to include mechanisms for continuous improvement and innovation throughout the engagement, ensuring the integration of global best practices and emerging technologies.

5 Mandatory Requirements and Proposal Submission

The purpose of this section is to outline the mandatory requirements that all proposers must meet to be considered responsive under this RFP. Compliance with the Mandatory Requirements will be evaluated on a Pass/Fail basis prior to the technical evaluation (work approach).

All supporting documents must be current, valid, and verifiable at the time of submission. Failure to submit any of the required documents will result in a non-compliant proposal.

5.1 Mandatory Requirements

All proposers must submit every document and certification listed in **Table 1** and **Table 2** as part of their proposal package. Each proposer must complete and sign (Annex A) and the checklist must be included as the first page of the Mandatory Requirements section of the proposal package.

Table 1 – Organizational Documents

Description / Documentation Needed	
RUP – Registro Único de Proponentes	Copy of valid registration issued by the Puerto Rico General Services Administration (ASG).
Certification of Legal Entity / Corporate Structure	Official certification identifying owners, officers, or members of the proposing entity.
Shareholder or Partner List	List of shareholders or partners and their ownership percentage within the proposing entity.
Employer Identification Number (EIN)	Copy of the Employer Identification Number (IRS Form SS-4 confirmation letter).
Good Standing Certificate	Issued by the Puerto Rico Department of State confirming the entity is active and in good standing.
Certificate of Existence or Authorization to Do Business in Puerto Rico	For non-local entities, provide certificate authorizing the entity to conduct business in Puerto Rico.
Merchant Registration Certificate	Issued by the Puerto Rico Department of Treasury (Hacienda).
Partnership Authorization Letter / Corporate Resolution	For partnerships: letter or resolution designating the authorized signatory. For corporations: certified Board of Directors resolution with corporate seal authorizing participation and contract execution.
Financial Statements	Year-end audited, reviewed, or compiled financial statements for the most recent two (2) years, issued by a Certified Public Accountant (CPA) in accordance with U.S. GAAP. Must include Balance Sheet, Statement of Operations, Statement of Cash Flows, and Notes. If the Proposer has not been in business within the year prior to the submission date, it must provide, for each Principal, Stockholder, Partner, or Member with 25% or more ownership (and those providing capital or guarantees): (1) audited, reviewed, or compiled financial statements for the last two years, prepared by a CPA under US GAAP. The financial statements must include Balance Sheet, Statement of Operations, Statement of Cash Flows, and notes to the financial statements; (2) a sworn statement dated within sixty (60) days before submission identifying all Principals, Stockholders, Partners, Members and their business participation; and (3) copies of income tax returns for the last two years.

Table 2 – Certifications and Affidavits

Requirement	Description / Documentation Needed
Sworn Statement of Compliance with Act No. 2-2018	Use the standard format provided in Annex A; must be signed and notarized.
Conflict of Interest Certification	Statement declaring the absence of any actual or potential conflict of interest with PRDEDC or other Government of Puerto Rico agencies. Use standard format provided as Annex B.
Criminal and Ethical Background Declaration	Sworn statement that neither the proposer nor its principals have any criminal record or pending ethical proceedings.
Sales and Use Tax (IVU) Debt Certification – Model SC-2927	Issued by the Puerto Rico Department of Treasury.
Income Tax Filing Certification – Model SC-6088	Issued by the Puerto Rico Department of Treasury.
Debt Certification – Model SC-6096	Issued by the Puerto Rico Department of Treasury.
Sales and Use Tax Return Filing Certification – Model SC-2942	Issued by the Puerto Rico Department of Treasury.
Employer Registration and Unemployment/Disability Insurance Certification	Issued by the Puerto Rico Department of Labor and Human Resources.
Chauffeurs’ Social Security Fund Certification	Issued by the Puerto Rico Chauffeurs’ Social Security Fund Administration.
State Insurance Fund Corporation (CFSE) Debt Certification – Form CFSE-3047	Issued by the Puerto Rico State Insurance Fund Corporation.
ASUME Compliance Certification	Corporate or individual certification of compliance issued by the Puerto Rico Child Support Administration (ASUME).
Municipal Tax (CRIM) Certification	Certification of filing and debt status for both personal and real property taxes, issued by the Municipal Revenue Collection Center (CRIM).
General Debt Certification (All Concepts)	Comprehensive debt certification covering all tax obligations, issued by the corresponding Puerto Rico government agencies.

6 Proposal Evaluation and Scoring Criteria

6.1 Evaluation Process Overview

Proposals will be evaluated through a structured, multi-stage process to ensure fairness, transparency, and alignment with the objectives of the PRDEDC.

The evaluation process will consist of the following stages:

- **Stage 1 – Mandatory Requirements (Pass/Fail):** Verification of all documents and certifications required in Section 5. Only compliant proposals will advance to the next stage.
- **Stage 2 – Technical Evaluation:** Assessment of the proposer’s understanding, methodology, capacity, and experience, based on the criteria in Section 3.2.
- **Stage 3 – Cost Plan Evaluation:** Review of the proposed budget, pricing structure after completion of the technical stage.
- **Stage 4 – Final Composite Score and Recommendation for Award:** Compilation of results from all stages to determine final rankings and recommendations.

6.2 Evaluation Criteria and Weighting

Each eligible proposal will be scored according to the criteria below. The total possible score is 100%.

Table 3 – Evaluation Criteria and Scoring Weights

Evaluation Factor	Description	Score (%)
Technical Approach and Work Plan	Evaluates the clarity and feasibility of the proposed strategy and execution framework. This criterion assesses the proposer’s overall technical approach, understanding of PRDEDC’s objectives and strategic priorities, integration across domains, and capacity to adapt to evolving economic and institutional contexts.	30%
Institutional Experience and Past Performance	Assesses the proposer’s track record and demonstrated experience in managing comparable projects. Evaluation considers the quality, scale, and relevance of previous work, client references, documented results, experience working with large groups of youth, dislocated workers, and individuals with disabilities, as well as documented outcomes and proven success cases.	20%
Proposed Team and Management Capacity	Evaluates the qualifications and structure of the proposed team, including a Project Manager, Financial Advisor or Financial Education Specialist, Certified Public Accountant (CPA) or Financial Consultant, Case Manager, Workshop Facilitator, Workforce Development Specialist, and any additional personnel necessary to successfully achieve the objectives of this RFP. Also considers certifications, awards, direct participation in the project, available infrastructure, technology, and identified subcontractors or partners, if applicable.	25%
Cost Plan	Reviews the overall cost structure, clarity, and reasonableness of the financial proposal relative to the proposed scope of work. Evaluation emphasizes cost-effectiveness, scalability, and demonstrated value for PRDEDC.	15%
Innovation and Added Value	Evaluates the integration of technologies, approaches and services not specifically required but beneficial to PRDEDC’s objectives	10%
Total		100%

6.3 Cost Plan Evaluation

The Cost Plan will form an integral part of the overall proposal evaluation. PRDEDC will review the financial component in conjunction with the proposer's technical and strategic approach to ensure consistency, feasibility, and value. Evaluation of the Cost Plan will consider:

- Cost competitiveness relative to the proposed scope of work and prevailing market standards.
- Clarity and transparency in the pricing structure, including any assumptions or exclusions.
- Reasonableness and justification of costs, ensuring that proposed expenses are aligned with the scope, methodology, and anticipated deliverables.

PRDEDC may request clarifications or supporting documentation for any cost element during the evaluation process. For detailed instructions on how to prepare and structure the Cost Plan, refer to Section 7.3 of this RFP.

6.4 Final Selection and Award

The Evaluation Committee, appointed by the Secretary of the PRDEDC, will review and score all responsive proposals and make final recommendations to the Secretary. The Committee will conduct a comprehensive, fair, and impartial evaluation based on the criteria established in this RFP.

The Evaluation Committee may request clarifications from proposers to obtain a better understanding of specific sections of a submitted proposal. Responses to clarification requests must solely explain or clarify information already included in the original submission and shall not introduce new material or modify the original proposal content.

Upon completion of the evaluation, the Committee will prepare a written report summarizing its findings and documenting the ranking of proposals based on the criteria stated in this section. This report, including the Committee's final recommendation, will be submitted to the Secretary of PRDEDC for adjudication and final determination.

Negotiations. Following the evaluation of proposals, PRDEDC may engage in negotiations with one or more qualified proposers. Negotiations are exchanges between the PRDEDC and proposers that are undertaken with the intent of allowing the proponents to revise their proposals. If the PRDEDC is not satisfied with the price offer of the proposer, they will recommend continuing further discussions/negotiations. The primary object of discussions is to maximize the PRDEDC ability to obtain the best value, based on the requirements and the evaluation factors outlined in the RFP. The PRDEDC Evaluation Committee may request

and receive the best and final offers. The Evaluation Committee may request **Best and Final Offers (BAFOs)** as part of this process.

Selection and Award. The proponent to be selected for the award will be based on the evaluation rubric stated in this RFP and the negotiations section. PRDEDC, based on the overall proposals received and their evaluation results, shall determine the number of successful proposers that represent the best interest of the overall services implementation and the people of Puerto Rico.

The firm to be awarded the RFP shall be recommended by the Evaluation Committee. After the final recommendation from the Evaluation Committee, the Secretary of the PRDEDC will issue the Award Notice. Award will be made to the responsible and responsive proponent whose Proposal represents the best value to the PRDEDC, taking all elements (including price and technical score) into consideration. Award will be made at fair and reasonable prices only. The DEDC reserves the right to select a proposal other than the lowest price from a proponent within the competitive range.

A proposal must conform to the material requirements of the RFP. If the proposal does not conform to the solicitation, it will be rejected because it is considered non-responsive. The Secretary of PRDEDC shall review the report of the Evaluation Committee and shall identify the proponent that should be selected to provide the services requested by this RFP. The determination of a proponent's selection will be based on the merits of the proposal presented, following the evaluation criteria. However, the Secretary of PRDEDC, taking into consideration the proponent's proposal and the Evaluation Committee recommendation, shall identify for selection the proponent as deemed most advantageous to the PRDEDC interests and objectives.

Award without Negotiation. If, after the initial evaluation of proposals, there is a clear winner and there is no need to negotiate or obtain further clarification or information from that proposer (e.g., the price is reasonable), the Secretary of PRDEDC may proceed directly to the award, provided that the RFP clearly stated that the award could be made without negotiations.

Notice of Selection. The PRDEDC will issue a written notice of selection to the successful proposer through email. The Notice of Selection will establish the selected firm's obligation to submit any applicable post-award documentation.

PRDEDC reserves the right, without limitations, to: (i) grant more than one contract and/or select more than one qualified respondent; (ii) amend the Contract(s) of the Selected respondent (s) to, among others, extend its original duration, as further explained in this RFP, or to extend its scope to include additional work.

Insurance Requirement. Requirements for the selected bidder, to be able to sign the respective contract.

- Public Responsibility Policy / Professional Public Liability Policy for a minimum of \$1,000,000.
- Public Responsibility Policy endorsed to the Puerto Rico Department of Economic Development and Commerce. This must be identified with the description of the proposal.
- The tenderer is responsible for maintaining a Public Responsibility Policy endorsed in favor of the Puerto Rico Department of Economic Development and Commerce y for the entire term of the contract.
- The PRDEDC is not responsible for accidents or damages of any kind that the property and / or personnel of the tenderer could suffer. The bidder is responsible for his assets and/ or, by means of insurance for this purpose, for any damage that will be caused to the property and / or to the staff of the PRDEDC.

Execution of Agreements. The PRDEDC will seek to execute a Service Agreement with the selected proposer. If an agreement cannot be reached, the PRDEDC may terminate negotiations with the chosen proponent and proceed to the next-highest rated proponent until an agreement determined to be fair and reasonable to both parties is obtained.

No proposal shall be binding upon the PRDEDC until an Agreement has been executed. The DEDC reserves the right to issue press releases or public statements regarding the services under the contract; and the right to cancel the award of an Agreement at any time before execution of the contract, without incurring in any liability.

Rejection of Proposals and Cancellation of RFP. Issuance of this RFP does not constitute a commitment by the Government of Puerto Rico and/or the PRDEDC to award a contract. The PRDEDC reserves the right, without limitations, to accept or reject, in whole or in part, and without further explanation, any or all proposals submitted; and/or to cancel this solicitation and reissue this RFP or another version of it, if it deems that doing so is in the best interest of the public interest, the Government of Puerto Rico, the PRDEDC or the impacted communities.

The PRDEDC reserves the right, without limitations, to disregard or waive any noncompliance, informalities and/or irregularities in the proposals received in response to this RFP, not otherwise identified as Mandatory Requirements and Qualifications in this RFP when, in its opinion, the public interest, the best interest of the Government of Puerto Rico, the PRDEDC or of the impacted communities will be served by such action.

7 Proposal Format and Submission Requirements

7.1 General Instructions

To ensure uniformity and facilitate prompt reference among all proposals, submissions must adhere to the following formatting and presentation requirements. Proposals will first be reviewed for completeness prior to detailed evaluation. Quality, substance, clarity, brevity, and responsiveness to PRDEDC's requirements are essential.

Formatting Requirements

- File format: PDF only.
- Font: Times New Roman, 12-point size.
- Line spacing: 1.15.
- Margins: 1 inch (2.54 cm) on all sides.
- Page size: 8.5" x 11" (Letter).
- Visual elements: All graphics, charts, and tables must be embedded within the document (external links are not permitted).
- Figures and tables: Must be numbered sequentially and referenced in the text by their corresponding number.

Signature Requirements

- All documents requiring a signature must be signed in blue ink.
 - Initials and signatures may be electronic (where applicable)

Language

- Proposals must be submitted in English.

The following subsection provides guidance on the expected structure and content of each proposal.

7.2 Proposal Organization and Structure

Each proposal shall follow the organizational structure described in this section to ensure clarity, consistency, and ease of evaluation. All content must be clearly labeled, and divided by section headers.

Cover Page:

Each proposal shall begin with a cover page clearly identifying the submission and the authorized point of contact. The cover page must include the RFP title and number, the legal name of the proposer, its mailing and email addresses, and the name, title, and telephone

number of the authorized representative. The submission date must also appear on this page.

Immediately following the cover page, proposers shall include a **Table of Contents**, listing all major sections and subsections of the proposal. The Table of Contents shall follow the nomenclature outlined below and serve as both an index and a checklist confirming that all required components are present. It is the proposer's responsibility to ensure that all sections of the proposal are identified and easy to locate.

Part 1 – Mandatory Requirements

This section shall include all administrative, legal, and organizational documents required under Section 5, including the completed and signed **Annex A**. These materials will be reviewed on a pass/fail basis to determine eligibility prior to technical evaluation.

All documents must be current, valid, and organized in the same order as listed in the checklist to facilitate compliance verification.

Part 2 – Executive Summary

This section shall provide a concise overview of the proposal, highlighting the proposer's qualifications, experience, and overall understanding of PRDEDC's needs. It should serve as a clear and non-technical introduction to the firm's capabilities, focusing on alignment with PRDEDC's communications and economic development priorities.

The Executive Summary shall not exceed three (3) pages in length.

Part 3 – Company Information, Relevant Experience, and Past Performance

This section establishes the proposer's organizational profile and demonstrates its past performance in similar engagements. The proposer shall include basic identifying information such as legal name, registration number, address, contact details, and the name and signature of the authorized representative.

Proposers are expected to summarize their corporate background and describe prior experience in projects of comparable scope or complexity, highlighting specific outcomes that demonstrate success.

Additionally, proposers must indicate their type of organization (e.g., corporation, partnership, joint venture, or sole proprietorship) and disclose any potential conflicts of interest, including prior or current relationships with PRDEDC, other government entities, or affiliated agencies.

The proponent must disclose any prior contractual relationship between the legal entity, its partners, shareholders, officers, directors, or any other natural or legal person expected to participate in the execution of the contract, and the PRDEDC, its operational and affiliated

entities, the Government of Puerto Rico, and/or any other federal or municipal government agency.

Part 4 – Approach to Scope of Services (Technical Proposal)

This section constitutes the core of the proposal and should articulate the proposer's comprehension of the assignment, proposed methodology, and rationale. The content should clearly address how the proposer intends to achieve the objectives described in Section 3 **Scope of Work / Statement of Work**.

The Technical Proposal (section Error! Reference source not found. to Error! Reference source not found.) shall not exceed twenty (20) pages. Any pages beyond this limit will not be reviewed or scored by PRDEDC.

Part 5 – Team Composition and Management Structure

This section shall describe the organizational structure and resources assigned to the project, including:

- Complete list of proposed team members, indicating names, roles, titles, years of experience, and areas of specialization.
- Resumes or professional summaries for each key staff member.
- Provide an organizational chart highlighting the key people who shall be assigned to accomplish the work required by this RFP, illustrating the lines of authority. Identification of any subcontractors, consultants, or strategic partners (if applicable), including their roles and specific functions.

Part 6 – References for Services Performed

The final section shall include **at least three (3) professional references** from prior clients comparable in scope, scale, or complexity. Each reference must include the client's name, organization, project title, duration, and contact information (email and phone number).

These references will be used to validate the proposer's past performance, reliability, and capacity to meet contractual obligations.

7.3 Cost Plan – Budget breakdown and pricing structure

This section must present a clear and detailed breakdown of the proposed costs for the entire contract period. The information shall be organized in tables and supported by explanatory notes as necessary.

PRDEDC reserves the right to request clarification, justification, or adjustment of any cost item during the evaluation process to ensure accuracy and reasonableness. Any inconsistencies between the Technical Proposal and the Cost Plan may affect the final evaluation score. The required components are as follows:

1. **Summary of total proposed cost:** Provide the total proposed cost for all services under this RFP, expressed in both numeric and written form. This summary shall include the overall cost and the total cost per service area (as defined in Section 3).

Workshop Duration	1 to 10 Participants (Cost per group)	11 to 20 Participants (Cost per group)	Additional Participant
1 hour			
2 hours			

2. **Breakdown by service domain:** Each major service area described in Section 3.2 shall include the following:
 - o Estimated hours or resource units.
 - o Personnel or roles assigned.
 - o Unit rates and total estimated cost per service area.
 - o Identification of any subcontracted personnel or external specialists, if applicable.
3. **Personnel costs:** List all personnel expected to participate in the project, specifying:
 - o Role or position title.
 - o Hourly or daily rate.
 - o Estimated total hours or days per resource.
4. **Explanatory narrative and pricing methodology** Include a concise narrative explaining the assumptions, pricing methodology, and basis of estimate used to determine costs. This narrative should describe how the pricing aligns with resource allocation, efficiency, and the scale of work required for each service area.

The **Cost Proposal** must be submitted as a **separate PDF file**, labeled: “Financial Proposal – PRDEDC RFP **2026-10**: *Proposer Name*”

Any discrepancies between the Technical Proposal and the Cost Plan may affect the final evaluation score.

7.4 Submission Method and Deadline

All proposals must be submitted by the deadline specified below. Proposals received after the stated date and time will not be accepted or evaluated.

Submission Deadline:

Date: August 7, 2026

Time: 5:00 p.m. AST

Any proposal received after this date and time shall be recorded as “late” and retained unopened in the official procurement file.

Email submission is the only accepted method for receipt of proposals in response to this RFP. All proposals must be submitted electronically in accordance with the following instructions:

- Proposals must be submitted as a PDF file, text-searchable (not scanned image-only), and not exceeding 25 megabytes (MB) in size.
- Proposals shall be submitted exclusively to PDL.RFP@ddec.pr.gov. PRDEDC will not consider any proposals that are submitted to an email address different from the one specified in this section.
- The email subject line must include the RFP number and the company name, formatted as follows: “RFP DDEC-2026-10– Company Name”
- File Naming Convention: The attached file must follow this format: RFP-DDEC-2026-10_CompanyName.pdf
- The Cost Plan must be submitted as a separate PDF file.

Proposers are responsible for ensuring that their submission is complete and that all files are accessible at the time of delivery.

The proposer is fully responsible for ensuring successful electronic transmission and delivery of its proposal. PRDEDC will not consider partial submissions received after the deadline, even if other parts were delivered timely.

- PRDEDC strongly recommends that proposers request a delivery receipt when sending their email submission.
- If an email transmission is rejected or an automatic acknowledgment is not received confirming successful delivery, the proposer must contact Claudia Febus Marcano at claudia.febus@ddec.pr.gov before the submission deadline.
- Any email containing viruses, malware, or corrupted attachments will be automatically rejected.
- PRDEDC staff will not open any email attachments prior to the closing of the submission period. PRDEDC does not assume any responsibility for delayed or rejected emails or for any files that cannot be opened.

7.5 Receipt of Proposals

All proposals must be received by the deadline specified in this RFP. Upon receipt, PRDEDC will date and timestamp each submission as official evidence of timely delivery. Only proposals received on or before the submission deadline will be considered for evaluation. Submission of a proposal constitutes the proposer's acknowledgment and acceptance of all terms, conditions, and disclaimers contained in this RFP, including PRDEDC's reserved rights and options. Proposals shall remain valid for a minimum period of **one hundred and twenty (120) calendar days** from the submission deadline. During this period, proposers may not withdraw, modify, or cancel their submission, except as specifically requested in writing by PRDEDC or as otherwise required by applicable law or regulation.

7.6 Errors and Omissions in Proposals

PRDEDC reserves the right to reject any proposal that contains material errors, omissions, or inconsistencies that could affect its completeness or accuracy. However, PRDEDC may, at its sole discretion and without obligation, request the proposer to correct minor clerical or administrative mistakes, or to provide clarifications or additional information necessary to facilitate evaluation.

It also reserves the right, without limitations, to request correction of any errors or omissions and/or to request any clarification or additional information from any proponent, without opening clarifications for all proponents.

7.7 Clarifications and Modifications

PRDEDC reserves the right to request written clarifications from proposers regarding their submissions. No material changes, price revisions, or additions to the original proposal will be permitted after the submission deadline, except at PRDEDC's written request. If proponent files more than one proposal before submission deadline, only the last version will be considered.

7.8 Confidentiality and Proprietary Information

All materials submitted in response to this RFP become the property of PRDEDC. Proposers must clearly identify and mark any portions of their submission that contain proprietary, trade secret, or confidential information. PRDEDC will handle such information with due care and in accordance with relevant statutes and regulations; however, the Department cannot guarantee the confidentiality of any material not properly labeled.

8 RFP Acquisition and Questions Procedure

8.1 RFP Documents Acquisition

All documents pertaining to the procurement process will be sent via e-mail upon request at PDL.RFP@ddec.pr.gov. Requests for proposal guidelines will be answered during business hours, which are 8:00 a.m. – 4:30 p.m.

PRDEDC reserves the right to amend this RFP at any time. Any amendments to the RFP will be issued as a written addendum. Copies of each Addendum for all prospective proponents shall be sent by e-mail or can be retrieved at PRDEDC's website to all people and entities that requested the RFP instructions.

All documents pertaining to the procurement process, including addendum issued by PRDEDC, are and will be published at www.desarrollo.pr.gov under the section for RFPs. All prospective proponents must monitor the abovementioned website to retrieve addendum, if any, issued for the below-stated procurement process.

8.2 Submission of Questions and Requests for Clarification

Each prospective proponent may submit written questions or requests for clarification concerning any aspect of this RFP, including its scope, content, procedures, or requirements, by completing and submitting Annex C. All questions must be submitted in writing no later than the deadline established herein to the email address specified below.

Questions must be clearly labeled and reference the relevant section(s) and page number in this RFP or related document. Questions may be in Spanish or English.

Questions must be submitted through PDL.RFP@ddec.pr.gov the subject must be "Questions related to RFP-DDEC-2026-10".

Key Deadlines

- **Deadline to Submit Questions:** *July 23, 2026 by 5:00 p.m. AST*
- **Deadline for PRDEDC's Responses:** *July 27, 2026*

All official responses, clarifications, or modifications to this RFP will be published at www.desarrollo.pr.gov.

Inquiries and communications regarding the RFP must be submitted to PRDEDC by the following email: PDL.RFP@ddec.pr.gov. The proponent is responsible for obtaining any needed clarification of the RFP requirements, while the RFP is open until the Q&A period closes. Email is the only method of communication.

8.3 Allowed and Prohibited Communications

Only questions and requests for clarifications on this RFP submitted by prospective proponents of this RFP are allowed. Other than these communications for clarifications purposes, communications by prospective proponents with officials and/or representatives of PRDEDC, and other government entities, or other relevant entities of the federal government, regarding any matter related to the contents of this RFP or the qualification and selection process, are prohibited during the submission and selection process. Failure to adhere to this requirement may result in the rejection of the submitted proposal. Verbal inquiries or e-mails sent to addresses not specified in this RFP will not be addressed by PRDEDC.

9 Contact & Schedule

9.1 Official Contact

All communications, inquiries, and submissions related to this RFP must be directed exclusively to the following official email: PDL.RFP@ddec.pr.gov

9.2 RFP Schedule and Key Dates

The following table summarizes the anticipated schedule for this procurement process. PRDEDC reserves the right to modify these dates through a written Addendum.

Table 4 – Key Dates

Milestone	Description	Date
RFP Issuance Date	Official release of the Request for Proposals.	<i>July 13, 2026</i>
Deadline to Submit Questions	Written inquiries due by 5:00 p.m. AST.	<i>July 23, 2026</i>
Publication of Addenda / Responses	PRDEDC issues written clarifications and responses.	<i>July 27, 2026</i>
Proposal Submission Deadline	Proposals due electronically by 5:00 p.m. AST.	<i>August 7, 2026</i>
Evaluation Period	Administrative, technical, presentation, and financial review.	<i>August 10 - 24, 2026</i>
Notice of Award	Notification of selected proposer.	<i>August 26, 2026</i>

PRDEDC reserves the right to adjust this schedule as needed.

10 Annex A

Mandatory Requirements Checklist **Request for Proposals - RFP-DDEC-2026-10** **Puerto Rico Department of Economic** **Development and Commerce**

Submitted proposals must include the following documents in the order listed below. All forms provided as part of this RFP must be duly completed and incorporated within the proposal package. The Department of Economic Development and Commerce reserves the right to reject any proposal that fails to meet these mandatory requirements in full.

Initials	Required Document
	RUP – Registro Único de Proponentes
	Certification of Legal Entity / Corporate Structure
	Shareholder or Partner List
	Employer Identification Number (EIN) – (IRS Form SS-4 confirmation letter).
	Good Standing Certificate
	Certificate of Existence or Authorization to Do Business in Puerto Rico
	Merchant Registration Certificate
	Partnership Authorization Letter / Corporate Resolution
	Financial Statements
	Sworn Statement of Compliance with Act No. 2-2018 (Anticorruption Code)
	Conflict of Interest Certification
	Criminal and Ethical Background Declaration
	Sales and Use Tax (IVU) Debt Certification – Model SC-2927
	Income Tax Filing Certification – Model SC-6088
	Debt Certification – Model SC-6096
	Sales and Use Tax Return Filing Certification – Model SC-2942
	Employer Registration and Unemployment/Disability Insurance Certification
	Chauffeurs' Certification

Initials	Required Document
	State Insurance Fund Corporation (CFSE) Debt Certification – Form CFSE-3047
	ASUME Compliance Certification
	Municipal Tax (CRIM) Certification
	General Debt Certification (All Concepts)

Proposer's Signature	Date
Proposer's Printed Name	