



Governing Board

UNIVERSITY OF PUERTO RICO

REQUEST FOR PROPOSALS

JG 2027-01

University of Puerto Rico System Sustainability and Structural Alternatives Study

University of Puerto Rico – Governing Board
Institutional Transformation Action No. 22
Certification 60 (2025-2026)
Certification 115 (2025-2026)

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SECTION 1 — INTRODUCTION

1.1 Invitation to Bid

The Governing Board of the University of Puerto Rico (UPR), through this Request for Proposals (RFP), invites qualified firms, consulting organizations, interdisciplinary teams, research institutions, and other entities with proven expertise in organizational transformation, institutional sustainability, financial analysis, governance, strategy, and institutional restructuring to submit proposals to conduct an independent study of the sustainability and structural alternatives of the University of Puerto Rico system.

This procurement is conducted pursuant to Certification 60 (2025-2026) of the Governing Board of the UPR and in accordance with applicable University procurement regulations.

Proposals must be submitted in accordance with the requirements stated in this RFP.

1.2 Description of the Institutional Transformation Action No. 22

Institutional Transformation Action No. 22 is defined as:

"Evaluating the sustainability of the University System, which comprises 11 campuses, and analyzing possible structural alternatives for the future, including models for campus specialization or organization into multi-campus university centers."

This study defines its scope in response to this institutional action. The analysis need not lead to any particular conclusion. Alternatives that emerge from the evidence gathered during the study, including configurations not anticipated in the initial definition, should be considered, provided they are substantiated by the study's findings.

1.3 Nature of the Engagement

The Governing Board is not seeking an academic research project. It seeks an independent, decision, and result-oriented consulting engagement designed to:

- Assess the sustainability of the current organizational model.
- Identify opportunities for institutional improvement.
- Analyze evidence-based structural alternatives.
- Quantify benefits, risks, and trade-offs of each alternative.
- Support informed deliberation by the Governing Board.

The selected Contractor will act as an independent advisor and will provide objective findings and recommendations based on verifiable data, recognized analytical methodologies, and professional judgment.

The study shall not constitute implementation of authority, policy adoption, or approval of any organizational change. All implementation decisions remain exclusively within the authority and discretion of the Governing Board.

1.4 Guiding Principles

The following principles govern the conduct of this engagement and shall guide the Contractor's approach to all analytical work, communications, and deliverables produced under this RFP.

1.4.1 Independence

The study shall be conducted independently and without predetermined outcomes.

1.4.2 Objectivity

Recommendations shall be based on evidence and analysis, not on institutional preferences or the position of any particular constituency.

1.4.3 Efficiency

The engagement shall emphasize efficient execution and the timely production of findings within the established timeframe.

1.4.4 Mission Preservation

All alternatives shall be evaluated in light of the University's statutory mission as established under Law No. 1 of January 20, 1966, as amended, its commitment to academic excellence, and its service to the people of Puerto Rico.

1.4.5 Fiscal Responsibility

Alternatives shall consider the responsible stewardship of public resources and long-term institutional sustainability.

1.4.6 Governance Utility

Deliverables shall be designed primarily to support deliberation and decision-making by the Governing Board.

SECTION 2 — INSTITUTIONAL CONTEXT

2.1 The University of Puerto Rico System

The University of Puerto Rico is the public university system of Puerto Rico and operates pursuant to Law No. 1 of January 20, 1966, as amended. The University currently consists of eleven (11) academic units and a Central Administration that collectively serve students throughout the island. For more than a century, the University has fulfilled a central role in higher education, research, professional development, community service, economic development, and social mobility.

2.2 The Governing Board

The Governing Board is the highest governing and fiduciary body of the University of Puerto Rico. It operates pursuant to Law No. 1 of January 20, 1966, as amended, and is responsible for the strategic direction, institutional policy, and long-term sustainability of the University system. Certifications 59 and 60 (2025-2026) established the analytical and oversight structure supporting this initiative and authorized its direct management by the Governing Board as a priority institutional action consistent with its fiduciary responsibilities.

2.3 Current Institutional Challenges

Like many public university systems, the University of Puerto Rico faces significant structural pressures affecting its long-term sustainability such as:

- **Demographic Changes**

Puerto Rico has experienced a sustained population decline over the past decades, affecting the size and composition of the traditional college-age population.

- **Enrollment Pressures**

System-wide enrollment has declined significantly compared to historical levels, creating challenges in program demand, resource allocation, and institutional capacity.

- **Fiscal Constraints**

The University operates within a constrained fiscal environment characterized by fixed public appropriations, fiscal oversight requirements, rising operating costs, deferred capital needs, and compensation concerns.

- **Organizational Complexity**

The current organizational structure reflects historical development patterns that may no longer be optimally aligned with current demographic, fiscal, operational, and academic realities.

2.4 Data Access

The Governing Board will make reasonable efforts to provide the Contractor with timely access to the documentation and data required to perform the scope of work. For that purpose, the Governing Board has identified and organized an initial set of institutional documentation, which will be made available to the selected Contractor following contract execution. The University's production of such initial documentation, as well as any subsequent documentation or data provided to the Contractor, shall not constitute a waiver or release of any right, claim of privilege, confidentiality protection, or other applicable legal protection.

SECTION 3 — OBJECTIVES OF THE ENGAGEMENT

The selected Contractor shall pursue the following objectives:

Objective 1

Assess the sustainability of the current eleven-unit organizational model across fiscal, academic, operational, and structural dimensions, including the short- and long-term viability of each university unit's resource allocation, academic focus, and contribution to the overall sustainability of the UPR system.

Objective 2

Identify operational, administrative, and governance inefficiencies, including functional duplication and resource underutilization across the system.

Objective 3

Analyze structural alternatives that may improve the long-term sustainability and institutional effectiveness of the system, including configurations that emerge from the evidence gathered during the study.

Objective 4

Estimate the operational, fiscal, and organizational implications associated with the identified alternative models.

Objective 5

Develop scenario projections under varying demographic and fiscal conditions to support long-term institutional planning.

Objective 6

Provide evidence-based findings and recommendations for consideration and deliberation by the Governing Board.

SECTION 4 — SCOPE OF WORK

4.1 General Scope

The Contractor shall conduct an evidence-based and methodologically rigorous assessment of the University of Puerto Rico system, in coordination with the Governing Board through the Special Committee on Academic and Administrative Restructuring and University Reform (CER, for its acronym in Spanish), and develop findings and recommendations on institutional sustainability and structural alternatives for deliberation by the Governing Board.

The work shall be organized into three phases: Current State Assessment, Structural Alternatives Analysis, and Strategic Recommendations. The work shall also allow staged deliveries within 180 calendar days from the date the contract is signed. The Contractor shall propose the most appropriate work sequence and structure in its Work Plan.

The Work Plan shall include measurable progress indicators and milestones that allow the CER to monitor execution throughout the engagement period. For each major phase of work, the Contractor shall identify what will have been completed, what data or inputs will have been collected or validated, and what analytical outputs will be available. These indicators need not be exhaustive but shall be specific enough to support meaningful progress assessment at each monthly coordination meeting.

4.2 Current State Assessment (Phase I)

This phase establishes the analytical foundation of the engagement. The Contractor shall conduct a comprehensive review of the University system's current condition across the following dimensions, drawing from the baseline documentation provided and any additional materials identified and requested. The dimensions listed below are the minimum required areas of assessment and do not limit the Contractor from examining additional factors relevant to the sustainability analysis.

A. Demographic and Enrollment Conditions

- Enrollment trends and projections.

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- Student demand by geographic area and program field.
 - Demographic and population context of Puerto Rico.

B. Fiscal Sustainability

- System revenue and expenditure trends.
- Cost drivers and long-term fiscal risks.
- Fiscal trajectory analysis under different scenarios.

C. Operational Efficiency

- Administrative structures and staffing patterns.
- Resource and physical facilities utilization.
- Academic and administrative duplication across campuses.
- Existing shared services initiatives and their current status.

D. Organizational Structure

- Governance arrangements and reporting relationships.
- Administrative duplication across campuses.
- Decision-making structures and their effectiveness.

E. Academic Operations and Effectiveness

- Faculty workload distribution and instructional resource utilization across campuses.
- Academic support services, student services, and retention resources.
- Alignment of the academic portfolio with current and projected student demand and workforce needs.
- Programmatic duplication, underutilization, and areas of academic risk across campuses.

4.3 Structural Alternatives Analysis (Phase II)

The central purpose of this engagement is to evaluate alternatives that may improve the long-term sustainability and effectiveness of the university system. Institutional Transformation Action No. 22 identifies the following configurations as the initial objects of analysis:

- **Campus specialization** - a model in which system units develop differentiated academic or functional profiles.
- **Organization of campuses into multi-campus university centers** - a model in which units are grouped under shared leadership or administrative structures.

These configurations are not prescriptive or exhaustive. The analysis should identify and evaluate other structural configurations that emerge from the study's findings, if evidence substantiates them. The Contractor shall not be limited to evaluating only the options referenced in Action No. 22, nor shall it be required to recommend any of them if the evidence does not support doing so.

For each alternative identified, the Contractor shall:

- Describe the proposed configuration and its institutional rationale.
- Estimate fiscal and operational implications.
- Assess applicable accreditation, legal, and regulatory risks.
- Identify high-level implementation requirements.
- Present an objective comparison with other evaluated alternatives.

4.4 Benchmarking Analysis

The Contractor shall conduct a comparative review of institutions with characteristics similar to the UPR system in more than one of the following dimensions:

- Institutional size and system scale.
- Fiscal conditions and oversight context.
- Geographic distribution and regional access.
- Demographic challenges and enrollment trends.
- Organizational structure and governance model.

The Contractor shall identify the most appropriate comparable institutions, justify their selection, and document the criteria, metrics, and limitations of the analysis. The analysis is not limited to any particular type of institution, sector, or jurisdiction.

4.5 Accreditation, Legal, and Regulatory Considerations

The Contractor shall identify accreditation, regulatory, and compliance considerations associated with the alternatives evaluated. The analysis shall include consideration of:

- Middle States Commission on Higher Education (MSCHE) requirements.
- Puerto Rico Council on Education requirements.
- Federal student aid eligibility considerations.
- Relevant programmatic accreditation frameworks.
- The legal framework applicable to the public university system.

The Contractor shall not be required to provide formal legal opinions or accreditation determinations.

4.6 Strategic Findings and Recommendations (Phase III)

The Contractor shall present all findings in a decision-support framework for the Governing Board. The findings and recommendations shall clearly distinguish analytical findings from interpretive conclusions, and actionable recommendations from options presented for consideration. Recommendations shall:

- Be evidence-based.
- Be actionable and clearly prioritized.
- Identify expected benefits, risks, and implementation considerations.
- Present comparative analyses where multiple alternatives are viable.

Where multiple alternatives are viable, the Contractor shall present comparative analyses and clearly identify trade-offs. The Contractor shall not advocate for any predetermined outcome.

For each alternative evaluated, the Contractor shall provide estimated operational efficiencies, cost impacts, implementation costs, and potential savings to the extent reasonably supported by available data.

All supporting data, quantitative models, and technical documentation underlying the findings shall be provided as appendices to the Final Report. Data and models shall be delivered in open, non-proprietary, and auditable formats. Proprietary tools used in the analysis shall be identified and documented, and all outputs derived from them shall be exportable in a format accessible without a proprietary license.

4.7 University Community Engagement

The Contractor shall design and implement a structured, time-bound process to gather representative qualitative input from the university community. Engagement mechanisms shall be limited to:

- Structured interviews with key informants.
- Surveys administered to representative groups.
- Selected focus groups.

No engagement activity shall commence without prior notification to the Governing Board and coordination with the UPR President's Office to facilitate the cooperation of campuses and institutional units.

SECTION 5 — DELIVERABLES

The engagement shall include the following three deliverables. The timelines stated are maximum; the Contractor may propose a more accelerated sequence in its Work Plan. The deliverables do not limit the scope of analysis; the Contractor may incorporate interim inputs, section drafts, or progress memoranda as needed to inform the final report.

Del.	Title	Description and Timeline	Payment
D-1	Work Plan	The Contractor shall submit a detailed Work Plan within fifteen (15) calendar days after the contract is signed. The CER shall review the Work Plan and may provide comments or recommendations. The Contractor may commence analytical work upon submission of the Work Plan, unless the CER identifies material deficiencies requiring revision. The Governing Board has identified the objectives, minimum analytical requirements, and expected deliverables. Bidders are encouraged to propose the methodology, sequencing of work, milestones, and project management approach	15%

Del.	Title	Description and Timeline	Payment
		they consider most appropriate to achieve those objectives within the maximum contract term.	
D-2	System Sustainability Assessment and Structural Alternatives Analysis Report	Includes integrated sustainability assessment across fiscal, academic, operational, and structural dimensions; demographic and financial analysis; and comparative analysis of structural alternatives. A draft may be submitted for CER comments prior to the final version.	40%
D-3	Final Report with Strategic Findings and Recommendations	Upon completion of the 180-calendar-day engagement period. Includes integrated findings, comparative evaluation of alternatives, evidence-based recommendations, and formal presentation before the CER and the Governing Board.	45%

All official documentation submitted by the Contractor under this engagement, including interim reports, deliverables, the final report, and recommendations, shall be submitted in English.

The Contractor shall provide periodic written progress updates, at intervals established in the approved Work Plan or as reasonably requested by the CER. Coordination meetings shall be scheduled as necessary to review progress, discuss data requests, identify risks, and facilitate timely completion of the engagement.

The Contractor's obligations under this Agreement shall not be deemed complete until the Final Report and all required work products have been formally reviewed and accepted by the Governing Board of the University of Puerto Rico.

Within a reasonable period following submission of the Final Report and completion of the required presentation(s), the Governing Board shall determine whether the Contractor has satisfactorily fulfilled the requirements established in this Request for Proposals and the resulting Contract. Such determination shall be based on whether the Contractor has substantially performed the agreed scope of work and delivered the required analyses, findings, and work products in accordance with the Contract.

Acceptance of the Final Report shall constitute acknowledgment that the Contractor has satisfactorily completed its contractual obligations. Such acceptance shall not be construed as approval, adoption, endorsement, or implementation of any findings, conclusions, recommendations, or alternatives presented in the Final Report. All decisions regarding policy, governance, institutional restructuring, implementation, or other actions remain within the sole authority and discretion of the Governing Board.

If the Governing Board determines, in its sole discretion, that the Final Report or any required deliverable materially fails to comply with the requirements of the Contract, it may require the Contractor to correct identified deficiencies within a reasonable period, at no additional cost to the

University, prior to final acceptance. Final payment shall be contingent upon the Governing Board's written acceptance of the Final Deliverable.

SECTION 6 — PROCUREMENT SCHEDULE AND CONTACT INFORMATION

6.1 Procurement Schedule

The anticipated procurement schedule is as follows. The Governing Board reserves the right to modify the schedule as necessary. The following table establishes the key dates and deadlines governing this procurement. All times are local times in Puerto Rico, American Standard Time (AST, UTC-4) unless otherwise specified.

Event	Date / Deadline
RFP Publication Dates	July 21 and 22, 2026
Deadline for Bidder's Questions	July 31, 2026
Responses to Questions	August 14, 2026
Proposal Submission Deadline	August 31, 2026
Technical Evaluation Period	September 14, 2026
Cost Proposal Opening	September 17, 2026
Notification of Award Recommendation	September 28, 2026
Signing of Contract	October 12, 2026
Estimated Project Start Date	October 12, 2026
Estimated Project Completion Date	180 calendar days from contract execution

The total engagement period shall not exceed one hundred eighty (180) calendar days from the date the contract is signed. Extensions shall only be granted under extraordinary circumstances and with written approval of the Governing Board.

6.2 Point of Contact

All communications, questions, and proposal submissions related to this RFP shall be directed exclusively to the Governing Board point of contact identified below. Communications directed to any other University official, committee member, or Governing Board representative will not be considered and may result in disqualification.

Name: Lcda. Karilyn Díaz León

Title: Legal Advisor, Governing Board of the University of Puerto Rico

Office: Governing Board of the University of Puerto Rico

Email: subastas.jg@upr.edu

6.3 Proposal Submission Instructions

Proposals shall be submitted in a sealed envelope at the offices of the Governing Board of the University of Puerto Rico, located on the First Floor of the University of Puerto Rico Central Administration Building, Jardín Botánico Sur, 1187 Flamboyán Street, Río Piedras, Puerto Rico. Electronic or emailed submissions will not be accepted under any circumstances.

Proposals must be received no later than August 31, 2026, as established in the Procurement Schedule set forth in Section 6.1, between the hours of 9:00 a.m. and 4:00 p.m. (AST). Proposals received after the deadline, regardless of cause, will not be considered.

Each submission shall include two separate and clearly labeled sealed envelopes: Volume I — Technical Proposal; and Volume II — Cost Proposal as described in Section 8. The Cost Proposal shall not be combined with or enclosed within the Technical Proposal under any circumstances. Submissions that do not comply with this requirement may be disqualified.

The outside of the sealed envelope shall be clearly marked: **RFP JG 2027-01 — System Sustainability and Structural Alternatives Study — [Bidder's Name]**.

The Governing Board will provide a written acknowledgment of receipt upon delivery of the proposal.

6.4 Proposal Validity

Submitted proposals shall remain valid and binding for a period of 180 calendar days from the submission deadline. The Governing Board reserves the right to request an extension of proposal validity, which bidders may accept or decline without penalty.

6.5 Modification and Withdrawal

Bidders may modify or withdraw their proposals at any time before the submission deadline by written notice to the point of contact identified in Section 6.2. Modifications or withdrawals received after the deadline will not be accepted.

SECTION 7 — MINIMUM QUALIFICATIONS

7.1 Eligible Bidders

The Governing Board seeks to maximize competition and encourages participation from qualified entities with proven expertise in organizational transformation, institutional restructuring, financial analysis, strategy, governance, or institutional sustainability.

Eligible bidders include, but are not limited to:

- Management and organizational strategy consulting firms.
- Higher education consulting firms.
- Public sector advisory firms.
- Financial advisory and data analytics firms.
- Research institutions and strategic think tanks.
- Interdisciplinary teams, consortia, and joint ventures.

The Governing Board does not require that bidders be exclusively focused on higher education consulting, provided they demonstrate relevant experience in large-scale organizational transformation, institutional sustainability analysis, or restructuring of complex multi-unit systems.

7.2 Minimum Organizational Qualifications

A. Organizational Experience

The Bidder must demonstrate a minimum of five (5) years of relevant experience in one or more of the following areas:

- Organizational transformation or institutional restructuring.
- Strategic planning and sustainability analysis.
- Governance reform and public sector modernization.
- Operational efficiency analysis and shared services implementation.
- Financial analysis, fiscal modeling and the development, evaluation, or implementation of fiscal plans and multi-year financial strategies.
- Data analytics and applied research.
- Higher education or comparable complex institutional systems.

B. Comparable Engagements

The Bidder must have completed at least three (3) comparable engagements within the last ten (10) years. Comparable engagements may include:

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- University system or higher education institution studies.
 - Government or public sector restructuring initiatives.
 - Multi-campus or multi-unit governance reviews.
 - Shared services and operational efficiency assessments.
 - Large-scale organizational redesign projects.
 - Strategic transformation efforts for complex institutions.

C. Capacity

The Bidder must demonstrate the organizational capacity necessary to complete the engagement within the required 180-calendar-day timeframe.

7.3 Key Personnel

The bidding team shall include, at a minimum:

Engagement Director: Responsible for overall project leadership and quality assurance.

Project Manager: Responsible for day-to-day coordination and management.

Subject-Matter Experts: With collective expertise in organizational design, public administration, financial analysis, governance, strategic planning, data analytics, and, preferably, higher education systems.

The team may include academic experts as part of an interdisciplinary composition but shall not be limited to academia. The Governing Board reserves the right to evaluate the qualifications of all bidding personnel. For each key person, the Bidder shall provide a resume or curriculum vitae. The Bidder shall also identify any subcontractors and confirm that the lead Bidder retains primary responsibility for all deliverables.

SECTION 8 — PROPOSAL REQUIREMENTS

8.1 Proposal Components

Proposals shall consist of two separate components submitted as independent documents: Volume I - Technical Proposal; and Volume II - Cost Proposal.

8.2 Technical Proposal

The Technical Proposal shall not exceed twenty-five (25) pages, excluding resumes, references, certifications, and appendices. It shall be organized as follows:

A. Executive Summary

A concise overview of the Bidder's understanding of the engagement.

B. Technical Approach and Methodology

Description of the proposed analytical framework, methodology, and project approach.

C. Work Plan and Schedule

Description of major tasks, milestones, and work sequence within the 180-day period.

D. Project Team

Identification of key personnel and their responsibilities.

E. Relevant Experience

Description of comparable engagements completed.

F. References

A minimum of three (3) client references for comparable engagements.

8.3 Cost Proposal

The Cost Proposal shall include:

- Total fixed price for the engagement.
- Labor categories and estimated level of effort.
- Direct and indirect costs.
- Payment schedule tied to the three deliverables.
- Relevant assumptions and exclusions.

The Governing Board strongly prefers fixed-price proposals.

8.4 Questions and Clarifications

All questions regarding this RFP shall be submitted in writing to the Governing Board point of contact identified in Section 6.2 before the date established in the Procurement Schedule. Oral questions will not be accepted.

Responses to questions deemed material by the Governing Board will be issued through written addenda distributed to all registered bidders. Verbal statements shall not be binding.

All communications regarding this RFP shall be addressed exclusively to the Governing Board designated point of contact identified in Section 6.2. No communication shall be addressed to the Governing Board, the CER, the UPR President's Office, or any other University official.

8.5 Addenda

The Governing Board reserves the right to issue addenda to this request at any time prior to the proposal submission deadline. Bidders shall be responsible for acknowledging all addenda issued.

8.6 Communications

For this RFP process, all communications must be made via email, addressed to the Governing Board designated point of contact identified in Section 6.2.

Neither Bidder nor any Bidding Team Members or any of their respective advisors, employees or representatives shall contact or attempt to contact, either directly or indirectly, at any time during the RFP Process, any of the following persons on matters related to this RFP Process, the RFP Documents, or the Proposals: (a) any member of the Governing Board, except the designated point of contact identified in Section 6.2; (b) any Advisor of UPR for this RFP process; (c) any UPR's employee or representative (d) any directors, officers or consultants of UPR.

Bidders and members of their team are prohibited from directly or indirectly contacting other Bidders, such as directors, officials, employees, consultants, advisers, agents or representatives, in matters related to its proposal preparation, content, or submission. Failure to comply with these communications restrictions may result in the rejection of the bidder's proposal.

Proposals shall be submitted with no connection to knowledge, information comparison, or arrangement with other bidders including their directors, officials, employees, consultants, advisers, agents, or representatives

SECTION 9 — EVALUATION CRITERIA

9.1 Evaluation Process

Proposals shall be evaluated in accordance with applicable University of Puerto Rico procurement regulations and institutional rules. The Governing Board shall determine the award. The CER and designated advisors shall participate in the evaluation process and provide technical support to ensure that proposals are evaluated considering the analytical, institutional, and governance requirements established in this RFP.

Evaluation shall be conducted in two stages. In the first stage, Technical Proposals shall be assessed considering the criteria established for this procurement. Cost Proposals shall be opened and evaluated only for bidders whose Technical Proposals meet the established minimum technical threshold. In the second stage, Cost Proposals shall be evaluated for reasonableness, transparency, and value relative to the proposed technical approach.

The Governing Board shall make the final award in compliance with applicable regulations and laws.

9.2 Evaluation Criteria

Evaluation Factor	Weight
Organizational Qualifications and Comparable Experience	35%
Technical Approach and Methodology	25%
Project Team Qualifications	20%
Cost Proposal	20%
Total	100%

The RFP will be awarded to the Bidder whose proposal best meets the terms and conditions of this RFP.

The Special Committee on Academic and Administrative Restructuring and University Reform may choose to reconsider Proposals with marginal scores. The criteria will be graded on a scale from 0 to 5 as follows: 0 = Incomplete, Omitted 1 = Poor, 2 = Below Average, Negative, or Disagree, 3 = Average or Neutral, 4 = Good, Positive, or Agree, and 5 = Excellent, Very Positive, or Strongly Agree.

9.3 Best Value Determination

The Governing Board shall make a determination on the award by selecting the proposal that represents the best value in light of the evaluation criteria established for this procurement, in compliance with applicable regulations and laws. The Governing Board is not bound to select the lowest-priced proposal.

9.4 Interviews

The Governing Board reserves the right, at its sole discretion, to require Bidders to make oral presentations of their Proposal to the Special Committee on Academic and Administrative Restructuring and University Reform. The Committee will also consider the information provided during the presentation for evaluation purposes, and scores may be adjusted in a final evaluation based on the presentations. Bidders are solely responsible for all costs or expenses incurred to attend and participate in the oral presentation process. UPR may determine to request on-line/virtual presentations using Microsoft Teams. The refusal of a Bidder to participate in an oral presentation may be cause for rejection of their proposal.

9.5 Negotiations

Prior to final award, the Governing Board, through the appropriate institutional channels and in compliance with applicable University procurement regulations, reserves the right to negotiate scope, deliverables, schedule, pricing, and contract terms with one or more bidders.

9.6 Process Rules & UPR'S General Instruction

This process will be regulated and executed according to Uniform Administrative Procedure Act of the Government of Puerto Rico (LPAU, by its Spanish acronym).

SECTION 10 — CONTRACTUAL REQUIREMENTS

10.1 Contract Type

The resulting contract shall be a fixed-price professional services agreement.

10.2 Contract Term

The term of the Contract shall commence upon its Effective Date and shall continue for a period not to exceed 180 days, unless extended by mutual written agreement of the Parties or as otherwise authorized by the Governing Board in accordance with applicable University policies. The Contractor shall develop a detailed Work Plan identifying the proposed sequencing of activities, milestones, interim deliverables, and estimated completion dates. The Work Plan shall serve as the primary project management document throughout the engagement.

10.3 Payment Schedule

Payments shall be tied to acceptance of the three deliverables in accordance with the distribution established in Section 5. No advance payments shall be authorized.

10.4 Engagement Oversight

During the 180-day period, the Contractor shall participate in monthly coordination meetings with the CER. These meetings serve to monitor progress, identify risks, and coordinate data needs. They do not constitute formal phase approvals and do not modify deliverable timelines.

10.5 Ownership of Work Product

All reports, analyses, data compilations, presentations, and other work products produced under the contract shall become the property of the Governing Board.

10.6 Confidentiality

The Contractor shall protect confidential and/or privileged information obtained during the engagement and shall comply with all applicable confidentiality laws and regulations. Prior to receiving access to institutional data or documentation, the Contractor and all team members, including subcontractors and advisors, shall execute a Non-Disclosure Agreement with the University of Puerto Rico.

10.7 Conflict of Interest

The bidder shall promptly disclose to the Governing Board any actual or potential conflict of interest related to this RFP or the services contemplated herein. The disclosure shall be provided in writing and in sufficient detail to allow the Governing Board to evaluate the nature and extent of the conflict. The Governing Board reserves the right, in its sole discretion, to reject a proposal, require mitigation measures, impose additional conditions, or cancel any resulting contract if an actual or apparent conflict of interest is not resolved to the University's satisfaction.

SECTION 11 — LEGAL REQUIREMENTS AND CERTIFICATIONS

11.1 Compliance with Laws

The Contractor shall comply with all applicable federal, local, and University laws and regulations governing the performance of this contract.

11.2 Required Documentation

Prior to signing the contract, the selected Contractor shall provide all certifications required under applicable University procurement policies, including but not limited to:

- a) Certificate of Eligibility of the Unique Registry of Professionals (RUP), Puerto Rico's official registry for providers of professional services seeking to contract with government entities.

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- b) Certificate of Good Standing issued by the Puerto Rico Department of State, if the successful Bidder is a corporation, limited liability company, or other legal entity organized under the laws of Puerto Rico or registered to do business in Puerto Rico.
 - c) Certificate of Incorporation or equivalent constituent document issued by the Puerto Rico Department of State. Foreign entities shall provide the equivalent document issued by their jurisdiction of organization, together with evidence of authorization to do business in Puerto Rico.
 - d) Corporate resolution, partnership authorization, or equivalent legal authorization identifying the natural person authorized to appear and sign the contract on behalf of the successful Bidder.
 - e) Certificate of No Tax Debt issued by the Puerto Rico Department of Treasury. If any debt exists, the successful Bidder shall submit an official document evidencing an active and current payment plan.
 - f) Certification of Filing of Income Tax Returns for the last five fiscal years, issued by the Puerto Rico Department of Treasury.
 - g) Certificate of No Debt issued by the Municipal Revenue Collection (CRIM), for all applicable concepts. If any debt exists, the successful Bidder shall submit an official document from CRIM evidencing an active and current payment plan.
 - h) Certificate of No Debt issued by the Child Support Administration (ASUME), or evidence of an active payment plan, as applicable.
 - i) Merchant Registration Certificate and Sales and Use Tax (IVU) registration, issued by the Puerto Rico Department of Treasury.
 - j) Certificate or evidence of compliance with unemployment insurance, temporary disability insurance, and chauffeur's insurance, as applicable, issued by the Puerto Rico Department of Labor and Human Resources.
 - k) Copy of the State Insurance Fund (Fondo del Seguro del Estado) policy, as applicable.
 - l) Affidavit pursuant to Law No. 2-2018, known as the Anticorruption Code for the New Puerto Rico.
 - m) Any bond, surety, insurance certificate, endorsement, or related document required by the RFP or by the final contract documents.
 - n) Any additional certification, release, affidavit, authorization, or legal document required by the University of Puerto Rico, the Governing Board, or applicable law before execution of the contract.

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- o) Financial statements for the most recent fiscal year.

Failure to submit the required documents within the established period may result in cancellation of the award, disqualification of the successful Bidder, forfeiture of any bid security submitted, or any other remedy available under the RFP, applicable regulations, or law.

The Governing Board of the University of Puerto Rico reserves the right to require updated or re-certified versions of any document listed above prior to signing the contract if necessary to verify compliance at that time. The Governing Board also reserves the right to add document requirements arising from the final contract terms, applicable law, or regulatory guidance issued after the date of this RFP.

11.3 Non-Collusion

Submission of a proposal constitutes certification that the proposal was developed independently and without collusion.

11.4 Equal Opportunity

The successful bidder and any authorized subcontractors shall comply with all applicable federal and Commonwealth of Puerto Rico laws and regulations regarding equal employment opportunity and non-discrimination. No discrimination shall be permitted based on sex, gender, gender identity, sexual orientation, age, race, color, national origin, social condition, disability, political or religious beliefs, marital status, veteran status, or any other protected classification under applicable law.

SECTION 12 — RESERVATION OF RIGHTS

The Governing Board of the University of Puerto Rico reserves the right, at its sole discretion and at any stage of the procurement process, to reject any or all proposals received in response to this RFP, including proposals that contain material errors or omissions, if such action is determined to be in the best interest of the University.

The Governing Board further reserves the right to waive minor informalities, technical deficiencies, or irregularities in any proposal when such waiver does not undermine the interests of the University or compromise the integrity of the procurement process.

The issuance of this RFP does not obligate the University to award a contract, reimburse any costs incurred by bidders in the preparation or submission of proposals, or procure any services described herein. No contractual obligation shall arise until a written contract has been duly executed by the University in accordance with applicable laws, regulations, and institutional approvals.

The Governing Board reserves the right to amend, modify, suspend, postpone, withdraw, or cancel this request at any time prior to contract execution. Any such action shall be communicated in writing to all registered bidders.

The Governing Board reserves the right to request additional information, clarifications, corrections, supplemental documentation, or presentations from one or more bidders whenever such information is deemed necessary to facilitate the evaluation process, without being obligated to extend such requests to all bidders. Bidders shall respond within the timeframe specified by the University.

The Governing Board reserves the right to conduct discussions or negotiations with one or more bidders regarding scope, methodology, staffing, pricing, schedule, or contract terms prior to contract execution. Such discussions do not create any obligation to enter into a contract with any bidder. The Governing Board also reserves the right to select the proposal that, in its sole judgment, represents the best value and is in the best interest of the University, regardless of price or ranking.

Nothing in this RFP shall be construed as creating contractual rights in favor of any bidder. A binding contractual relationship shall arise only upon execution of a written agreement approved in accordance with applicable policies, regulations, and law.

All costs incurred by bidders in connection with the preparation and submission of proposals, as well as any subsequent negotiations, shall be borne solely by the bidder. The Governing Board shall not be liable for any costs, expenses, or damages incurred by bidders in connection with this RFP, regardless of whether a contract is awarded.

All proposals and related materials submitted in response to this RFP shall become the property of the Governing Board upon submission. The Governing Board shall have no obligation to treat any information submitted as confidential unless such information is clearly identified as proprietary and is determined to be protected from disclosure in accordance with applicable law.

The Governing Board reserves the right to take any action reasonably necessary to protect its interests, preserve the integrity of the procurement process, and ensure compliance with applicable laws, regulations, policies, and Governing Board directives.

-----**END OF REQUEST OF PROPOSAL**-----