



**ADDENDUM NO. 3**

**REQUEST FOR PROPOSALS (RFP)**

**JG 2027-01**

**UNIVERSITY OF PUERTO RICO SYSTEM SUSTAINABILITY, STRUCTURAL  
ALTERNATIVES, AND FIVE-YEAR FISCAL PLAN DEVELOPMENT SERVICES**

**QUESTIONS AND ANSWERS**

**August 18, 2026**

**1. PURPOSE OF THIS ADDENDUM**

This Addendum No. 3 ("Addendum") is issued by the Governing Board of the University of Puerto Rico ("Governing Board") pursuant to Sections 8.4 and 8.5 of RFP JG 2027-01 ("RFP"). Its purpose is to issue the Governing Board's written responses to Bidder Questions deemed material to the procurement process.

**2. RESPONSES TO BIDDER QUESTIONS**

A compilation of the questions received, together with the corresponding answers, has been prepared to ensure that all material inquiries are addressed prior to the submission of proposals. Some questions may not appear exactly as originally submitted, as repetitive or overlapping inquiries, whether submitted by the same or different Proponents, may have been consolidated for clarity and to avoid duplication.

**3. COMMUNICATIONS AND POINT OF CONTACT**

All communications regarding RFP JG 2027-01 shall continue to be directed exclusively to the Governing Board point of contact identified in Section 6.2 of the RFP. Oral questions will not be accepted. Bidders are responsible for acknowledging this Addendum in accordance with Section 8.5 of the RFP.

Issued by RFP Point of Contact (POC):

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**QUESTIONS AND ANSWERS**  
**RFP JG 2027-01**

| # | QUESTION                                                                                                                                                                                                                                                          | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
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| 1 | Will the Board consider issuing a bounded scope statement, or a defined list of the data domains to be assessed across the eleven units, so that bidders can responsibly price a fixed-price engagement?                                                          | Refer to Section 4 of the RFP and Addendum No. 1. The Scope of Work identifies the required analytical domains and deliverables. Bidders should price the complete Scope of Work as amended and state any material data, methodology, or pricing assumptions in their Proposal.                                                                                                                                                                                                                                                                                                                                                                          |
| 2 | For the Structural Alternatives Analysis (Phase II), is there a maximum number of structural alternatives the Board expects to be analyzed to full fiscal and operational depth, or is that determination left to the bidder?                                     | No. The Awardee should evaluate the alternatives that emerge from the evidence and are sufficient to support the Governing Board's deliberation and decision-making.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| 3 | Does the requirement to quantify benefits, risks, and trade-offs (Section 1.3) apply with equal rigor to bidder-originated alternatives that emerge during the study, or is a qualitative assessment acceptable for those configurations?                         | For each structural alternative evaluated, the Contractor must address fiscal and operational implications, accreditation, legal and regulatory risks, high-level implementation requirements, and an objective comparison with other alternatives. The analysis should also identify expected benefits, risks, implementation considerations, estimated efficiencies, cost impacts, implementation costs, and potential savings to the extent reasonably supported by available data. Bidders may propose the level of analytical detail they consider appropriate to satisfy these requirements and support meaningful comparison and decision-making. |
| 4 | Will the Board share the "initial set of institutional documentation" referenced in Section 2.4, or a detailed index of it, during the question period or before the submission deadline, so that bidders can assess data readiness against the 180-day timeline? | At this stage of the procurement process, the Governing Board will not provide an exhaustive list of every dataset that may be included in the initial package. Access to institutional information remains subject to applicable privilege, confidentiality, privacy, security, and legal protections.                                                                                                                                                                                                                                                                                                                                                  |
| 5 | What is the current condition and format of the core datasets (enrollment, finance, human resources and faculty workload, and facilities)? Are these datasets centralized, or maintained separately by each campus?                                               | Institutional data relevant to the Scope of Work may be maintained across multiple University systems, academic units, and administrative offices, and the Governing Board does not represent that all datasets are centralized, maintained in a uniform format, or fully                                                                                                                                                                                                                                                                                                                                                                                |

| # | QUESTION                                                                                                                                                                                                                                                                                                            | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
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|   |                                                                                                                                                                                                                                                                                                                     | <p>reconciled across the eleven academic units and Central Administration.</p> <p>The Governing Board expects that the majority of relevant institutional information will be available in digital form; however, data definitions, formats, historical coverage, granularity, completeness, and accessibility may vary by source and organizational unit. Certain datasets may therefore require reasonable validation, reconciliation, normalization, or processing as part of the engagement.</p> |
| 6 | <p>If institutional data or documentation is delivered late, or requires substantial cleansing attributable to the University, will such delay toll the 180-day engagement period? Section 6.1 limits extensions to "extraordinary circumstances"; would University-caused data delay qualify as such?</p>          | <p>The 180-calendar-day engagement period begins on the Effective Date of the executed Contract. Any schedule adjustment will be governed by the RFP and the Contract.</p>                                                                                                                                                                                                                                                                                                                           |
| 7 | <p>Does the fifteen-day Work Plan window (Deliverable D-1) run concurrently with the start of data access, or does data access begin only upon the CER's acceptance of the Work Plan?</p>                                                                                                                           | <p>The fifteen (15)-day period for Deliverable D-1 begins upon contract execution. Substantive analytical work shall commence upon approval of the Work Plan, as provided in Section 5 of the RFP.</p>                                                                                                                                                                                                                                                                                               |
| 8 | <p>Can the Board clarify the standard for "satisfactory" acceptance of the Final Report (Deliverable D-3)? Specifically, will acceptance be based on methodological rigor and completeness against the agreed scope, independent of whether the Board concurs with the substantive findings or recommendations?</p> | <p>Yes. Acceptance will be based on the Contractor's satisfactory performance of the Scope of Work and completion of the required deliverables in accordance with the RFP and the Contract. Acceptance does not require the Governing Board to agree with, adopt, or implement the Contractor's findings or recommendations.</p>                                                                                                                                                                     |
| 9 | <p>Will the provision requiring correction of deficiencies "at no additional cost" (Section 5) be limited to deficiencies measured against the defined scope of work, rather than to new or expanded analyses requested after submission of the Final Report?</p>                                                   | <p>The requirement to correct deficiencies at no additional cost applies to work that does not materially conform to the Scope of Work, the applicable deliverable requirements, or the Contract. It does not authorize the Governing Board to require materially new or expanded analyses outside the agreed Scope of Work without appropriate written modification in accordance with applicable University contracting requirements. The Contractor</p>                                           |

| #  | QUESTION                                                                                                                                                                                                                                                                   | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
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|    |                                                                                                                                                                                                                                                                            | remains responsible, at no additional cost, for correcting errors, omissions, inconsistencies, or deficiencies in work required by the Contract.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 10 | Section 10.7 requires disclosure of conflicts of interest but does not define a disqualifying conflict. Can the Board specify what affiliations or relationships would constitute a disqualifying conflict of interest for this engagement?                                | Refer to Section 10.7 of the RFP, Act No. 1-2012, as amended, and Act No. 2-2018, as amended, together with all other applicable Puerto Rico ethics and anticorruption requirements. All actual, potential, or apparent conflicts of interest must be fully disclosed. The Governing Board will evaluate each disclosed conflict under the applicable legal and ethical standards. A conflict involving a prohibited financial interest, compensation, profit, benefit, or other economic participation by a public servant or University employee in the proceeds or benefits of the Contract shall not be treated as a matter that can be cured merely through disclosure or ordinary mitigation, except where applicable law expressly permits the arrangement and all required prior waivers, authorizations, or ethics determinations have been obtained. The Governing Board reserves the right to reject a Bidder, require removal of a proposed team member, impose lawful conditions, or take any other action required to preserve compliance, independence, and integrity of the procurement. |
| 11 | Will individuals or units affiliated with the University of Puerto Rico be permitted to participate as subcontractors or advisors to an independent prime contractor, subject to disclosure and mitigation measures, or is such participation categorically disqualifying? | Current employees, faculty members, researchers, officers, or other personnel of the University of Puerto Rico may not participate in a Proposal or in performance of the resulting Contract in a manner that would provide them compensation, profits, financial benefits, or any other economic interest derived from the Contract where such participation is prohibited by applicable law. This restriction includes compensated participation as a bidder, team member, subcontractor, consultant, advisor, or subject-matter expert when the arrangement would result in a prohibited benefit from a University contract. All Bidders and proposed team members are subject to Section 10.7 of the RFP, Act No. 1-2012, as amended, Act No. 2-2018, as amended, and all other applicable University and governmental ethics requirements. Any proposed participation by current UPR personnel must be fully disclosed. An exception may be considered only where expressly permitted by applicable law and                                                                                         |

| #  | QUESTION                                                                                                                                                                                                                                                                          | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                 |
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|    |                                                                                                                                                                                                                                                                                   | supported by any required prior waiver, authorization, or ethics determination. In the absence of such legal authority, the Bidder should not include the current UPR employee or official in the proposed team.                                                                                                                                                                                                                       |
| 12 | Under the 0-to-5 scoring applied across the four weighted factors (Section 9.2), how will the composite score translate into a final ranking, and will scores or the resulting ranking be disclosed to bidders?                                                                   | Each evaluation factor will be scored using the scale established in Section 9.2.                                                                                                                                                                                                                                                                                                                                                      |
| 13 | Which specific University of Puerto Rico procurement regulation governs this process? Section 9.6 references the Uniform Administrative Procedure Act (LPAU), but the applicable procurement certification or regalement is not identified in the RFP.                            | This procurement is governed by the terms and conditions of RFP JG 2027-01 and its Addenda, the applicable procurement rules and certifications of the University of Puerto Rico, the Puerto Rico Uniform Administrative Procedure Act, Act No. 38-2017, as amended (“LPAU”), and Executive Order OE-2021-029, regarding the evaluation and approval of professional services contracts exceeding \$250,000, to the extent applicable. |
| 14 | Are travel and community-engagement logistics (surveys and focus groups conducted across campuses) to be priced within the fixed price, or treated as reimbursable direct costs?                                                                                                  | Yes. It should be included in the fixed price.                                                                                                                                                                                                                                                                                                                                                                                         |
| 15 | Given that source documentation, interviews, surveys, and focus groups will be predominantly in Spanish, will the Board accept data-collection instruments and raw qualitative inputs in Spanish, with only the formal deliverables rendered in English as required by Section 5? | All official documentation should be submitted in English.                                                                                                                                                                                                                                                                                                                                                                             |

| #  | QUESTION                                                                                                                                                                                                                                                                                                                                                                | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
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| 16 | <p>Will the Board accept a teaming arrangement or joint venture in which the prime contractor holds the comparable-experience qualifications required by Section 7.2.B, while subcontractors supply local knowledge and subject-matter depth? Do the prime contractor's qualifications alone satisfy Section 7.2.B, or must each team member independently qualify?</p> | <p>Yes. The RFP permits teaming arrangements, consortia, joint ventures, and the use of subcontractors or advisors. The lead Bidder or prime contractor must independently satisfy the organizational qualifications applicable to the Bidder under Section 7.2.B, including the applicable experience requirements. Subcontractors, advisors, and other team members are not required to independently satisfy those organizational qualifications unless the RFP expressly provides otherwise. However, the qualifications and experience of the entire proposed team will be considered, as applicable, in evaluating the Bidder's technical capacity to perform the Scope of Work. The lead Bidder shall remain fully responsible for the performance of the Contract and all required deliverables. Also refer to Section 7.3.</p> |
| 17 | <p>Section 11.2 lists Puerto Rico-specific certifications (RUP, CRIM, ASUME, IVU, and others). For a bidding team that includes a prime contractor organized outside Puerto Rico, which certifications apply to the prime contractor versus to subcontractors, and what equivalent documents are accepted for foreign entities?</p>                                     | <p>All Bidders are subject to the same eligibility, compliance, and contracting requirements established in the RFP. Bidders organized outside Puerto Rico must also provide the applicable Puerto Rico documentation required of foreign entities and, where appropriate, equivalent certifications or compliance documents from their jurisdiction of organization. The selected Contractor must satisfy all applicable requirements of Section 11.2 prior to contract execution.</p>                                                                                                                                                                                                                                                                                                                                                 |
| 18 | <p>Will the Governing Board provide bidders with an index of the documents and datasets already assembled for the engagement?</p>                                                                                                                                                                                                                                       | <p>Relevant information will be made available to the selected contractor, as appropriate and subject to availability, applicable law, confidentiality, privacy, security, and UPR policies and procedures. The specific scope, format, method, and timing of access will be coordinated following contract execution.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

| #  | QUESTION                                                                                                                                              | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
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| 19 | Are institutional data definitions consistent across all eleven units, and who will validate and certify supplied data?                               | The Governing Board expects that institutional data definitions, structures, and quality may not be fully consistent across all eleven academic units. Bidders should therefore anticipate that certain data may require validation, reconciliation, or normalization as part of the engagement and should identify reasonable assumptions regarding data quality, completeness, and reliability in their proposals.                                                                                                                                                                                                                                                                                                                                                            |
| 20 | What response period should bidders assume for subsequent data requests?                                                                              | The initial institutional documentation will be made available following contract execution. Subsequent requests should be coordinated through the Work Plan and the engagement oversight process.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 21 | How does the Governing Board define institutional and unit-level “sustainability” for this engagement?                                                | For this engagement, sustainability is evaluated across fiscal, academic, operational, organizational, and structural dimensions, including the short- and long-term viability of each university unit's resource allocation, academic focus, and contribution to overall UPR system sustainability. The RFP does not establish a single numerical sustainability threshold. Rather, the Contractor is expected to evaluate relevant quantitative and qualitative factors and their implications for the long-term sustainability of each unit and of the UPR system as a whole.                                                                                                                                                                                                |
| 22 | What financial, academic, operational, access, research, and mission criteria should be used to assess each unit's viability and system contribution? | The assessment should evaluate institutional and unit-level sustainability through an integrated economic, fiscal, academic, operational, research, access, and mission-based framework. In addition to resource allocation, fiscal sustainability, operational efficiency, staffing, facilities utilization, duplication, student demand, and workforce needs, the analysis should assess, to the extent reasonably supported by available data, the contribution of UPR and its units to Puerto Rico's economic and social development, including workforce development, human-capital formation, research and innovation, attraction and retention of talent, regional economic activity, access to higher education, social mobility, and other measurable public benefits. |

| #  | QUESTION                                                                                                                                                                                                                                                                        | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
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| 23 | Which stakeholder constituencies must be engaged, and is there a required minimum number of interviews, surveys, focus groups, or campus visits?                                                                                                                                | No numerical minimum is established for interviews, surveys, focus groups, participants, campuses represented, or campus visits. Bidders should propose an engagement structure sufficient to obtain representative input within the required timeframe.                                                                                                                                                                                                                                                                                             |
| 24 | Will there be an identified specifically-designated contact that will have authority to approve the work plan, resolve scope issues, coordinate data access, consolidate comments, and accept deliverables?                                                                     | The CER will serve as the Governing Board's primary oversight and coordination body for the engagement. The Contractor will coordinate Work Plan review, scope questions, data-access issues, and consolidated comments through the CER or its designated representatives. Operational coordination with University units may occur through the President's Office as provided in the RFP. Formal acceptance of deliverables will occur in accordance with Section 5 and the Contract, and final acceptance of D-5 remains with the Governing Board. |
| 25 | Will the contractor have access to individual-level student or employee data?                                                                                                                                                                                                   | Any such access will depend on availability, analytical necessity, and compliance with applicable confidentiality, privacy, data-security, FERPA, and other legal requirements.                                                                                                                                                                                                                                                                                                                                                                      |
| 26 | To what extent should the demographic and enrollment conditions seek to incorporate data on other Caribbean or Latin American nations?                                                                                                                                          | The required demographic analysis is centered on UPR and Puerto Rico. However, the benchmarking provisions are not limited to any particular jurisdiction, so relevant Caribbean, Latin American, United States or other comparative information may be incorporated where methodologically appropriate and justified.                                                                                                                                                                                                                               |
| 27 | We note that the current state assessment is not listed as a separate deliverable in Section 5, nor is there a payment identified for its completion and submission. Is there any flexibility in that payment schedule to account for the completion of that phase of the work? | Refer to amended Section 5 and Addendum No. 1. The payment percentages are D-1 15%, D-2 20%, D-3 20%, D-4 25%, and D-5 20%. No advance payments are authorized.                                                                                                                                                                                                                                                                                                                                                                                      |

| #  | QUESTION                                                                                                                                                                                                                                                                                                                                                                                                                                   | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
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| 28 | In 11.2, the RFP lists a number of certification requirements that the successful bidder must submit prior to contract signing. It is not clear if the UPR will require a surety bond, or under what conditions it might do so. Can you clarify whether this will be a requirement and, if so, for how much? Moreover, are all of the remaining certifications listed in 11.2 required “under applicable University procurement policies”? | Any such requirement, if applicable, would be addressed in the final contract documents in accordance with applicable procurement requirements.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| 29 | Please confirm whether a recent facilities condition assessment is available and, if so, whether it will be provided to the consultant.                                                                                                                                                                                                                                                                                                    | The RFP requires analysis of resource, physical-facilities utilization, capital and infrastructure planning and quantified fiscal impacts. The Governing Board will make reasonable efforts to provide available institutional information necessary for those analyses, but the solicitation does not guarantee the existence or completeness of specific facilities-condition, deferred-maintenance, asset, space-utilization, or real-property datasets.                                                                                                                                                                                            |
| 30 | Eligibility under Section 7.1. May prior experience developing a PROMESA Section 201-certifiable fiscal plan be satisfied through a subcontractor or teaming partner, or must it reside directly with the proposer's key personnel?                                                                                                                                                                                                        | The lead Bidder must satisfy the organizational qualifications applicable to the bidder, including the five-year experience requirement added by the Addendum. The RFP permits interdisciplinary teams, consortia, joint ventures, and subcontractors, and the lead Bidder retains primary responsibility for all deliverables. The RFP does not require each of the three comparable engagements to demonstrate every element of the combined scope, and experience involving FOMB or equivalent oversight entities is preferable but not required. Required key personnel and their responsibilities should be identified in the Technical Proposal. |
| 31 | Acceptance criteria for Deliverable D-4. Does FOMB certification constitute acceptance of Deliverable D-4, or is separate Governing Board approval also required?                                                                                                                                                                                                                                                                          | Refer to Addendum No. 1. FOMB certification is not a condition for contractual acceptance of D-4. Formal acceptance remains with the Governing Board, subject to the Contractor's continuing Section 201 support obligations established in the RFP and Addendum.                                                                                                                                                                                                                                                                                                                                                                                      |

| #  | QUESTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | ANSWER                                                                                                                                                                                                                                                                                                                                                   |
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| 32 | <p>Addendum No. 1, Section 2.5 - Section 6.1, Page 6 Scope and duration of post-180-day FOMB / Section 201 support: Please clarify the expected scope and duration of the Contractor's obligations related to the Section 201 PROMESA process following the initial 180-calendar-day engagement period. Specifically, please confirm whether the Contractor will be expected to provide support, revisions, modeling updates, meetings, presentations, or other services beyond the 180-day period, and whether there will be any defined limit on the number of review cycles, FOMB comments, Notices of Violation, or revisions to be addressed under Deliverable D-5. Given that the engagement is structured as a fixed-price contract, please also clarify whether post-180-day support associated with the Section 201 process is expected to be included in the fixed price and, if so, whether UPR will establish any parameters or assumptions regarding the anticipated level of effort.</p> | <p>Addendum No. 1 expressly provides that amendments and support required as part of the Section 201 process may extend beyond the initial 180-calendar-day engagement period and remain part of the Contractor's obligations under Deliverable D-5. Accordingly, bidders should account for such obligations in the fixed price for the engagement.</p> |
| 33 | <p>Addendum No. 1, Section 2.4 - Section 5, Pages 4–5 Required timeline for D-2, D-3 and D-4: Please clarify whether UPR has established target or maximum submission dates for Deliverables D-2, D-3, and D-4 within the 180-calendar-day engagement period. If no fixed dates have been established, please confirm that the Contractor is expected to propose the timing and sequencing of D-2 through D-5 in its Work Plan, including the use of parallel workstreams where appropriate.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p>Refer to amended Section 5. No separate fixed submission dates are established for D-2, D-3, and D-4; the Contractor must propose sequencing in D-1 sufficient to complete the required work within the engagement period.</p>                                                                                                                        |
| 34 | <p>Addendum No. 1, Section 2.3 - Section 4.8, Page 4 Expected level of financial model detail and existing UPR model: Please clarify whether UPR currently maintains an institutional financial projection model, budgeting model, or other financial planning model that the Contractor will be expected to enhance, reconcile, or replace as part of the engagement.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <p>Regardless of any existing model, the Contractor should deliver an integrated, fully transferable Microsoft Excel financial projection model with documented assumptions, formulas, supporting schedules, training, and knowledge transfer.</p>                                                                                                       |

| #  | QUESTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
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|    | <p>If an existing model is available, please indicate whether it will be provided to the selected Contractor and whether the expected deliverable is an enhancement of the existing model or the development of a new integrated financial projection model.</p> <p>Please also clarify the expected level of detail and granularity of the model, including whether projections are expected at the system level only or by academic unit, campus, program, cost center, revenue source, or other organizational dimensions.</p> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 35 | <p>Addendum No. 1, Section 1 (page 1) Addendum acknowledgment: Please confirm the required format or documentation that bidders should use to formally acknowledge receipt of Addendum No. 1 and any subsequent addenda, and whether a signed acknowledgment form is required as part of the Proposal.</p>                                                                                                                                                                                                                        | <p>Section 8.5 requires bidders to acknowledge all addenda, and Addendum No. 1 reiterates that requirement. Bidders should acknowledge each addendum in the proposal.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 36 | <p>Section 8.2 states that the Technical Proposal shall not exceed twenty-five (25) pages, excluding resumes, references, certifications, and appendices, and subsequently identifies Sections A through F as the required components of the Technical Proposal. Please confirm which of the components listed under Sections 8.2.A through 8.2.F are included in the page limit (25).</p>                                                                                                                                        | <p>The page limit for the Technical Proposal is hereby increased to thirty (30) pages. This thirty (30)-page limitation applies to the complete Technical Proposal required under Section 8.2, including all substantive content responsive to Sections 8.2.A through 8.2.F. The Executive Summary shall not exceed two (2) pages and shall be included within the thirty (30)-page limit. Resumes, references, certifications, and supporting appendices remain excluded from the page count. However, substantive information required under Sections 8.2.A through 8.2.F may not be placed in an appendix for the purpose of circumventing the page limitation. This response modifies Section 8.2 of the RFP accordingly.</p> |

| #  | QUESTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
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| 37 | <p>Given the requirements and provisions in Sections 1.4.1, 1.4.2 and 10.7, are current employees, faculty members, researchers, or other personnel of the University of Puerto Rico, whether employed by Central Administration or any of the eleven academic units, eligible to participate as bidders, team members, subcontractors, advisors, or subject-matter experts in a proposal?</p>                                                                                                                                   | <p>Current employees, faculty members, researchers, officers, or other personnel of the University of Puerto Rico may not participate in a Proposal or in performance of the resulting Contract in a manner that would provide them compensation, profits, financial benefits, or any other economic interest derived from the Contract where such participation is prohibited by applicable law. This restriction includes compensated participation as a bidder, team member, subcontractor, consultant, advisor, or subject-matter expert when the arrangement would result in a prohibited benefit from a University contract. All Bidders and proposed team members are subject to Section 10.7 of the RFP, Act No. 1-2012, as amended, Act No. 2-2018, as amended, and all other applicable University and governmental ethics requirements. Any proposed participation by current UPR personnel must be fully disclosed. An exception may be considered only where expressly permitted by applicable law and supported by any required prior waiver, authorization, or ethics determination. In the absence of such legal authority, the Bidder should not include the current UPR employee or official in the proposed team.</p> |
| 38 | <p>Objective 1 expressly contemplates analysis of the eleven university units, including each unit's resource allocation, academic focus, and contribution to system sustainability. For Objective 2 and the Current State Assessment requirements related to operational, administrative, governance, staffing, resource-utilization, and duplication issues, does the Governing Board similarly expect analyses to be conducted individually for each of the eleven academic units, in addition to a system-wide analysis?</p> | <p>Yes, to the extent necessary to satisfy the Scope of Work. Objective 1 requires consideration of each of the eleven academic units, while Objective 2 and the Current State Assessment require analysis of operational, administrative, governance, staffing, duplication, and resource-utilization issues across the system. Unit-level examination should therefore be performed where necessary to support the system-wide analysis.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

| #  | QUESTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
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| 39 | Should Central Administration be treated as an additional distinct organizational unit for purposes of these analyses, including the assessment of staffing, functions, decision-making, shared services, administrative duplication, and opportunities for operational efficiencies?                                                                                                                                                                                                                                                          | The RFP expressly identifies UPR as consisting of eleven academic units and Central Administration.                                                                                                                                                                                                                                                                                                                                                       |
| 40 | Is the Contractor expected to develop separate financial projections for each of the eleven academic units and Central Administration, or is the five-year Fiscal Plan principally expected to operate at the consolidated UPR system level, with unit-level analyses used to support the assessment of structural alternatives?                                                                                                                                                                                                               | Yes. The Fiscal Plan is expected to operate as an integrated UPR system plan while incorporating sufficient unit-level and structural-alternative financial analysis to evaluate the implications of each alternative.                                                                                                                                                                                                                                    |
| 41 | Addendum No. 1 establishes FY2028 through FY2032 as the projection period for the Fiscal Plan. Should bidders also contemplate a longer analytical horizon for purposes of evaluating demographic trends, enrollment demand, institutional sustainability, capital needs, pension obligations, and the longterm viability of structural alternatives, or should all quantitative forwardlooking analyses generally be limited to the five-year Fiscal Plan period?                                                                             | FY2028 through FY2032 is the required Fiscal Plan projection period. The RFP also requires assessment of long-term institutional sustainability, demographic conditions, enrollment trends, capital considerations, and structural alternatives. Longer historical or analytical horizons may therefore be used where methodologically appropriate, while the required Fiscal Plan itself must cover FY2028-FY2032.                                       |
| 42 | Given the requirements in Section 4.8 Fiscal Plan Development, specifically: “An updated macroeconomic and demographic baseline calibrated to current conditions, including post-disaster recovery dynamics and the trajectory of federal funds” Will the Governing Board identify the official Commonwealth macroeconomic, fiscal, demographic, and policy assumptions that the Contractor should use or reconcile with when developing the Fiscal Plan, or is the Contractor expected to independently develop and defend those assumptions? | The RFP does not prescribe a single mandatory set of Commonwealth macroeconomic, fiscal, demographic, or policy assumptions. The Contractor is expected to develop and document a reasonable, current, and auditable baseline and, as appropriate, reconcile its assumptions with relevant official Government of Puerto Rico and other authoritative sources. Any material differences from governmental assumptions should be identified and explained. |

| #  | QUESTION                                                                                                                                                                                                                                                                                                                                                                                                        | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
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| 43 | <p>Given that formal legal opinions and accreditation determinations are expressly excluded from the engagement, please confirm whether accreditation, regulatory, and legal considerations may be addressed through analytical review and consultation with subject-matter experts, rather than requiring attorneys or accreditation professionals to serve as dedicated members of the core project team.</p> | <p>Yes. The RFP does not require attorneys or accreditation professionals to serve as dedicated members of the core project team, nor does it require the Contractor to provide formal legal opinions or accreditation determinations. However, the Contractor remains responsible for conducting a sufficiently rigorous analysis of the legal, regulatory, compliance, and accreditation implications of each material structural alternative evaluated. Bidders may satisfy this requirement through qualified members of the proposed team and/or consultation with appropriate subject-matter experts, including legal, regulatory, or accreditation professionals, as reasonably necessary to support the analysis. The Technical Proposal should describe how the Bidder intends to obtain and integrate the expertise necessary to address these considerations.</p> <p>Any legal, regulatory, or accreditation conclusions material to the evaluation of a structural alternative must identify the applicable requirements, assumptions, limitations, and potential risks and shall be supported by appropriate professional analysis. Nothing in this requirement shall be construed as requiring the Contractor to render a formal legal opinion or an accreditation determination.</p> |
| 44 | <p>Is the required analysis of physical facilities intended to focus on utilization and the implications of facilities for structural alternatives, or should bidders contemplate an independent assessment of facility condition, deferred maintenance, and future capital requirements?</p>                                                                                                                   | <p>The RFP requires analysis of physical-facilities utilization and, as amended by Addendum No. 1, capital and infrastructure planning and the fiscal implications relevant to the structural alternatives evaluated. It does not require an independent engineering-level facilities condition assessment. Bidders should propose the level of facilities analysis reasonably necessary to evaluate sustainability, capital requirements, utilization, and structural alternatives.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

| #  | QUESTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
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| 45 | Is the academic portfolio assessment intended primarily to identify systemwide patterns of duplication, utilization, demand, and sustainability, or is the Contractor expected to conduct a detailed academic program review of every degree and academic offering across the eleven units?                                                                                                                                                                                                                                                                                                                                                                                                                                                         | The academic portfolio assessment is intended to identify and evaluate systemwide and unit-level patterns of program duplication, enrollment, utilization, demand, workforce alignment, and sustainability as relevant to the structural alternatives under consideration. The RFP does not require a comprehensive academic or accreditation review of every individual degree or academic offering across the eleven units. Bidders should propose the level of program-level analysis reasonably necessary to support the required sustainability and structural-alternatives assessment. |
| 46 | For the analysis of alignment between the academic portfolio and workforce needs, does the Governing Board envision a Puerto Rico-wide labor-market assessment, or should the analysis also evaluate regional labor-market conditions and occupational demand associated with individual campuses and academic programs?                                                                                                                                                                                                                                                                                                                                                                                                                            | Bidders should propose an appropriate geographic methodology for evaluating workforce needs and occupational demand in Puerto Rico. The methodology should consider regional labor-market conditions where reasonably relevant to evaluating campus-level and systemwide sustainability and structural alternatives. The RFP does not prescribe a mandatory geographic level of analysis for every campus or academic program.                                                                                                                                                               |
| 47 | The RFP provides that, prior to execution of the contract, the selected Contractor shall provide the certifications and documents listed on pages 19 and 20, including the RUP Certificate, Certificate of Good Standing, tax and other governmental certifications, corporate authorizations, insurance documentation, and other applicable compliance documents. Could you please confirm whether the certifications and documents listed on pages 19–20 are only required from the selected Contractor prior to contract execution and are not required to be included with the proposal submission? If any of these certifications or documents should be submitted with the proposal, we would appreciate it if you could identify which ones. | Refer to Section 11.2. The listed certifications and compliance documents are required from the selected Contractor prior to contract execution and are not proposal-submission requirements unless another provision expressly states otherwise. Bidders must nonetheless satisfy all eligibility and qualification requirements applicable at the time of Proposal submission.                                                                                                                                                                                                             |
| 48 | Can investment firms with headquarters outside Puerto Rico bid on this RFP? Are there any restrictions on investment firms with holdings of Puerto Rico debt?                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Yes. An entity organized outside Puerto Rico may submit a Proposal subject to the eligibility, registration, qualification, and contracting requirements applicable under the RFP and                                                                                                                                                                                                                                                                                                                                                                                                        |

| #  | QUESTION                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
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|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Section 11.2. Holdings of Puerto Rico debt are not addressed in the RFP as an automatic disqualification. However, any financial interest, advisory relationship, creditor position, or other circumstance that may create an actual, potential, or apparent conflict of interest must be fully disclosed under Section 10.7. The Governing Board will evaluate any disclosed conflict based on the particular facts and may determine that the conflict is disqualifying, may be mitigated through appropriate safeguards, or does not materially affect eligibility.                                          |
| 49 | The University has separately solicited development of the UPR Fiscal Plan FY2028–2032. Can the Governing Board clarify the intended relationship between that engagement and RFP JG 2027-01 – in particular, whether the two are expected to be sequenced or coordinated, whether the fiscal trajectory analysis under Section 4.2(B) should be built on or reconciled to that plan, and whether participation in one procurement is viewed as creating a conflict of interest under Section 10.7 with respect to the other? | The prior Administration solicitation for development of the UPR Fiscal Plan FY2028-FY2032 was cancelled and no award was made under that procurement. The Fiscal Plan development requirements have been incorporated into RFP JG 2027-01 through Addendum No. 1. RFP JG 2027-01, as amended, is the governing competitive procurement for the combined scope. Participation in the prior cancelled solicitation does not, by itself, create a conflict of interest under Section 10.7; however, all Bidders remain subject to the disclosure, independence, and conflict-of-interest requirements of the RFP. |
| 50 | Given that electronic submission is not accepted under Section 6.3, will delivery by commercial courier within the stated hours be accepted as timely receipt? And how many copies of each submission within the envelopes are needed?                                                                                                                                                                                                                                                                                        | Yes, but Section 6.3 requires proposals (1 copy) to be physically received at the Governing Board offices, in sealed envelopes, by the stated deadline and during the specified hours.                                                                                                                                                                                                                                                                                                                                                                                                                          |

| #  | QUESTION                                                                                                                                                                                                                                                                                                                                                                                                                                                  | ANSWER                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
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| 51 | <p>Status of Prior Submissions 1. Please confirm whether proposals previously submitted in response to the now-cancelled Administration RFP for development of the UPR Fiscal Plan FY2028–2032 are considered part of the record for RFP JG 2027-01, or whether all bidders, including those who submitted under the cancelled RFP, must submit an entirely new proposal that independently satisfies all requirements of RFP JG 2027-01, as amended.</p> | <p>Materials submitted under the prior cancelled solicitation and any other RFP shall not be incorporated by reference. Any information, qualifications, methodology, personnel, pricing, or other materials that a Bidder wishes the Governing Board to consider must be included in its Proposal submitted under RFP JG 2027-01, subject to the applicable submission requirements and page limitations.</p>                                                                                                                                              |
| 52 | <p>If a new, independent submission is required, may a bidder incorporate by reference material previously submitted under the cancelled RFP (e.g., firm qualifications, relevant experience, or resumes), or must all required content be restated in full within the Volume I Technical Proposal submitted under RFP JG 2027-01?</p>                                                                                                                    | <p>Any entity wishing to be considered under RFP JG 2027-01 must submit a new, complete, and timely Proposal that independently satisfies the RFP and all Addenda. Materials submitted under the prior cancelled solicitation may not be incorporated by reference. Any qualifications, experience, personnel, methodology, pricing, or other information that a Bidder wishes the Governing Board to consider must be included in the Proposal submitted under RFP JG 2027-01, subject to the applicable submission requirements and page limitations.</p> |