Request for Proposals (RFP)

Design & Implementation of a Qualified Private Promoter Program for Invest Puerto Rico

Issue Date: October 16, 2025
Proposal Due Date: November 7, 2025, 5:00 PM AST

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1. INTRODUCTION

1.1 Background

Invest Puerto Rico (IPR), in coordination with the Puerto Rico Department of Economic Development & Commerce (DDEC) seeks to implement a qualified network of sector-aligned private sector promoters to expand and diversify its business attraction efforts.

1.2 Purpose

Invest Puerto Rico seeks a qualified consultant to design, develop, and operationalize the Private Promoter Program—a success-fee-based network of sector-aligned business development professionals authorized under Act 13-2017 and Act 60-2019. The consultant will lead Phases I and II of program implementation, establishing the regulatory framework, operational infrastructure, and technology systems required for program launch.

1.3 Contract Period

The contract shall be for a six-month period from December 1, 2025, through May 31, 2026, with deliverables due at specified milestones. IPR reserves the right to adjust the schedule as needed.

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2. SCOPE OF SERVICES

2.1 PHASE I: DESIGN & REGULATORY FRAMEWORK

(Months 1-3) December 2025 – February 2026

Month 1-2: Program Analysis and ROI Review

- Conduct Private Promoter Program market and ROI analysis to understand potential program revenues, target companies, costs and economic impact to better inform program development - – this includes analysis of compensation models, funding and payment mechanisms, benchmarking with other jurisdictions and other key elements relevant to informing program design

Month 2-3: Program Development

Program Scope Definition

- Define program budget, metrics, and success criteria
- Identify strategic partners and collaboration mechanisms
- Establish actionable performance targets by sector and metrics

Performance Management System

- Design pipeline dashboard architecture and KPI tracking framework
- Create performance monitoring protocols and reporting templates

Regulatory and Procedural Documentation

- Draft updated Private Promoter Program regulations and guidelines
- Document deal flow processes with role clarity between promoters and IPR staff
- Develop eligibility criteria and qualification standards for promoters
- Map handoff procedures and quality control checkpoints

Capability Building Curriculum Design comprehensive training program covering:

- Ethical standards and code of conduct
- Puerto Rico business environment and competitive advantages
- Incentives framework and business licensing requirements
- CRM protocols and client relationship management best practices
- Sector-specific technical content and market trends

Marketing and Promotional Materials

- Develop the promotional toolkit for promoters with templates, presentation decks and any other relevant materials

Deliverable: Comprehensive Program Design Package (Due: February 28, 2026) Including: program scope document, performance management framework, updated regulations, deal flow process map, eligibility criteria, priority sector strategies, training curriculum, and promotional toolkit

Milestone Payment: 60% of contract value upon acceptance of IPR of deliverables

2.2 PHASE II: TECHNOLOGY AND LEGAL FRAMEWORK

(Months 4-6) March 2026-May 2026

Technology Implementation (Months 4-6)
CRM Platform Configuration

- Assist in the integration of lead data in the CRM platform for promoter pipeline management, including tracking fields, workflows, and reporting dashboards
- Establish monthly pipeline review process and reporting protocols
- Train IPR staff on CRM administration and usage specific to private promoter management

Public Reporting Requirements

- Identify key performance indicators for public reporting on IPR's online platform, along with reporting cadence and format

Tool Enhancement Blueprint

- Provide recommendations for AI-enabled lead generation tools as needed
- Create implementation roadmap for future tool deployment

Incentive Tracking System

- Design incentive calculation tracking system in coordination with DDEC, Hacienda, and FOMB
- Develop automated calculation workflows
- Create audit trail and documentation requirements
- Establish payment verification protocols

Deliverable: Technology Implementation Report (Due: May 31, 2026) Including: configured CRM platform, operational public portal, tool enhancement recommendations, and incentive tracking system design

Legal and Administrative Framework (Months 4-6)
Contract and Agreement Templates (in collaboration with IPR's legal counsel)

- Assist in drafting standard service agreement template for promoters
- Develop conflict-of-interest disclosure forms
- Design performance amendment and termination provisions

Compliance and Ethics Framework (in collaboration with IPR's legal counsel)

- Establish ethical guidelines and code of conduct
- Design enforcement mechanisms and penalty structures
- Create complaint and investigation procedures
- Develop remediation and appeals processes

Certification and Approval Workflows

- Document application review and approval workflow
- Create individual project eligibility certification procedures
- Design multi-agency coordination protocols (DDEC, Hacienda, FOMB)
- Establish appeal procedures for denied applications

Payment Processing Procedures

- Design end-to-end payment processing workflow
- Document required verifications and approvals
- Create coordination protocols with DDEC, Hacienda, and FOMB
- Establish audit requirements and documentation standards

Deliverable: Legal and Administrative Framework Package (Due: May 31, 2026) Including: all contract templates, ethical guidelines, certification workflows, and payment processing procedures

Milestone Payment: 40% of contract value upon acceptance of IPR of deliverables

2.3 DELIVERABLES SUMMARY

Deliverable	Due Date	Phase
Market Analysis and ROI Report	January 31, 2026	I
Comprehensive Program Design Package	February 28, 2026	I
Technology Implementation Report	May 31, 2026	II
Legal and Administrative Framework Package	May 31, 2026	II

2.4 COORDINATION AND GOVERNANCE

Joint Working Committee

The consultant will report directly to IPR. A Joint Working Committee consisting of IPR, DDEC Secretary (or designee), and Fiscal Oversight & Management Board (FOMB) Economic Growth & Revitalization Coordinator (or designee) will have advisory input during the project.

Meeting Requirements:

- Periodic progress meetings with IPR and/or Joint Working Committee
- Monthly milestone review presentations
- Ad-hoc working sessions as required for deliverable review
- Final presentation for each phase deliverable

3 QUALIFICATIONS AND PROPOSAL REQUIREMENTS

QUALIFICATIONS

The Proposer must show to the complete satisfaction of IPR that it has the necessary facilities, ability, and financial resources to provide the services specified herein in a satisfactory manner. The Proposer should also give a history and references in order to satisfy IPR regarding the Proposer's qualifications. IPR may make reasonable investigations deemed necessary and proper to determine the ability of the Proposer to perform the work, and the Proposer shall furnish IPR all information for this purpose that may be requested. IPR reserves the right to reject any offer if the evidence submitted by, or investigation of, the Proposer fails to satisfy IPR that the Proposer is properly qualified to carry out the obligations of the contract and to complete the work described therein. As a best practice and subject to IPR's best ability and judgment, IPR will favorably consider proposals that include individuals that are residents of Puerto Rico, or that include local small businesses from Puerto Rico (PYMEs) as either direct contractors, local members of a joint venture, or part of a non-Puerto Rico based team.

3.1 Technical Proposal

Proposals must include the following sections:

A. Executive Summary

- Overview of proposed approach
- Key differentiators and value proposition
- Organizational capabilities and relevant experience
- Summary of team qualifications

B. Understanding of Requirements

- Demonstration of understanding of IPR's context and challenges
- Interpretation of project objectives and success criteria

C. Methodology and Approach

- Methodology for each phase
- Quality assurance processes

D. Work Plan and Timeline

- Detailed project schedule with milestones
- Resource allocation plan
- Risk management approach

E. Team Qualifications

- Team member resumes and roles
- Similar project experience (minimum 3 case studies)
- References from comparable projects (minimum 3 that IPR can contact)

F. Relevant Experience

- Experience with economic development program design and implementation
- Experience with CRM platform implementation (Salesforce preferred)
- Knowledge of Puerto Rico business environment (preferred)
- Proven track record managing multi-stakeholder government projects
- Experience with performance-based contracting and KPI development
- Change management and organizational transformation experience

3.2 Cost Proposal

Cost proposal must be submitted separately and include:

- Total fixed price for entire scope of work
- Any expenses included (travel, software, data sources, etc.)
- Payment terms aligned with milestone schedule

QUESTIONS

Please direct all questions to: John Bozek, Chief Strategy and Research Officer, JBozek@investpr.org

SELECTION CRITERIA

Criteria for evaluation will include:

40% Ability and Capacity to Perform Services

30% Costs, Fees and Expenses

20% Examples of Work Product

10% References

RFP SUBMISSION PROCESS

Issue Date: **October 16, 2025**

Submissions of Questions and Requests for Clarification (via email): **October 24, 2025, 3pm AST**

Responses to Questions and Requests for Clarification (via email): **October 29, 2025, 3pm AST**

Proposal Due Date: **November 7, 2025, 5PM AST**; email to John Bozek (jbozek@investpr.org)

Evaluation period: **November 10 to 14, 2025**

Notification date: **November 17, 2025**

Contracting period: **November 18 to 26, 2025**

Anticipated Contract Start Date: **December 1, 2025**

IPR reserves the right to adjust the above schedule or to cancel the RFP process at its sole discretion.