



PROPOSAL

Money Follows the Person Program

NEMT ANALYSIS AND PLANNING CONTRACTOR

Submitted by:
Estudios Técnicos, Inc.

Response to:

RFP 2024-PRMP-MFP-NEMT-003
Puerto Rico Department of Health

Graham A. Castillo Pagán
President

March 25, 2024

DEPARTAMENTO DE
SALUD





March 25, 2024

Puerto Rico Department of Health
Medicaid Program,
268 Luis Muñoz Rivera Ave.
World Plaza – 12th Floor (Suite 12)
San Juan, Puerto Rico 00918
ATTN: Elizabeth Otero-Martínez

To whom it may concern:

Estudios Técnicos, Inc. (ETI), is pleased to submit to your consideration this proposal in response to the Request for Proposals process 2024-PRMP-MFP-NEMT-003 for conducting a non-Emergency Transportation Services Gap Analysis (NEMT).

ETI is a private consulting, research, and technical assistance firm established in 1989, which is certified by the Puerto Rico Minority Supplier Development Council. ETI possesses a wealth of expertise in implementing the methodologies required by the PRDoH, particularly in conducting gap analysis and projects involving vulnerable populations, surveys, and transportation planning. We are committed to adhering to the highest ethical standards and our human resources are are cultural competent.

ETI has partnered with Klein Engineering P.S.C (KEPSC) and Truenorth Corporation. KEPSC is a firm well known in transportation engineering, with whom ETI develops transportation plans. ETI, in collaboration with Truenorth, were recently selected to conduct a Needs Assessment for the Puerto Rico Department of Health Money Follows the Person Long-Term Services Support Assessment (LTSS).

We appreciate the opportunity of presenting this proposal and remain available should you require any additional information. For those purposes you may contact us at 787-751-1675 or by email at gcastillo@estudios tecnicos.com

Sincerely,

Graham A. Castillo
President

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EXECUTIVE SUMMARY

This proposal is submitted in response to the Request for Proposals 2024-PRMP-MFP-NEMT-003) from the Department of Health of the Government of Puerto Rico for conducting a non-Emergency Transportation Services Gap Analysis (NEMT), as part of the Money Follows the Person Program (MFP).

Estudios Técnicos, Inc. (ETI), is a private consulting, research, and technical assistance firm, established in Puerto Rico in 1985 (Registration Number 60775). ETI is certified by the Puerto Rico Minority Supplier Development Council. The firm has 38 professionals with the experience, financial capacity, human resources, and structure to support the PR Department of Health in this endeavor. ETI has completed more than 3,500 projects on a wide range of topics, including research that has served as the basis for the development, implementation, and evaluation of public policies and programs. ETI has extensive experience in research, economic and social analysis, urban and regional planning, transportation planning, program evaluation, GIS, statistical and econometric analysis, and federal compliance, among other areas. Also, it has its own fieldwork unit comprised of over 50 surveyors and fieldworkers certified for conducting research with human subjects (PHRP Protecting Human Research Participants).

For purposes of this project Estudios Técnicos, Inc. is joining efforts with Klein Engineering, P.S.C. and Truenorth Corporation. KEPSC have successfully partnered with ETI to complete many transportation projects, as referenced in this proposal. Most recently, VAGTEC and Steer (traffic engineers), engaged ETI to administer 3,000 household surveys for the development of the Puerto Rico 2050 Long-Range Transportation Plan.

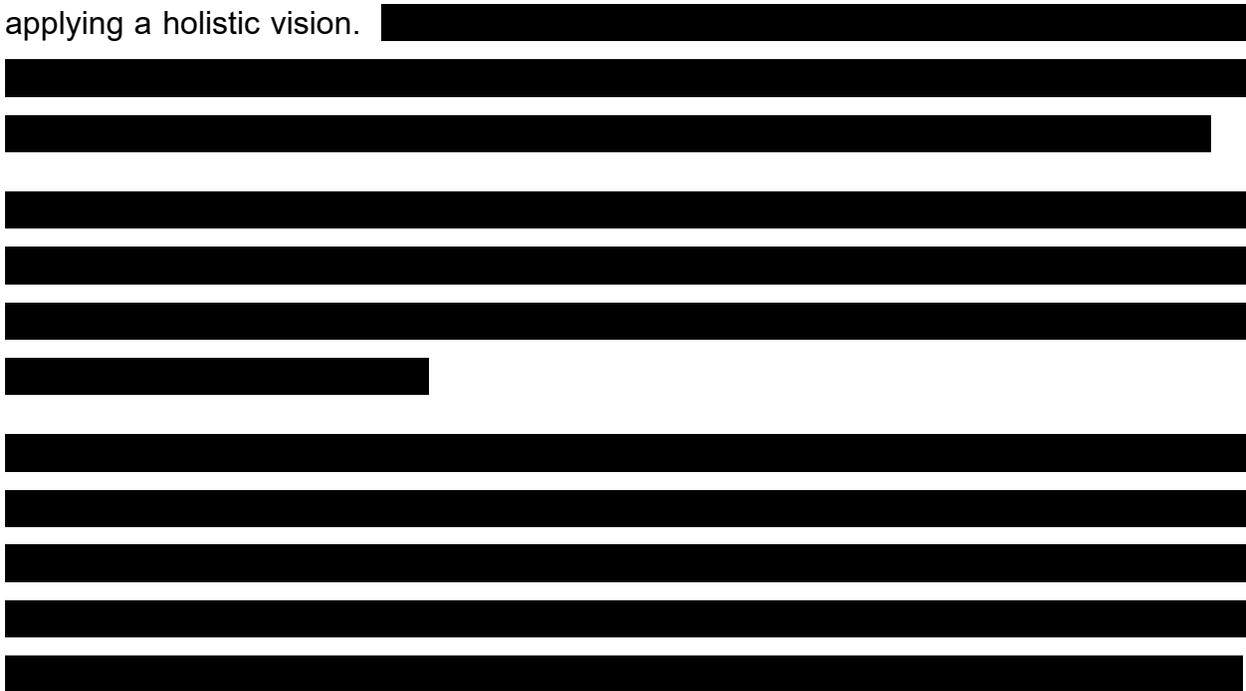
For this project's purposes, [REDACTED]

[REDACTED] Tasks will be organized into four main phases that will encompass key activities to be performed for this project, as shown on the following illustration.



ETI is committed to ensure a comprehensive and culturally sensitive approach for the gap analysis development, considering the diverse cultural landscape, particularly within Puerto Rico and its island municipalities. The surveyor team is fully bilingual with understanding of the Puerto Rican culture and ample experience with the target populations. The firm is committed to adhering to the highest ethical standards. Our approach includes strategies for effectively engaging diverse cultures and communities within Puerto Rico. ETI takes very seriously compliance with research processes. Our resources are trained prior to all engagements, all processes are piloted, and quality control protocols are incorporated in interviewing and surveying processes.

Our team comprising experts from various disciplines will formulate conclusive recommendations based on the information gathered, needs identified in the gap analysis, and the subsequent steps required for the implementation of a NEMT benefit applying a holistic vision.



ORGANIZATION INFORMATION

Estudios Técnicos, Inc.

Estudios Técnicos, Inc. (ETI), is a corporation established in Puerto Rico in 1985, certified by the Puerto Rico Minority Supplier Development Council. It is the leading economic, social, market research, and planning consulting firm. The firm has a staff of 38 professionals, a team of field workers and supervisors, and associates in specialized areas. ETI has provided support to municipalities, state agencies, and non-profit organizations in policy analysis and development, institutional and regulatory analysis, stakeholder engagement, gap analysis, data collection, program evaluation, master plans, among other deliverables. Moreover, the firm has a strong trajectory working with the Puerto Rico Department of Health, Department of Family, Department of Housing, and other government agencies.

A major strength of the firm is its interdisciplinary character and the opportunities this creates for enriching project results and undertaking complex assignments requiring the integration of various disciplines. Over the years, the ability to handle complex assignments has been one of the firm's core capabilities. The firm is organized into seven work groups that interact with each other depending on the needs of each project:

- Environmental and Urban Planning
- Social Analysis & Policy
- Economic Analysis & Policy
- Consumer Insights and Business Strategy
- Real Estate and Business Economics
- Data Analytics
- Statistics

The Environmental and Urban Planning division has prepared and led central projects related to urban planning, transportation planning, hazard mitigation and recovery. The director of the Environmental and Urban Planning division is Yoana L. López de Jesús, PPL.

Recent completed transportation projects led by ETI include the 2024 Multimodal Transportation Strategic Plan for the Municipality of Rio Grande, and the 2021 Strategic

Transit Plan for the Municipality of Luquillo. Currently ETI is conducting an Evaluation of the Public Transportation System for the Municipality of Humacao, and a Viability and Transit Study for the Municipality of Cidra. Other transportation projects and related services include Environmental Justice and Community Impact Assessments. Most recently, ETI was engaged by VAGTEC and Steer to conduct 3,000 household surveys for the Puerto Rico 2050 Long-Range Transportation Plan.

The Environmental and Urban Planning Division prepared 44 Municipal Recovery Plans during 2021-2023 for the CDBG-DR program under contract by CMA Engineers and Architects, the project manager. This project was successfully and effectively delivered during a limited time schedule. ETI boasts an impeccable reputation in the CDBG-DR program and among the senior management of the Department of Housing, given our success in providing services to the program and the agency. This reputation extends to the Puerto Rico Department of Natural Resources, the Puerto Rico Planning Board, the Department of Family, the Office of Socioeconomic Development, municipalities, and the Department of Health for the outstanding work the firm has provided throughout the years.

This division has also collaborated in other projects led by ETI's Social Analysis & Policy division related to health, medical and housing services in Puerto Rico such as: the Integrated HIV Surveillance, Prevention and Care Plan, 2022-2026 Plan, and Puerto Rico's State Housing Plan 2024-2030.

Klein Engineering, PSC (KEPSC)

Klein Engineering, PSC (KEPSC) is a professional services corporation specializing in surface transportation and traffic engineering, highway safety, and civil site design, serving public and private customers. Our team provides complete engineering solutions of the highest professional level, while promoting planned and sustainable development in equilibrium with the conservation of our environment's natural patrimony. Our mission is to save lives through the analysis and design of innovative, efficient, and environmentally sustainable surface transportation infrastructure safety and traffic operations engineering solutions.

Klein Engineering's professionalism and renowned expertise in multiple engineering, construction management, environmental, and other disciplines are based on solid academic preparation, with extensive knowledge of today's engineering best practices

and methodologies, enhanced by years of experience successfully designing, managing, and inspecting transportation, utility, and facility improvement projects, with a broad range in scope and budget. Our team's technical capabilities, expertise, and experience will assure you the most satisfactory execution of all assigned projects. Our goal is clear: we always strive to achieve excellence in every assignment undertaken, and our greatest asset is having received the recognition and respect of our peers and the clients we have served.

Klein Engineering, PSC has actively participated in complex engineering design work, and has been actively involved in traffic operations and safety analysis projects using methodologies presented in the Highway Capacity Manual and the Highway Safety Manual. Our team has also participated in projects that require the identification of operational and safety issues for all road users, including pedestrians, bicyclists, motor vehicles, and comprehensive transportation and transit studies across Puerto Rico. The work completed by our team has always focused on using a context-sensitive approach that provides operational and economically feasible solutions based on engineering best practices that are targeted to specific conditions and users. KEPSC focuses on providing innovative solutions that support efficient use of limited resources for infrastructure funding.

Truenorth Corporation

Truenorth Corporation is the Caribbean's leading business transformation firm serving large enterprise and government clients. Truenorth leads change and strives to earn trust. Its core values guide its team of over 450 professionals to deliver the right business solution. Since its inception in the year 2001, they have grown steadily to become the leader in the provision of consulting services in the region. According to the prestigious publication Caribbean Business, Truenorth has a solid client portfolio distributed among its four (4) distinct business divisions which include:

- Management Consulting Division, managed by Mr. Fabian Fejgielman, is organized under the brand name Vision Point. The Management Consulting Division has various principals and managers administering a varied staff of professionals and offers Management Consulting, Project Management, IT

Strategy services, Revenue Assurance Services, Process related services, Business Process Outsourcing Services, and Call Center Services.

- Technology Division, managed by Mr. William Roman, is organized under the brand name Stable Point. This division enjoys a close working relationship with IBM, VMWare, Microsoft, and AWS, as the key partners of the division, and offers a vast array of technology services ranging from mainframe upgrades, service/help desk management, technology management, Disaster Recovery strategies, business continuity, all type of Cloud solutions and many others.
- Software Division is managed by Mr. Gabriel Fernandez and is organized under the brand name Code Point. This division enjoys a close working relationship with Microsoft and offers a wide array of software offerings including custom application development.
- Customer Experience Division is managed by Mr. Carlos Fernández and is organized under the brand name Consumer Experience Point. A cloud-based state-of-the-art Customer Experience Operation that leverages Technology and Teamwork to generate measurable performance improvement moving from a customer service experience to a Total Engagement Experience.

Since 2009, Truenorth has been working actively with the Puerto Rico Medicaid Program (PRMP) in various initiatives such as process optimization, capacity analysis, strategic planning, process management, and software development. The firm was involved with the operation, project management, and implementation of the official Eligibility and Enrollment platform MEDITI. It had 700+ users and it was implemented in 80+ regional PRMP offices. In addition, Truenorth has been consistently providing support to the Puerto Rico Health Insurance Administration (ASES for its Spanish Acronym) for nearly four years as the Enrollment Counselor of the Government of Puerto Rico's Vital Health Plan. In this capacity, Truenorth offers assistance and guidance to over 1.3 million beneficiaries of the Puerto Rico government plan who have been deemed eligible by PRMP.

Relevant Capabilities and Services

Transportation Planning

Experience in Similar Projects within the Transportation Sector

As mentioned, since its establishment in 1985, the Estudios Técnicos, Inc. has carried out over 3,500 projects, several of which are like the type of study requested by the Department of Health, including work in the Islands Municipalities of Vieques and Culebra. Some examples illustrating this experience are included in this section.

ETI is committed to ensure a comprehensive and culturally sensitive approach while conducting this non-Emergency Transportation Services Gap Analysis taking into consideration the diverse cultural landscape, particularly within Puerto Rico and its island municipalities. The evaluators team is fully bilingual with understanding of the Puerto Rican culture and ample experience with the target populations. Furthermore, the team is certified for conducting research with human subjects (PHRP Protecting Human Research Participants) and adheres to the highest standards of ethics.

The team formed by the members of KEPSC and ETI has accomplished a wide range of transit and transportation related projects in Puerto Rico. We have selected a few of these projects and are presented in the table below.

Table 1. List of similar projects lead by the consultant team

Project Name	Project Lead	Geographic Area	Date
Multimodal Transportation Strategic Plan for the Municipality of Rio Grande	ETI	Rio Grande	2024
AC-230045: Replacement of Bridge No. 1740	KEPSC	Maunabo	2024
AC-230023: Safety Improvements at PR-2, from Km. 67 to Km. 76.3	KEPSC	Arecibo	2023-2024
Fajardo Port Assessment	ETI	Fajardo	2023
Dale Blvd. / Rippon Blvd. STARS Study	KEPSC	Prince William County, VA	2023
Strategic Transit Plan for the Municipality of Luquillo	ETI	Luquillo	2021
Accelerated Safety Upgrades for PR-137, PR-52, PR-142, PR-779, PR-354	Several	Morovis, Corozal, Cayey, Comerío, Mayagüez	2018-2023
AC-811544, Landslide and Road Damage Evaluation and Repair Recommendations	KEPSC	Islandwide	2018-2023

AC-812541: Hurricane María efforts for Signing and Guardrails for Bayamón, Cataño, Guaynabo, San Juan, and Trujillo Alto Municipalities	KEPSC	Metropolitan Area	2018-2020
Feasibility Study for the Southeastern Transit System	KEPSC	Southeastern Region	2016
Puerto Rico Capitol Building District	KEPSC	San Juan	2015
Proposed Bicycle Facilities from Bahía Urbana to the Conventions District	KEPSC	San Juan	2014
Updated Financial Feasibility Study for the TODOS (Novotren) train system between Caguas and San Juan	ETI	San Juan and Caguas	2013
Regional Transit System for the Central Eastern Region of Puerto Rico	KEPSC	Central Eastern Region	2012
Improvements to the intersection of PR-177 and PR-174 in Bayamón	KEPSC	Bayamón	2011
Mass Transportation Technical Study for the Municipality of Canóvanas	ETI	Canóvanas	2009
Transportation Study for the Environmental Impact Statement for the new Highway between Cidra and Cayey	KEPSC	Cidra and Cayey	2009
Traffic Impact Study for the Comprehensive Cancer Center	KEPSC	San Juan	2009
Feasibility Study for the Construction of a Bridge between Vieques and Ceiba	KEPSC	Vieques and Ceiba	2008

The firm has also participated in many Environmental Justice and Economic Impact Studies for the planning of road infrastructure in Puerto Rico, including the study required for the extension of PR-22 from Arecibo to Aguadilla and the PR-52 Dynamic Toll System.

Recent Transportation Plans led by ETI

ETI's experience in Transportation Planning during the last decade has been diverse. Our most recent projects vary in magnitude and scope, which adjust to the clients' requests, needs, available funds and timeframe. The teams have worked on comprehensive, strategic, and short-range transportation plans. Additional information about these projects and other related projects can be provided upon request.

Table 2. Completed and On-going Transportation Planning Projects led by ETI

On-going



Cidra

Viability and Transit Study

2023 – present

Client: Municipality of Cidra

Contact information: Hiram G. Ríos Rodríguez

Phone: 787-434-1400 Ext.1009

Team Members: Yoana López (Project Director), Monique Lorenzo (Licensed Planner), Tatiana Marquina (Licensed Planner), Desiree Pastrana (Licensed Planner), Nicole González (Planner), Roberto Moyano (GIS Specialist), Evan González (Engineer), Francisco Klein (Engineer), Carlos Torres (Engineer), Sonya Viera (Engineer), José Báez (Engineer), Graham Castillo (Economist), Leslie Adames (Economist), Roberto Aragón (Economist), and Carlos Torija (Statistician).

Description: ETI recently began the initial phase of the development of the Project. This study will result in a document that will guide the implementation of a transit system and the coordination of land use and transportation decision making in Cidra.



Humacao

Evaluation of the Public Transportation System for the Municipality of Humacao

2023 – present

Client: Municipality of Humacao

Contact information: Betsy L. López, PPL

Phone: (787) 852-3066, Ext. 3160

Team Members: Yoana López (Project Director), Monique Lorenzo (Licensed Planner), Desiree Pastrana (Licensed Planner), Roberto Moyano (GIS Specialist), Evan González (Engineer), Francisco Klein (Engineer), Carlos Torres (Engineer), Sonya Viera (Engineer), José Báez (Engineer), Graham Castillo (Economist), Leslie Adames (Economist), Roberto Aragón (Economist), and Carlos Torija (Statistician).

Description: ETI recently began the last phase of the development of the Project which will result in a guide for improving the current transportation services in the Municipality, establishing a local multimodal transportation system in the municipality of Humacao that is both effective and economically feasible and that will promote economic development.

Completed



Río Grande

Multimodal Transportation Strategic Plan

2022 – 2024

Client: Municipality of Río Grande

Contact information: Kenia Alejandro Peña / Antonio J. Rosa Suárez

Phone: 787-887-2370, Ext.4000

Team Members: Graham Castillo (Project Director), Yoana López (Project Coordinator), Roberto Moyano (GIS Specialist), Tatiana Marquina (Licensed Planner), Francisco Klein (Engineer), Evan González (Engineer), Roberto Aragón (Economist/Financial Analysis), and Carlos Torija (Statistician).

Description: ETI completed a multimodal transportation strategic plan for the municipality of Río Grande that will increase accessibility, mobility, integration, and connectivity across modes for residents and visitors of the Municipality. The planning process was enriched by the input received from local agencies, and stakeholder surveys and interviews.



Luquillo

The Strategic Transit Plan for the Municipality of Luquillo

2021

Client: Municipality of Luquillo

Contact information: Jardany Díaz Salgado, PPL

Phone: 787-889-2525, Ext. 255

Team Members: Graham Castillo (Project Director), Yoana López (Licensed Planner), Roberto Moyano (GIS Specialist), Francisco Klein (Engineer), Evan

González (Engineer), Carlos Torija (Statistician), Roberto López (Financial Analysis).

Description: ETI has efficiently developed a Strategic Transit Plan for the municipality of Luquillo that is both effective, economically feasible and promotes economic development, as well as connectivity between different sectors in Luquillo. This transit plan had a special focus on developing linkages between the urban center and the tourism sectors of the Municipality through a multimodal approach.



Aguadilla **Comprehensive Transportation Study for** **2016**
the Municipality of Aguadilla

Client: Municipality of Aguadilla

Contact information: Merissa Badillo Gómez

Phone: 787-891-1005, Ext.8047

Team Members: Graham Castillo (Project Director), Evan González (Engineer & Project Coordinator), Roberto Moyano (GIS Specialist), Francisco Klein (Engineer), Carlos Torija (Statistician), Anitza Cox (Public Involvement), and Roberto López (Financial Analysis). Description: ETI efficiently prepared a Comprehensive Transportation Study for the municipality of Aguadilla that increased accessibility, mobility, and connectivity across motorized and non-motorized modes for residents and visitors, as well as neighboring municipalities, such as Aguada, Moca, and Mayagüez.

Planning and Public Engagement

As part of the development of planning documents and assessments, the Team will design, organize, and moderate community meetings. Our team will also design and manage surveys, interviews, and focus groups to collect data to identify the priorities and needs of the target groups and gather their recommendations on the issue at hand.

The Municipal Recovery Plans (MRP) is a recent example of a project that relied extensively on public participation, consultation, and close collaboration with the Puerto Rico Department of Housing, municipalities, and community leaders. The Puerto Rico Department of Housing also contracted ETI to lead the process of updating the State

Housing Plan 2024-2030, the third time the firm has completed this plan under three different public administrations. ETI is in the final stages of completing this plan. The firm was responsible for completing literature review, analysis of economic, social, demographic, environmental, and housing trends, data collection activities, conducting public participation workshops and presentations, identifying housing needs and challenges, and developing goals, objectives, and strategies for the revised plan.

Another recent example of our planning capacity and working with communities with a cultural competency approach is a study completed for DNER, on managed coastal retreat, climate change adaptation, and coastal hazards. The analysis was based on a survey with 400 participants and interviews with 16 key stakeholders. These methods were employed to collect perceptions on managed retreat (a sensitive topic) and elicit recommendations regarding adaptation strategies.

A flagship project that was executed by ETI was the *Household Census, Business Census, Relocation and Community Cohesion Study, and the Environmental Justice Study for the Proyecto Enlace del Caño Martín Peña (CMP) (2003)*. Over 150 residents of the communities were trained and supervised by ETI staff to conduct the census of 8,000 households in the eight communities surrounding the CMP.

Policy analysis and recommendations

The ETI Team comprises individuals with expertise in economics, demography, social analysis, law, political science, and planning, strategically positioning the firm to excel in policy analysis. Projects completed by the firm often include policy assessments and policy recommendations. Recently, for the DNER, the firm completed a [study](#) on integrating adaptation and resilience-building strategies into land use planning. The Team identified and analyzed relevant policies and regulations. It then developed a series of public policy modifications and suggestions for additional measures to strengthen climate change considerations in Puerto Rico's land use policy. In transportation planning, ETI has been developing transportation plans in compliance with local and federal laws to ensure the success of the projects, and the implementation of services needed by the population.

KEY PROJECT STAFF

The combination of Estudios Técnicos, Inc. and Klein Engineering P.S.C. provides a unique blend of professionals who have both wide-ranging state-of-the-art skills in transportation and related planning and extensive experience in Puerto Rico. To satisfy study objectives, the firm will assign a team with previous experience in transportation related projects (See Key Staffs' Resumes and Licenses in Appendix D). Graham A. Castillo will be the official in charge and will act as overall project supervisor. The project team will be as follows:

Estudios Técnicos, Inc

Graham Castillo-Pagán, J.D. – Is an economist and lawyer and President of Estudios Técnicos, Inc. He has supervised the preparation of a number of key projects over the years and was the executive officer in charge of the execution of the economic impact study for the Mass Transportation Technical Study for the Municipality of Canóvanas, the Feasibility Study for the TODOS Train to Caguas and its 2013 revision and the Environmental Justice Study for the Northwest Corridor: Hatillo-Aguadilla as well as the financials for the Aguadilla and Naguabo's transportation projects. He has conducted extensive financial analysis, including cost and benefit analysis required by Federal regulation associated to road, flood mitigation, and other infrastructure investments. Mr. Castillo will be ETI's Executive responsible for the project and will provide technical advice on regulatory matters and Benefit Costs Analysis.

Anitza Cox, Esq., M.Ed: Lawyer. Director of the Social Analysis and Policy Division. She holds a bachelor's degree in communications and a master's degree in education with a concentration in instructional design, both from the University of the Sacred Heart. She completed her law degree at the University of Puerto Rico and a graduate certification in Community Development and Public Administration from Rutgers University, Camden. In addition to her work at ETI, she has been in the academia for over 20 years. She is currently a professor at the Graduate School of Public Administration at the University of Puerto Rico, Rio Piedras Campus, where she teaches courses on research, program evaluation, and external resources, among others. Additionally, she provides a pilot course at the University of the Sacred Heart on Strategic Philanthropy, sponsored by The Philanthropy Lab in Texas. Anitza Cox will be the Research Director.

Yoana López de Jesús, MP, PPL – Coordinates the Planning Division of the firm. Mrs. López completed her Juris Doctor at the University of Puerto Rico. Mrs. López earned her degree from UPR's Graduate School of Planning and has a BS in Environmental Sciences with a minor in Geography. Before joining the firm, Mrs. López worked at the University of Puerto Rico, in a federal project ascribed to the Vice-presidency of Students Affairs and later in the Office of Compliance and Research Integrity ascribed to the Vice-presidency of Research and Innovation of the UPR. She coordinates transportation studies, management plans, land use plans, strategic plans for the public sector, community impact assessments and environmental justice studies, among other projects for the public and private sectors. She supervised the preparation and revision of various Municipal Land Use Plans. She also coordinated several plans for the Department of Natural and Environmental Resources to comply with Federal regulations for NOAA and the USFWS. Mrs. López will be the Project Manager and the technical leader in implementing the planning framework, land use analysis, and collaborating with the planning and implantation of the public engagement activities.

Tatiana Marquina, Ph.D., PPL - Professional Licensed Planner at the Urban, Regional, and Environmental Planning Division. Dr. Marquina holds an MP in Planning from the University of Puerto Rico - Río Piedras, and a PhD in Natural Resources from the University of Vermont. She is an interdisciplinary planner with experience in qualitative and quantitative research, participatory methods, and community-based planning. At the firm, she has been involved in developing Municipal Recovery Plans, which assist municipalities with recovery strategies after natural disasters. She conducted multiple interviews and community meetings to present the planning programs and gather input that informs the planning process. She has led studies on climate change adaptation strategies and has collaborated on multiple projects, including recycling strategies, coastal resources management, climate change impacts, land use, and transportation plans. Dr. Marquina, as a licensed planner, will collaborate in the urban and sustainable approaches related to transportation planning and natural risk analyses.

Monique A. Lorenzo Pérez, MCRP, PPL – Professional Licensed Planner at the Urban, Regional, and Environmental Planning Division. Mrs. Lorenzo has a master's degree in City and Regional Planning from Ohio State University, and a bachelor's degree in Sociology from the University of Puerto Rico at Mayagüez. Monique has vast experience

in qualitative research and working in multidisciplinary environments. Her most recent work focuses on investigating the impacts of managed retreat practices in informal communities in Puerto Rico. As a graduate student, Monique worked as a research associate in community planning, hazard mitigation, and climate adaptation topics, mainly focusing on the case of Puerto Rico. As an undergraduate, she worked for the Interdisciplinary Center for Coastal Studies at the University of Puerto Rico, Mayagüez Campus, collaborating in different projects using GIS. Before joining the firm, she worked for Environmental Design and Research, Landscape Architecture, Engineering & Environmental Services (EDR) in Columbus, Ohio supporting Ohio Power Siting Board (OPSB) permitting efforts, including the preparation of environmental studies, such as visual impact assessments, planting/screening plans, socioeconomic evaluations, glare assessments, vegetation management plans, and cultural resource studies. Most recently, as part of the Urban, Regional, and Environmental Planning Division in Estudios Técnicos, Inc. Monique was the planning lead on various Municipal Recovery Plans completed by ETI and is currently collaborating in the development of Land use plans, Transportation plans, and steering research efforts and public meetings. She recently led a coastal hazard and climate adaptation study and collaborated in the development of a coastal resources management plan. Mrs. Lorenzo will collaborate in the technical transportation planning analysis, interviews to key stakeholders, and other public engagement activities.

Desiree Pastrana Otero, MP, PPL –Mrs. Pastrana is a Professional Licensed Planner and has a master’s degree in Urban Planning from the University of Illinois at Champaign-Urbana. As part of the Urban, Regional, and Environmental Planning Division in Estudios Técnicos, Inc., she has worked in the development of Municipal Recovery Plans, Transportation Plans, and public engagement activities, supports the development of other land use and management plans in the firm. Mrs. Pastrana will collaborate in the urban and transportation planning analysis, as well as in the key stakeholders and public engagement activities.

Nicole Paulette González Figueroa, MP - Planner at the Urban, Regional, and Environmental Planning Division. Ms. González has a bachelor’s degree in political science from Vassar College and a master's degree from the Graduate School of Planning of the University of Puerto Rico - Río Piedras Campus. As an undergrad, her

work centered around community outreach efforts with the latino and migrant communities in Poughkeepsie, New York. As a graduate student, her research focused on housing affordability, community economic development and socially just recovery planning, employing tools such as GIS. Before joining the firm, Nicole served with the public corporation ENLACE on the community relocation efforts for the environmental restoration project of the Caño Martín Peña channel. As part of the Urban, Regional, and Environmental Planning Division in Estudios Técnicos, Inc., she worked with the development of Municipal Recovery Plans, land use, and transportation plans in the firm. Ms. González will collaborate in the urban and transportation planning analysis, as well as in the key stakeholders and public engagement activities.

Roberto Moyano, MS – Mr. Moyano is a GIS specialist. He has a BS in Geography from the University of Puerto Rico and an MS in GIS from the Universidad Pontificia de Salamanca, Madrid Campus. Mr. Moyano was responsible for the geographic layers and metadata reproduction for more than 43 municipalities in Puerto Rico under the Municipal Recovery Planning program. He oversees GIS projects and will be responsible for generating the required maps, data collection, and conducting geospatial data analysis.

Victor Elgueta - He obtained a degree in Natural Resources Engineering from the Universidad Austral de Chile. Mr. Elgueta since 2012 has been working in Geographic Information Systems in different types of projects, public and private, and since 2014 he has done it professionally. Currently, Mr. Elgueta is a GIS analyst in Estudios Técnicos, where he has developed geographic databases, maps and illustrations for different initiatives, such as the Municipal Recovery Planning Program, where he carried out cartography for 48 Municipalities, among other projects. He will collaborate in the development of databases and GIS analysis.

Carlos Torija Rodríguez De Liébana, MS. – Mr. Torija is the firm's statistician with degrees in Statistics and Operations Research from the Universidad Complutense in Madrid, Spain. He has completed post graduate courses on Quality Control in Information Systems at the same university. He completed a course at UNED, in Spain, which qualifies him as an expert on sample survey design. He has been in charge, since 1995 of the design and selection of samples, and supervising all data entry, processing, and interpretation processes. He was the statistician for the Origin and Destination Survey for

the Puerto Rico Long Range Transportation Plan 2030, in which almost 14,000 drivers around the island were surveyed. He also supported the coordination of the field work in a number of complex projects, including Socioeconomic Studies, socioeconomic census, and the survey for the feasibility study of Caguas train. Mr. Torija will be the Project Statistician responsible for developing the survey design and overseeing data collection and processing.

Rafael Arroyo, MA, PhD. - Rafael works in the company's Analysis and Social Policy division and collaborates in projects that require the implementation of qualitative research techniques. He completed his Ph.D. in social psychology at the University of Puerto Rico and is currently completing another master's degree in Organizational Psychology. He will support research design and analysis functions.

Héctor González Nieves, JD - Collaborates in the Division of Analysis and Social Policy providing technical assistance in federal programs and as a research analyst for government entities and the non-profit sector. He holds a bachelor's degree in international relations, a master's degree in Public Administration from the University of Puerto Rico, and a Juris Doctor from the Pontifical Catholic University. He will hold research and analyst functions of gathered data.

Edward A. Mercado Sanabria, JD, MPA- Consultant. Collaborates in the Social Analysis and Policy Division. He holds a bachelor's degree in criminal justice with a concentration in Forensic Psychology, a Juris Doctor from the UPR Law School, and a master's degree in Public Administration with a specialization in Public Management from the University of Puerto Rico. He has experience in projects in the public, private, and non-profit sectors including technical assistance to federal programs, public policy issues, strategic planning, needs assessments, citizen participation plans, and program evaluation and monitoring. He will support the regulatory analysis, program management alternatives and implications for the NEMT program in P.R. and the analysis of funding opportunities.

Roberto Aragón – He is the director of the Real Estate and Business Economics Division at Estudios Técnicos, Inc., where he oversees a wide range of studies for various industries, including the health care industry. One of Mr. Aragón's areas of expertise is Health Economics, in which he has studied at the graduate level and continuously works

as an expert economist to obtain Certificates of Necessity and Convenience before the Assistant Secretariat for Regulation and Accreditation of Health Facilities (SARAFS) of the Department of Health. In addition, he has extensive experience in the preparation of feasibility studies for various types of health facilities, both outpatient and inpatient, real estate investments, and transportation systems. His strong academic background, which includes a Master's Degree in Economics from the University of Puerto Rico, Río Piedras Campus, enables him to lead multidisciplinary teams in market feasibility studies, financial analysis, business plan development, and economic impact assessment. With more than 17 years of consulting experience, he has worked with clients from the public sector, private sector, and non-profit organizations, identifying profitable investment opportunities. In addition, he has been the Lead Economist in the recovery plans of 51 municipalities with CDBG-DR Municipal Recovery Plans funds, supervising the feasibility studies of municipal projects under the City Revitalization Program (CRP), Portfolio of Investments for Growth (IPG), CDBG-MIT HEALTH y CDBG-MIT IPGM. Most recently, Aragón has been leading the development of financial and implementation plans for on-going transportation studies for the municipalities of Humacao and Cidra. Mr. Aragón will be leading the feasibility and Benefit-Cost Analysis of different course of action (broker use and alternative administrative and program management approaches) in the implementation of a NEMT program in P.R. as well as associated costs, and budget potential funding opportunities.

Roberto Rios - has a bachelor's degree in Social Sciences from the University of Puerto Rico. He has more than 10 years of experience in supervision, management, and quality control in data and collection processes. He will be the field supervisor of the household survey.

Surveyors – ETI has a staff of 50 field surveyors that work under contract for the firm. They have extensive experience working with vulnerable populations and are certified in ethical principles of research with human subjects.

Subcontractor: Klein Engineering, P.S.C.

Francisco R. Klein, PE, PTOE, RSP2I - Francisco is a professional engineer with 22 years of experience. Francisco's knowledge, expertise, and experience are only surpassed by his great sense of mission and responsibility, attention to detail, and ability

to analyze every angle in order to accomplish the set goal and meet every deadline in a timely manner. His experience and accomplishments in design and construction plans for roads, highways, and transit systems span geographically outside national borders, contributing to improved new visions and ideas for implementing safety and efficiency on these. He has been working as a trusted consultant for federal, state, municipal, and private customers for almost two decades.

Francisco consistently strives to lead his team to diligently work with the expected and required precision, keeping forever present that the contribution made is not only to the physical well-being of the roads designed and constructed, but, more importantly, to the safety of the lives that travel upon these roads. Francisco's love and passion for transportation and traffic engineering stem from the opportunity of saving lives on a daily basis, with every project that is undertaken and completed with excellence. Francisco is a licensed engineer in VA, PR, DC, AZ, NC, MD, TX, and FL; he is also certified as a Professional Traffic Operations Engineer (PTOE) and as a Road Safety Professional (Level 2 - Infrastructure). Francisco has also obtained Advanced Work Zone and GRIT certifications from VDOT and completed the Transportation Project Management Institute (TPMI) program 2018.

Evan F. González, PE, MSCE - civil engineer with over 25 years of experience in project management and transportation engineering. He holds a B.S.C.E. and an M.S.C.E. from the University of Puerto Rico at Mayagüez and is a registered professional engineer in Puerto Rico and Maryland. Mr. González is also licensed to practice land surveying in the Commonwealth of Puerto Rico.

As a professional engineer, Evan has provided services in traffic impact studies, traffic signal design, transportation planning, road safety assessments, temporary traffic control during construction, and project management to public and private corporations, such as the Puerto Rico Highway and Transportation Authority, Autopistas Metropolitanas, LLC, The Sembler Company, Walgreens Puerto Rico, Crowley Maritime Corporation, and Hugo Neu Americas SE, among others. In addition, he has teamed with engineering firms such as Atkins, Kimley-Horn, DG3A Design Group, EBP Design Group, Torrojas Puerto Rico, CSA Architects and Engineers, and Estudios Técnicos, Inc.

Mr. González has also held executive positions in the Government of Puerto Rico, as President and General Manager of the Puerto Rico Metropolitan Bus Authority (MBA), Assistant Executive Director for Traffic and Operation of the Puerto Rico Highway and Transportation Authority (PRHTA), Deputy Director and Assistant Executive Director for Planning, Engineering, and Construction for the Puerto Rico Ports Authority (PRPA), and Executive Director of the Puerto Rico Traffic Safety Commission (PRTSC). As part of his tasks, for six (6) years he directly managed federal grants for different programs under FTA, FHWA, Federal Aviation Administration (FAA), and National Highway Traffic Safety Administration (NHTSA).

As Assistant Executive Director for Traffic and Operations for the PRHTA, he was responsible for establishing public policy regarding topics such as the Guidelines for the preparation of Traffic Impact Studies in Puerto Rico, sign standards for Puerto Rico, and the use of contrast pavement marking on concrete pavements. Mr. González established the road safety division under the Transportation Area. In addition, he oversaw the day-to-day operations of the Transportation Area and the Toll Roads and interacted with design Consultants and Contractors in establishing goals and objectives and verifying that projects were completed on time and within budget for the PRHTA Transportation and Traffic projects.

As President and General Manager of MBA, he was in charge of the establishment of Public Policy regarding bus operations in the metropolitan area of San Juan. As Executive Director of PRTSC, he oversaw the establishment of Public Policy regarding safety improvement projects through the hazard elimination, occupant protection, alcohol impaired drivers, and vulnerable road users, among others.

Mr. Gonzalez's knowledge and experience, as well as his continuous drive for excellence, are valuable assets that make him an outstanding leader.

Mr. Carlos G. Torres, PE - Carlos is a civil engineer with 22 years of experience in various types of public and private sector engineering infrastructure projects. He has led design teams for significant residential and commercial site/land developments, water/wastewater infrastructure, roadway/transportation, and education/institutional projects. In addition, he has managed and led final design and construction documents

of emergency relief projects for the Puerto Rico Highway and Transportation Authority (PRHTA) and holds VDOT's GRIT certification.

Carlos is a registered professional engineer in the Commonwealth of Puerto Rico, Virginia, and Arizona, and his distinctive data-driven approach to problem solving and strong leadership are a key asset to our team in the accomplishment of every goal and objective.

Mr. José D. Báez, PE, PMP - José is a project manager and professional engineer with experience in all phases of civil engineering projects, from surveying and field gathering data, design, permitting, and construction inspection. Mr. Báez's leadership shows as he guides groups to work as teams throughout the planning, executing, monitoring, and closing stages of the project life cycle. His experience at managing and controlling project scope, schedule, cost, risk, change, and resources, as well as his commitment to responsibility ensure a smooth pace and on-time delivery of assigned projects, while adhering to strong safety standards.

Mr. Báez's engineering and project management skills, combined vision, and expertise allow for project optimization of resources, effectively track and control budget, and achieve measurable success.

Mr. Báez is a licensed engineer in PR and certified Project Management Professional (PMP) with over 18 years of experience in Puerto Rico, the State of Florida, and the City of Chicago.

Mrs. Sonya Viera, EIT - Sonya has over 25 years of experience in various engineering consulting positions. She is a dedicated and goal-oriented colleague who continuously attempts to achieve higher standards in every task undertaken.

As a transportation engineer, Sonya has provided and directed services in traffic operation analyses, traffic impact studies, and alternative analyses to public and private industries in the Washington DC Metropolitan Area (i.e., District of Columbia, Maryland, and Virginia). She has also worked in parking studies, corridor analyses, and long-range transportation plans in Mexico, Puerto Rico, and Delaware. Finally, Sonya has performed traffic signal and intersection improvement plans as well as temporary traffic control designs in Washington, DC and Puerto Rico.

Sonya holds a Bachelor of Science in Civil Engineering from the University of Puerto Rico at Mayagüez and a Master of Science in Civil Engineering from the University of Maryland at College Park. She continuously looks for practical solutions and tools to improve the quality of engineering projects, resulting in cost-effective benefits to public and private clients as well as communities.

Subcontractor: Truenorth Corporation

Dany Villafuerte has over 25+ years of experience in the consulting industry. He is responsible for assisting clients across various industries, including utilities, insurance, healthcare, banking, government, distribution, and manufacturing. His areas of expertise include Project Management, Strategic Planning, IT Auditing & Regulatory Compliance, Process Reengineering, and General Consulting. He brings a wealth of experience and knowledge to complex projects and assessments, and he is committed to delivering high-quality services that meet the unique needs of each client. He is a Certified Information System Auditor (CISA). He is a member of the Information Systems Audit and Control Association (ISACA) and was for three (3) years the Director of the Academic Relations and Private Corporate Liaison Committee of the Puerto Rico Chapter. Also, he is a member of the InfraGard Program of the Puerto Rico Chapter. Furthermore, he possesses a master's degree in industrial engineering and has provided services within Puerto Rico, Perú, Costa Rica, Dominican Republic, and New York.

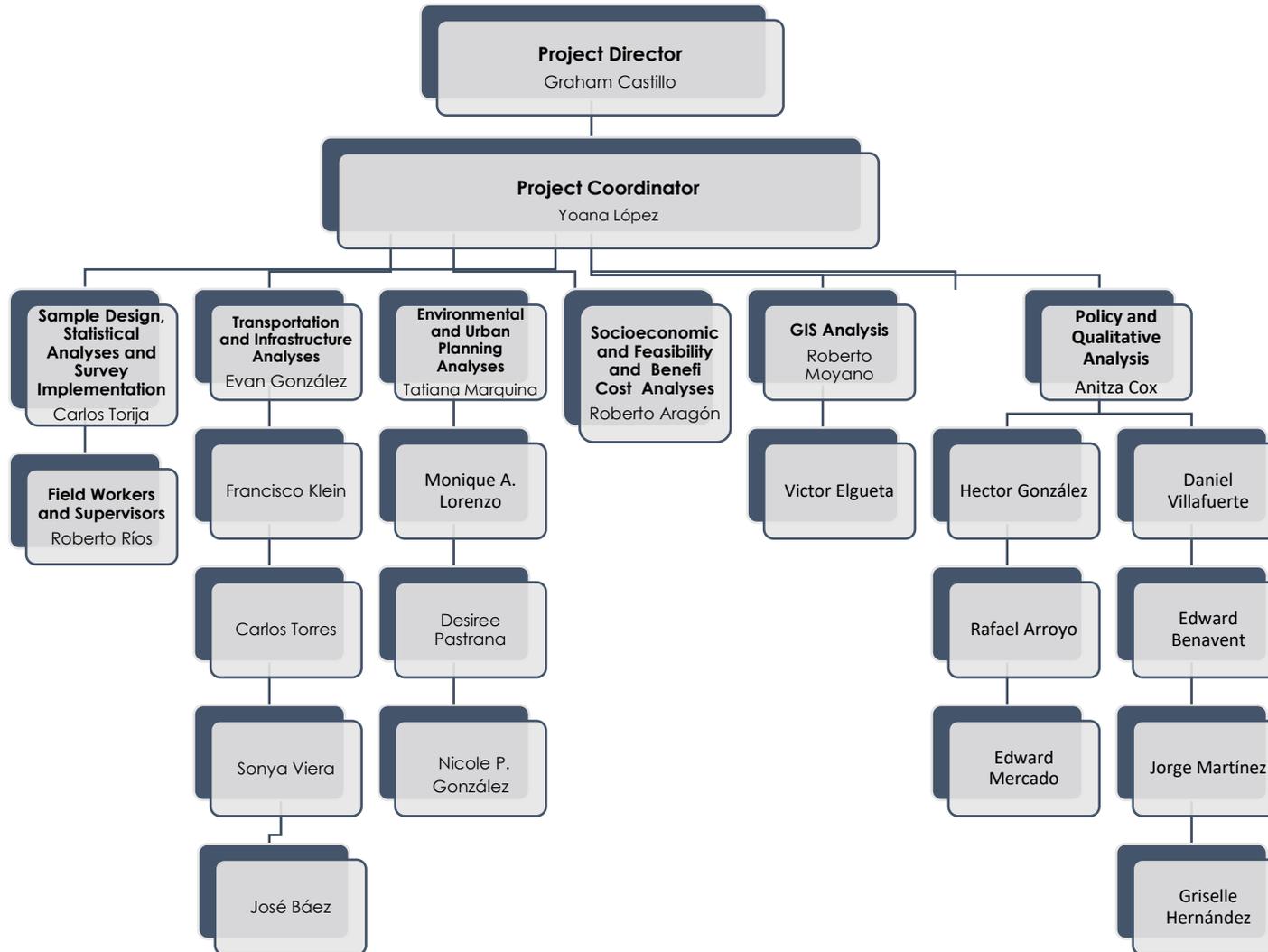
Edward Benavent is an experienced vision planning and repositioning professional with more than 35 years of experience and a successful management record in Marketing Communications, Customer Engagement, and Contact Center. His expertise lies in designing the optimal Consumer Journey, converting it into a superior Customer Experience that fosters unwavering loyalty. Key successful factors have been a commitment to measurement, and consistently tracking performance and results to ensure continuous improvement and optimal outcomes. He strongly believes in the power of innovation to drive positive change within organizations, leading to better outcomes and sustained growth.

Jorge Martinez is a professional associated with the areas of Strategic Planning and Management, Organizational Transformation, Change Management, Project Portfolio

Management, Program and Project Management, and Information Systems and Technology Management. He has supported clients in managing project and program portfolios with the purpose of achieving strategic objectives and operational and financial goals. Jorge has more than 30 years of work experience and has been in different management roles in project and portfolio management; Technological infrastructure; management, design and development of applications (software), and IS/IT compliance, among others. He has been successful in developing and implementing departmental strategies, improving operational efficiencies and cost control.

Griselle Hernandez has over 24 years of experience in project planning and execution for private and government implementation projects. Has proven ability to support multiple projects, coordination with diverse teams' resources, and consistent track record of on-time and on-quality delivery exceeding customer satisfaction. Her depth of knowledge in management techniques ensures projects are implemented within contractual obligations and regulatory requirements. Her strengths include outstanding leadership abilities, organizational development, customer relations, supervision, strategic planning, problem-solving capabilities, and negotiation with business partners and clients.

The staff that will be assigned to the project is presented in the following figure.





APPENDIX A
SCOPE OF WORK

APPENDIX A: SCOPE OF WORK

Our team, in collaboration with the MFP Project Staff and input received from the stakeholders will evaluate modes of transit, system accessibility for the elderly and disabled, eligibility for transportation services, system costs, and how services will be managed by the MFP Project. A gap analysis will be conducted to determine the non-emergency medical transportation (NEMT) needs of the Puerto Rico Long Term Services and Supports (LTSS) target population as compared to available transportation services within the 78 municipalities of the Archipelago of Puerto Rico.

Phase 1. NEMT Gap Analysis Plan

Task 1.1 Initial Project Schedule and Project Kickoff

The initial project schedule will include a breakdown of the tasks with responsibilities, timelines, durations, milestone dates, deliverable dates, and our staff's hours per deliverables for each project phase. It will also include a summary of the teams' hours necessary per phase and deliverable, and all critical dependencies for the project's milestones and deliverables.

Subtask 1.1.1 Develop a project schedule

An initial project schedule to be discussed and revised by the client will include:

- The detailed task assigned per phase and timelines.
- Identification of resources or entities assigned for each deliverable within the Work Breakdown Structure (WBS) to the level at which control will be exercised.
- Dependencies that will carry out the task will be identified.

This project schedule will be updated bi-weekly and delivered to the MFP Project Lead. The Project Lead will be notified of every modification made to the Project Schedule since the prior submitted version. Our team will submit weekly updates to the MFP Project Lead.

Subtask 1.1.2 Kick-off-meeting

Our team will hold a Kick-off meeting where the team members will be presented as well as any members of the MFP Project Lead, NEMT Specialist and other assigned staff by the PRDoH. The overall proposed work approach for this project will be discussed, and the coordination of data required for carrying out of the following tasks.

As part of this initial meeting, our team will request from the PRDoH a list of contacts to solicit input. This list of potential stakeholders could include but is not limited to:

- Relevant transportation agencies and other local entities
- Health services providers
- Existing non-emergency transportation providers

In addition, stakeholder participation strategies will be discussed with the MFP Project Lead and NEMT Specialist to define those that are most appropriate for the goals of the project. During this meeting, the project's schedule will also be discussed as well as any potential dates for follow-up and final meetings, deliverable submission dates, and the projected related activities.

Task 1.2 Background Research

Background research tasks will involve a literature review to identify historical data, and existing literature, case studies, and analysis of secondary sources about other relevant information regarding Puerto Rico's transportation systems and infrastructure. The research topics discussed in this section of the proposal. A background research exercise will provide the basis for identifying existing issues and needs for non-emergency medical transportation services, issues that will also be addressed during the Primary Research Phase of ETI's proposed approach. The study will be targeted to the following groups:

- Elderly (60+)
- People with disabilities (21+)
- Caregivers
- Transportation providers
- Division of Medicaid

Other case studies about NEMT programs implemented in other jurisdictions will be considered in this review.

Subtask 1.2.1. Socioeconomic and demographic profile

This subtask will consist of analyzing available census data for Puerto Rico's 78 municipalities including but not limited to the following variables:

- Demographic and socioeconomic trends: population, age distribution, sex, households, income, and poverty.
 - Transit dependent population characteristics: zero-vehicles households, older adult population (65 years and over), disabled population, low-income population.

Subtask 1.2.2 Existing conditions of transportation services and infrastructure in Puerto Rico

Background research, based on secondary information, will be done to identify and collect information regarding the existing conditions of transportation services and infrastructure in Puerto Rico. More specifically existing conditions for:

- a. Transportation Infrastructure in Puerto Rico.
- b. Available modes of transit, including mass transit, municipal and nonprofit on demand transit, ride sharing options, and informal friends and family options, upon available information.
- c. Current transportation services challenges in Puerto Rico for the target population.

Subtask 1.2.3 Assessment of transportation needs and comparative analysis

This subtask consists of gathering current transportation data and developing an assessment of needs and opportunities within the transportation sector. Additionally, a comparative analysis of Puerto Rico NEMT brokerage models and those in other states will be made by studying case studies identified during the literature review process and analyzing locally gathered data. [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] This analysis will be done in the context of the Geo Spatial Gap Analysis to establish regional implications.

Finally, our team will develop tools and evaluate preliminary the current state of Puerto Rico NEMT needs for the population of interest in Puerto Rico (this includes the municipalities of Vieques and Culebra). This assessment will be conducted in more detail using geospatial data during Task 3.2.

Subtask 1.2.3 Assessment of program financing options (Medicaid administrative funding as opposed to program funding)

Early on the project the research team specialized in Federal Programs Management and Compliance (Anitza Cox, J.D. and Edward Mercado, J.D.) and the financial analyst/economist will evaluate relevant literature and the regulatory framework, and the budgetary implications and Medicaid allotment of using “Medicaid administrative funding as opposed to program funding for supporting the eventual NEMT service costs”. The Team will provide a comparison to PRMP. They will also identify cost-effective initiatives that can be implemented with no or limited additional funding and will assist PRMP with NEMT capacity building throughout the contract period.

In the Medicaid program, as in other programs, administrative funding and program

[REDACTED]

In this context, the evaluation requires defining the following: [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Our framework to address this task is to identify core funding and operational strategies for the PRMP and NEMT services. Once the core strategies are selected, [REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]

Subtask 1.2.4 Identification of existing service providers and potential partner agencies for NEMT in Puerto Rico

Our team will identify existing agencies and local services (such as TransCita, Ida Y Vuelta, Inc., Med Transport, Advanced, among others) that offer NEMT services in Puerto Rico. Through this task, the aim is to obtain information that will allow us to measure the efficiency of their operations, including [REDACTED]

[REDACTED]

This phase is in preparation for Phase 2, during which our team will begin the stakeholder engagement process and will conduct a web survey with telephone follow-up to service providers that offer NEMT services to the population of adults aged 60+, and people with disabilities.

Task 1.3 Existing Data Evaluation and Methods for New Data Recollection

[REDACTED]

This geodatabase should be revised and validated with the PRDoH and the MP. This preliminary database revision further continues in Tasks 2.2. The analysis of the information will be conducted during Task 3.2.

Task 1.4 Stakeholder Engagement Plan

Subtask 1.4.1 Survey Administration, Execution, and Analysis Plan

The Survey Administration, Execution, and Analysis Plan will describe the proposed methodology for the surveys and target group numbers. Based on our preliminary assessment our team proposes conducting interviews with stakeholders, surveys to the elderly and adults with disabilities, focus groups with caregivers, and questionnaires to existing NEMT service providers.

ETI will develop and Outreach Plan to be presented to the program for approval, that will consist of:

[REDACTED]

The surveys will be executed by a group of professionally equipped bilingual survey administrators who will contact target participants. The survey instruments will be developed in English and Spanish and will comply with ADA (Americans with Disabilities Act) regulations to ensure accessibility for individuals with disabilities, including making the service content accessible to people with visual, auditory, or other impairments. Data collectors will be trained during this phase on the methodology, tools, and applicable research protocols. Also, data gathering instruments will be validated during this phase of the project through a pilot test to ensure internal coherence, test the logistics proposed for its implementation, and to ensure that the questions are understood and culturally sensitive.

The final instrument used for the survey will be approved by PRDoH or the assigned staff.

Phase 2. Identify Gaps (conduct gap analysis)

Task 2.1 Conduct Stakeholder Engagement Efforts and Analyze Results

Subtask 2.1.1 Questionnaires to service providers

Based on the information of existing service providers in Puerto Rico gathered in subtask 1.2.4 our team will conduct a web survey with telephone follow-up of service providers of

the population of adults aged 60+, and people with disabilities. Through this task, the aim is to obtain information about the workforce, the needs they observe in the population and in the service delivery system, as well as the challenges they face and areas where they believe capacity building is a priority.

Thus, the size and type of sample will be determined based on the size and characteristics of the identified services providers. The questionnaire will be programmed using the web survey application, Question Pro, and the data will be processed using the statistical application SPSS. Follow-up will be done by telephone and through web reminder.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

The final instrument will be reviewed by the client and approved before our team begins collecting information.

Subtask 2.1.2 Interviews to stakeholders

Prior to implementing the Surveys our team recommends beginning the engagement process with conducting in-depth interviews with [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

A preliminary list of stakeholders includes, but is not limited to:

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

The main purpose of these interviews is to seek input and identify key information about:

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

The preliminary results from this subtask would also help refine the data collection instruments to be developed in the following subtasks and phases. In-depth interviews, particularly those known as key informant interviews, are a useful qualitative research technique for the proposed gap analysis. These allow gathering information from individuals whose experience and preparation qualify them to provide an informed opinion on the subject under study. The interviews would be conducted using a semi-structured guide of questions, with the aim of having the flexibility to capitalize on other topics that arise during them, which could provide valuable information to the study. The selection of key informants and development of the questionnaire guide will be made in close consultation with the MFP Project Lead and Advisory Committee.

The type of sampling that would be used will be non-probabilistic by judgment and quota. That is, representatives of opinion leaders from the different stakeholder groups identified as part of Phase 1 will be sought. [REDACTED]

[REDACTED]
[REDACTED]

[REDACTED] The benefit of this approach is that it allows the flexibility to incorporate other informants into the process. For the analysis of the data that emerges from this task, [REDACTED]

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

Subtask 2.1.3 Conduct surveys to the elderly, adults with disabilities and their caregivers

One of the core tasks of the Gap Analysis is the survey of adults aged 60 and over and people with disabilities over 21 years of age. To this end, it is proposed to conduct a survey of these two groups that are representative of the population of Puerto Rico and by region. The sample would be probabilistic, multistage, stratified, and with sample selection under random criteria. Based on the characteristics of the population, it is recommended to work with a sample size of 600 people, elderly people over 60 years of age and adults with disabilities living at home. This would yield a margin of error of $\pm 4\%$ for the entire sample at a confidence level of 95%.

The surveys would be conducted face-to-face in the home by ETI's fieldwork staff, which has extensive experience working with vulnerable populations and is certified in ethical principles of research with human subjects. This team will additionally receive specific training for the project in which the PRDoH can participate. [REDACTED]

Estudios Técnicos' staff will use computer-assisted systems (which helps to maintain greater control during the data collection process). The information collected will be analyzed using the statistical software SPSS. [REDACTED]

Data to be identified and gathered through surveys include, but is not limited to:

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

[REDACTED]

Subtask 2.1.4 Analyze results and SWOT Analysis

Survey results will be analyzed and organized by themes. A draft of the findings will be made, and it will include tables, charts, and graphs.

A SWOT analysis will be executed, to identify strengths, weaknesses, opportunities, and threats that resulted from the interviews, surveys, and literature review. The SWOT analysis is a method used for identifying and analyzing internal strengths and weaknesses and external opportunities and threats that could help shape current and future operations and help develop strategic goals for NEMT in Puerto Rico.

Task 2.2 Collect Geospatial Data

Census data and geospatial information of existing NEMT services and other relevant information for each municipality will be gathered and incorporated into a database with access to MFP Staff. ETI GIS experts for years have developed data platforms for clients. Information to be collected during this task includes, but is not limited to:

[REDACTED]

This geospatial data will be then used by our GIS experts to create a geospatial analysis (see Task 3.2) including but not limited to:

[REDACTED]

Phase 3. Record, Review, Consolidate and Analyze Recollected Data

Task 3.1 Organize and Present Survey Response Findings

Based on the results from the previous phase. Our team will prepare a report on the findings. These results will be presented and submitted to the PRDoH using MS Power Point Presentation, and MS Word. These will include, as requested in the RFP: Charts, graphs, tables, and text for the final report. The self-explained subtasks identified for this process include:

Subtask 3.1.1 Data Processing

Collected data from interviews, questionnaires, surveys, and focus groups will be organized, transcribed (if applicable), categorized, and analyzed.

Subtask 3.1.2 Quality Control

For assuring reliable data and unbiased conclusions result from this study, QC will be carried out. Data quality control in qualitative research is critical to achieving accurate results, especially considering the mix of approaches of gathering data used for this study.

Subtask 3.1.3 Analysis and interrelation of findings

In this subtask, the team will apply the triangulation technique to interrelate findings.

Task 3.2 Conduct Geospatial Analysis

Subtask 3.2.1 Geospatial analysis of the transportation system and existing services

Our team will conduct a Geospatial Gap Analysis of the NEMT. In this regard, transportation data collected during the previous phases will be used.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] The result of the spatial analysis will complement other study findings.

Some of the data that will be used to support this analysis includes:

[REDACTED]

The Geospatial Analysis will be conducted to determine the distance between the medical services used and the patients place of origin and identifying the spatial distribution and describe the relationship between the existing health and medical services facilities, transit dependent populations and transit services availability, among other relevant analyses.

During the kick-off meeting, details about the reach of this geospatial analysis can be discussed.

Subtask 3.2.2 Analyze transportation trends

The analysis of transportation data helps identify trends in transportation needs and facilitates the identification of key origin and destination points. [REDACTED]

[REDACTED]

For instance, transportation trends to medical facilities in Puerto Rico can be identified and analyzed with census population data to identify potential needs and gaps in services.

Task 3.3 Risk Analysis

In order to comprehensively examine the potential risks associated with transportation services, it is imperative to establish categories into which these risks can be grouped. As part of our study, our team will undertake the task of establishing these categories. The identified categories will serve as a framework to organize and analyze the identified risks. The objective of this exercise is to ensure that all potential risks are identified and addressed in a structured and systematic manner.

Subtask 3.3.1 Geospatial hazard risk analysis

A geospatial hazard risk analysis will be conducted to assess the sustainability of transportation services during times of emergency caused by natural events (like hurricanes and earthquakes). [REDACTED]

[REDACTED]

[REDACTED] This can provide a layer of information that can be used to further analyze risks associated with transportation services in Puerto Rico.

Subtask 3.3.2 Risks associated with service capacity problems

This section pertains to risks associated with service capacity problems, specifically the risk of inadequate transportation capacity in Puerto Rico to meet the transportation

demand of eligible beneficiaries. [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Subtask 3.3.3 Risks associated with regulatory compliance

Transportation services are subject to a variety of risks that can have a significant impact on the regulatory metrics that must be met, including those related to [REDACTED]. To ensure these metrics are met, it is imperative to implement and monitor necessary controls, such as the strict validation of all service personnel, to optimize user safety.

Subtask 3.3.4 Risks associated with the level of satisfaction of the beneficiaries

The satisfaction level of beneficiaries is an area of concern that is characterized by certain risks that can significantly impact the quality-of-service provision. These risks may manifest themselves in various ways, such as [REDACTED]. It is imperative for the NEMT program to provide vehicles that are equipped to accommodate customers based on their specific needs and abilities. By doing so, the program can ensure that the customers receive the level of service they require and deserve.

Task 3.4 Compliance with State and Federal Regulations Governing NEMT services

An in-depth analysis of all state and federal regulations governing NEMT services will be completed as part of the study. The study will include the analysis and detailed evaluation of all state and federal safety standards and safety requirements presented for NEMT services. Furthermore, the NEMT service programs [REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED] Our Team of legal professionals that provide Grant Management and Compliance Services to various local agencies will be responsible of this task.

Phase 4. Findings and Recommendations

Task 4.1 Document Findings

This task will consist of developing a document discussing findings and providing recommendations from the gap analysis. Within this document, the barriers, challenges, and workable solutions will be included as well as an analysis of the current transportation models available and possible ways to complement these with the NEMT program. Additionally, a synthesis of research and stakeholder outreach will be presented.

Task 4.2 Outline of Conclusions from the Gap Analysis

This task will consist of developing an initial outline of the findings and conclusions from the Gap Analysis. This will inform and provide guidance to the following tasks, in terms of identifying the recommendations and implementation that result from this project.

Task 4.3 Recommendations for Implementation

Our team will provide recommendations of implementation methods [REDACTED] [REDACTED] These include analyzing the possibility of using innovative models such as the rideshare program staffed by volunteers and will recommend quality measures and contractor evaluation criteria.

As part of a policy and funding analysis, our team will evaluate the use of Medicaid administrative funding as opposed to program funding for supporting the eventual NEMT service costs and provide a comparison to PRMP, including the impact on Puerto Rico's annual Medicaid allotment. Also, our team will identify cost-effective initiatives that can be implemented with no or limited additional funding.

Task 4.4 Outline of Potential Next Steps for PRMP to Implement NEMT

Our team will provide recommendations of potential next steps to the PRMP to implement NEMT services in Puerto Rico. These recommendations will consider:

- The feasibility of using a transportation broker.
- How would the brokerage system look like.
- Possible cost and infrastructure need for implementation.
- How it would account for different regional needs.

These recommendations for the next steps will be aligned with the results of the prior phases (background research, case studies, and stakeholders' recommendations. Based

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

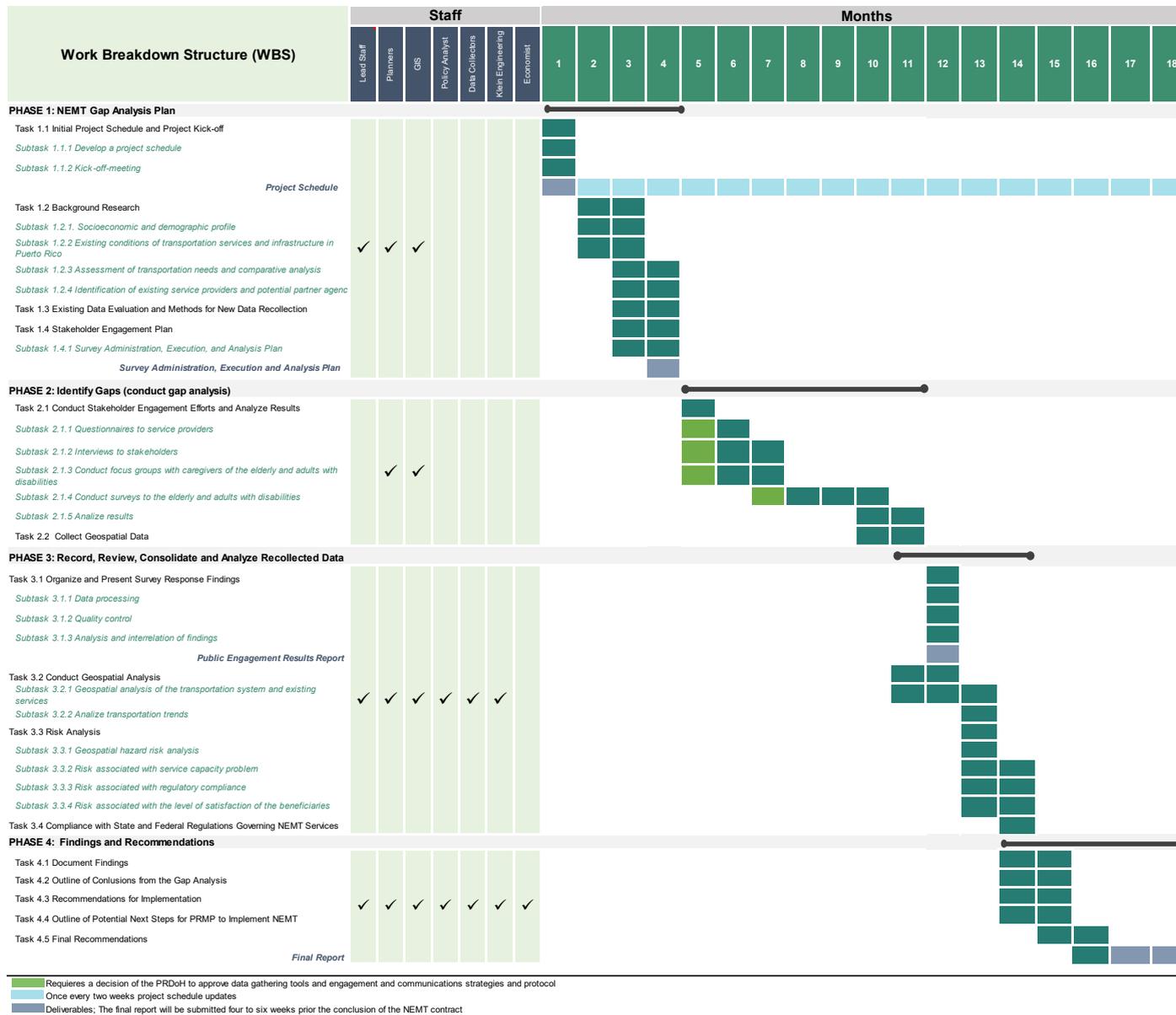
[REDACTED]

Subtask 4.5.1 Final Report

A final report will be prepared consisting of the results of the gap analysis, and recommendations. Our team will submit a final report with the findings, recommendations and action plan to the MFP Team and MFP Advisory Committee four to six weeks prior to the conclusion of the NEMT contract.

- Data hand-off: Our team will provide PRMP access to all GIS geospatial analysis developed for this project, including access to a software such as ArcGIS, and other data collecting and processing softwares such as Survey 123. Our Team suggests considering other platforms that could also facilitate collaboration between the NEMT Specialist and our GIS team, this can be discussed in more detail during the kick-off meeting.

WBS AND SCHEDULE





APPENDIX B

DESCRIPTIONS OF
SIMILAR PROJECTS

NEMT- Attachment B

**The vendor is NOT to change any of the pre-filled cells in the following tables.
The vendor may add additional reference tables as necessary.**

Vendor Reference Form

Vendor Information	
Vendor Name: Estudios Técnicos, Inc.	Contact Name: Graham Castillo
	Contact Phone: 787-751-1675
Customer Information	
Customer Organization: VAG Transportation Engineering Consultants, PSC (VAG TEC)	Contact Name: Gustavo A. García
	Contact Title: PE
Customer Address: San Juan, P.R.	Contact Phone: 787-724-2494
	Contact Email: gustavo@vagtecpr.com
Project Information	
Total Vendor Staff:	40+ including planners, data analysts, and surveyors.
Project Objectives: Conduct 3,000 surveys to homes in Puerto Rico for the revision of the Puerto Rico Long Range Multimodal Transportation Plan 2050.	
Project Description: ETI was subcontracted by VAG TEC to support in the administration of 3,000 household surveys in Puerto Rico. Steer Davies and Gleade was contracted by the Puerto Rico Highways and Transportation (hereinafter ACT) for the revision of the Long-Term Multimodal Transportation Plan for Puerto Rico 2050. In turn, Steer contracted with VAG TEC to distribute a transportation survey to island-level households with the aim of describing and identifying the travel behaviors, the number of trips per household as well as the characteristics of those trips.	
Vendor's Involvement: Our Team will be developing the surveys and administering them across Puerto Rico.	
Project Benefits: The project and our collaboration will contribute to the revision and update of the Puerto Rico Long Range Multimodal Transportation Plan.	
Key Personnel	
Name: Yoana Lopez	Role: Staff Planner
Name: Carlos Torija	Role: Statistician
Name: Monique Lorenzo	Role: Planner
Project Measurements:	
Estimated one-time costs: N/A	Actual one-time costs: N/A
Reason(s) for change in one-time cost: N/A	
Original Value of Vendor's Contract: \$303,795.00	Actual Total Contract Value: \$303,795.00
Reason(s) for change in value: N/A	

NEMT- Attachment B

Estimated Start & Completion Dates:	From:	2024	To: 2024
Actual Start & Completion Dates:	From:	2024	To: On-going
Reason(s) for difference between Estimated and Actual dates: The project is on-going.			
As subcontractor, ETI will be conducting the following scope of subcontracted activities:			
<ul style="list-style-type: none">• Support in the revision of the questionnaire• Sample design• Programming, training, and validation of the questionnaire• Administering the Questionnaire• Database Processing and Delivery• Possible accompaniment during the data analysis period			

NEMT- Attachment B

**The vendor is NOT to change any of the pre-filled cells in the following tables.
The vendor may add additional reference tables as necessary.**

Vendor Reference Form

Vendor Information	
Vendor Name: Estudios Técnicos, Inc.	Contact Name: Graham Castillo
	Contact Phone: 787-751-1675
Customer Information	
Customer Organization: CMA Architects & Engineers LLC	Contact Name: Alvin Rodríguez
	Contact Title: Managing Member
Customer Address: Guaynabo, P.R.	Contact Phone: 787-316-1436
	Contact Email: amrodriguez@cmapr.com
Project Information	
Total Vendor Staff:	23, including planners and consultants.
Project Objectives: Develop municipal recovery plans for all the municipalities under the CDBG-DR Municipal Recovery Planning program that selected the Option 2.	
Project Description: ETI developed municipal recovery plans for 44 municipalities including Vieques and Culebra. The phases of each plan included (1) an analysis of existing conditions, (2) a gap analysis, (3) municipal profile and the (4) final plan.	
Vendor's Involvement: ETI served as subcontractor to CMA. As a team we provided planning services to the Municipalities that selected a service provider (Option 2) for the development of their municipal recovery plans. Our team conducted interviews, focus groups, field visits, lead community meetings, provided GIS services and developed the municipal plans.	
Project Benefits: The project and our collaboration contribute to Puerto Rico's post- hurricane and Earthquake recovery process. These plans will help communities and municipalities to strengthen their infrastructure, municipal services, and community ties.	
Key Personnel	
Name: Yoana Lopez	Role: Staff Planner
Name: Monique Lorenzo	Role: Staff Planner
Name: Tatiana Marquina	Role: Staff Planner
Name: Desiroo Pastrana	Role: Staff Planner
Name: Nicole Gonzalez	Role: Data Analyst
Name: Roberto Aragón	Role: Economist
Name: Roberto Moyano	Role: GIS Specialist
Name: Victor Elgueta	Role: GIS Analyst
Project Measurements:	
Estimated one-time costs: N/A	Actual one-time costs: N/A
Reason(s) for change in one-time cost: N/A	

NEMT- Attachment B

Original Value of Vendor's Contract: \$5,973,793.42		Actual Total Contract Value: \$5,973,793.42	
Reason(s) for change in value: N/A			
Estimated Start & Completion Dates:	From:	2021	To: 2023
Actual Start & Completion Dates:	From:	2021	To: 2023
Reason(s) for difference between Estimated and Actual dates:			
<p>If the vendor performed the work as a Subcontractor, the vendor should describe the scope of subcontracted activities:</p> <ul style="list-style-type: none"> • Data collection: conduct interviews, focus groups, GIS, site visits, meetings with municipalities and communities. • Planning services: Operational plans, establish initiatives and strategies, develop operational plans. • Analyze economic, fiscal, and sociodemographic data. • Develop public engagement activities. • Among others. 			

NEMT- Attachment C

Subcontractor Reference Form

Subcontractor Information					
Vendor Name: Truenorth Corporation	<table border="1"> <tr> <td>Contact Name:</td> <td>Dany D. Villafuerte</td> </tr> <tr> <td>Contact Phone:</td> <td>(787) 706-3033 / (787) 607-4186</td> </tr> </table>	Contact Name:	Dany D. Villafuerte	Contact Phone:	(787) 706-3033 / (787) 607-4186
Contact Name:	Dany D. Villafuerte				
Contact Phone:	(787) 706-3033 / (787) 607-4186				
Customer Information					
Customer Organization: Puerto Rico Health Insurance Administration (PRHIA) Administración de Seguros de Salud de Puerto Rico (ASES)	<table border="1"> <tr> <td>Contact Name:</td> <td>Roxanna K. Rosario Serrano, BHE, MS</td> </tr> <tr> <td>Contact Title:</td> <td>Executive Director</td> </tr> </table>	Contact Name:	Roxanna K. Rosario Serrano, BHE, MS	Contact Title:	Executive Director
Contact Name:	Roxanna K. Rosario Serrano, BHE, MS				
Contact Title:	Executive Director				
Customer Address: 1549 Calle Alda San Juan, Puerto Rico 00926	<table border="1"> <tr> <td>Contact Phone:</td> <td>(787) 474-3344 / (787) 452-1300</td> </tr> <tr> <td>Contact Email:</td> <td>rrosario@asespr.org</td> </tr> </table>	Contact Phone:	(787) 474-3344 / (787) 452-1300	Contact Email:	rrosario@asespr.org
Contact Phone:	(787) 474-3344 / (787) 452-1300				
Contact Email:	rrosario@asespr.org				
Project Information					
Total Vendor Staff:	28				
<p>Project Objectives:</p> <p>The objective of the study was to carry out a comprehensive evaluation of the level of satisfaction of the beneficiaries of the Health Plan of the Government of Puerto Rico. The study focused on assessing the perceived level of satisfaction with the Vital Plan, the overall experience with the insurer, and the satisfaction level with the healthcare services rendered by the providers.</p> <p>To accomplish this objective, a sample size will be considered, which will be statistically representative to identify any significant differences in the level of satisfaction by geographic region or insurer. The study will entail an in-depth analysis of the feedback received from the beneficiaries to gain insights into their experiences with the health plan and to identify areas that require improvement. The purpose of considering the regions in the analysis is to evaluate the existence of geographic differences and measure the level of satisfaction of the current model (without regions) versus the previous model in which the insurer was assigned according to the beneficiary's region of residence.</p>					
<p>Project Description:</p> <p>The study was conducted in five methodological stages with the aim of ensuring scientific accuracy and obtaining results that are representative of the population of beneficiaries of the largest health plan in Puerto Rico. The first stage involved designing and developing questionnaires and tools. The second stage was focused on determining the sample size and target population, while the third stage involved selecting a random sample. The fourth stage consisted of collecting information, and the fifth stage involved analyzing the data and presenting the results.</p> <p>Over 10,500 beneficiaries of Plan Vital, aged 21 years and above, were interviewed and distributed across the 8 geographical regions and 4 insurers that comprise the Plan. The study obtained a margin of error of less than 3.5% by geographic region and 2.6% by insurer. The findings were insightful and revealed crucial insights.</p>					
<p>Vendor's Involvement:</p> <p>Truenorth was fully responsible for executing and participating in all project activities. The project was carried out in close coordination with ASES and with the corresponding validations and approvals. During the stage of determining the sample size, Estudios Técnicos Inc. was subcontracted to ensure an independent analysis.</p>					
<p>Project Benefits:</p>					

NEMT- Attachment C

<p>The study findings provided valuable insights to the stakeholders and policymakers to enhance the effectiveness of the Puerto Rico Government Health Plan and improve the satisfaction level of the beneficiaries.</p>			
<p>Key Personnel</p>			
Name: Dany Villafuerte		Role: Project Director	
Name: Edward A. Benavent		Role: Customer Experience Expert	
Name: Andrés Ramos		Role: Data Analysis Expert	
Name: Griselle Hernández		Role: Project Manager	
<p>Project Measurements:</p>			
Estimated one-time costs: \$210,000.00(*)		Actual one-time costs: \$210,000.00(*)	
<p>Reason(s) for change in one-time cost:</p> <p>(*) This project was carried out as part of a collaborative agreement while providing services as the Plan Vital Enrollment Counselor.</p>			
<p>Original Value of Vendor's Contract: \$2,143,108.00 (*)</p>			
Original Value of Vendor's Contract: \$2,143,108.00 (*)		Actual Total Contract Value: \$2,143,108.00 (*)	
<p>Reason(s) for change in value:</p> <p>(*) The monetary value of the vendor's contract is not indicative of the total cost of the Project. The amount mentioned in the contract encompasses all services rendered by Truenorth in its capacity as the Plan Vital Enrollment Counselor.</p>			
<p>Estimated Start & Completion Dates:</p>			
From:	Dec/02/2020	To:	Apr/02/2021
<p>Actual Start & Completion Dates:</p>			
From:	Dec/02/2020	To:	Apr/23/2021
<p>Reason(s) for the difference between Estimated and Actual dates:</p> <p>The primary factor responsible for the disparity of three additional weeks was the number of beneficiaries that were required to be contacted for the purpose of attaining the sample size of over 10,500 completed surveys. It was observed that nearly thrice the number of beneficiaries had to be contacted to achieve the desired sample size.</p>			

NEMT- Attachment C

Subcontractor Reference Form

Subcontractor Information	
Vendor Name: Klein Engineering, PSC	Contact Name: Francisco R. Klein, PE, PTOE, RSP2I
	Contact Phone: 787-993-2071
Customer Information	
Customer Organization: Puerto Rico Highway and Transportation Authority (PRHTA)	Contact Name: Edwin A. Martínez, PE
	Contact Title: Design Area – Coordinator of Project managers
Customer Address: P.O. Box 42007, San Juan, PR 00940-2007	Contact Phone: 787-721-8787 X. 51450
	Contact Email: EMartinez@act.pr.gov
Project Information	
Total Vendor Staff:	15
Project Objectives: Provide safety upgrades to State Road PR-2, between Km. 67 and Km. 76.3, in Arecibo.	
Project Description: Provide safety upgrades for all users of State Road PR-2, Km. 67 through Km. 76.3, in Arecibo. The design consists of the implementation of proven safety countermeasures that will result in safety upgrades to the road. The road will provide safer infrastructure for pedestrians, bicyclists, and drivers, and will optimize the use of the existing right-of-way to provide more efficient traffic operations.	
Vendor's Involvement: Prime Design Consultant to PRHTA.	
Project Benefits: Safer and more efficient traffic operations that will reduce fatalities, serious injuries, and delays.	
Key Personnel	
Name: Francisco R. Klein, PE, PTOE, RSP2I	Role: Principal in Charge; Senior Engineer and Safety Analyst
Name: José D. Bácz, PE, PMP	Role: Project Manager
Name: Carlos G. Torres, PE, MECE	Role: Senior Engineer, Hydraulics
Name: Sonya I. Viera, EIT	Role: Traffic Engineer
Project Measurements:	
Estimated one-time costs: \$21,665,695	Actual one-time costs: N/A
Reason(s) for change in one-time cost: Project is in the design phase.	
Original Value of Vendor's Contract: \$1,736,850.86	Actual Total Contract Value: \$1,736,850.86

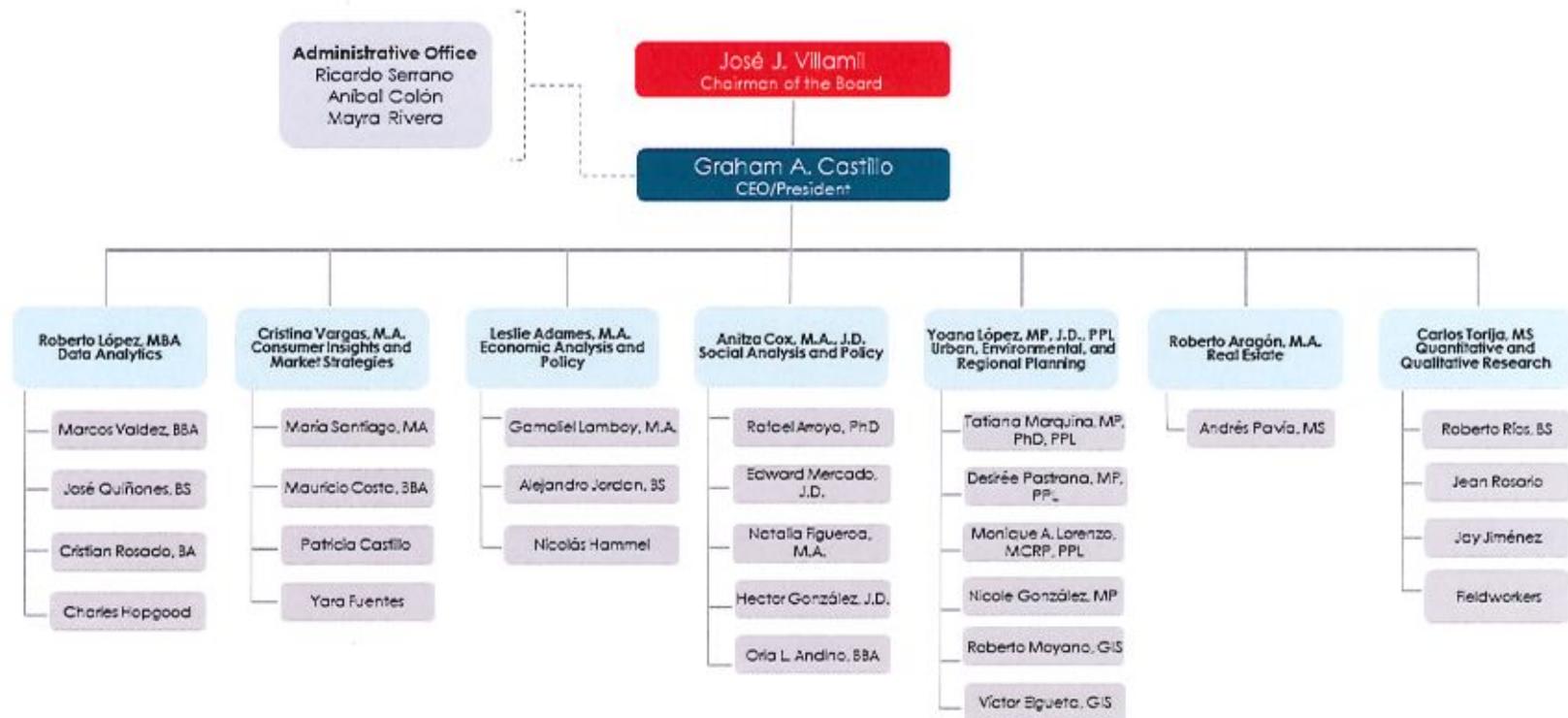
NEMT- Attachment C

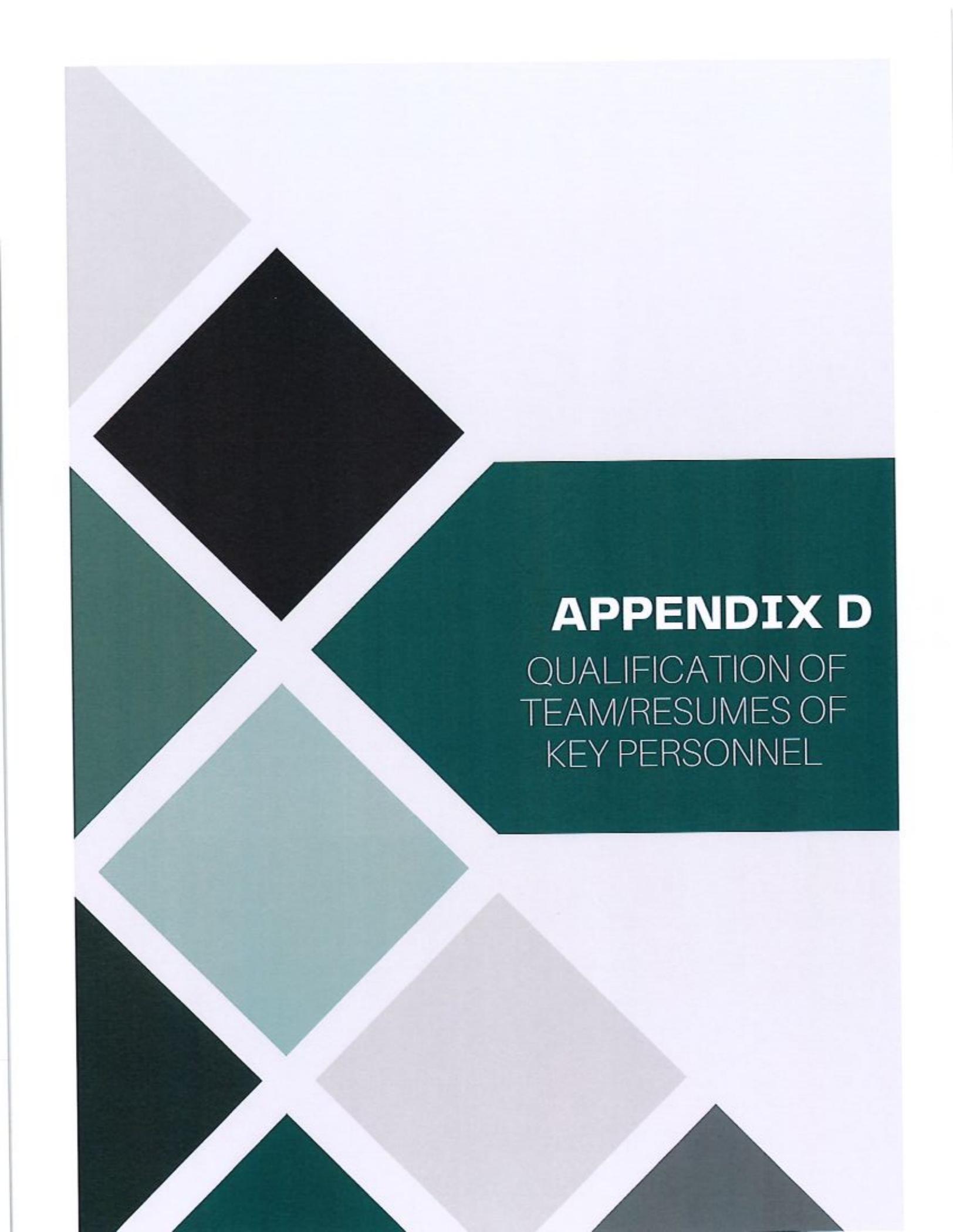
Reason(s) for change in value: N/A				
Estimated Start & Completion Dates:	From:	2023.04.26	To:	2024.06.30
Actual Start & Completion Dates:	From:	2023.04.26	To:	2024.06.30
Reason(s) for difference between Estimated and Actual dates: N/A				
If the vendor performed the work as a Subcontractor, the vendor should describe the scope of subcontracted activities: N/A				



APPENDIX C
ORGANIZATIONAL
CHART

APPENDIX C: ORGANIZATIONAL CHART





APPENDIX D

QUALIFICATION OF
TEAM/RESUMES OF
KEY PERSONNEL

Sonya I. Viera-Colón, E.I.T.
PR: P.O. Box 12009, San Juan, PR 00922
VA: 9926 Main St., Ste. 200, Fairfax, VA 22031
PR: 787-993-2071; VA: 703-738-1414
sonya.viera@klein-engineering.com



SUMMARY STATEMENT

Bilingual **Transportation Engineer** with more than 20 years of experience in technical analysis, report documentation, client interaction, and mentoring/training. Experience in traffic engineering and transportation planning projects through traffic operation analyses, impact studies, and corridor studies, amongst others, have led to executing innovative programs. Excellent computer skills with advanced knowledge of MS Office, AutoCAD, Visio, Synchro/SimTraffic, SIDRA, WinTass, Vistro, Vissim, and other computer softwares.

CERTIFICATIONS / LICENSES

Commonwealth of Puerto Rico E.I.T. License No. 28577
ITE Member No. 1082789

EDUCATION

University of Puerto Rico – Mayagüez Campus 1997
Bachelor of Science in Civil Engineering (BSCE)

University of Maryland – College Park Campus 1999
Master of Science in Civil Engineering (MSCE)

EXPERIENCE

Klein Engineering, PSC (San Juan, PR and Fairfax, VA) July 2022 – Present
Project Engineer

Responsible for the technical analysis and report documentation of the following traffic engineering and transportation planning projects in Virginia and Puerto Rico:

- Traffic operational analyses
- Traffic impact studies
- Traffic signing and pavement marking designs

Gorove/Slade Associates, Inc. (Chantilly, VA and Haymarket, VA) 2019 – 2020
Transportation Engineer

Worked on the technical analysis and report documentation of the following traffic engineering projects in Virginia and Washington, DC:

- Traffic operational analyses
- Traffic impact studies
- Alternative analyses

Independent Contractor (Reston, VA) 2008 – 2017
Project Engineer

Assisted three engineering firms mainly doing cable routing for circuit analysis for commercial nuclear utility plants in the US and Japan performing the following tasks:

- Database work
- Drawing markups

Carlos G. Torres, PE
PR: P.O. Box 12009, San Juan, PR 00922
VA: 9926 Main St., Ste. 200, Fairfax, VA 22031
PR: 787-993-2071; VA: 703-738-1414
carlos.torres@klein-engineering.com



SUMMARY STATEMENT

Experienced Civil Engineer who combines excellent technical, analytical, and engineering qualifications. Demonstrated achievements in creating designs and construction documents for highways, site, and land developments projects, for both the public and private sectors, to include intersections, roadside, grading, drainage plans, as well as water, storm, and sanitary sewer systems plans. Excellent computer skills with advanced knowledge of MS Office, MS Project, AutoCAD, Civil 3D, and other computer software.

Commonwealth of Puerto Rico P.E. License No. 22524

Commonwealth of Virginia P.E. License No. 61988

State of Arizona P.E. License No. 71845

NCEES Record ID No. 18-815-91

VDOT Guard Rail Inspection Technician (GRIT)

EDUCATION

Bachelor of Science in Civil Engineering

Polytechnic University of Puerto Rico, San Juan, PR 2002

Associate Degree in Civil Engineering Technology

University of Puerto Rico, Bayamón, PR 1997

WORK EXPERIENCE

Klein Engineering, PSC, San Juan, PR; Fairfax, VA

June 2019 - Present

Senior Civil Engineer

Engineering consulting and project management firm.

- Highway Design
- Construction Permitting, Environmental Analysis
- Grading and Drainage Design
- Water distribution System Design

EBP Design Group Consulting Engineers, PSC, San Juan, PR

Feb. 2000 – May 2019

Senior Civil Engineer / Design Department Supervisor

Senior Project Engineer and Manager for the development of highway, land development and civil design projects for the public and private sector. Responsible for the design, drawing, and coordination of all aspects related to highway, land development, and civil construction plans.

- Led Assessment, analysis, and design of solutions for 13 different landslides around the island for PRHTA as part of a recovery project after the events of Hurricane Maria.
- Managed the assessment, analysis, and design of 102 kilometers of roads in the western area of the Island for PRHTA as part of a recovery project after the events of hurricane Maria.
- Design experience in: geometric layout, drainage and grading plans, sanitary and water distribution systems plans, utilities relocation plans, sanitary pump stations, typical sections details, street and pipe profiles, cross sections, maintenance and protection of traffic, signing and pavement markings, and others. Experience in construction cost estimates, construction documents, and construction supervision / inspection.

are funded by FEMA and have the objective of restoring the roads to their conditions before the storm as well as providing resiliency for future events to facilitate access to the residents of the area.

Project Customer USDA-NRCS

Project Name EWP – Obstructions / Debris Removal – Caribbean Area – Puerto Rico

Role Project Manager

Project Description Klein Engineering, PSC has been working with the United States Department of Agriculture – Natural Resources Conservation Service (USDA-NRCS) since 2018 in the removal of obstructions and debris caused by Hurricanes Irma and María in water channels across multiple locations in Puerto Rico. The USDA-NRCS Caribbean Area office required obstruction removal services as part of the Agency's EWP Program to remove debris resulting from Hurricanes Irma and Maria in September 2017 which continue to create serious threat to life and property.

Project Customer Department of Veterans Affairs (VA), National Cemetery Administration (NCA)

Project Name Puerto Rico National Cemetery (PRNC) Replacement - Phase 1, Morovis, PR

Role Project Manager

Project Description Phase 1 of the Puerto Rico National Cemetery Replacement consist of the first 50 of 124 acres suitable for development within a 247.5-acre parcel. The Phase 1 will provide for 10 years of burial capacity including casket, columbarium, and in-ground cremation sites. The Phase 1 cemetery would also include committal shelters, supporting infrastructure, parking, irrigation, landscaping, visitor amenities, signage, and align the main entrance along Puerto Rico State Road PR-137. Services provided included managing and designing drainage and grading plans, sanitary and water distribution systems plans, utilities relocation plans, sanitary pump stations, typical sections details, street and pipe profiles, cross sections, maintenance and protection of traffic, signing and pavement markings , and improvements and widenings to State Roads PR-137 and PR-155.

Project Customer Puerto Rico Integrated Transit Authority

Project Name Tren Urbano Stations Inspections

Role Project Manager

Project Description Klein Engineering, PSC is collaborating with H2 Asociados, PSC in the inspection of damages caused by hurricanes Irma and María to Tren Urbano facilities. Station reports include details of assessed damages associated with the atmospheric events and photographic documentation for cost estimation, including the terminals' structures and access areas for pedestrians entering the stations.

Francisco R. Klein, PE, PTOE, RSP2I
PR: P.O. Box 12009, San Juan, PR 00922
VA: 9926 Main St., Ste. 200, Fairfax, VA 22031
PR: 787-993-2071; VA: 703-738-1414
francisco.klein@klein-engineering.com



SUMMARY STATEMENT

Bilingual **Civil Engineer** with excellent international experience and proven accomplishments in creating designs and construction plans for roads, highways, transit systems and sites to include intersections, roadside, grading, drainage plans, and connections to local water, storm and sanitary sewer utilities. Extensive experience with deterministic and stochastic traffic models. A high energy and self-motivated team player who can work well under pressure to meet aggressive deadlines. Excellent computer skills with advanced knowledge of iWork, MS Office, MS Project, OpenRoads Designer, OpenRoads Concept Station, AutoCAD, Civil 3D, Synchro / SimTraffic, SIDRA, Vistro, Vissim, RSAP, and other computer software.

Commonwealth of Puerto Rico P.E. License No. 20659
Commonwealth of Virginia P.E. License No. 52902
District of Columbia P.E. License No. 908829
Arizona P.E. License No. 65411
North Carolina P.E. License No. 050331
Maryland P.E. License No. 5505627
Texas P.E. License No. 138233
Florida P.E. License No. 89719
NCEES Record No. 17-002-00
Professional Traffic Operations Engineer (PTOE) No. 3671
Road Safety Professional (RSP₁) No. 182
Road Safety Professional Infrastructure Level 2 (RSP2I) No. 118
FAA UAS Remote Pilot Certificate No. 4482209
ITE Member No. 1030969
ASCE Member No. 497104
OSHA 10-Hour Certification on Road Construction Work
OSHA 30-Hour Certification on Construction Work
VDOT Advanced Work Zone Training
VDOT Guard Rail Inspection Technician (GRIT)

EDUCATION

Goldman Sachs 10,000 Small Businesses
Babson College, Wellesley, MA 2015

Master of Engineering Degree in Civil Engineering
University of Puerto Rico, Mayagüez, PR 2009
“User’s Manual of Transit Data Gathering and Events Recording Program with Sample Application” (2009, Final Project).

E-Business Diploma
Gabriela Mistral University, Santiago, Chile 2001

Civil – Industrial Engineering. Graduated *magna cum laude*.
Diego Portales University, Santiago, Chile 2000

PARTIAL LIST OF REPRESENTATIVE PROJECTS

Project Customer Puerto Rico Highway and Transportation Authority

Project Name AC-811544: Landslide and Road Damage Evaluation and Repair Recommendations, Multiple Municipalities, Puerto Rico

Role Project Manager

Project Description As part of its recovery efforts, the Puerto Rico Highway and Transportation Authority (PRHTA) divided the highways and roads of Puerto Rico into regions and units for the preparation of the Technical Reports, and resulting PS&E's for the repairs of landslides caused by Hurricane Maria. Klein Engineering, PSC worked as a Prime Consultant with roads located in the following municipalities: Aibonito, Ciales, Guayama, Naguabo, Toa Baja, Utuado, and Villalba.

Project Customer Puerto Rico Highway and Transportation Authority

Project Name AC-812541: Hurricane María Efforts for Signing and Guardrails, San Juan Metropolitan Area, Puerto Rico

Role Principal in Charge

Project Description As part of its recovery efforts, PRHTA divided the highways and roads of Puerto Rico into regions and units for the preparation of the Detailed Damage Inspection Reports, and resulting PS&E's for damages to signs and guardrails in the aftermath of hurricanes Irma and Maria. Klein Engineering, PSC worked as a Prime Consultant with roads in the Metropolitan Area.

Project Customer Puerto Rico Highway and Transportation Authority

Project Name AC-812541: Consulting Services in Relation to Section 106 Compliance Requirements for Signage and Guardrail Projects for Bayamón, Cataño, Guaynabo, San Juan, and Trujillo Alto Municipalities Emergency Relief Program – Hurricanes Irma and María.

Role Principal in Charge

Project Description Klein Engineering, PSC is supporting PRHTA and FHWA with Section 106 compliance with SHPO for the work done for the repairs of guardrails damaged by Hurricane María to roads in the Metropolitan Area.

Project Customer Banco Popular de Puerto Rico

Project Name Hato Rey Plaza District traffic analysis and design.

Role Traffic Engineer

Project Description Klein Engineering, PSC is working as consultants to Banco Popular de Puerto Rico and Perkins-Eastman for the analysis of alternative traffic patterns in the Golden Mile area of Hato Rey. Macroscopic and microscopic simulations have been completed for existing and proposed conditions, as well as proposed plans and cross sections that transform the existing car-oriented infrastructure to people-oriented facilities, promoting alternative modes of transportation and safer access to vulnerable users.

Project Customer USDA-NRCS

Project Name EWP – Obstructions / Debris Removal – Caribbean Area – Puerto Rico

Role Principal in Charge

Project Description Klein Engineering, PSC has been working with the United States Department of Agriculture – Natural Resources Conservation Service (USDA-NRCS) since 2018

José D. Bącz, PE, PMP
PR: P.O. Box 12009, San Juan, PR 00922
VA: 9926 Main St., Ste. 200, Fairfax, VA 22031
PR: 787-993-2071; VA: 703-738-1414
jose.baez@klcin-engineering.com



SUMMARY STATEMENT

Project Manager and Professional Engineer with experience in all phases of civil engineering projects, from surveying and field gathering data, to design, permitting, construction inspection, and project management. Demonstrated expertise in project planning, executing, monitoring and closing. Experienced at managing and controlling project scope, schedule, cost, risk, changes, and resources. Committed to the responsibility of ensuring a smooth work-flow and on-time delivery of assigned projects. Fully bilingual (English and Spanish). A team player committed to safety and project success. Exceptional computer skills with advanced knowledge of MS Office, MS Project, Primavera P6, AutoCAD, Civil 3D, Synchro / SimTraffic, and other computer software.

Commonwealth of Puerto Rico P.E. License No. 21719
Project Management Professional Certification (PMP)
OSHA 10-Hour Certification on Construction Safety and Health

EDUCATION

Master of Project Management Keller Graduate School of Management Chicago, IL	2015
Bachelor of Science of Civil Engineering Polytechnic University of Puerto Rico San Juan, PR	2003

EXPERIENCE

Klein Engineering, PSC, San Juan, PR; Fairfax, VA	2010 - 2012
Senior Engineer	2020 - Present

Engineering consulting and project management firm.

- Highway and Transit Design
- Traffic Impact Studies and Traffic Signal Systems Design
- Design of Modern Roundabouts
- Road Safety Assessments
- Construction Permitting, Environmental Analysis
- Construction Management
- Forensic Engineering

Tompkins International, Inc. – Orlando, FL	2018 –2019
Project Manager	

- Develop project plan, manage project execution, communicate status and results, and drive projects to completion according to strict deadlines and budget guidelines on supply chain and technology projects.
- Define and document project scope, goals, and deliverables that support business goals.
- Plan and schedule project timelines and milestones identifying dependencies and critical path.

- Track all issues that arise during the project and drive their resolution.
- Develop and deliver progress reports, proposals, requirements documentation, and presentations.
- Develop and implement PMO processes and policies.
- Conduct post implementation reviews, and identify areas for improvement, document lessons learned.

Peoples Gas Light & Coke Co. – Chicago, IL

2012 –2017

Project Manager / Engineer

- Responsible and accountable for implementing major, complex construction and engineering projects. Areas of responsibility included project initiating, planning, executing, monitoring, and controlling, and closing.
- Employed project management processes to meet project budgets, schedules, safety objectives, and compliance with local, state, and federal regulations including OSHA.
- Developed, prepared, and implemented procedures for effective control of project activities following project management knowledge areas including integration, scope, time/schedule, cost, quality, human resources, communications, risk, and procurement management.
- Prepared design documents, material, and construction specifications, cost estimates and project scheduling for work related to public improvement, new services, and facilities maintenance.
- Collaborated and communicated with the stakeholders on project objectives including project updates/presentations to executive stakeholders.

Sprinkle Consulting, Inc. - Tampa, FL

2006 –2010

Project Manager

- Responsible for design, planning, permitting, and management within various technical disciplines on residential, commercial, and public site development projects.
- Designed site geometry, grading, storm sewer system, gravity and pressure sanitary sewer systems, sanitary lift stations, and potable, fire, and reclaimed water distribution systems.
- Oversaw, led, and managed CAD and technical personnel on different tasks of a project.
- Performed construction inspection for site approval, including as-built revision and water and sewer lines testing.

EBP Design Group Consulting Engineers, PSC, San Juan, PR

2002 –2006

Project Manager

- Part of the design and project management team to develop the geometric design, drainage, sanitary sewer, water distribution, and grading of the site for residential, commercial, industrial, and public developments.
- Prepared construction costs estimates and arranged the site data and calculations required for the project permitting and planning processes.
- Performed construction inspection and management for quality and compliance. Prepared required inspection reports and forms for environmental agencies.
- Worked with surveying crew to gather field data for different phases; starting with existing conditions prior to design, stake out or specific data during construction, and as-built for completed projects

PARTIAL LIST OF COMPLETED PROJECTS

Project Customer Puerto Rico Highway and Transportation Authority

Project Name AC-812541: Consulting Services in Relation to Section 106 Compliance Requirements for Signage and Guardrail Projects for Bayamón, Cataño, Guaynabo, San Juan, and Trujillo Alto Municipalities Emergency Relief Program – Hurricanes Irma and María.

Role Project Manager

Project Description Klein Engineering, PSC is supporting PRHTA and FHWA with Section 106 compliance with SHPO for the work done for the repairs of guardrails damaged by Hurricane María to roads in the Metropolitan Area.

Project Customer Puerto Rico Highway and Transportation Authority

Project Name AC-811544: Landslide and Road Damage Evaluation and Repair Recommendations, Multiple Municipalities, Puerto Rico

Role Project Manager

Project Description As part of its recovery efforts, the Puerto Rico Highway and Transportation Authority (PRHTA) divided the highways and roads of Puerto Rico into regions and units for the preparation of the Technical Reports, and resulting PS&E's for the repairs of landslides caused by Hurricane Maria. Klein Engineering, PSC worked as a Prime Consultant with roads located in the following municipalities: Aibonito, Ciales, Guayama, Naguabo, Toa Baja, Utuado, and Villalba.

Project Customer Mr. Special

Project Name Mr. Special San Germán

Project Description Klein Engineering, PSC prepared the civil site design and Traffic Impact Analysis for a proposed 60,000 SF retail store in the Municipality of San Germán. Work included geometric layout, drainage and grading plans, and utilities. Work was coordinated with other design disciplines to provide service to the new building.

Project Customer GDT, LLC

Project Name Desarrollo Comercial San Gerardo

Project Description Klein Engineering, PSC prepared the civil site design and Traffic Impact Analysis for a proposed commercial development in Cupey. Work included geometric layout, drainage and grading plans, and utilities. Three-dimensional design models were developed to assess existing and proposed utilities, given the constraints presented by topographic conditions and the as-built environment.

Project Customer N.K. Bhandari / Veterans Affairs Administration

Project Name Department of Veterans Affairs Caribbean Healthcare System (VACHS) Garage

Project Description Klein Engineering, PSC prepared Traffic Impact Analysis for a proposed 1,500 vehicle parking garage for the existing hospital. Traffic and permitting consultant to the design team during the construction phase of the project.

Project Customer EBP Design Group, PSC / Municipality of Bayamón - PRHTA

Project Name State Road PR-177 Traffic Signal System Design

Project Description Klein Engineering, PSC designed the traffic signal system along a busy urban corridor with two major intersections.

Project Customer Creative Developments**Project Name** Caminito Residential Development Traffic Signal Design**Project Description** Klein Engineering, PSC designed geometric improvements and traffic signal at the intersection of State Road PR-181 and PR-189, as part of the residential development.**Project Customer** People's Gas**Project Name** Multiple**Project Descriptions:**

- Calumet Pipeline Retrofit (Distribution). Project objective was to retire the Calumet 2 transmission gas main and retrofit the Calumet 3 to new code standards. Led the project and work related to the distribution gas mains relocation and replacement to allow the transmission line work to be performed. Constant monitoring and controlling of schedule and budget was critical for the project's success.
- O'Hare Modernization Program Gas Main Relocation. The project included various locations within O'Hare International Airport which required gas main relocation to allow airport improvements to take place. Effective communication was extremely important because the project was part of a major program. Due to the multiple improvements occurring at the same, time schedule control was key for success. Led the design activities for the relocation.
- Public Improvement Main Relocation. These projects included the relocation of gas mains throughout the city due to public utility improvements. Budget and scheduled were closely monitored to guarantee work was complete before the public utility began construction. The improvement of gas facilities were also part of this project due to compliance requirements.

Project Customer Sprinkle Consulting, Inc.**Project Name** Multiple**Project Descriptions:**

- Bridge Haven Subdivision. Designed 150 lots on a 50-acre site with 3 interconnected retention ponds.
- Sawgrass Creek Condominiums. Worked on the design of a 13.79-acre site with 8 buildings, a total of 140 units, and a floodplain mitigation area.
- Riverview Bell Plaza. Design of a 34.2-acre site, with 207,000-square-feet of retail which includes a Sam's Club, an outparcel Walgreens, an outparcel Burger King, and wetland mitigation area.
- Fish Hawk Crossing. Design of a 3.23-acre site, with 22,170-ft² which includes a Walgreens and a retail strip.
- The Estuary. Design of a 87.7-acre site which includes 379,000 square feet of office/retail area, a 90-room hotel, a 360-unit apartment complex, and 1.7 miles of new 2 and 4-lane roadway.
- Davis Islands Trail. The project consisted of a 7,000 L.F. pedestrian and bicycle recreational trail around a regional airport with requirements very similar to a road design including geometrical alignment and traffic signalization.

Anitza María Cox-Marrero, Esq.

EDUCATIONAL BACKGROUND:

Graduate Community Development Certificate
Rutgers University, Camden
2015

Juris Doctor
School of Law
University of Puerto Rico
2010
Admitted to the Bar (#18950)

Graduate courses in Organizational Psychology
Interamerican University
Metro Campus, Puerto Rico
2004-2006

Masters Degree in Instructional Design
School of Educational Technology and Instructional Systems
University of the Sacred Heart
Santurce, Puerto Rico
2003

Bachelor in Communications
University of the Sacred Heart
Santurce, Puerto Rico
June, 1998

Professional Experience:

ESTUDIOS TÉCNICOS, INC.
Social Policy and Research Division
Director
1995 – Present

Director for 15 years of the Division of Social Policy and Research of Estudios Técnicos, Inc. (Puerto Rico's leading economic, social and planning consulting firm). Responsible for community action plans, need assessments, public involvement plans, evaluations, technical assistance,

and field work coordination for projects related to the Government and the Non Profit Sector. Have coordinated projects which involve the evaluation and design of public policies and plans, in the areas of health (HIV prevention, care and treatment), social services, community development, housing for special populations and juvenile delinquency. Currently provides technical assistance to several governmental agencies and top NPOs in areas of compliance and program design.

Examples of recent experience:

- Study of the social and economic impact of nonprofit organizations in Puerto Rico (1996, 2002, 2007, 2015 & 2022)
- Coordination of project and design of processes for CDBG-Disaster Recovery Funds (CDBG-DR) & Disaster Recovery Enhanced Fund (DREF), 2009 funds allocation
- Development of processes for the implementation of federally-funded programs, for housing and infrastructure activities, including:
 - Community Development Block Grant, US Department of Housing and Urban Development
 - Emergency Solutions Grant, US Department of Housing and Urban Development
 - Continuum of Care, US Department of Housing and Urban Development
 - Neighborhood Stabilization Program, US Department of Housing and Urban Development
 - Section 108 Loan Guarantee Program, US Department of Housing and Urban Development
- Custom designed program analytical tools - Developed several tools to gauge program performance and compliance issues. i.e NSP program income, Disaster Recovery, ESG and NSP3 record keeping checklists.
- Design of the Center for Social Innovation, an initiative of the Government of Puerto Rico to address the recommendations of capacity building (regarding municipalities and non-profit organizations) included in the Report of the President's Task Force on Puerto Rico's Status and the State Housing Plan: 2014-2018.
- Development of the Puerto Rico Juvenile Information Sharing System, developed for a group of governmental agencies that work with juvenile delinquency, as an initiative of the Federal Department of Justice.
- Coordination of the development of the Puerto Rico Integrated HIV Surveillance, Prevention and Care Plan 2016 – The plan was developed as part of the requirements of the federal agencies that grant funds for

purposes of HIV surveillance, prevention and care in Puerto Rico. Work was based on a community participatory approach, including HRSA and CDC recipients and sub-recipients, Persons Living with HIV and other stakeholders, in order to develop an integrated plan and establish the basis of a proper structure that would facilitate its implementation.

- Evaluation of the implementation of the School Improvement Grant Program in Puerto Rico (2013-2017)
- Socio-economic Study for the Dept. of Education and the USDA, 2004-2019.
- Evaluation of Judicial Proceedings in cases dealing with mistreatment or violence against children, 2006, for the Courts Administration under the Federal Court Improvement Program.

University of Puerto Rico

Professor, Public Administration
2018-present

In charge of offering graduate courses in the Graduate School of Public Administration, Río Piedras campus on: Research, Program Evaluation, External Resources, and Theory and Practice of the Third Sector.

University of Puerto Rico

Professor, Continuing Education and Professional Studies Division
2021-present

In charge of the design and facilitation of the courses of a certification on access and compliance of federal funds for nonprofit organizations

Rutgers University, Camden (Puerto Rico Project)

Professor
2016

In charge of offering the post graduate course on Alternative Development Strategies for Distressed Cities.

University of the Sacred Heart, Santurce

Professor
2005-2021

In charge of offering post graduate courses as part of the Graduate Program on Administration of Nonprofit Organizations.

Courses: Legal Aspects of Nonprofit Management; Strategic Planning; Program Evaluation; Research, International Experiences

Interamerican University, Bayamón

Professor

2000-2006

Responsible for courses related to Research, Communication, Preproduction and Planning, Administration of Media Center, and Video Production for Educational Purposes.

Independent Producer and Publicist

1996 – 1999

Provide advertising and production services for domestic and international clients. Investigate, design and execute marketing and promotion strategies for established brands and new product launching utilizing print, broadcast and cinema mediums. Actively participate in public messages in conjunction with the University of the Sacred Heart. Also involved in the production of institutional material for the Smithsonian Tropical Research Institute at Panamá.

CERTIFICATIONS AND LICENSES

PR Bar, License #18950

CONTINUING EDUCATION:

GMBok Training

National Grants Management Association
June 13-14, 2023

Continuing education credits in law

72 credits in Subjects related to:

Family affairs
Administrative Law
Civil Procedure
Obligations and Contracts
Ethics
2017-2023

Resiliency Academy

National Disaster Resiliency Competition
US Department of Housing and Urban Development
The Rockefeller Foundation
Chicago, 2015

Resiliency Academy

National Disaster Resiliency Competition

US Department of Housing and Urban Development
The Rockefeller Foundation
Atlanta, 2014

Public Relations and Nonprofit Organizations
Center for Economic Development
University of Mayaguez
2009

Fiduciary Duties of a Board of Directors
Asesores Financieros Comunitarios
2009

Community Leadership Development
Community Development and the Environment
Neighborhood Reinvestment Training Institute
2001

Health as a social Investment
Organización Internacional de la Salud (UIPES)
La Habana, Cuba
2000

Honors:

Cum Laude, University of Puerto Rico, School of Law, 2010
Summa Cum Laude, 1998 and 2003
Academic Excellence Distinction, highest overall GPA for 1998 graduating class
Academic Distinction, highest overall GPA in Communications Department, 1998
Premio Pórtico, 1996-1998
Dean's List 1996-1998

OTHER PUBLICATIONS:

"La situación de las niñas en el sistema de justicia juvenil", Revista de Derechos Humanos y Transformación de Conflictos, Universidad del Sagrado Corazón, IV Volumen (2012).

ORGANIZATIONS:

American Evaluators Association
Member

National Grant Management Association, Puerto Rico Chapter
Member

Comisión del Gobernador para Fomentar el Voluntariado y el Servicio Comunitario
FORMER CHAIR 2017-2018

Fundación Comunitaria de Puerto Rico
Member of the Board of Directors

Internet Society
Puerto Rico Chapter
Member of the Board, former President

Fundación Estudios Técnicos, Inc.
Chairwoman Board of Directors

Sales and Marketing Association
Member

Edward A. Mercado Sanabria, Esq., MPA

Carolina, Puerto Rico

EDUCATIONAL BACKGROUND:

Master of Public Administration - Specialization: Public Management
University of Puerto Rico Graduate School of Public Administration
Río Piedras Campus
December 2019

Juris Doctor
University of Puerto Rico School of Law
Río Piedras Campus
May 2013

Bachelor of Arts in Criminal Justice - Major: Forensic Psychology
University of Puerto Rico
Carolina Campus
August 2010

PROFESSIONAL EXPERIENCE:

Estudios Técnicos, Inc.
Social Analysis and Policy Division
Researcher/Consultant
2018 – Present

Collaborates in projects of public, private, and nonprofit sectors including public policy issues, strategic planning, need assessments, public involvement plans, evaluations, technical assistance, monitoring, and field work (interviews, surveys, and focus groups).

Examples of recent experience include:

- Assisting in developing policies and procedures and provide technical assistance for implementation of federally funded programs for housing, infrastructure, and fiscal recovery activities, including:
 - Community Development Block Grant, US Department of Housing and Urban Development
 - Community Development Block Grant - Coronavirus, US Department of Housing and Urban Development
 - Emergency Solutions Grant, US Department of Housing and Urban Development

- Emergency Solutions Grant - Coronavirus, US Department of Housing and Urban Development
 - Continuum of Care, US Department of Housing and Urban Development
 - Neighborhood Stabilization Program, US Department of Housing and Urban Development
 - Section 108 Loan Guarantee Program, US Department of Housing and Urban Development
 - HOME Investment Partnerships Program, US Department of Housing and Urban Development
 - HOME - American Rescue Plan, US Department of Housing and Urban Development
 - Housing Trust Fund, US Department of Housing and Urban Development
 - Coronavirus State Fiscal Recovery Fund under the American Rescue Plan Act of 2021, US Department of the Treasury
-
- Develop federal funds proposals, needs assessment studies, and provide technical assistance for Head Start and Early Head Start Programs of multiple municipalities and non-profit organizations, 2018-Present
 - Coordination and development of activities and tasks of the Perinatal Infections Prevention Board, Department of Health, 2020 - Present
 - Coordinate and conduct monitoring of Community Services Block Grant (CSBG) Program for the Office of Socioeconomic and Community Development (ODSEC, as its Spanish acronym), 2023 - Present
 - Needs Assessment Study of Children and Youth from 6 to 18-Years-Old for Boys and Girls Clubs of Puerto Rico, 2023
 - Coordination of activities of the Puerto Rico Viral Hepatitis Elimination Committee – Assisting the Committee in developing the Puerto Rico Viral Hepatitis Elimination Plan 2023-2027, Department of Health, 2023
 - Coordination of activities to develop and assist in developing the Puerto Rico Integrated HIV Surveillance, Prevention and Care Plan 2022-2026, Department of Health, 2022
 - Coordination of activities of the Puerto Rico Integrated HIV Surveillance, Prevention and Care Plan 2017-2021 – Assisting the Multisectoral Committee of Public Policy in HIV Related Affairs to develop strategies to address public policy barriers. Moderating educational conferences for health professionals and the community, Department of Health, 2018-2022
 - Needs Assessment Study of CSBG Program for ODSEC, 2022

- Needs Assessment Study about Early Childhood in Puerto Rico for ACUDEN, Department of the Family, 2020
- Study to Determine the Preparation Level of Proyecto ENLACE del Caño Martín Peña and Fideicomiso de Tierra del Caño Martín Peña to Access and Manage Disaster Recovery Federal Funds, 2019-2020
- Socio-economic Study of School Lunch Program for the Department of Education, 2019

University of Puerto Rico, Río Piedras Campus

Research & Teaching Assistant

2018-2019

Collaborate with Dr. César A. Rey Hernández in research projects about human trafficking, government, policy, poverty, and education. This included research, editing articles, preparing presentations, and elaborating public policy summaries.

University of Puerto Rico, Medical Sciences Campus

Center for Sociomedical Research and Evaluation

Interviewer

2015-2016

Interview persons living in prison and persons with an HIV positive diagnosis about their health conditions.

Solo Practitioner Attorney at Law

2014-2018

Provide counseling to clients about general legal matters. Prepare and/or revise contracts and legal documents.

HONORS:

Summa Cum Laude, University of Puerto Rico, Río Piedras Campus, 2019

Cum Laude, University of Puerto Rico, School of Law, 2013

Magna Cum Laude, University of Puerto Rico, Carolina Campus, 2010



CARLOS V. TORIJA RODRÍGUEZ DE LIÉBANA

STATISTICIAN

QUALIFICATION SUMMARY

Is the firm's statistician with degrees in Statistics and Operations Research from the Universidad Complutense in Madrid, Spain. He has completed post graduate courses on Quality Control in Information Systems at the same university. He completed a course at UNED, in Spain, which qualifies him as an expert on sample survey design. He has been in charge, since 1995 of the design and selection of samples, and supervising all data entry, processing and interpretation processes.

PROFESSIONAL EXPERIENCE

1995– Present: Statistician, Estudios Técnicos, Inc., San Juan, P.R.

EDUCATION

- Universidad Complutense de Madrid (España) Graduate. Estadísticas y en Investigación Operativa.
- Degrees in Statistics and Operations Research. Both titles from Universidad Complutense, Madrid, Spain. A course in Data Quality Control from la Escuela Universitaria de Estadística, de la Universidad Complutense, Madrid, Spain.
- He received a professional certification as Expert in Design and Processing of Surveys and Opinion Polls from the University UNED (Madrid, Spain) in collaboration with the Business-University Foundation (Madrid, Spain).
- He received a professional certification as Expert in Advanced Methods in Applied Statistics from the University UNED (Madrid, Spain) in collaboration with the Business-University Foundation (Madrid, Spain).

RAFAEL ARROYO MORALES

Montebello Estates, Trujillo Alto, PR 00976 | 787-407-1629 | rarroyo@estudiostecnicos.com

Social Community Psychologist organized with experience in working with programs and communities. Oriented in teamwork to solve tasks.

EXPERIENCE

1996 to present

Analyst – Consultant in Social Analysis – Estudios Técnicos, Inc.

Social research work in a multidisciplinary company. Work on identifying the needs of groups or communities to search for potential courses of action. Evaluations and support for service programs in the formative and summative compliance. Use of primary and secondary sources with qualitative and quantitative research techniques.

2013-2015

Lecturer Professor – University Professor – Metropolitan University (UMET)

Preparation of syllables for each course taught, teaching courses and student assessments, evaluating student performance through written assignments and exams.

2012-2014

Lecturer Professor – University Professor – Interamerican University of Puerto Rico

Preparation of syllables for each course taught, teaching courses and student assessments, evaluating student performance through written assignments and exams.

EDUCATION

May 2012

Postgraduate concentration in Industrial Psychology – Interamerican University of Puerto Rico

May 2007

Doctorate in Social Community Psychology – University of Puerto Rico

SKILLS

- Planning and coordination of teamwork
- Personnel skills development
- Development of research instruments
- Report writing and data presentation
- Presentation of findings to interest groups
- Conducting in-depth interviews
- Conducting focus groups
- Proficient in qualitative and quantitative analysis
- Proficient in the use of research programs Excel, SPSS, NVivo

DESIREE PASTRANA OTERO, PPL

ENVIRONMENTAL, URBAN AND REGIONAL PLANNING DIVISION PLANNER

EDUCATION

Environmental Design (B.A.)
School of Architecture
University of Puerto Rico, Río
Piedras, P.R. 2014-2019.

Master of Urban Planning (M.U.P.)
University of Illinois, Champaign-
Urbana, IL. 2019-2021.
Urban and Regional Planning
master's degree

Responsible for supporting the development of plans, studies, reports, assessments, and other projects conducted by the Urban, Regional, and Environmental Planning Division. Collaborate in various projects for the public and private sector using data management techniques, qualitative and quantitative research analysis. Works in the coordination and data analysis for various of Municipal Recovery Plans. Support public engagement activities as required by the ongoing projects.

Relevant Project Experience

1. Municipal Recovery Planning Program (MRP)

Client's Name: Puerto Rico Department of Housing
Description: The MRP program is part of the eligible activities under the CDBG-DR that obligate funds to municipalities for the development of recovery plans to address unmet needs after the hurricanes Irma and María. Mrs. Pastrana worked as the staff planner for the municipalities of Gurabo, Sabana Grande, and Peñuelas. She was also involved in the data analysis of other municipal plans under the program.

2. Coastal Landmarks Inventory

Client's Name: Department of Natural and Environmental Resources

Description: This project consisted in creating a digital coastal landmarks inventory that the general public can access with the purpose of promoting its active management, as well as environmental education, scientific research, and public participation associated with the management of the coastal resources. For this project, Mrs. Pastrana assisted, along with other planning and GIS staff, with identifying the coastal landmarks and developing the inventory criteria.

3. Hormiguero's Land Use Plan Comprehensive Review

WORK EXPERIENCE

Estudios Técnicos, Inc.
Planner
2021 – Present

Roosevelt Roads Promise Zone
Planning and Implementation
Developer
2020 – 2021

University of Illinois Campaign-Urbana,
College of Fine and Applied Arts
Graduate Research Assistant
2021

SPECIAL COURSES AND LICENSES

Professional Planner License No.
964, Government of Puerto Rico
(since 2022)

Core IRB Training: Course in the
Protection of Human Subjects,
CITI Program (February 2021)

SBR Training: Assessing Risk in Social
and Behavioral Sciences,
CITI Program (January 2021)

Client's Name: Municipality of Hormigueros

Description: A comprehensive revision of the land use plan requires updating the Municipality's current social, economic, environmental, and physical condition and revising the public policies that guided the 2010 plan to refine and make necessary changes if needed. The project includes the revision of the land use classes in the municipality considering the most up-to-date information resulting from hurricane María and climate change, such as floods and landslides, and providing recommendations related to housing, social and economic development, protection and use of rustic lands and future developments.

4. Multimodal Transportation Strategic Plan for the Municipality of Río Grande

Client's Name: Municipality of Río Grande

Description: Establish a transit plan to improve the mobility of its residents and visitors, provide reliable and safe transportation, reduce traffic congestion, expand transit service, and support the Municipality's land use and economic development public policies. Mrs. Pastrana collaborates in this project with the analysis of socioeconomic context and trends, and the literature review. Furthermore, she will assist in the identification and development of public transit routes and the implementation strategies that is both effective and economically feasible and that will promote economic development.

5. Study for the Management of the Coastal Resources in the Municipality of Cabo Rojo

Client's Name: Department of Natural and Environmental Resources

Description: Establish a management criterion for preserving the diverse coastal natural resources in the Municipality of Cabo Rojo. This study includes understanding the anthropogenic and environmental stressors that are affecting or may affect the coastal resources due to their current uses. For this project, Mrs. Pastrana is working on the development of a public engagement strategy that will allow the collection of secondary data from users, experts, managers, and other key stakeholders.

MONIQUE A. LORENZO PÉREZ, PPL

ENVIRONMENTAL, URBAN AND REGIONAL PLANNING DIVISION PLANNER

EDUCATION

Sociology B.A.
University of Puerto Rico.
Mayagüez, P.R. 2014-2019.

Master of City and Regional
Planning
The Ohio State University,
Columbus, OH. 2019-2021.

WORK EXPERIENCE

Estudios Técnicos, Inc.
Planner
2021 – Present

Environmental Design & Research,
Landscape Architecture,
Engineering & Environmental
Services.
Environmental Services Intern
2020-2021

Centro Interdisciplinario de Estudios
del Litoral (CIEL).
Research Assistant
2015-2019

SPECIAL COURSES AND LICENSES

Professional Planner License No.
961 (since 2022)

Benefit-Cost analysis (BCA): Entry
Level (2021)

Work on land use plans, climate change and risks assessment, municipal recovery plans, coastal and natural resources management plans, among other projects. Collaborated in several environmental and urban projects for public and private sectors using diverse qualitative and quantitative techniques to identify problems, objectives, and strategies for planning projects.

Relevant Project Experience

1. Municipal Recovery Plans
Client's Name: Puerto Rico Department of Housing
Project Description: Development of Municipal Recovery Plans for hurricanes Irma and Maria for the local municipalities. Some of the activities conducted as part of the project include organizing interviews, hosting community meeting and focus groups.
2. Human dimension consideration as part of climate, adaptation, habitat restoration and managed retreat planning
Client's Name: Department of Natural and Environmental Resources
Project Description: Prepare a study that allows the client to understand the human dimension in decision-making processes related to adaptation strategies linked to climate change and coastal natural hazards.
3. Cabo Rojo Municipality Master Coastal Resources Management Plan
Client's Name: Department of Natural and Environmental Resources
Project Description: Development of a Master Plan for the Management of Coastal Resources in the Municipality of Cabo Rojo.
4. Hormigueros's Land Use Plan Comprehensive Review
Client's Name: Autonomous Municipality of Hormigueros
Project Description: A comprehensive revision of the land use plan requires to update the municipality's current social, economic, environmental, and physical condition and revise the public policies that guided the 2010 plan

to refine and make necessary changes if needed. Project includes the revision of the land use classes in the municipality considering the most up to date information resulting from hurricane María and climate change, such as floods and landslides and provide recommendations related to housing, social and economic development, protection and use of rustic lands and future developments.

5. **Aguadilla's Land Use Plan Comprehensive Review**

Client's Name: Autonomous Municipality of Aguadilla

Project Description: A comprehensive revision of the land use plan requires to update the municipality's current social, economic, environmental, and physical condition and revise the public policies that guided the 2011 plan to refine and make necessary changes if needed. Project includes the revision of the land use classes in the municipality considering the most up to date information resulting from hurricane María, earthquakes and climate change, such as floods and landslides and provide recommendations related to housing, social and economic development, protection and use of rustic lands and future developments.

NICOLE P. GONZÁLEZ FIGUEROA, MPL

ENVIRONMENTAL, URBAN AND REGIONAL PLANNING DIVISION PLANNER

EDUCATION

Political Science (B.A.)
Vassar College.
Poughkeepsie, NY. 2015-2019.

Master of Planning for Community
Economic Development (M.P.L.)
Graduate School of Planning,
University of Puerto Rico – Río
Piedras campus, San Juan, PR.
2020-2023.
Urban and Regional Planning
master's degree

WORK EXPERIENCE

Estudios Técnicos, Inc.
Data Analyst
2022 – Present

Advantage Business Consulting
Junior Planning Consultant
2021 – 2022

Corporación del Proyecto ENLACE del
Caño Martín Peña
Field Specialist
2020 – 2021

Corporación del Proyecto ENLACE del
Caño Martín Peña
Americorps VISTA for the Housing Area
2019-2020

Responsible for supporting the development of plans, studies, reports, assessments, and other projects conducted by the Urban, Regional, and Environmental Planning Division. Collaborate in various projects for the public and private sector using data management techniques, qualitative and quantitative research analysis. Works in the coordination and data analysis for various of Municipal Recovery Plans. Support public engagement activities as required by the ongoing projects.

Relevant Project Experience

1. Municipal Recovery Planning Program (MRP)

Client's Name: Puerto Rico Department of Housing
Description: The MRP program is part of the eligible activities under the CDBG-DR that obligate funds to municipalities for the development of recovery plans to address unmet needs after the hurricanes Irma and María. Mrs. González worked as the staff planner for the municipalities of Adjuntas, Cidra, and Vieques. She was also involved in the data analysis of other municipal plans under the program.

2. Northwest Corridor PR-22 Project Hatillo – Aguadilla

Client's Name: CMA Architects and Engineers
Description: This project consisted in analyzing the potential socioeconomic and environmental impacts of the proposed route alternatives for the northwest corridor PR-22 between the municipalities of Hatillo and Aguadilla. Mrs. González assisted, along with other planning, economics, and GIS staff, with the analysis of socioeconomic variables for the population that resides in the municipalities of Hatillo, Camuy, Quebradillas, Isabelita, Moca, and Aguadilla.

3. Hormiguero's Land Use Plan Comprehensive Review



SPECIAL COURSES AND LICENSES

Module 1: URA Overview
U.S. Department of Housing and
Urban Development
August 2020

Client's Name: Municipality of Hormigueros

Description: A comprehensive revision of the land use plan requires updating the Municipality's current social, economic, environmental, and physical condition and revising the public policies that guided the 2010 plan to refine and make necessary changes if needed. The project includes the revision of the land use classes in the municipality considering the most up-to-date information resulting from hurricane María and climate change, such as floods and landslides, and providing recommendations related to housing, social and economic development, protection and use of rustic lands and future developments.

4. The Cost of Inaction on Climate Change in Puerto Rico
Client's Name: Department of Natural and Environmental Resources
Description: Establish a methodology to estimate the costs of climate change inaction in Puerto Rico as a key component for a Hazard Mitigation, Climate Adaptation and Resilience Plan to be developed at the state level. Mrs. González collaborated with the development of the public engagement plan for the project that allowed for primary data collection from representatives of the public and private sectors, as well as experts in climate change and similar topics. Furthermore, she assisted with the completion and qualitative analysis of 26 interviews that illustrated the effects and non-monetary costs of climate change inaction in Puerto Rico.

5. Study for the Management of the Coastal Resources in the Municipality of Cabo Rojo
Client's Name: Department of Natural and Environmental Resources
Description: Establish a management criterion for preserving the diverse coastal natural resources in the Municipality of Cabo Rojo. This study includes understanding the anthropogenic and environmental stressors that are affecting or may affect the coastal resources due to their current uses. For this project, Mrs. González is working on the analysis of socioeconomic variables for the population residing in Cabo Rojo, with emphasis on the coastal areas. In addition, she will assist in an analysis of the tourism industry in the Cabo Rojo region and its effects on its coastal resources.

ROBERTO E. MOYANO FLORES

GIS SPECIALIST

EDUCATION

Master in Geographic Information Systems, Pontifical University of Salamanca, Madrid campus, 2007-2008.

Bachelor's degree in Geography, University of Puerto Rico, 2002 - 2006.

WORK EXPERIENCE

Estudios Técnicos, Inc., San Juan
GIS Analyst, 2006 to present

Environmental Protection Agency, Region 2, GIS Technician, 2006

Resource Center for Science and Engineering, University of Puerto Rico Assistant Buyer, 2003 - 2006

Mr. Moyano works in the planning division and he is also the firm's Cartographer. His areas of specialization include spatial analysis, remote sensing and location intelligence. He has worked with various municipalities in areas of urban planning and land use. At the state level he has been instrumental in several management plans for natural protected areas. He supports many initiatives in the firm requiring the georeferencing of information for tracking, analysis or compliance purposes.

Accomplishments:

Led a team to identify structures that were in the maritime zone using remote sensing and field visits deploying mobile data collection.

Provides GIS support in the development of socioeconomic indexes.

Developed a data mapping and visualization tool to internally manage FEMA data on the damages caused by Hurricane María.

Relevant Project Experience:

GIS and Data Analyst, Multi-Hazard Mitigation Plan for the municipality of Aguadilla, September 2017. Mr. Moyano is leading a team that identified threats and hazards in the municipality of Aguadilla. As part of the data gathering step, he led a participatory mapping exercise to identify hazards at the neighborhood level and incorporate them in the analysis. Leveraging geospatial analytics, the team has identified, among other, population as well as critical infrastructure at risk.

Memberships & affiliations

North American Cartographic Information Society (NACIS)

TATIANA MARQUINA, PHD, PPL, ENVIRONMENTAL, URBAN AND REGIONAL PLANNING DIVISION PLANNER

EDUCATION

Rubenstein School of Environment
and Natural Resources (Ph.D.)
University of Vermont. 2021.

Graduated School of Planning (M.P.)
University of Puerto Rico, Río Piedras.
2016.

Political Science (B.A.)
American University in Bulgaria. 2012.

WORK EXPERIENCE

Estudios Técnicos, Inc.
Planner
2021 – Present

University of Vermont
Research Assistant
2017-2021

Corporación del Proyecto ENLACE
Caño Martín Peña
Budget and Planning Coordinator
2016-2017

Centro para la Conservación del
Paisaje
Planner
2015

University of Puerto Rico
Research Assistant
2013-2016

LICENSES

Professional Planner License No.
965 (since 2022)

Responsible for preparing disaster recovery plans, climate change and risks assessments, and coastal and natural resources management plans, among other studies and analyses. Collaborated in several environmental and urban projects for public and private sectors. Used diverse qualitative and quantitative data collection and analysis techniques to identify problems, assess needs, and develop objective and strategies for planning projects.

Relevant Project Experience

1. Cabo Rojo Municipality Master Coastal Resources Management Plan
Client's Name: Department of Natural and Environmental Resources
Project Description: The project focuses on developing a management plan for the coastal area of Cabo Rojo Municipality, applying the Limits of Acceptable Change approach to the management of a natural area. Conducted a search of relevant literature on conservation strategies, documents related to natural areas in Cabo Rojo, and on best practices for using the Limits of Acceptable Change approach. Analyzed and summarized the findings. Assisted with the development of data collection instruments.
2. Improving local communities resilience: capacity building, risk reduction and hazard mitigation
Client's Name: Department of Natural and Environmental Resources
Project Description: The project focuses on developing recommendations for mainstreaming climate change adaptation measures into state and local decision-making in Puerto Rico. Conducted a review of relevant legal and planning instruments on climate change adaptation in Puerto Rico. Analyzed case studies and identified relevant climate change adaptation and adaptation mainstreaming strategies. Worked on developing data collection instruments to conduct

interviews and identify challenges and opportunities for climate change adaptation in Puerto Rico.

3. Strategic Transit Plan for the Municipality of Río Grande

Client's Name: Municipality of Río Grande

Project Description: Establish an implementation plan for a local transit system in the municipality of Río Grande, that is both effective and economically feasible and that will promote economic development. Analyzed and summarized public policies relevant to the Plan.

4. The Municipal Recovery Planning Program

Client's Name: Puerto Rico Department of Housing

Project Description: The program centers on identifying the needs created or exacerbated by the hurricanes Irma and Maria in these municipalities by collecting and analyzing secondary data, conducting meetings and interviews. Further, it included the development of strategies and projects that can assist the municipalities with the recovery from these natural disasters and with building resilience. Developed municipal recovery plans for the municipalities of Barranquitas, Aguada, Rincón, Culebra, and Vieques. Assisted with the development of recovery strategies on natural resources management and hazard mitigation for multiple municipalities. Conducted public meetings, presentation, interviews and assisted with focus groups discussions.

VÍCTOR M. ELGUETA MOLL

GIS ANALYST

EDUCATION

Bachelor's degree in Natural Resources Engineering, 2008 - 2014. Austral University of Chile.

WORK EXPERIENCE

Estudios Técnicos, Inc., San Juan
GIS Analyst, 2021 to present.

Skootel, LLC. Service Center
Operations Director, San Juan.
2020-2021.

Agricultural Service of Chile,
Pest control and monitoring
project, Patagonia, Chile, 2018.

Forestry Engineers Association,
Forestry consultant, Patagonia
Chile, 2017-2018.

Nativo Consultores SPA.,
Forestry/Environmental
consultant, GIS dept.
Patagonia, Chile, 2016-2018.

Environmental specialist,
Patagonia, Chile, 2015-2016.

Forestry management advisor,
Patagonia, Chile, 2015.

Freelance GIS Technician, 2012
to present.

Mr. Elgueta works in the planning division and he is also a cartographer at the firm. His areas of specialization include spatial analysis and remote sensing. He has worked in several environmental projects where he has specialized in GIS, field work and conservation.

Accomplishments:

Has worked on forest conservation projects, unifying scientific data, field data gathering, government resources and community level work.

Has applied the use of GIS in a wide variety of projects in Chile and Puerto Rico.

Excellent use of spatial analysis tools for social, economical, environmental, historical and other projects.

Relevant Project Experience:

Víctor Elgueta has been a GIS and Data Analyst, for several private and public funded projects. Plague control, technical assessment for land management, biodiversity management, geology, among others. As a specialist in the topic, he has also done spatial data collection in the field to apply the information in mapping needs for multiple conservation projects. Through past experiences, Mr. Elgueta has successfully connected community surveying and orientation with spatial analysis.

Memberships & affiliations

Forest Engineers Association of Chile.

YOANA L. LÓPEZ DE JESÚS, PPL

ENVIRONMENTAL, URBAN AND REGIONAL PLANNING DIVISION DIRECTOR

EDUCATION

Environmental Science (B.S.) and
Geography (Minor)
University of Puerto Rico, Río
Piedras, P.R. 1998-2003.

UPR Law School (J.D.)
University of Puerto Rico, Río
Piedras, P.R. 2003-2006.

Graduated School of Planning
(M.P.)
University of Puerto Rico, Río
Piedras, P.R. 2006-2008.
Environmental & Urban Planning
Master's degree

WORK EXPERIENCE

Estudios Técnicos, Inc.
Planning Division Director
2021 – Present

Estudios Técnicos, Inc.
Urban and Environmental Planner
2019 – 2021

University of Puerto Rico,
Central Administration
Compliance Office
2016-2019

University of Puerto Rico,
Central Administration
CACGP, Acceso al Éxito
2008-2016

SPECIAL COURSES AND LICENSES

Responsible for coordinating land use plans, climate change and risks assessment, hazard mitigation plans, coastal and natural resources management plans, outdoor recreation plans, community impact assessments, and environmental justice studies, among others. Collaborated in several environmental and urban projects for public and private sectors using diverse qualitative and quantitative techniques to identify problems, objectives, and strategies for planning projects. Manages a staff of environmental planners, GIS analysts and other professionals, as required by specific projects.

Relevant Project Experience

1. Coastal Resources Master Plan of the Municipality of Cabo Rojo
Client name: Department of Natural and Environmental Resources (DNER)
Project Description: Estudios Técnicos, Inc. supported the DNER in the development of a comprehensive planning document that will serve as a guide for the managing entities, municipal staff and other collaborators in the management of these coastal resources within the municipal territory.
2. Municipal Recovery Planning Program (MRP)
Client's Name: Puerto Rico Department of Housing
Project Description: The MRP program is part of the eligible activities under the CDBG-DR that obligate funds to municipalities for the development of recovery plans to address unmet needs after the hurricanes Irma and María. Mrs. López worked as the staff planner for the municipality of Manatí. She was also involved in the proof reading and quality control of other municipal plans under the program.
3. Fajardo's Land Use Plan Comprehensive Review
Client's name: Autonomous Municipality of Fajardo
Project Description: A comprehensive revision of the land use plan requires to update the municipality's current social, economic, environmental and physical condition and revise the public policies that guided the 2010 plan to refine

Professional Planner License No.
792 (since 2009)

Strategic Planning, Division of
Continuing Education and
Professional Studies, University of
Puerto Rico, Mayagüez Campus
(November 2011)

Advanced Proposal Writing:
Community Programs and Projects,
Division of Continuing Education and
Professional Studies, University of
Puerto Rico, Mayagüez Campus
(November 2011).

Public Transit Oriented Development,
Planetizen (June- July 2007)

and make necessary changes if needed. Project includes the revision of the land use classes in the municipality considering the most up to date information resulting from hurricane María and climate change, such as floods and landslides and provide recommendations related to housing, social and economic development, protection and use of rustic lands and future developments.

4. **Aguadilla's Land Use Plan Comprehensive Review**
Client's Name: Autonomous Municipality of Aguadilla
Project Description: A comprehensive revision of the land use plan requires to update the municipality's current social, economic, environmental and physical condition and revise the public policies that guided the 2011 plan to refine and make necessary changes if needed. Project includes the revision of the land use classes in the municipality considering the most up to date information resulting from hurricane María, earthquakes and climate change, such as floods and landslides and provide recommendations related to housing, social and economic development, protection and use of rustic lands and future developments.
5. **Strategic Transit Plan for the Municipality of Luquillo**
Client's Name: Municipality of Luquillo
Project Description: Establish an implementation plan for a local transit system in the municipality of Luquillo, that is both effective and economically feasible and that will promote economic development.
6. **Development of a community toolkit that will be complimentary to the Road to Resiliency: Guide of strategies for climate change adaptation**
Client's Name: Department of Natural and Environmental Resources (DNER)
Project Description: The toolkit is based on the lessons learned from hurricane María. Key informant interviews were conducted to municipal officers that work directly with communities and a survey was administered to community-based organizations. The purpose was to learn from their experiences, and to auscultate which tools and methods are appropriate to the communities they serve.
7. **Strategic Management Plan for the Recreational Uses in the Northeast Reserves Marine Corridor**
Client's Name: CSS-Dynamac
Project Description: This project's approach is marine spatial planning. It is funded by NOAA and aims to organize recreational uses in the marine waters of eastern Puerto Rico.
8. **Statewide Comprehensive Outdoor Recreation Plan**
Client's Name: Department of Sports and Recreation

Project Description: Revision of the Statewide Comprehensive Outdoor Recreation Plan (SCORP) for Puerto Rico.

9. Hazard Mitigation Grant Program (Section 404) Prioritization Tool
Client's Name: Central Recovery and Reconstruction Office (COR³)
Project Description: Creation of a tool to be used by COR3 to prioritize the hazard mitigation applications from sub-applicant's island-wide (municipalities, agencies, public corporations and private non-profit organizations).

Evan F. González, PE, MSCE
PR: P.O. Box 12009, San Juan, PR 00922
VA: 9926 Main St., Ste. 200, Fairfax, VA 22031
PR: (787) 993-2071; VA: (703-738-1414
evan.gonzalez@klein-engineering.com



SUMMARY STATEMENT

Bilingual Civil Engineer with over twenty years of experience with proven accomplishments in creating designs and construction plans for roads, highways, transit systems and sites to include intersections, roadside, grading, drainage plans, and connections to local water, storm and sanitary sewer utilities. Experience with electronic surveying and global positioning equipment to produce plans. A high energy and self-motivated team player who can work well under pressure to meet aggressive deadlines. Excellent computer skills with advanced knowledge of MS Office, MS Project, AutoCAD, Civil 3D, Synchro, SIDRA, RSAP, and other computer software.

Commonwealth of Puerto Rico P.E. License No. 14981 P.E.

State of Maryland P.E. License No. 49656 P.E.

Registered Surveyor, on the Permanent Surveyor List of Puerto Rico, October 1996.

EDUCATION

Master of Science Degree in Civil Engineering
University of Puerto Rico, Mayagüez, PR 2001

B.S. in Civil Engineering.
University of Puerto Rico, Mayagüez, PR 1994
Specialized in Environmental Engineering

WORK EXPERIENCE

KLEIN ENGINEERING, PSC, San Juan, PR; Fairfax, VA January 2014 - Present

Senior Engineer

Engineering consulting and project management firm.

- Highway and Transit Design
- Traffic Impact Studies and Traffic Signal Systems Design
- Project Management
- Road Safety Audits
- Environmental Analysis
- Forensic Engineering

EFGB Consulting Engineers, President May 2007 - Present

President

Engineering consulting and project management firm.

- Highway and transit analysis and design
- Traffic impact studies for highway project and site development
- Highway intersection design
- Traffic signal design
- Site design
- Project Management

**Puerto Rico Metropolitan Bus Authority,
President and General Manager**

February 2006 - May 2007

- In charge of Bus mass transit operations
- Governor of Puerto Rico Representative in related topics

**Puerto Rico Ports Authority,
Auxiliary Executive Director for Engineering, Planning and Construction**

March 2005 - February 2006

- Head Engineer for all Port and Airport Facilities in Puerto Rico
- Oversight of important Projects such as:
 - The reconstruction of runway 10-28 in Luis Muñoz Marín Airport
 - New Terminal at Vieques Airport and Rafael Hernández Airport in Aguadilla
 - Reconstruction of Wharfs E and F in the Port of San Juan
- Authorized for vehicle access in the airports of Puerto Rico, knowledge in control tower communication
- Head of all Environmental related issues
- Assisted in the preparation of Federal Grant request

**Puerto Rico Ports Authority,
Deputy Executive Director**

July 2004 - March 2005

- Assistant to the Executive Director in infrastructure related issues
- Assist the Executive Director in all appointed matters regarding Ports Authority operations

**Puerto Rico Traffic Safety Commission,
Executive Director**

November 2002 - July 2004

- Coordination of all aspects related to Traffic Safety in Puerto Rico
- Dictate Public Policy in Traffic Safety
- Represent the Governor of Puerto Rico in topics related to Traffic Safety

**Puerto Rico Highway and Transportation Authority
Deputy Executive Director for Traffic and Toll Roads**

February 2001 to October 2002

- In charge of Traffic and Operations and Toll Road Operations
- In charge of Road Safety Audits and Road Safety inspections
- Oversaw the road safety study to change the speed limit on PR-52, PR-22 and PR-53 Toll Roads
- Formed the Traffic Safety Division of the Puerto Rico Highway and Transportation Authority.

JRM Consulting Engineers

April 1998 to February 2001

- Project Manager & Field Inspector

PARTIAL LIST OF REPRESENTATIVE PROJECTS

Project Customer Puerto Rico Highway and Transportation Authority

Project Name AC-811544: Landslide and Road Damage Evaluation and Repair Recommendations, Multiple Municipalities, Puerto Rico

Project Description As part of its recovery efforts, the Puerto Rico Highway and Transportation Authority has divided the highways and roads of Puerto Rico into regions and units for the preparation of the Technical Reports, and resulting PS&E's for the repairs of landslides caused by Hurricane Maria. Klein Engineering, PSC is working as a Prime Consultant with roads located in seven (7) municipalities across the Island.

Project Customer Puerto Rico Highway and Transportation Authority

Project Name AC-812541: Hurricane María Efforts for Signing and Guardrails, San Juan Metropolitan Area, Puerto Rico

Project Description As part of its recovery efforts, PRHTA has divided the highways and roads of Puerto Rico into regions and units for the preparation of the Detailed Damage Inspection Reports, and resulting PS&E's. Klein Engineering, PSC worked as a Prime Consultant with roads in the Metropolitan Area.

Project Customer Banco Popular de Puerto Rico and Perkins-Eastman

Project Name Hato Rey Plaza District traffic analysis and design.

Project Description Klein Engineering, PSC is working as consultants to Banco Popular de Puerto Rico and Perkins-Eastman for the analysis of alternative traffic patterns in the Golden Mile area of Hato Rey. Macroscopic and microscopic simulations have been completed for existing and proposed conditions, as well as proposed plans and cross sections.

Project Customer Puerto Rico Integrated Transit Authority

Project Name Metropolitan Transit System Consulting

Project Description When the Puerto Rico Integrated Transit Authority was created in 2013, one of its main goals was to provide the most efficient service with the resources it had available. Data on existing facilities, routes, and number of vehicles, among others, were collected to determine the most efficient coverage that could be provided to promote ridership and interconnection with other modes, especially the Tren Urbano heavy rail system that serves the San Juan Metropolitan Area. Proposed route maps, transit stop design and placement guidelines, existing facilities reports, and ride check studies were some of the tasks that were successfully completed for the Agency.

Project Customer Municipality of Naguabo

Project Name Transit System Implementation Plan for the Municipality of Naguabo

Project Description Klein Engineering, PSC was the prime consultant for the implementation plan of Naguabo's municipal transit system. Work included the research on previous and existing available services, socioeconomic conditions, existing and projected traffic, preliminary design and alignment of proposed routes, and public outreach, among others. The new transit system must be able to mobilize its users within the Central Business District (CBD), as well as between the latter and the main tourist attractions of Naguabo. KEPSC's team analyzed future demand for the proposed intra-municipal transit system as part of the route design process.

Project Customer Puerto Rico Highway and Transportation Authority

Project Name Rehabilitation and Scour Mitigation of Bridge No. 1724.

Project Description Klein Engineering, PSC was the design Consultant to PRHTA for the project, which included traffic, structural, and environmental analysis and design. Pavement distress assessment was done for the segments of PR-181 and PR-852 that approached the bridge, as well as for the bridge deck.

Project Customer RK&K / FAM66

Project Name Improvements to I-66 Outside the Beltway

Project Description Klein Engineering, PSC served as a subconsultant to analyze traffic operations for proposed temporary traffic control that will be implemented at the interchanges of I-66 with I-495, Route 123, and Route 243. The I-495 and I-66 Westbound ramp analysis was done using Vissim, and the analysis for Chain Bridge Road and Nutley Street were done using Synchro / SimTraffic.

Project Customer Government of Puerto Rico

Project Name Multiple

Project Descriptions:

- Auxiliary Executive Director for Engineering, Planning and Construction, Puerto Rico Ports Authority
 - Head Engineer for all Port and Airport Facilities in Puerto Rico
 - Oversight of runway reconstruction, new terminals, vehicle access, etc.
 - Head of all Environmental related issues
 - Assist in the preparation of Federal Grant request
- Deputy Executive Director, Puerto Rico Ports Authority
 - Assistant to the Executive Director in infrastructure related issues
 - Assist the Executive Director in all appointed matters regarding Ports Authority operations
- Executive Director, Puerto Rico Traffic Safety Commission
 - Coordination of all aspects related to Traffic Safety in Puerto Rico
 - Dictate Public Policy in Traffic Safety
 - Represent the Governor of Puerto Rico in topics related to Traffic Safety
- Deputy Executive Director for Traffic and Toll Roads , Puerto Rico Highway and Transportation Authority
 - In charge of Traffic and Operations and Toll Road Operations
 - In charge of Road Safety Audits and Road Safety inspections
 - Oversaw the road safety study to change the speed limit on PR-52, PR-22 and PR-53 Toll Roads
 - Formed the Traffic Safety Division of the Puerto Rico Highway and Transportation Authority.

RAFAEL ARROYO MORALES

Montebello Estates, Trujillo Alto, PR 00976 | 787-407-1629 | rarroyo@estudiostecnicos.com

Psicólogo Social Comunitario organizado y con experiencia en el trabajo con programas y comunidades. Orientado en el trabajo en equipo para la solución de tareas.

EXPERIENCIA

1996 al presente

Analista – Consultor en Análisis Social – Estudios Técnicos, Inc.

Trabajo de investigación social en empresa multidisciplinaria. Trabajo en identificación de necesidades de grupos o comunidades para la búsqueda de potenciales cursos de acción. Evaluaciones y apoyo a programas de servicios en su desempeño formativo y cumplimiento sumativo. Utilización de fuentes primarias y secundarias con técnicas cualitativas y cuantitativas de investigación.

2013-2015

Profesor Conferenciante – Profesor Universitario – Universidad Metropolitana (UMET)

Preparación de sílabos para cada curso impartido, impartir cursos y avalúos de estudiantes, evaluación de desempeño de estudiantes a través de trabajos escritos y exámenes.

2012-2014

Profesor Conferenciante – Profesor Universitario – Universidad Interamericana de Puerto Rico

Preparación de sílabos para cada curso impartido, impartir cursos y avalúos de estudiantes, evaluación de desempeño de estudiantes a través de trabajos escritos y exámenes.

EDUCACIÓN

Mayo 2012

Concentración de postgrado en Psicología Industrial – Universidad Interamericana de Puerto Rico

Mayo 2007

Doctorado en Psicología Social Comunitaria – Universidad de Puerto Rico

DESTREZAS

- Planificación y coordinación de trabajo en equipo
- Desarrollo de destrezas de personal
- Desarrollo de instrumentos de investigación
- Redacción de informes y presentación de datos
- Presentación de hallazgos a grupos de interés
- Conducción de entrevistas a profundidad
- Conducción de grupos focales
- Proficiente en análisis cualitativo y cuantitativo
- Proficiente en uso de programas de investigación Excel, SPSS, NVivo

366 San Genaro Street
Urb. Sagrado Corazon
San Juan PR. 00926

Cell phone (787) 385-6125
raragon@estudios tecnicos.com
aragonroberto@hotmail.com

Roberto Aragón Carrasco, MA

Experience

Nov 2019 – Present. **Estudios Técnicos, Inc.**
Director Real Estate & Business Economics Division

- Manage Estudios Técnicos, Inc.'s' real estate and business projects, including market feasibility, financial feasibility, business plans, demand for housing, best-use analysis, and economic impact, among other studies.
- Supervise the socioeconomic analysis for 51 municipal recovery plans under the Municipal Recovery Planning Program (MRP) with CDBG-DR funding.
- Prepare feasibility studies for residential and economic development projects using CDBG-DR funding under the City Revitalization Program (CRP)
- Provide consulting services in economics, planning, and finance.
- Prepare reports both in English and Spanish for clients in the public and private sectors.
- Prepare demand analysis for hotels, parking facilities, and residential projects.
- Prepare market analysis for various products and services, as requested by clients.
- Prepare necessity, convenience, and economic feasibility studies for health facilities to obtain permits and licenses from the PR Department of Health.
- Prepare macroeconomic models of the PR economy. Prepare industry models for different sectors, such as retail, construction, and banking, among others sectors.
- Forecast macroeconomic indicators such as real GDP, investment, government expenditures, private consumption, exports, unemployment rate, and inflation, among other indicators.

Aug 2018 – Oct 2019. **Advantage Business Consulting, Inc.**
Manager

- Supervise economists and statisticians and coordinate studies with external consultants.
- Provide consulting services in economics, planning, and finance.
- Support litigation; prepare reports on economic damages for personal injury, economic loss, breach of contract, intellectual property, wrongful termination, and malpractice cases.
- Prepare necessity, convenience, and economic feasibility studies for health facilities to obtain permits and licenses from the PR Department of Health.

- Prepare macro-econometric models of the PR economy. Prepare econometric models for economic sectors, such as retail, construction, auto sales, and banking, among other sectors.
- Forecast macroeconomic indicators such as real GDP, investment, government expenditures, private consumption, exports, unemployment rate, and inflation, among other indicators.
- Prepare demand and price elasticity analyses for hotels, parking buildings, entertainment centers, and shopping centers.
- Design survey questionnaires and interviews questionnaire guides to apply in different economic studies.
- Prepare reports both in English and Spanish.

2007–2018
Chief Economist

H. Calero Consulting Group Inc.

- Supervise economists and statisticians and coordinate studies with external consultants.
- Provide consulting services in economics, planning, and finance.
- Collect and analyze data from several sources, including The US Census Bureau, Bureau of Economic Analysis (BEA), Bureau of Labor Statistics (BLS), Centers for Disease Control (CDC), Centers for Medicare and Medicaid Services (CMS), the PR Planning Board, the PR Department of Labor and Human Resources, The Institute of Statistics of PR, among others.
- Support litigation; prepare reports on economic damages for wrongful personal injury, breach of contract, intellectual property, wrongful termination, and malpractice cases.
- Prepare market feasibility and economic impact studies.
- Prepare necessity, convenience, and economic feasibility studies for health facilities to obtain permits and licenses from the Department of Health.
- Prepare market analysis for various products and services, as requested by clients.
- Draft consulting services proposals as requested by clients
- Prepare macro-econometric models of the PR economy. Prepare econometric models for diverse economic sectors, such as retail, construction, auto sales, and banking, among other sectors.
- Forecast macroeconomic indicators such as real GDP, investment, government expenditures, private consumption, exports, unemployment rate, and inflation, among other indicators.
- Using the methodology of the Conference Board, prepare six quarterly economic indices for the PR economy, including the coincident and leading indices and four indices for sectors consumption, manufacturing, banking, and construction.
- Prepare demand and price elasticity analyses for hotels, parking buildings, entertainment centers, and shopping centers.
- Research and draft the firm's two economic newsletters, Puerto Rico Economic Pulse (monthly) and Puerto Rico Economic Compass (quarterly). I also prepared the booklet of these newsletters using Adobe Photoshop and Adobe InDesign.
- Design survey questionnaires and interviews questionnaire guides to apply in different economic studies.
- Assist the firm's President in various research tasks.
- Prepare reports both in English and Spanish.

2007–2008

University of Puerto Rico, Rio Piedras

Campus

Professor

- Teach Mathematics for Economists I (ECON 4121) three credits, a master's program's pre-requisite at the Economics Department of the Social Sciences Faculty, University of Puerto Rico.
- Professor at the Institute of Labor Relationships of the University of Puerto Rico. Labor Economics (RELA 3075) three credits. It is a core undergraduate course. I had thirty students per class.

2005–2007

University of Puerto Rico, RRP.

Teacher Assistant

- I was responsible for the practices and laboratories of several courses at undergraduate and graduate levels; some of them were Econometrics, Statistics for Economists, Computing for economists, Mathematics for economists, and Microeconomics.
- For these academic activities, I prepared guides for laboratory exercises, solved students' questions, and prepared for exams.
- I used statistical and econometric software, including Excel, SPSS, and EVIEWS. I worked with conventional software, too, such as Microsoft Word and PowerPoint.
- I researched the effects of environmental public policy, specifically Green Fiscal Reforms (using General equilibrium software called GAMS). I made demand models of mass consumption goods, among other studies.

2003–2004

Peruvian Tax Administration (SUNAT).

Assistant at the Peruvian Tax Administration

- I worked at the Department of Debt Control of the Peruvian Tax Administration, Cusco City's office.
- I maintained 10,000 clients' databanks.
- I worked with the following software: Microsoft Excel, Word, PowerPoint, FoxPro, and customized applications.
- I provide technical assistance to other workers in my department regarding software and hardware issues.
- I participated in tax evasion detection programs for individual and corporate taxpayers.

Education

2004–2007

University of Puerto Rico, Puerto Rico.

Master In Arts Economics, with a concentration in Public Finance. 4.0 GPA graduate *Summa Cum Laude*. The thesis was Approved as outstanding.

1999–2002

San Antonio Abad University. Peru.

- **Bachelor's degree**, significant in **Economics** with a concentration in Economic Theory and Policy.
Graduated with the highest academic ranking of the year.

1995–1997

Tupac Amaru Technological Institute. Peru.

- **Associated Degree in Computing and Information science**,

I graduated with the second-highest academic ranking of the year.

1998–2000 San Antonio Abad University Language Center.

- English Advanced level

Extended courses

2007-Present: Attended the following courses and seminars: Use of PUMS data of the Population Census and the American Community Survey at the Institute of Statistics of PR, Seminar of Forensic economics at the Puerto Rico Economists Association, MCS Health Policy Forum: Impacts of Health Reform, Statistics with Minitab at the Institute of Statistics of Puerto Rico, advanced Microsoft Excel, Annual meetings of the Puerto Rican Association of Financial Analysts, Seminar of Puerto Rican statistics at the PR Institute of Statistics.

2004 8th University Extension Course in Telecommunications. Organized by the Peruvian Supervisor Organism for Private Investment in Telecommunications. OSIPTEL.

2002 49th University Extension Course, Central Reserve Bank of Peru, Lima, Peru. It is an advanced program for the best students of economics sciences in Peru.

2001 Course of Actualization and selection, Central Reserve Bank of Peru, Lima Peru

**Publications,
Dissertations, and
International
Conferences**

2007-Present – More than one hundred consulting reports in business valuation, economic and financial feasibility, development plans, economic forecasting, Economic impact, support litigation, economic damages, wrongful dismissal, personal injury economic loss, among others.

2018 - Coauthor of the H. Calero Consulting Group, Inc's book How Hurricane Maria Forges PR's Economic Future.

PUERTO RICO

2008- 2018. More than fifty issues of the PR Economic Pulse and PR Economic Compass. These newsletters are H. Calero Consulting Group's proprietary publications on economics, finance, and planning.

PUERTO RICO

2008- Coauthor of the H. Calero Consulting Group, Inc's book Inside the Puerto Rico Economy, an analysis of the critical economic topics in Puerto Rico from 1998 thru 2007.

PUERTO RICO

2007 May, Publication of the master's degree Thesis "Green Fiscal Reform in the United States: A General Equilibrium Approach." The thesis's director was Professor Carlos Rodriguez Ph.D.

PUERTO RICO

2006 Dissertation and Publication paper "Fiscal Reform in the United States of America: General Equilibrium Approach." 10th Castilla y Leon's Congress of Economists.

SPAIN

2005 9th Congress of the Latin America and the Caribbean Economists Association. Dissertation "Green Fiscal Reform: Theory and Applications"

MEXICO

2005 International Meeting for Macroeconomics Strategies from the Economic Humanism. Publication of "Green Fiscal Reform on the North-South Convergence Vis-à-vis the Economic Humanism"

ARGENTINA

Experience overview:

Mr. Castillo is the President of ETI with over 25 years of experience providing consulting services in a broad range of fields, including Real Estate Economics, Macroeconomic Analysis, Benefit-Cost Analysis, Financial Analysis, Strategic and Implementation Plans, and with HUD'S housing programs including CDBG, HOME and NSP. With HUD'S CPD programs. He has provided services to the Department of Housing of Puerto Rico, the Puerto Rico Housing Finance Authority and the Office of the Commissioner of Municipal Affairs. He has been a consultant to the Home Mortgage Association and the Puerto Rico Bankers Association in housing matters.

Throughout his career, he has coordinated complex projects requiring the management of multidisciplinary teams in economic development, municipal policy, and infrastructure investments, among other. He has experience managing policy, regulatory and procedural issues. He is considered a leading housing economist in Puerto Rico. He also has close to 10 years of experience working with the CDBG program, including Section 108, and other HUD'S housing programs as well as New Market Tax Credits. He completed an analysis of the situation of the housing industry in Puerto Rico for the Builders Association.

Relevant project experience:

- Principal in charge in the firm for the development of the strategic and implementation plan for a \$79 million FEMA Grant to support code enforcement in Puerto Rico. Castillo led the effort of coordinating interagency resources to define project vision, goals, challenges, implementation strategies and a detailed implementation plan.
- Principal in charge of the Puerto Rico's State Housing Plan: 2011-2015 and 2013-17 update - one of Puerto Rico's most comprehensive housing studies, developed for the Department of Housing and Urban Development (HUD) (originally submitted in 2011). The Plan was adopted by the Federal agency to guide the Island's affordable housing development programs. ETI has also served as consultant in the Housing Plan Implementation Committee.
- Expert in Economic Impact Studies and Cost Benefit Analysis
- Principal in charge of the Study to Evaluate Puerto Rico's Municipal Structure (08/17/16). The study evaluated the statutory context of Puerto Rico Municipal Jurisdictions, their economic, social and financial situation and their performance metrics. It provided recommendations on policy and regulatory amendments needed to track and improve municipal performance.
- Advice to various local governments, state grantees and non-for profits on Housing and Community Development Programs (HUD-CPD) (2010-to present)
- Advice on Action Plan and market strategies for Neighborhood Stabilization Program 3 (NSP) (2012-2015)
- Principal in charge of the preparation of an Economic Development report for the Central District of Bayamon as part of a requirement of an EDA Planning and Technical Assistance Grant
- Coordinated the Demand for Housing Study for period 2007-2012, in which the housing crisis was anticipated.

Education

- J.D, Interamerican University of Puerto Rico, May 2000
- Completed the MA course work in Economics, University of Puerto Rico, 1989 (Thesis pending)
- B.B.A., with a concentration in Economics and a minor in Accounting Interamerican University, 1987

Certifications and training

- PR BAR, July 2001 (Licence Inactive)
- US Court of Appeals, 2001

ROBERTO RÍOS HERNÁNDEZ

PROFILE

A highly ethical individual with a strong desire to succeed both professionally and personally in a position that requires excellent communication skills and a professional attitude.

I want to be part of a community with mutual respect and where each positive contribution is valued.

I am looking forward to working in a place where tasks are always required to be carried out efficiently and in harmony.

I am proactive and organized, with a passionate commitment to the job.

CONTACT

PHONE:
787-619-6965

EMAIL:
robertorios6@yahoo.com

SKILLS

- ✓ Interpersonal communication skills
- ✓ Strong modeling skills and an ability to present and intuitively explain complex scenario analysis.
- ✓ Strong leadership skills with the ability to motivate and guide teams towards achieving project objectives.
- ✓ Knowledge of administrative procedures and problem-solving

EDUCATION

University of Puerto Rico, (UPR) Carolina Campus
2006

Diploma. Bachelor of Criminal Justice (BBA) with a major in Social Science Law & Society.

Correctional Department, San Juan, P.R
2004

University Internship, Technical Work in Socio-Penal Matters

WORK EXPERIENCE

Estudios Técnicos, Inc. -Supervisor-
2010 – Present

Responsibilities & Achievements:

Supervision and Leadership:

- Provide effective leadership and supervision to field teams, ensuring adherence to project timelines, quality standards, and safety protocols.
- Mentor and train field staff to enhance their skills, productivity, and professional development.

Project Coordination:

-Act as a central point of contact for project coordination, liaising between clients, project managers, and field teams to ensure seamless project execution.

-Develop and implement project plans, schedules, and resource allocation strategies to optimize project outcomes.

Administrative Management:

-Manage payroll activities, including timekeeping, payroll processing, and employee compensation, to ensure accurate and timely payments.

-Oversee administrative tasks such as scheduling, logistics coordination, and procurement of necessary resources for field operations.

Data Collection and Analysis:

-Conduct comprehensive surveys, interviews, and studies in various field settings to gather relevant data for statistical analysis and research purposes.

-Utilize advanced data collection techniques and tools to ensure the accuracy, reliability, and validity of collected data.

Inmotion Promotions & Events -Supervisor-
2008- 2012

-Successfully coordinated and executed a diverse range of events, including product launches, corporate conferences, promotional campaigns, and community outreach initiatives, exceeding client expectations and achieving positive feedback.

-Implemented efficient event planning processes and streamlined logistical workflows, resulting in cost savings and improved operational efficiency.

-Led a highly effective event team, fostering a collaborative and supportive work environment that contributed to enhanced team morale and performance.



Daniel Villafuerte

EDUCATIONAL BACKGROUND:

Master's degree In industrial engineering

University of Puerto Rico -- Mayagüez Campus

Industrial Engineering Bachelor

University of Lima, Peru

PROFESSIONAL EXPERIENCE:

Truenorth Corporation

Principal

Management Consulting Division

Dany Villafuerte has over 25+ years assisting clients in the areas of utilities, insurance, healthcare, banking, government, distribution, and manufacturing with expertise in Project Management, IT Auditing & Regulatory Compliance, Process Reengineering, and Management Consulting.

Example of recent Experience:

- In charge of a multidisciplinary team for provisioning the enrollment counselor services under the government health plan program (VITAL Plan). This service is provided for 1.5 million beneficiaries and key services are:
 - Call Center services.
 - Choice Counseling in person and over the phone
 - Web-based application or platform to support online Choice Counseling and all other requested Enrollment Counselor activities.
 - Online provider search functionality available to the general public (the "Provider Search Portal")
- Satisfaction study of Plan Vital beneficiaries with services from carriers, primary medical groups, and primary care providers.



- Operation, project management, and implementation of the official Eligibility and Enrollment platform MEDITI. Subsequently, in the design, development, and implementation of MEDITI2, which was officially launched and implemented island-wide in July 2017. MEDITI2 was the official E&O Application used by the Medicaid Program to evaluate more than 1.7 million beneficiaries.

- In charge of a team of business analysts and technical consultants to design, implement, and support multiple initiatives focused on the Technology Transformation of the Puerto Rico Department of Health/Medicaid Program. Some of these initiatives are:
 - Implementation and maintenance of the Medicaid Eligibility platforms (MEDITI and MEDITI2)
 - Design, configuration, and implementation of a Virtual Appointment solution
 - Supplier selection and performance monitoring of the Medicaid Program call center
 - Design, development, and implementation of the Fraud and Abuse System and Tools (FAST)
 - Design, development, and implementation of the Management of Quality Control system
 - System Simulation and Assessment to increase the Puerto Rico Poverty Level
 - Process definition and system platform implementation to create a remote eligibility evaluation
 - Capacity analysis and strategy definition to balance eligibility workload
 - Truenorth provided support in the interface between the Fraud and Abuse system and the new E&E system (MEDITI3G).

- Process Optimization and Technology Transformation at Puerto Rico WIC Program:
 - Automation of processes that were carried out manually.
 - New communication mechanisms and service channels for beneficiaries of the Puerto Rico WIC Program
 - Controls to obtain visibility and monitor the performance of the operation.
 - Virtualization of services and processes for participants, merchants, and food distributors
 - New mechanisms to make easy the eligibility evaluation process.
 - Beneficiaries' retention and outreach initiatives





- Assessment for identification of revenue optimization initiatives at PR Workers Compensation (CFSE). Analysis, identification, and sizing of revenue opportunities to collect over \$120 million per year in insurance premiums due to fraud detection and accuracy of payroll reported by clients.
- Management of Revenue Assurance Program at PR Electric Power Authority (PREPA). In charge of a multidisciplinary team of senior consultants to define and implement a revenue program focused on re-engineering revenue (energy theft, uncollectable accounts, fraud, incorrect meter setup, and early detection of errors in the billing system, among others).
- Program management and production support of the Transactional Portal at Puerto Rico Housing Financial Authority. In charge of six (6) business analysts and developers to define, develop, implement, and maintain a transactional portal. This portal supports critical governmental initiatives with financial institutions to promote the real estate industry.
- Management of Revenue Assurance Program at PR Aqueduct and Sewer Authority (PRASA). Program definition (goals and objective, organizational structure, program plan, resources, and tools) to improve collection processes and identify new revenue opportunities.
- Implementation of SAP IS-U at Puerto Rico Aqueduct and Sewer Authority. Project Management for the implementation of SAP IS-U (Industry Standard for Utilities) modules to support all commercial activities. Planning, monitoring, and coordination with multiple contractors to integrate internal and external systems. Supporting during the definition of functional and technical requirements, construction, testing, and deployment phases.
- System Audits for various private and governmental organizations. Assessment and recommendations associated with IT audits and reviews of general controls at multiple organizations such as governmental agencies, insurance companies, and financial institutions. In addition, he worked with multiple regulations such as HIPAA, SOX, PCI, and Rule 76 (Office of Puerto Rico Insurance Commissioner).
- Reengineering of the Property Registry of the Commonwealth of Puerto Rico. Development of a new operational model and



implementation of new processes and information technologies to transform and modernize the Property Registry.

Vila del Corral & Company (RSM Puerto Rico)

Manager
Management Consulting
2000-2006

Responsible for assisting clients across various industries, including utilities, insurance, healthcare, banking, government, distribution, and manufacturing. Some areas of expertise include Project Management, IT Auditing & Regulatory Compliance, Process Reengineering, and Management Consulting.

Intel Puerto Rico

Industrial Engineer
Manufacturing, Las Piedras Site

Responsible for the optimization and process improvement of SMT lines in the manufacturing of boards. In charge of assessments, quality control, and ergonomics evaluations during the implementation of new products or new technology.

CERTIFICATION:

Certified Information System Auditor
CISA

CONTINUING EDUCATION:

Implementing IT Governance
ISACA, Monterrey, Mexico
October 2007

Information Technology Audit Practices
ISACA, Baltimore
June 2005

**R/3 SAP courses of Material Management (MM),
Finance and Controlling (FI/CO), Sales and
Distribution (SD)**
San Juan
April-May 2005

IT Project management
AMA, Washington DC



June 2003

Agora System

CORPME, Madrid, Spain

November 2002

Oracle Financial 11i

Caracas, Venezuela

October 2000

System Manufacturing Division Award, Intel, P.R.,

July 1999

Progress v. 8 System Design and Development

Lima, Peru

July 1994

ORGANIZATION:

**Member of the Information System Audit and
Control Association**

ISACA

**Director of the Academic Relations and Private
Corporate Liaison Committee**

ISACA Puerto Rico Chapter.

Member of the InfraGrad Program

Puerto Rico Chapter



Edward A. Benavent

Educational Background:

Graduate BS in Marketing and Management

La Salle University Philadelphia

Internship for High-Potential Talent

6 months

ASW: Y&R New York

Business Administration

4-week workshop sponsored by JWT

Duke University

Professional Experience:

Truenorth Corporation

Principal / Customer Experience Operations

2020 – Present

A state-of-the-art partnership that leverages technology to generate measurable performance improvement as well as deliver a proactive, interactive experience that builds customer satisfaction and business results.

Example of recent experience:

- Experienced vision planning and repositioning professional with a successful management record in Marketing Communications, Customer Engagement, and Contact Center.
- Designing the optimal Consumer Journey, converting it into a superior Customer Experience that fosters unwavering loyalty. Key successful factors have been a commitment to measurement, and consistently tracking performance and results to ensure continuous improvement and optimal outcomes. I strongly believe in the power of innovation to drive positive change within organizations, leading to better outcomes and sustained growth.



- Customer Experience: 15 years in the contact center industry, has provided expertise in driving exceptional customer service solutions.
- The approach is founded on meticulous market opportunity analysis, allowing the design of tailored solutions that resonate with customer needs and industry trends.
- Pioneering technology innovations within contact center operations have consistently enhanced efficiency and elevated customer satisfaction.

Linkactive, Puerto Rico

EVP/General Manager

2007 – 2019

Earned market leadership by transforming a transaction-driven direct marketing company into a multi-channel communications organization. Through a Brand Team approach transformed "silo" direct marketing capabilities into the premier provider of Integrated Customer Engagement Solutions in Puerto Rico.

Example of Experience:

- Repositioned a stagnant direct marketing company, transforming it into the multicultural operation LinkActiv.
- This strategic move enabled the pursuit of opportunities in the domestic US market, resulting in significant growth with US sales reaching 35% of total revenue and expanding the client portfolio.

Leo Burnett, Puerto Rico/ Caribbean

President

1999 – 2007

Provided the leadership and team building skills to transform Leo Burnett from the number 22 ranked agency in 1999 to a top 5 agency with a creative leadership reputation.

JWT Partnership PR/ Caribbean

Vice President, General Manager

1994 - 1999

Responsible for four communications divisions; Advertising, Promotions & Direct, Public relations, and the Dominican Republic operations with a total staff of 106 professionals. In addition to building the minority relationship with JWT. Executing seamless multi-media marketing solutions.

Example of experience:



- Transformed a confederation of independent communication companies into an Integrated Communications Solutions Group, achieving seamless execution and doubling revenues within three years.
- The success of this transformation led JWT, a minority partner, to acquire 100% ownership of the local operation.

YOUNG & RUBICAM

1981 – 1994

Madrid Spain: Appointed to Client and Marketing Services Director in May 1984, earning new business such as: Colgate, Kraft, Diageo, Searle, Frito Lay, KFC, and Toys 'R Us. Promoted to Madrid's General Manager in October 1989, responsible for a professional staff of 85 people and \$162 million billings. San Juan PR, Client Services responsible for designing marketing and communications solutions for blue chip clients such as Destileria Serralles, Frito Lay, American Home Products

ORGANIZATIONS:

Ronald Mcdonald House Charities

Board Member 17 years.
Board President for 11 years.

SME PR BOARD

Member 5 years

Board Advertising Agency Association PR

President, Board of Directors
Member for 11 years



Jorge L. Martinez

EDUCATIONAL BACKGROUND:

Masters Business Administration (MBA)

Decision and Information Systems, and Operations Management
Indiana University

Master of Engineering Management (MEM)

Construction and Environmental Management
Polytechnic University of Puerto

Bachelor of Science

Industrial Engineering
Universidad de Puerto Rico – Mayagüez

PROFESSIONAL EXPERIENCE:

Truenorth Corporation

Program Manager

Jorge is a professional associated with the areas of Strategic Planning and Management, Organizational Transformation, Change Management, Project Portfolio Management, Program and Project Management, and Information Systems and Technology Management. He has supported clients in the management of project and program portfolios with the purpose of achieving strategic objectives and operational and financial goals.

Jorge has more than 30 years of work experience and has been in different management roles in project and portfolio management; Technological infrastructure; management, design, and development of applications (software), and IS/IT compliance, among others. He has been successful in developing and implementing departmental strategies, improving operational efficiencies and cost control.

Example of recent experience:

- Portfolio and project management to support the Liberty Communications company in Latin America and Puerto Rico, specifically with initiatives supporting the integration of the new



mobile business area and its transition with the past services offered by AT&T.

- Assist technology leaders in negotiating the scope of the Transition Service Agreement (TSA) for IT services, leading activities required to close the negotiations and any changes to the TSA after the close of the deal.
- Validate the scenery in alignment with TSA since Day 1.
- Support in the definition of the scope, and planning of work activities before and after the closing of IT project negotiations and dependencies with the functional areas of the business.
- Management of the project portfolio and its initiatives, maintaining communication between the work team, sponsors, integrators, and parties with interest in the project, while also performing the role of project manager in key initiatives.
- Support in the preparation of status reports and ad hoc reports for the Liberty Latin America executive team.
- Up-to-date maintenance of the portfolio of projects, initiatives, and activities in the format and methodology established by the client with the corresponding project managers and escalating if necessary.

Example of experience:

- Experience in establishing governance in project and portfolio management, designing standard procedures and processes, and collaborating with senior leaders and managers in the review, selection, and prioritization of programs, initiatives, and projects in support of local strategy.
- Played the role of Business Process Owner for the standards and processes of the previous point and led/coached the Project Management Office (PMO), the Project Management Community, and the Portfolio Manager Network in the execution of their roles to ensure timely and complete completion of deliverables and realization of agreed business benefits for the projects, programs, and portfolios they represented.
- Designed, implemented, and sustained the use of the visual management system for portfolio management visibility and performance tracking against strategic objectives, and trained project sponsors, program managers, and project leaders in the activities of resource planning, and identifying and resolving cross-project issues in a timely manner to optimize overall business benefits.



- Managed specific medium to large-sized projects for AstraZeneca (AZ), where the most important was the local planning and implementation of IT infrastructure and customer service outsourcing following AZ's global strategy. Activities covered change management (including impact on employees and end users), due diligence, local resource and service transfer agreements, detailed transition planning, knowledge transfer, implementation, and monitoring of the transition. Global stakeholders and outsourced transition managers (both from AZ and the contractor) recognized that the local implementation in Puerto Rico exceeded expectations and was a complete success in minimizing end-user impact.
- Led the team of contractors responsible for maintaining and supporting existing enterprise business applications and ensured the business was supported and secure as the SAP implementation project progressed.
- Prepared and obtained approval of the strategic plan for the qualification of the IT network and associated infrastructure at all IPR Pharmaceuticals sites (Canovanas, Carolina, and Guayama).
- Led the Qualification project and technical documentation of the system including the preparation of the complete project plan, and request for proposal for the bidding process to identify the qualification contractor.
- Performed Quality Manager duties in IS to ensure IPR Pharmaceuticals met all AstraZeneca guidelines and regulatory requirements related to IT systems.
- Promoted a professional and customer service environment for all helpdesk and PC specialists to evaluate potential solutions against impact on customer service, establish service consistency, and obtain customer feedback and approval of the service provided.
- Led projects for the implementation of maintenance management systems. Designed and developed software components in the areas of Energy Management and Total Productive Maintenance.

CERTIFICATION AND LICENSES:

Portfolio Management Professional (PfMP) /
Project Management Institute

Project Management Professional (PMP)
Project Management Institute



Certified Scrum Product Owner (CSPO)
Scrum Alliance

Licensed Professional Engineer
Puerto Rico – License #: 11454PE

Lean Six Sigma Black Belt
Completed education requirements and exam.





Griselle Hernández

EDUCATIONAL BACKGROUND:

Master Business Administration (MBA)

InterAmerican University, Rio Piedra, Puerto Rico

Bachelor of Business Administration (BBA)

University of Puerto Rico, Rio Piedras

PROFESSIONAL EXPERIENCE:

Truenorth Corporation

Senior Project Manager

December 2017- Present

Griselle Hernandez has over 24 years of experience in project planning and execution for private and government implementation projects. Has proven ability to support multiple projects, coordination with diverse teams' resources, and consistent track record of on-time and on-quality delivery exceeding customer satisfaction.

Example of recent experience:

- As a Project Manager and SME, designs, leads, and implements system solutions. Responsible for the definition of solutions' scope, deliverables, and acceptance criteria to ensure the solution being implemented and services meet customer expectations.
- Managed the Capacity Analysis for the Puerto Rico Department of Health responsibilities included: analysis of data, current processes and systems, and meetings with Medicaid key personnel to determine the optimal need for human resources for the eligibility process.
- Manage the implementation of the ASES VITAL mobile application at the Health Insurance Administration (ASES).



- Manage the implementation of the Mi WICPR mobile application at the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC).
- Manage the implementation for CAVV 24/7 at the Rape Victims Support Center (CAVV).
- Manage and implement the Queue System Solution for key locations in the Medicaid Program.
- Manage and implement Virtual Appointments System at Medicaid Regional Offices. Prepared statistical reports and a dashboard for the Medicaid Executive Team.
- Manage the Queue System Solutions for the Puerto Rico Department of Health. In charge of the implementation of the solutions at 86 WIC (Special Supplemental Nutrition Program for Women, Infants, and Children) clinics, technical consultants to deploy and design.
- Manage the Sarbanes-Oxley (SOX) audit for the telecommunications industry. In charge of implementing IT General Controls and applications controls related to Business Technology, auditing activities, developing responses to audit findings, and leading remediation of audit findings.

Netxar Technologies

Principal Project
Manager/Service Delivery
Manager
2007-2017

As a Principal Project Manager, she was responsible for the direction and creation of the Project Management Office. Manages all project phases including initiating, planning, executing, closing, and controlling outcomes.

Example of Experience:

- Ensures projects comply with budget control processes and metrics.
- Responsible for the Network Operations Center (NOC), service level agreements compliance, and escalation methods.
- Thorough understanding of client business problems and both: (i) demonstrate the commitment to help the client to solve them;



and, (ii) use that knowledge to leverage the attainment of new orders.

Unisys Puerto Rico

Project Manager
2000-2006

As a project manager with Unisys, she was assigned to managing services and customer support agreements in the Global Infrastructure Services Division meeting Consulting Practice metrics. Acting as an Account Service Manager, she was responsible for leading the largest infrastructure managed services contract in Puerto Rico.

Example of Experience:

- Accountable for customer support processes, which support the line of business product personnel and operations, simplifying the management of multi-vendors in the provision of infrastructure support.
- Responsible for establishing standards and controls for the delivery of infrastructure services such as; scheduling of resources, process improvement/optimization, managing escalations, resolution ownership for boundary line issues, customer satisfaction/quality standards, and proactive analysis of service metrics.

CONTINUING EDUCATION:

ITIL Foundations

Six Sigma Green Belt

Project Financial Management Workshop

Project Estimating Workshop

Project Risk Management Workshop

Building Work Breakdown Structures

RENOVACIÓN APROBADA: 10 de marzo, 2021

RENEWAL APPROVED ON: March 10, 2021



Gobierno de Puerto Rico
Government of Puerto Rico

DEPARTAMENTO DE ESTADO
Department of State

Secretaría Auxiliar de Juntas Examinadoras
Office of the Assistant Secretary of State for Examining Boards

La Junta Examinadora de Planificadores Profesionales
The Examining Board of Professional Planners

por la presente certifica que
hereby certifies that

Yoana Liz López De Jesús

habiendo cumplido todos los requisitos de Ley, se ha inscrito en el Registro de esta Junta como
having met all the requirements of law, has been registered as:

Planificador Profesional
Professional Planner

En testimonio de lo cual se expide esta licencia para autorizar el ejercicio de dicha profesión bajo el sello de la Junta Examinadora.
In testimony whereof, this license is issued to authorize the practice of this profession, under the seal of the Examining Board.

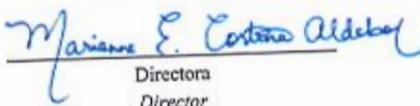
En San Juan, Puerto Rico, efectivo 10 de marzo de 2021
In San Juan, Puerto Rico, effective March 10, 2021.

Número de Licencia: 792
License Number

Vencimiento: 12 de febrero de 2025
Expires: February 12, 2025




President
(Board President)


Directora
Director



Gobierno de Puerto Rico
Government of Puerto Rico

DEPARTAMENTO DE ESTADO
Department of State

Secretaría Auxiliar de Juntas Examinadoras
Office of the Assistant Secretary of State for Examining Boards

La Junta Examinadora de Planificadores Profesionales
The Examining Board of Professional Planners

por la presente certifica que
hereby certifies that

Tatiana Marquina

habiendo cumplido todos los requisitos de Ley, se ha inscrito en el Registro de esta Junta como
having met all the requirements of law, has been registered as:

Planificador Profesional
Professional Planner

En testimonio de lo cual se expide esta licencia para autorizar el ejercicio de dicha profesión bajo el sello de la Junta Examinadora.
In testimony whereof, this license is issued to authorize the practice of this profession, under the seal of the Examining Board.

En San Juan, Puerto Rico, hoy 29 de septiembre de 2022
In San Juan, Puerto Rico, on September 29, 2022.

Número de Licencia: 965
License Number

Vencimiento: 28 de septiembre de 2026
Expires: September 28, 2026




Presidente
(Board President)


Directora
Director



Gobierno de Puerto Rico
Government of Puerto Rico

DEPARTAMENTO DE ESTADO
Department of State

Secretaría Auxiliar de Juntas Examinadoras
Office of the Assistant Secretary of State for Examining Boards

La Junta Examinadora de Planificadores Profesionales
The Examining Board of Professional Planners

por la presente certifica que
hereby certifies that

Monique Arleane Lorenzo Pérez

habiendo cumplido todos los requisitos de Ley, se ha inscrito en el Registro de esta Junta como
having met all the requirements of law, has been registered as:

Planificador Profesional
Professional Planner

En testimonio de lo cual se expide esta licencia para autorizar el ejercicio de dicha profesión bajo el sello de la Junta Examinadora.
In testimony whereof, this license is issued to authorize the practice of this profession, under the seal of the Examining Board.

En San Juan, Puerto Rico, hoy 29 de septiembre de 2022
In San Juan, Puerto Rico, on September 29, 2022.

Número de Licencia: 961
License Number

Vencimiento: 28 de septiembre de 2026
Expires: September 28, 2026




Presidente
(Board President)


Directora
Director



Gobierno de Puerto Rico
Government of Puerto Rico

DEPARTAMENTO DE ESTADO
Department of State

Secretaría Auxiliar de Juntas Examinadoras
Office of the Assistant Secretary of State for Examining Boards

La Junta Examinadora de Planificadores Profesionales
The Examining Board of Professional Planners

por la presente certifica que
hereby certifies that

Desiree Pastrana Otero

habiendo cumplido todos los requisitos de Ley, se ha inscrito en el Registro de esta Junta como
having met all the requirements of law, has been registered as:

Planificador Profesional
Professional Planner

En testimonio de lo cual se expide esta licencia para autorizar el ejercicio de dicha profesión bajo el sello de la Junta Examinadora.
In testimony whereof, this license is issued to authorize the practice of this profession, under the seal of the Examining Board.

En San Juan, Puerto Rico, hoy 29 de septiembre de 2022
In San Juan, Puerto Rico, on September 29, 2022.

Número de Licencia: 964
License Number

Vencimiento: 30 de septiembre de 2026
Expires: September 30, 2026




Presidente
(Board President)


Directora
Director

RENOVACIÓN APROBADA: 22 de octubre, 2019

RENEWAL APPROVED ON: October 22, 2019



Gobierno de Puerto Rico
Government of Puerto Rico

DEPARTAMENTO DE ESTADO
Department of State

Secretaría Auxiliar de Juntas Examinadoras
Office of the Assistant Secretary of State for Examining Boards

La Junta Examinadora de Ingenieros y Agrimensores
The Examining Board of Engineers and Land Surveyors

por la presente certifica que
hereby certifies that

Evan F González Baker

habiendo cumplido todos los requisitos de Ley, se ha inscrito en el Registro de esta Junta como
having met all the requirements of law, has been registered as:

Ingeniero Licenciado, RPA
Licensed Engineer, PRS

En testimonio de lo cual, se expide esta licencia para el ejercicio de dicha profesión, bajo el sello de la Junta Examinadora.
In testimony whereof, this license is issued to practice this profession, under the seal of the Board of Examiners.

En San Juan, Puerto Rico, efectivo 01 de octubre de 2019
In San Juan, Puerto Rico, effective October 01, 2019.

Número de Licencia: 14981
License Number

Vencimiento: 30 de septiembre de 2024
Expires: September 30, 2024



[Signature]
Profesional

[Signature]
Director
Director



RENOVACIÓN APROBADA: 31 de marzo, 2020

RENEWAL APPROVED ON: March 31, 2020



Gobierno de Puerto Rico
Government of Puerto Rico

DEPARTAMENTO DE ESTADO
Department of State

Secretaría Auxiliar de Juntas Examinadoras
Office of the Assistant Secretary of State for Examining Boards

La Junta Examinadora de Ingenieros y Agrimensores
The Examining Board of Engineers and Land Surveyors

por la presente certifica que
hereby certifies that

Francisco Roberto Klein Moya

habiendo cumplido todos los requisitos de Ley, se ha inscrito en el Registro de esta Junta como
having met all the requirements of law, has been registered as:

Ingeniero Licenciado
Licensed Engineer

En testimonio de lo cual, se expide esta licencia para el ejercicio de dicha profesión, bajo el sello de la Junta Examinadora.
In testimony whereof, this license is issued to practice this profession, under the seal of the Board of Examiners.

En San Juan, Puerto Rico, efectivo 24 de julio de 2020
In San Juan, Puerto Rico, effective July 24, 2020.

Número de Licencia: 20659
License Number

Vencimiento: 23 de julio de 2025
Expires: July 23, 2025



[Signature]
Presidente

[Signature]
Directora
Director

Ing. Francisco R. Klein Moya, PE
20659 PE
Exp. 3/31/2022
Miembro en Propiedad
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707-750-2250
800-981-5771
Sede CIAPR
Urb. Roosevelt 560 Antillas Nuevas San Juan PR

CIAPR
UNIVERSIDAD DE PUERTO RICO
UNIVERSITY OF PUERTO RICO

Un Colegio fuerte, organizado y unido, en ruta a los 100 años.



Gobierno de Puerto Rico
DEPARTAMENTO DE HACIENDA
Área de Rentas Internas

Certificación de Radicación de Planillas

Fecha: 01 marzo 2024
ID de Contribuyente: 04731-41248
ID de Correspondencia: L1376588480

ESTUDIO TECNICOS INC
PO BOX 12144
SAN JUAN PR 00914-0144

Este Comerciante **ha cumplido** con la radicación de sus Planillas Mensuales de Impuesto sobre Ventas y Uso y/o Planilla Mensual de Impuesto sobre Importaciones.

ADVERTENCIA:

De no estar de acuerdo con esta información, deberá presentar su reclamación acompañada de la evidencia correspondiente en uno de nuestros Centros de Servicio al Contribuyente (SAC). Para conocer la localización de los SAC, puede acceder a www.hacienda.pr.gov. Si tiene preguntas relacionadas a este documento, puede comunicarse al Centro de Contacto Hacienda Responde al (787) 622-0123.

VALIDACIÓN

Para verificar si este Certificado es válido, acceda <https://suri.hacienda.pr.gov> y presione el enlace de "Validar Certificados y Licencias".

Vigencia: Este Certificado es válido hasta 30 días después de la fecha de emisión.



CERTIFICATE OF GOOD STANDING

I, **Omar J. Marrero Díaz**, Secretary of State of the Government of Puerto Rico,

CERTIFY: That, **ESTUDIOS TECNICOS, INC.**, register number **60775**, a for profit domestic corporation, organized under the laws of Puerto Rico on **July 31, 1985**, has complied with the filing of its Annual Reports.



IN WITNESS WHEREOF, the undersigned by virtue of the authority vested by law, hereby issues this certificate and affixes the Great Seal of the Government of Puerto Rico, in the City of San Juan, Puerto Rico, today, **April 20, 2023**.

Omar J. Marrero Díaz
Secretary of State

To validate this certificate go to: <https://estado.pr.gov/>

This certificate is valid for one (1) year from issue date (Regulation 8688, Art. 26). However, it is subject to faithful compliance with the provisions of Chapter XV and Chapter XXI of Act 164-2009, as applicable.

Certificate Validation Number: **541964-19297625**



THIS CERTIFIES THAT

Estudios Tecnicos Inc.

* Nationally certified by the: **PUERTO RICO MINORITY SUPPLIER DEVELOPMENT COUNCIL**

*NAICS Code(s): 5411690

* Description of their product/services as defined by the North American Industry Classification System (NAICS)

02/05/2024

Issued Date

PR03650

Certificate Number

**Ying McGuire
NMSDC CEO and President**

Francisco S. Cabrera

01/28/2025

Expiration Date

By using your password (NMSDC issued only), authorized users may log into NMSDC Central to view the entire profile: <http://nmsdc.org>

[Certify, Develop, Connect, Advocate.](#)

* MBEs certified by an Affiliate of the National Minority Supplier Development Council, Inc.®

Mayra Rivera

From: Dun & Bradstreet <DandB@click.dandb.com>
Sent: Friday, August 12, 2022 2:26 PM
To: Mayra Rivera
Subject: Your DUNS Lookup Request for ESTUDIOS TECNICOS INC



\$todayformat(0,MM/dd/yyyy)

\$FIRST_NAME\$ Rivera,

The following is the Dun & Bradstreet D-U-N-S® Number for **ESTUDIOS
TECNICOS INC**

D-U-N-S number: **185549094**

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Pending ID Assignment

Expiration Date



FSD Number



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ESTUDIOS TECNICOS INC

Active Registration



Unique Entity ID:
F24JDZ6FKCL5

Doing Business As:
(blank)

Purpose of Registration:
All Awards

Expiration
Date

Sep 28, 2024

CAGE/NCAGE:
4T7Q4

Physical Address:
113 AVE DOMENECH
SAN JUAN, PR 00901
USA



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Gobierno de Puerto Rico
Administración de Servicios Generales
Registro Único de Licitadores

CERTIFICADO DE ELEGIBILIDAD

FECHA DE EXPEDICIÓN	NÚMERO DE CERTIFICACIÓN	FECHA DE VENCIMIENTO
21 de diciembre de 2023	202338516	21 de diciembre de 2024

Nombre del Licitador: Estudios Tecnicos Inc

Numero de Licitador: 6211

Unique Entity ID (SAM.gov): F24JDZ6FKCL5

Dirección Postal: PO Box 12144 San Juan, PR 00914

Teléfono: (787) 751-1675

Correo Electrónico: mayrae@estudios tecnicos.com

PERSONAS AUTORIZADAS A FIRMAR	
NOMBRE Y APELLIDOS	TÍTULO QUE OSTENTA
Graham A Castillo Pagan	Presidente

Será responsabilidad de cada Agencia Ejecutiva, Corporación Pública o Municipio validar la elegibilidad del licitador antes de adjudicar cualquier procedimiento de adquisición, órdenes de compra u otorgar contratos. Así como el de garantizar que el licitador puede proveer los bienes y servicios no profesionales conforme las normas que lo regulan.

ADVERTENCIA: Cualquier alteración anula este certificado y podría ser sancionado criminalmente conforme a las disposiciones aplicables del Código Penal de Puerto Rico



Validación: <https://validacion.pr.gov/>, debe usar el número de certificado como código de validación



Gobierno de Puerto Rico
Administración de Servicios Generales
Registro Único de Proveedores de

Servicios Profesionales

CERTIFICADO ÚNICO DE PROVEEDORES

FECHA DE EXPEDICIÓN

28 de diciembre de 2023

NÚMERO DE CERTIFICACIÓN

202338702

FECHA DE VENCIMIENTO

28 de diciembre de 2024

Nombre del Proveedor: Estudios Tecnicos Inc

Número de Proveedor: 6211

Unique Entity ID (SAM.gov): F24JDZ6FKCL5

Dirección Postal: PO Box 12144 San Juan, PR 00914

Teléfono: (787) 751-1675

Correo Electrónico: mayrae@estudios tecnicos.com

PERSONAS AUTORIZADAS A FIRMAR

NOMBRE Y APELLIDOS	TÍTULO QUE OSTENTA
Jose J Villamil	Presidente Junta Directores
Graham A Castillo Pagan	Presidente

Será responsabilidad de cada Agencia Ejecutiva, Corporación Pública o Municipio validar la elegibilidad del proveedor antes de otorgar cualquier contrato. Así como el de garantizar que el proveedor pueda ofrecer los servicios profesionales conforme a las normas que lo regulan.

ADVERTENCIA: Cualquier alteración anula este certificado y podría ser sancionado criminalmente conforme a las disposiciones aplicables del Código Penal de Puerto Rico.





DEPARTAMENTO DEL
TRABAJO
Y RECURSOS HUMANOS
GOBIERNO DE PUERTO RICO

GOBIERNO DE PUERTO RICO
DEPARTAMENTO DEL TRABAJO Y RECURSOS HUMANOS

CERTIFICACION

LA UNIDAD DE EMPLEO: ESTUDIOS TECNICOS INC

REGISTRADO CON EL NÚMERO DE CUENTA: 2546970003 Y EIN: 660419374

EFFECTIVO EL: 01 DE SEPTIEMBRE DE 1986

- * NO TIENE DEUDA PARA LOS PROGRAMAS DE SEGURO POR DESEMPEÑO Y SEGURO POR INCAPACIDAD HASTA EL TRIMESTRE TERMINADO EL 31 DE DICIEMBRE DE 2023

EN SAN JUAN, PUERTO RICO HOY 06 DE FEBRERO DE 2024.

Belmis Lizardis Cama
BELMIS LIZARDIS CAMA

SECCION DE CONTRIBUCIONES



NEGOCIADO DE SEGURIDAD DE EMPLEO | DIVISION DE CONTRIBUCIONES



Certificación de Radicación de Planillas

Fecha: 25 marzo 2024
ID de Contribuyente: 04731-41248
ID de Correspondencia: L0258985664

ESTUDIO TECNICOS INC
PO BOX 12144
SAN JUAN PR 00914-0144

Contribución sobre Ingresos - Entidad Jurídica

Año Contributivo	Estatus
2022	Planilla radicada
2021	Planilla radicada
2020	Planilla radicada
2019	Planilla radicada
2018	Planilla radicada

Advertencia:

De no estar de acuerdo con esta información, deberá presentar su reclamación acompañada de la evidencia correspondiente en uno de nuestros Centros de Servicio al Contribuyente (SAC). Para conocer la localización de los SAC, puede acceder a www.hacienda.pr.gov. Si tiene preguntas relacionadas a este documento, puede comunicarse al Centro de Contacto Hacienda Responde al (787) 622-0123.

VALIDACIÓN

Para verificar si este Certificado es válido, acceda a <https://suri.hacienda.pr.gov> y presione el enlace de "Validar Certificados y Licencias".



DEPARTAMENTO DEL
TRABAJO
Y RECURSOS HUMANOS
GOBIERNO DE PUERTO RICO

PROGRAMA DE SEGURO SOCIAL PARA CHOFERES Y OTROS EMPLEADOS

CERTIFICACIÓN ELECTRÓNICA

NÚMERO SEGURO SOCIAL PATRONAL: 660-419374

NÚMERO DE CERTIFICADO: S-24-045321-524638

EL PROGRAMA DE SEGURO SOCIAL PARA CHOFERES Y OTROS EMPLEADOS DEL DEPARTAMENTO DEL TRABAJO Y RECURSOS HUMANOS CERTIFICA:

QUE SE HA REALIZADO UNA BÚSQUEDA EN LOS ARCHIVOS DE EXPEDIENTES DE LA SECCIÓN DE DETERMINACIÓN DE PATRONOS Y COBROS DE CUENTAS ATRASADAS Y DE LA MISMA SURGE QUE:

ESTUDIOS TECNICOS INC NO APARECE REGISTRADO EN ESTE PROGRAMA.

LA INFORMACIÓN INCLUIDA EN ESTE DOCUMENTO ES VÁLIDA HASTA: 31 DE MARZO DE 2024

EN TESTIMONIO DE LO CUAL SE EXPIDE LA PRESENTE CERTIFICACION.

EN SAN JUAN, PUERTO RICO, **01 DE FEBRERO 2024**

Para validar la información contenida en esta certificación, favor acceder a:
To validate the information in this certificate, please access the following URL:

<http://www.pr.gov/validacionelectronica>



ADVERTENCIA: Cualquier alteración anula el documento y constituirá violación al artículo 292 del Código Penal.

WARNING: Any alteration voids this document and constitutes a violation of article 292 of the Penal Code.

* Favor de utilizar el núm. de solicitud como código de validación

* Please use the Application number as validation code.

ESTE DOCUMENTO ES EMITIDO ELECTRONICAMENTE
THIS IS A ELECTRONIC SUBMITTED DOCUMENT



Gobierno de Puerto Rico
DEPARTAMENTO DE HACIENDA
Área de Rentas Internas

Certificación de Deuda

Fecha: 25 marzo 2024
ID de Contribuyente: 04731-41248
ID de Correspondencia: L0397979328

ESTUDIO TECNICOS INC
PO BOX 12144
SAN JUAN PR 00914-0144

Certifico que el contribuyente identificado en la parte superior de este documento no tiene deudas por ningún concepto incluyendo contribución sobre ingresos al día 25 marzo 2024 en nuestro sistema.

IMPORTANTE:

De estar de acuerdo con esta información: deberá realizar el pago a través de SURI <https://suri.hacienda.pr.gov> a la mayor brevedad posible para así evitar la acumulación de intereses.

De no estar de acuerdo con esta información: deberá presentar su reclamación acompañada de la evidencia correspondiente en cualquiera de nuestros Centros de Servicio al Contribuyente (SAC). Para conocer la ubicación de estos centros, puede acceder a www.hacienda.pr.gov. Si tiene preguntas relacionadas a este documento, puede comunicarse con nuestro Centro de Llamadas Hacienda Responde al (787) 622-0123.

Advertencia: Este documento incluye un detalle de deuda de contribuciones asociadas a su cuenta con balances adeudados, incluyendo intereses, recargos, penalidades, multas y otros, a la fecha de emisión del mismo . Además, esta certificación no incluye deudas pendientes de tasar o en proceso de investigación a la fecha de emisión .

VALIDACIÓN:

Para verificar si este Certificado es válido, acceda <https://suri.hacienda.pr.gov> y presione el enlace de "Validar Certificados y Licencias".

Vigencia: Este Certificado es válido hasta 30 días después de la fecha de emisión.

CERTIFICADO DE REGISTRO DE COMERCIANTE

Nombre de localidad:

TRUENORTH CORPORATION
B7 CALLE TABONUCO
STE 1603
GUAYNABO PR 00968-3342

Nombre legal:

TRUENORTH CORPORATION
1510 AVE FD ROOSEVELT
STE 1303
GUAYNABO PR 00968-2624

0061057-0033

Agente retenedor

Fecha de emisión:

16-oct.-2023

Fecha de expiración:

31-ene.-2025

Tipo de certificado: Comerciante

Código NAICS:

42343

54169

Actividad comercial:

Comerciantes Mayoristas de Computadoras, Equipo Periférico y Software

Otros Servicios de Consultoría Científica y Técnica

Certifico que este comerciante está inscrito en el Registro de Comerciantes del Departamento de Hacienda.



**Secretaria Auxiliar
Área de Rentas Internas**

Este certificado no es transferible y deberá exhibirse en todo momento en un lugar visible al público en la localidad indicada. Para verificar si este certificado es válido, acceda a <https://suri.hacienda.pr.gov> y presione el enlace "Valide certificados y licencias".



L1655691456



Gobierno de Puerto Rico
Administración de Servicios Generales
Registro Único de Licitadores

CERTIFICADO DE ELEGIBILIDAD

FECHA DE EXPEDICIÓN

NÚMERO DE CERTIFICACIÓN

FECHA DE VENCIMIENTO

24 de octubre de 2023

202336007

24 de octubre de 2024

Nombre del Licitador: TRUENORTH CORP

Numero de Licitador: 7908

Unlque Entity ID (SAM.gov): YFQNH88RR825

Dirección Postal: PMB 353 1353 RT 19 Guaynabo, PR 00966

Teléfono: (787) 706-3033

Correo Electrónico: accounting@truenorth.pr

PERSONAS AUTORIZADAS A FIRMAR

NOMBRE Y APELLIDOS	TÍTULO QUE OSTENTA
Gabriel Fernandez Ferrer	Chief Executive Officer
William Roman Ubiñas	Secretario
Marcos Fabian Fejgielman Szenfain	Subtesorero

*Este Licitador tiene otras personas autorizadas a firmar ofertas. Favor de consultar la página de Internet del Registro Único de Licitadores o contactar al Licitador para más información.

Será responsabilidad de cada Agencia Ejecutiva, Corporación Pública o Municipio validar la elegibilidad del licitador antes de adjudicar cualquier procedimiento de adquisición, órdenes de compra u otorgar contratos. Así como el de garantizar que el licitador puede proveer los bienes y servicios no profesionales conforme las normas que lo regulan.

ADVERTENCIA: Cualquier alteración anula este certificado y podría ser sancionado criminalmente conforme a las disposiciones aplicables del Código Penal de Puerto Rico.



Validación: <https://validacion.pr.gov/>, debe usar el número de certificado como código de validación

RV.20220729



CERTIFICADO DE CUMPLIMIENTO ("GOOD STANDING")

Yo, Omar J. Marrero Díaz, Secretario de Estado del Gobierno de Puerto Rico,

CERTIFICO: Que, TRUENORTH CORP., registro número 124654, una corporación doméstica con fines de lucro organizada bajo las leyes de Puerto Rico el 14 de diciembre de 2001, ha cumplido con la radicación de sus Informes Anuales.



EN TESTIMONIO DE LO CUAL, firmo el presente y hago estampar en él el Gran Sello del Gobierno de Puerto Rico, en la ciudad de San Juan, Puerto Rico, hoy, 5 de febrero de 2024.

Omar J. Marrero Díaz
Secretario de Estado

Para validar este certificado acceda a:

<https://estado.pr.gov/>

Este certificado es válido por un (1) año a partir de la fecha de su expedición (Reglamento 8688, Art. 26). Sin embargo, está sujeto al fiel cumplimiento de las disposiciones del Capítulo XV y Capítulo XXI de la Ley 164-2009, según aplique.

Número de Validación del Certificado: 629910-19715602