

**Texas Public Finance Authority
Request for Qualifications
for Management Consultant Services
RFP No. 347-26-0030**

QUESTIONS AND ANSWERS

The following questions were submitted to the Authority by 12:00 PM (Noon) CT, October 13, 2025:

1. Is there an incumbent currently providing these services?

Answer: The incumbent's management consulting services contract expired on August 31, 2025.

2. Will the selected firm be expected to provide on-site support, and if so, to what extent?

Answer: TPFA anticipates that the services performed under the management consulting contract will be performed in person.

3. Could you provide the budget or anticipated funding range for this scope of work? Does TPFA have a budget outlined for this project that they can share? Has the budget allocation for this engagement changed or remained consistent with the previous contract term?

Answer: The Not-To-Exceed amount for the management consulting contract is \$120,000.

4. What is the expected timeline for the review, planning, and implementation phases?

Answer: The specific timeline will be determined by the selected respondent in consultation with the TPFA and will conclude August 31, 2026.

5. Are there existing data management systems, tools, or platforms currently in use that the consultant should be familiar with?

Answer: TPFA does not expect the selected respondent to be familiar with the numerous data management systems, tools or platforms currently in use by the agency.

6. Are there any anticipated deliverables, reports, or presentations required throughout or at the conclusion of the contract?

Answer: Not determined at this time.

7. TPFA define a “better offer” beyond cost — is it measured by value-added capabilities, innovation, risk reduction, or delivery performance?

Answer: Relevant experience and qualifications will be used in evaluating responses.

8. Are there specific challenges or limitations with the incumbent vendor that TPFA hopes to address or improve upon?

Answer: No.

9. What differentiating factors would TPFA consider compelling enough to justify transitioning from the incumbent vendor?

Answer: Refer to response in Question No. 7.

10. What outcomes or success metrics does TPFA prioritize for this engagement (e.g., cost efficiency, turnaround time, scalability, knowledge transfer)?

Answer: TPFA is seeking completion of the initial assignments covered in the response to Question No. 15. There are no predetermined outcomes or success metrics for completion of the first assignment, and any outcomes or success metrics will be determined by the TPFA and the selected respondent for the remaining assignments.

11. How will qualitative factors such as technical approach, innovation, and team capability be weighted relative to cost in the evaluation process?

Answer: Relevant experience and qualifications will be used in evaluating responses.

12. Beyond core deliverables, does TPFA expect additional services such as leadership training, technical workshops, documentation playbooks, or post-engagement support?

Answer: No.

13. What are TPFA’s expectations regarding knowledge transfer or upskilling of internal staff?

Answer: Refer to response to Question No. 15.

14. Is TPFA seeking a long-term strategic partner who can provide ongoing advisory input, or a vendor focused solely on defined deliverables?

Answer: TPFA is not seeking a long-term strategic partner. The services will be focused on the scope referenced in the response to Question No. 15.

15. How many roles or resources are anticipated to be included within the scope of this project? Does TPFA anticipate that the planned process improvement efforts outlined in the RFP will be manual or automated flows? What specific operational areas are targeted for improvement?

Answer: The roles and resources will be determined based on the specific assignment. The initial assignment would involve reviewing the agency's policies & procedures to assure conformance with applicable laws, regulations, and best practices. Certain agency functions will be identified and analyzed to determine if such processes may be automated to improve efficiency and productivity, including identifying systems that may be required for automation and records retention.

16. Is there a page limit for responses?

Answer: There is no page number limit for responses.

17. Please outline any formatting requirements or preferences for responses.

Answer: There are no formatting requirements for responses.

18. Are there existing benchmarks or KPIs TPFA wants to improve?

Answer: No.

19. When and how will fee negotiations occur?

Answer: Compensation will be addressed during contract negotiations following award.

20. Is there a preferred pricing model (hourly, fixed, milestone-based)?

Answer: There is no predetermined pricing module for the management consulting contract.

21. What constitutes a "fully completed" HUB Subcontracting Plan? Are there penalties for non-performance under the HUB plan?

Answer: Each response requires submission of a completed Exhibit A - HUB Subcontracting Plan ("Plan"), as designated under Section 2.a. of the Plan, regardless of whether or not a respondent will or will not be subcontracting any portion of the

management consultant contract. The Plan is posted to the ESBD at: <https://www.txsmartbuy.com/esbd>.

22. How will TPFA handle proprietary information? What safeguards exist for trade secrets?

Answer: Refer to the instructions in Section 2.6.(b) of the RFQ to take the necessary precautions to safeguard trade secrets, proprietary or otherwise confidential information, when submitting responses.

23. What is the expected duration and format of interviews? Will interviews be virtual or in-person?

Answer: After evaluating responses, TPFA will determine whether to interview respondents.

24. What are the insurance requirements?

Answer: The insurance requirements will be covered during contract negotiations following award.

25. What cybersecurity standards must be met?

Answer: The cyber security standards will be covered during contract negotiations following award. Additionally, Section B.2.14 of the RFQ addresses TPFA required cybersecurity training completion of the selected respondent.

26. What constitutes acceptable use of AI under this contract?

Answer: Acceptable use of AI will be determined by TPFA in consultation with the selected respondent.