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## ADDENDUM NO. 1

To: All Prospective Bidders

From: David Coderre, VP of Procurement

Date: March 17, 2025

Re: Request for Proposals (RFP) # 25-09 Consulting Services for a Redevelopment Master Plan at 12-1 Great Brook Valley Gardens

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This addendum forms part of and modifies the Request for Proposals dated February 19, 2025, and consists of four (4) pages.

Where any items called for in the RFP documents are supplemented here, the supplemental requirements shall be considered as added thereto. All other terms and conditions shall remain unchanged and in full effect.

**PLEASE NOTE:**

**FAILURE TO ACKNOWLEDGE RECEIPT OF ADDENDA ON THE PRICE PROPOSAL FORM MAY SUBJECT TO DISQUALIFICATION.**

**ITEM NO. 1: Questions for clarification.**

Please see below for responses to inquiries:

**Q1. Can you provide a ballpark idea of the available budget? It would be helpful to have a sense of the fee so that all teams can craft their proposals to a similar level of effort.**

**A1.** While we are unable to provide a specific budget figure at this time, we encourage proposers to develop a scope and fee that align with similar Master Planning efforts. Proposals should reflect a comprehensive approach that meets all of the outlined objectives of the RFP.

**Q2. Do you have any information about the schedule/timeframe to complete the Master Plan work? For example, by the end of 2025 or by summer 2026?**

**A2.** We anticipate starting the Masterplan work in the spring/summer of 2025 and completing the work by spring/summer of 2026, depending on the final scope and stakeholder engagement process.

**Q3. Regarding scope for community engagement, how many resident & public meetings do you envision, and would they be remote, in-person, or hybrid?**

**A3.** We envision 3-5 resident and public meetings throughout the process. These meetings will be a mix of in-person, remote, and hybrid formats to maximize accessibility and participation. We welcome proposers' recommendations on engagement strategies. Meetings will likely be held onsite at 180 Constitution, our community space, between 5:00 PM and 7:00 PM after normal business hours to maximize community engagement.

**Q4. Will the project need to fit within existing zoning requirements, or does the scope include drafting new zoning?**

**A4.** The project scope includes evaluating how the redevelopment aligns with existing zoning requirements. If zoning changes are necessary to achieve the vision of the Master Plan, the selected firm will be expected to provide guidance on potential rezoning options for a future Developer to implement.

**Q5. Regarding the study to determine if an Educational Facility is needed, does this require a complete analysis of all the schools in Worcester, evaluation of current and projected enrollment, etc.?**

**A5.** The study should focus on assessing the need for an Educational Facility within the redevelopment area and the surrounding school district, considering factors such as existing school capacity, projected enrollment, and accessibility. A full citywide school analysis is not required, but the study should incorporate relevant data from Worcester Public Schools and other local educational institutions as needed.

**Q6. RFP page 12 of 41, Part 2 - Price Proposal - mentions that price must break down share into a monthly fee for state-aided and federally aided programs. Does this apply? If so, how much is state-funded and how much is federally funded?**

**A6.** The Great Brook Valley development is an entirely federally funded development. Therefore, the state-aided portion does not apply.

**Q7.** The Price Proposal form asks for "the professional services fee (overhead and fixed fee) included in the lump sum cost." Please clarify what this means. It is our understanding that the entire scope of work is professional services. Do you need overhead broken out separately from fixed-fee, or both combined?

**A7.** The professional services fee refers to both overhead and fixed fees included within the lump sum cost. You may choose to provide a combined figure or break it out separately, but the total cost should be clear and comprehensive.

**Q8.** Page 12 also asks for an hourly fee structure. Should this be included as a separate sheet?

**A8.** Yes, an hourly fee structure should be included as a separate sheet along with the price proposal, as requested in Part 2 of the Price Proposal section.

**Q9.** Please clarify what is needed for "cost estimates" listed under Required Deliverables (page 14 of 41). Cost estimates are typically a separate specialty from financial analysis and economic planning and could be a major cost component of the scope. For example, do you need cost estimates of demolition, site clearance, infrastructural upgrades, building construction, a new school, etc.?

**A9.** The cost estimates should cover key redevelopment expenses, including demolition, site clearance, infrastructural upgrades, building construction, civil surveys, engineering work, a new educational facility, etc. If necessary, proposers may outline the level of cost estimating expertise they will provide or suggest subcontracting this component.

**Q10.** Page 21 of the RFP contains a "Certificate of Corporation Clerk" form. Our firm is an LLC and not a corporation. In lieu of completing this form, could we instead provide documents stating that we are registered as an LLC?

**A10.** Yes, you may submit documentation proving your LLC registration in place of the Certificate of Corporation Clerk form.

**Q11.** Please provide clarification on the financial analysis task: "Conduct a financial analysis, including cost estimates, potential funding sources, and projected economic impacts?" We assume that the cost estimates and funding sources are project related. Does this mean the fiscal impacts for the Housing Authority or the City?

**A11.** The financial analysis should include cost estimates, potential funding sources, and projected economic impacts related to the redevelopment project. While the focus is on WHA's financial implications, broader economic impacts on the City of Worcester may also be considered in the master plan. The potential funding sources are critical, please list experience with programs including HUD RAD; HUD Section 18; HUD Faircloth; HUD Choice Neighborhoods; IRS Low Income housing Tax Credits etc.

**Q12.** Should we provide a project approach, and if so, in which section of the proposal?

**A12.** If you deem it beneficial to your response, yes, please add a project approach. This can be included in the Technical Proposal section.

**Q13.** Do you have a target DBE requirement for this project?

**A13.** The RFP does not specify a Disadvantaged Business Enterprise (DBE) requirement related to the Master Planning process, but it is important to note that any projections included in the resulting plan will have DBE requirements.

**Q14.** Can you provide an approximate budget and/or the funding sources for this project?

**A14.** Please refer to Question and Answer #1.

**Q15.** Does WHA have a budget or fee range in mind for the redevelopment master plan? Clarifying this will help us align our proposed work plan and scope with WHA's financial expectations.

**A15.** Please refer to Question and Answer #1.

**Q16.** The RFP states that the price proposal should include a "monthly fee broken down by State Aided and Federally Aided programs and an hourly fee structure for special projects." Can WHA clarify which specific state and federal funding sources we should reference or should this be omitted as this is considered a "special project"?

**A16.** Please refer to Question and Answer #6.

**Q17.** Does WHA have a recent survey or other measured drawings of the Great Brook Valley property? If not, should we anticipate conducting a new or augmented survey as part of the master plan scope?

**A17.** We do not have a recent full-site survey or updated measured drawings of the Great Brook Valley property. Proposers should anticipate conducting a new or augmented survey as part of the Master Plan scope, particularly for infrastructure, topography, and site conditions necessary to support redevelopment planning. If specific existing data is available, it will be shared with the selected firm.

**Q18.** Does WHA have a target unit count or mix in mind for affordable vs. market rate housing or will this be determined collaboratively during the development of the master plan?

**A18.** We anticipate replacing the existing 560 public housing units and adding hundreds of new affordable housing opportunities, along with some market-rate units. However, the exact unit count and mix will be determined collaboratively during the development of the Master Plan, based on market analysis, financial feasibility, and community needs.

**Q19.** Does WHA envision the 560 replacement units being created through demolition and new construction, rehabilitation, or a combination of both? Understanding this will help shape our design and phasing strategy.

**A19.** We anticipate that the majority of the 560 replacement units will be created through demolition and new construction, rather than rehabilitation. However, the final approach will be determined as part of the Master Plan process, considering structural assessments, financial feasibility, and resident relocation considerations. The selected firm will help evaluate options and develop a phasing strategy that ensures minimal disruption to current residents while achieving long-term redevelopment goals.

**Q20.** The Minimum Evaluation Criteria form (item 4) requires a signed affidavit of good standing. Would a Certificate of Good Standing issued by the state fulfill this requirement or is WHA expecting a specific form to be provided with the proposal?

**A20.** A Certificate of Good Standing issued by the state will fulfill this requirement. We do not require a specific form to be provided with the proposal, but proposers must ensure that the document is current and valid at the time of submission.

**Q21.** For proof of licensure, are registration numbers acceptable, or does WHA require copies of the actual physical licenses?

**A21.** We require copies of the licenses, but not the physical originals. Registration numbers alone are not sufficient; the selected respondent should submit digital or scanned copies of all relevant professional licenses for key personnel.