

**ADDENDUM NO. 1**

**To**

**MassDevelopment Request for Qualifications**

**For**

**Specialized Economic Development, Transformative Development, and Real Estate Services**

**Response to Questions**

Posted May 3, 2024

**Q1: We saw the RFQ that MassDevelopment just released and were curious whether our current contract (that runs to 2026) has us covered or whether we should apply for this to remain eligible to bid for future projects?**

A1: All current house doctor contracts will remain active and may be utilized for services through completion dates. However, if a current house doctor contract is set to expire in 2026, the firm/consultant would not be able to provide further services to MassDevelopment beyond the completion date unless it received a contract award under a new RFQ. That being said, we anticipate another RFQ will be released before the 2026 contract expiration and would recommend applying for an RFQ release closer to the 2026 expiration date.

**Q2: What is the difference between the Principal in Charge and the Project Manager and their roles?**

A2: The terms can have different meanings depending on how the agency defines the roles, but generally, the Principal in Charge holds a high-ranking position in an organization. On the other hand, a manager is responsible for directing and overseeing the work of others within an organization. In some cases, a principal may also act as a manager, but the roles can be distinct, with the principal focusing on overall strategy and direction. In contrast, managers focus on day-to-day operations and personnel management.

**Q3: If we are only applying for the Translation portion and nothing else, will General Liability Insurance and Worker's Comp Insurance be enough to fill the requirements, or will we need to purchase additional insurance?**

A3: We encourage you to apply to the RFQ with evidence of what levels of insurance you carry and what insurance you are willing to obtain to meet the requirements stated on pages 13-14. Any requests for exceptions to the insurance requirements presented in the RFQ should be included in the proposal submission. That does not guarantee, however, that any exceptions will be accepted by MassDevelopment.

**Q4: I don't believe I qualify to require insurance per section H of the application---do I need to submit something in writing to further explain this?**

A4: Section 6: H insurance requirements are only required for agencies applying as Real Estate Appraisers (Scope of Services #12). A final Certificate of Insurance (COI) with the required insurance language found in section 6, pages 13-14, will be required before the final execution of any contract. We encourage you to apply to the RFQ with evidence of what levels of insurance you carry and what insurance you are willing to obtain to meet the requirements stated on pages 13-14. Any requests for exceptions to the insurance requirements presented in the RFQ should be included in the proposal submission. That does not guarantee, however, that any exceptions will be accepted by MassDevelopment.

**Q5: The attached is my cover letter—will this suffice or am I missing anything since the RFQ doc didn't specify a template for the cover letter?**

Q5: A cover letter is not required.

**Q6: Is our company eligible to apply given our active existing House Doctor Contract with MassDevelopment for Planning & Permitting Services? For context, the date of completion for that contract is June 28, 2026.**

A6: Please see A1.

**Q7: We specialize in housing needs assessments, housing market studies, and other housing-related planning and analytical activities including zoning and regulations. We did not see a category well suited for these skills - could you suggest one? Or, if we would be better suited for a different house doctor contract, could you advise when that pool might open for new applications again?**

A7: The Economic Development Capacity Building may be a category you'd like to consider, noting your specialty. The next RFQ to include other categories such as permitting advisory and master planning has not yet been scheduled but will likely be in 2026.

**Q8: Is there a pre-established overall DBE goal for the house doctor contract, or will DBE goals be set at the time the specific task orders are issued?**

A8: While there are no pre-established DBE goals for the overall house doctor contract or task orders, the Agency encourages respondents to utilize qualified DBEs as subcontractors and suppliers where possible.

**Q9: We have identified and contacted five DBE firms who have agreed to be part of our team and we will provide their relevant certification documentation. When completing the table that appears on Exhibit C, are we permitted to enter "TBD" in the Dollar Amount of Participation section, as the scope of the potential assignments is not known at this time?**

A9: TBD is acceptable.

**Q10: If we are qualified and selected for a particular scope of services, are we allowed to subcontract with other firms who have qualified under this contract on their own, especially those with DBE certification?**

A10: Yes.

**Q11: As we anticipate meeting the DBE goals for this contract, do we have to respond to Question 2 on page 37 of the RFQ? (“Explain the good faith efforts the respondent has already made to obtain Diverse Business Enterprise participation.”) Demonstration of “good faith efforts” is typically needed for cases when firms have difficulty meeting DBE goals, which has not been our experience with DBE subconsultants.**

A11: Yes.

**Q12: Are the new contracts proposed to take effect after 6/30/2024?**

A12: Yes.

**Q13: Where did the \$5,000,000 umbrella liability policy come from? It's not in the attached contract, and that's a prohibitively expensive thing to obtain for any relatively small business to obtain. Is it possible to get a waiver?**

A13: The \$5,000,000 umbrella policy has been an insurance requirement for the agency since its inception. We encourage you to apply to the RFQ with evidence of what levels of insurance you carry and what insurance you are willing to obtain to meet the requirements stated on pages 13-14. Any requests for exceptions to the insurance requirements presented in the RFQ should be included in the proposal submission. That does not guarantee, however, that any exceptions will be accepted by MassDevelopment.

**Q14: Can you define what you mean by social media management journaling?**

A14: This refers to documenting how to create and maintain a social media presence.

**Q15: Can you provide examples of the types of marketing and communications projects you anticipate?**

A15: Due to the agency’s various needs, we can’t provide examples of the types of marketing and communication or anticipate what future projects will involve.

**Q16: Obviously project sizes and scopes will vary but is there an average project budget or range?**

A16: Under a house doctor contract, services are requested by MassDevelopment on an as-needed basis at its sole discretion. MassDevelopment staff reach out to consultants with relevant experience for individual projects and ask them to submit a scope of work tailored to the project. While each house doctor contract is established with a maximum dollar value cap to accommodate several projects, MassDevelopment does not represent or otherwise guarantee that any minimum quantity or value of services will be requested of any particular consultant.

**Q17: Could you provide an example of “place-based efforts and institutions/companies”?**

A17: Please refer to A15.

**Q18: Under the “house doctor” approach, what is the typical timeframe between announcing a project, accepting bids and completion date of that given project?**

A18: The request for qualifications is to contract with agencies for future projects at MassDevelopment. If awarded a contract, a MassDevelopment staff member will reach out to

one or multiple house doctors with a general scope of work until they reach a consensus on the final scope of work - discussion of a scope of work does not guarantee the contacted House Doctor(s) will receive the contract for the project. The scoping process can take anywhere from two weeks to two months (but is not limited to), this depends on the project's complexity. Expected completion dates will be listed in the executed contract and can vary in timeframe depending on the project's needs.

**Q19: We have worker's compensation and commercial liability insurance. What we do not have, and have usually seen only required of contractors with higher liabilities and wider range of services, such as construction and real estate, are auto liability, professional liability and umbrella insurance. What is the flexibility and/or responsive approach to these types of "required insurance" coverage for 1) small businesses like ours that are 2) in the communications and creative media industry?**

A19: We encourage you to apply to the RFQ with evidence of what levels of insurance you carry and what insurance you are willing to obtain to meet the requirements stated on pages 13-14. Any requests for exceptions to the insurance requirements presented in the RFQ should be included in the proposal submission. That does not guarantee, however, that any exceptions will be accepted by MassDevelopment.

**Q20: We are an architectural firm, with experience in several of the Scope areas, and we would like to be considered for multiple Scope Selections. Can you please suggest a best-practice strategy to respond to more than one category? Should we submit separate responses, or all on the same response?**

A20: Please click on all the service areas that apply to your firm and provide an overall project summary within the same application. You can click on multiple categories in the Cognito Application form.

**Q21: Are Federal funds ever used to support MassDevelopment projects? If so, do Federal terms and conditions of those funds flow down to "House Doctor" consultants?**

A21: No.

**Q22: Could you clarify if possible projects for the retail/ food sector strategy scope would involve spatial concept development or if they are limited to business planning services.**

A22: Both would apply.

**Q23: Within Task/Scope 6 - does MassDevelopment foresee development support being focused primarily on individual parcels/buildings or will there be neighborhood & larger district developments where support would be more focused on helping small developers build capacity and take on larger projects?**

A23: Both would apply.

**Q24: Regarding Section 6.e. (Elements of Proposal: references) of the RFQ for Specialized Economic Development, Transformative Development & Real Estate Services, would it be possible to**

**add references going back further than the past five years as long as the minimum qualifications for 6.e. are met?**

A24: We ask that you stay within the 5-year time frame as specified in the RFQ but understand if you have references dating over that time frame.

**Q25: Is a separate proposal expected or just the application? I'm just confused because usually we create the proposals ourselves. I've never submitted an application for an RFP.**

A25: No separate proposal is expected; we ask applicants to fill out only the information needed in the application.

**Q26: For the Small Scale Construction category could you please provide us with some more description about the types of projects? The \$100,000 total project cost seems unlikely to cover some of the examples given if they are for multiple unit residential projects (for example making an apartment building ADA accessible may likely tip above the stated ceiling).**

A26: Due to the agency's various needs, we can't provide examples of the specific projects, as these will vary according to each department's needs. That being said, for this category we are likely looking for assistance with projects in single family homes or individual apartment units with relatively small total project budgets.

**Q27: In what category would master plans, downtown plans, or campus plans belong?**

A27: Scope of Services 4: District Management Feasibility and Place Governance Support

**Q28: We provide financial services for food businesses specifically. Should we also check off the small business financial services category or does this fit under the umbrella of the food services category?**

A28: Please check both categories as both apply.