



ADDENDUM NO. 1

**RFP STRATEGIC PLANNING CONSULTING SERVICES
JOB NO.: 260602**

DATE ISSUED: JUNE 22, 2026

I. UPDATES:

DUE DATE:

DELETE:

Submission Deadline: All proposals must be submitted and received in the designated Agency office no later than the submittal deadline stated herein Proposal Submissions must be received no later than **3:00 p.m. EST on June 24, 2026**. Late submissions and modifications to previously submitted packages will not be accepted.

ADD:

Submission Deadline: All proposals must be submitted and received in the designated Agency office no later than the submittal deadline stated herein Proposal Submissions must be received no later than **3:00 p.m. EST on July 6, 2026**. Late submissions and modifications to previously submitted packages will not be accepted.

II. QUESTIONS AND ANSWERS:

1. **Question:**

Part A - Budget & Time Constraints: What are the specific financial limits and ultimate timeline constraints for this exercise so we can align our approach with your requirements?

Part B - Section XII, Fee Schedule (Page 10)

Project Budget & Ceilings — Has CHA established an estimated budget range or a "Not-to-Exceed" financial ceiling for the initial 1-year base period of this strategic planning initiative?

Answer for Part A and Part B:

The Housing Authority has not established a fixed budget for this engagement and is seeking proposer recommendations regarding the level of effort and associated costs necessary to successfully complete the project. Proposers should submit their best value approach, including a detailed scope of services, project schedule, and fee proposal.

2. **Question:**

Section IX, Timeline (Page 6)

Total Exercise Due Date — The timeline outlines that "Strategic Planning Meetings" will take place between July and August 2026 but does not specify the final deadline for the final delivery package. What is CHA's expected or mandated ultimate due date for the submission and approval of the Final Strategic Plan document?

Answer:

The Housing Authority anticipates initiating the project upon contract award and would prefer completion of the strategic planning process within approximately six (6) to nine (9) months. However, the proposed timeline should reflect the consultant's recommended approach for stakeholder engagement, data collection, analysis, strategic plan development, and final presentation to the Board of Commissioners.

3. Question:

Part A - Reference Flexibility: We are experts in strategic planning, but our core past performance is in the private and international sectors rather than with public housing authorities. Will CHA accept and score private/international references equally to ensure open competition?

Part B - Section VII.g, References (Page 6) | Section XI.e, References (Page 9)

Reference Constraints — The RFP requires a minimum of three (3) references for similar strategic planning projects completed within the past 5 years, "preferably for public housing authorities." To ensure a truly competitive process, will CHA explicitly confirm that strategic planning references for corporate clients, large non-profits, or non-HUD municipal/governmental agencies will receive equal scoring weight?

2. Scope, Volume, & Metric Clarifications

Part C - Section VII, Consultant Qualifications & Section X, Proposal Evaluation

Methodology vs. Operational Subject Matter Expertise — The RFP heavily weights deep operational knowledge of HUD programs, Section 8 administration, and public housing operations (30% of total points). Because strategic planning is a horizontal discipline focused on framework execution, performance metrics, and goal setting—and because CHA staff are already the definitive subject matter experts on their own operations—will CHA clarify if firms bringing proven, industry-agnostic strategic planning frameworks will be scored equally to housing-specific niche consultants?

Answer Part A, Part B and Part C:

CHA is obligated to evaluate the RFP based on the evaluation of factors and methodology stated in the solicitation. Under HUD procurement requirements and general principles of fair and open competition, offerors must be evaluated consistently and in accordance with the criteria published in the RFP. This ensures that all proposers are treated fairly and that the award decision can withstand audit, protest, or HUD review.

4. Question:

Section II, Proposal Submission (Page 4) | Section XIII.7, Proposal Preparation Costs (Page 12)

Physical Submission Constraints & Electronic Alternative — Section II requires physical delivery of 1 original and 2 exact tabbed, hard-copy proposals to the Charleston office. Given that physical courier shipping can take up to 3 business days—effectively shortening the time out-of-state firms have to construct a highly tailored technical proposal—will CHA consider amending the guidelines to allow for secure electronic submission via email or an online procurement portal to ensure a more equitable and competitive bidding process?

Answer:

Delete:

I. PROPOSAL SUBMISSION

A total of 1 original signature copy (marked "ORIGINAL") and 2 exact copies (each of the 2 separate proposal submittals shall have a cover and extending tabs) of the proposal submittal, shall be placed unfolded in a sealed package and addressed to: Housing Authority of the City of Charleston, Priscilla M. Waring, Procurement & Contracts Director, Procurement and Contracts Management Department, Suite 102, Charleston, SC 29403.

Add

I. PROPOSAL SUBMISSION

Proposals may be emailed to pwaring@chacity.org. The email subject line should state: Proposal Submission for Job No. 260602- Strategic Planning Consulting Services.

The proposal submission may also be delivered by hard copy to the Housing Authority of the City of Charleston, Priscilla M. Waring, Procurement & Contracts Director, Procurement and Contracts Management Department, Suite 102, Charleston, SC 29403.

5. Question:

Part A:

Section XI.h (Page 10) | License and Insurance Documentation

Architect/Engineer License Mismatch — The text states proposals must include "Professional licenses (Architect/Engineer)" and a "Firm license to practice in the state." Given that this solicitation is for Strategic Planning Consulting Services and not architectural, engineering, or construction design, could CHA please confirm that an active professional A&E license is not a requirement for this project and that this is boilerplate text to be waived?

Part B:

Section XI.h (Page 10) | License and Insurance Documentation

Out-of-State Bidders & Business Licensing — To ensure maximum open competition and secure the best strategic expertise, will CHA accept corporate/professional registrations from a bidder's home state at the time of proposal submission, with the understanding that the selected vendor will obtain any required City of Charleston or South Carolina business licenses post-award?

Answer Part A and Part B:

Delete

The listing shall at a minimum License and Insurance Documentation

1. Professional licenses (Architect/Engineer)
2. Firm license to practice in the state.
3. Certificate of Insurance
4. Professional liability coverage verification: A new certificate listing CHA as an additional holder will be required of the winning firm.

Add:

Prior to contract execution, the successful proposer shall possess all licenses, certifications, registrations, authorizations, and professional liability coverage required by federal, state, and local laws to perform the services contemplated under this contract.

6. Question

Section VI.g, Resident and Community Engagement | Section VII.b, Stakeholder Engagement External Community Stakeholder Engagement — Does CHA expect the consultant to design and hold separate, standalone workshops or focus groups for external stakeholders outside of public housing operations (such as city authorities, local community leaders, or neighborhood groups), or will these external voices be integrated into the core onsite sessions?

Answer:

Yes, CHA expects the consultant to design and hold separate, standalone workshops or focus groups for external stakeholders outside of public housing operations (such as city authorities, local community leaders, or neighborhood groups).

7. Question:

Section VI.a, Organizational Assessment | Section VII.d, Organizational Development Expertise

Specific Organizational Assessment Frameworks — Regarding the organizational assessment deliverable, is CHA expecting the application of specific proprietary human capital or leadership assessment tools (such as Clifton Strengths, DiSC, or similar corporate diagnostics), or does the agency expect the assessment to focus primarily on operational surveys, qualitative interviews, and data-driven workflow analytics?

Answer:

Offeror should propose a strategic plan that best fits CHA needs.

8. Question:

Section XII, Fee Schedule (Pages 10-11)

Pricing Structure Discrepancy (Lump Sum vs. Hourly) The Fee Schedule instructions state that hourly rates will "apply to individual task orders," yet the "No Deposit/No Retainer" clause states that CHA "will pay the successful proposer(s) for firm fixed fee proposed only." Could CHA please clarify if bidders should propose a total lump-sum firm fixed-fee for the standard deliverables (Items a–j in Section VIII), or if the contract will be executed as an hourly Time & Materials/Task Order structure?

Answer:

The Housing Authority intends to utilize a hybrid pricing structure under this solicitation. Proposers shall submit a firm fixed-fee, not-to-exceed (NTE) price covering the completion of the core Strategic Planning Services and all standard deliverables. The fixed-fee proposal should include all labor, meetings, stakeholder engagement activities, travel, materials, and other costs necessary to complete the required scope of work.

In addition, proposers shall provide hourly labor rates and any applicable unit costs for supplemental services that may be requested by CHA outside the original scope or as additional work authorized through a written task order.

The contract cost points will be based primarily on the proposed fixed-fee/NTE amount for the required deliverables. Hourly rates and unit costs will be used only for pricing approved additional services authorized by CHA through task orders or contract amendments. No retainer or deposit will be paid. Payment for the core scope of services will be made based on the successful completion of agreed-upon deliverables and milestones within the approved NTE contract amount.

9. Question:

Part A:

Section XII, Pricing Items | & Realistic Fees (Page 10)

Definition of "Realistic Fees" vs. Undefined Volume — The RFP mandates a "realistic and reasonable proposed cost" that is all-inclusive. However, Section VIII requests "pre-planning interviews," "facilitation of onsite strategic planning sessions," and "stakeholder engagement" without defining baseline quantities. **To ensure accurate and competitive fixed fees**, could CHA provide the estimated or required volume for: (a) the number of required pre-planning interviews; (b) the expected number of in-person/onsite strategic planning workshops/sessions; and (c) the expected number of formal board presentations?

Part B:

Section VII.b | Stakeholder Engagement and Facilitation (Page 5)

Direct Stakeholder Headcount — To help proposers accurately scope workshop facilitation materials, breakout session strategies, and staffing support, how many total internal stakeholders (including Board commissioners, executive leadership, and general staff) are expected to directly participate in the strategic planning process?

Answer:

ADD:

The Housing Authority requires proposers to submit a firm fixed-price proposal for all services described in the Scope of Work. The proposal shall include a detailed cost breakdown by task, a schedule of hourly rates for any additional services requested by the Housing Authority, and identification of all reimbursable expenses. All anticipated costs, including travel, lodging, meals, printing, facilitation materials, and administrative expenses, shall be included in the proposed fixed fee unless otherwise specifically identified by the offeror and must be approved by the Housing Authority. Offerors should use as a base for their cost submission for strategic plan involving a seven-member Board of Commissioners, eight executive leadership, and 100 staff. The RAB has 10 members, and current residents for engagement.

Recommended Fee Structure

1. Lump Sum Fixed Fee

Required Cost Breakdown

Task	Hours	Rate	Extended Cost
Project Initiation and Kickoff Meeting			
Review of Existing Documents and Data			
Stakeholder Interviews			
Board of Commissioners Interviews			
Executive Leadership Interviews			
Employee Surveys and Engagement			

Task	Hours	Rate	Extended Cost
Resident/Client Engagement Sessions			
Environmental Scan and SWOT Analysis			
Strategic Planning Workshop/Retreat			
Development of Draft Strategic Plan			
Presentation of Draft Plan			
Final Strategic Plan and Implementation Roadmap			
Performance Metrics/KPI Development			
Board Presentation and Adoption Support			
Project Management and Administrative Costs			
Total Fixed Fee			

2. Hourly Rate Schedule (For Additional Services Only)

In addition to the fixed fee, hourly rates for services that may be requested beyond the original scope. Hourly rates shall be utilized only for services authorized in writing by the Housing Authority that are outside the approved Scope of Work.

Estimated hours by labor category

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Labor Category	Hours	Rate	Extended Cost
Principal Consultant			
Senior Consultant			
Project Manager			
Analyst/Researcher			
Administrative Support			
Total NTE			

3. Reimbursable Expenses

All travel, lodging, meals, printing, meeting facilitation materials, and incidental expenses shall be included in the consultant's proposed fixed fee. No separate reimbursement will be provided unless specifically approved in advance by the Housing Authority."

4. Optional Additional Services

Optional Service	Hours	Rate	Extended Cost
Additional Stakeholder Meetings			
Additional Board Retreat Session			
Strategic Plan Update After Year 1			
Facilitation of Annual Planning Session			
Executive Coaching Services			

5. Suggested Payment Schedule According to Deliverables:

Milestone	Percentage of Payment
Contract Execution and Kickoff	
Completion of Assessment and Stakeholder Engagement	
Completion of Strategic Planning Workshop	
Submission of Draft Strategic Plan	
Acceptance of Final Strategic Plan	

II. ALL OTHER INFORMATION REMAINS THE SAME

END OF ADDENDUM NO. 1