



Montrose EUL - Industry Forum *Solicitation* Process

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Agenda

- Jones Lang LaSalle's Role
- Request for Proposal Process
- Contents and Process for Submission of Proposal
- Evaluation Criteria
- Solicitation Process

Jones Lang LaSalle's Role

Relationships



- Contractor for VA
- Assist with solicitation process
- Evaluate proposal submissions

Request for Proposal

Process

- Public Hearing
- ↓
- Draft RFP Release
- ↓
- Industry Forum
- ↓
- Final RFP Release
- ↓
- Proposal Submittal
- ↓
- Oral Presentations (if requested)
- ↓
- Developer Selection
- ↓
- Developer creates Development Plan for VA review
- ↓
- Negotiate Terms
- ↓
- Transaction Closing

Request for Proposal

Overview

- RFP posted at:
<http://www.va.gov/ASSETMANAGEMENT/EnhancedUse/Montrose/RFP.asp>
- Six (6) Sections:
 - Section 1.0: Executive Summary
 - Section 2.0: Proposed Development of the EUL Site
 - Section 3.0: Development Plan
 - Section 4.0: Contents and Process for Submission of Proposals
 - Section 5.0: Evaluation Criteria
 - Section 6.0: Miscellaneous Terms and Conditions Applicable to this RFP

Contents and Process for Submission of Proposal

Section 4.0 – Submittal Requirements

- Volume I: Cover Letter, Statement of Compliance
- Volume II: Other Requirements
 - Section 1.0: Offeror's Background and Administrative Information
 - Section 2.0: Relevant Offeror Experience, Past Performance, Etc.
 - Section 3.0: Development Concept
 - Section 4.0: Financial Capability
 - Section 5.0: Property Maintenance and Management
 - Section 6.0: Capability and Qualifications
 - Section 7.0: VA's Requirements, Goals, and Objectives
 - Section 8.0: Experience in Community Relations
 - Milestone Time Table
 - Consideration to VA

Contents and Process for Submission of Proposal

Section 4.0 – Submittal Guidance

- Meet deadlines for submission
- Emphasize content over “gloss”
- Comply with page limits
- Clearly identify roles of team members
- Provide relevant cases studies that mirror project in magnitude and complexity
- Provide (1) Master Plan which addresses both Phase I and Phase II
- Consider VA project goals:
 - To provide affordable housing to veterans and senior veterans; in any housing opportunity veterans should have preferred preference
 - Use consideration received through this EUL to enhance services provided to veterans at the Montrose Campus
 - Enhance amenities available to veterans and the surrounding community
 - Ensure project’s compatibility with the fabric of the existing neighborhoods

Evaluation Criteria

Critical Factors That Are Equally Weighted

- 1) Offeror's Background and Administrative Information & Relevant Experience, Past Performance, Etc.
- 2) Development Concept & Property Maintenance and Management
- 3) Financial Capability & Consideration to VA
- 4) VA's Requirements, Goals, and Objectives
- 5) Capability and Qualifications & Community Relations

Evaluation Criteria

Factor 1: Offeror's Background and Administrative Information & Relevant Experience, Past Performance, Etc.

Refer to sections 4.2.3.1 and 4.2.3.2

- Background and administrative information
- Past performance:
 - Include at least (4) projects that are *comparable in magnitude and complexity*
- References:
 - Include (4) references of successfully completed development projects *that VA will confirm / validate*

Evaluation Criteria

Factor 2: Development Concept & Property Maintenance and Management

Refer to section 4.2.3.3 and 4.2.3.5

- Provide enough information to demonstrate vision and realistic development concept
- Make sure Development Concept addresses:
 - Overall concept
 - Master Plan layout and concept for both Phase I and II
 - Concept for infrastructure sharing
 - Relocation of services

Evaluation Criteria

Factor 3: Financial Capability & Consideration to VA

Refer to sections 4.2.3.4 and 4.4

VA will evaluate each proposal to assess:

- Offeror's experience / ability to obtain project financing
 - Provide a strategy to obtain project financing
- Financial Statements to show Offeror's financial wherewithal
- Preliminary description of the Project's economics and finances
- Consideration to VA (Phase I only)
 - Including supporting assumptions

Evaluation Criteria

Factor 4: VA's Requirements, Goals, and Objectives

Refer to sections 2.4.8 and 4.2.3.7

Statutory:

- Provide fair monetary and/or "in-kind" consideration to VA
- Contribute to VA's mission
- Project goals:
 - Provide affordable housing to veterans and/or senior veterans
 - Use consideration to enhance services provided to veterans
 - Enhance amenities available to veterans and the surrounding community
 - Project's compatibility with the fabric of the existing neighborhoods
 - Project's ability to maintain the integrity of the Hudson River Waterfront

Evaluation Criteria

Factor 5: Capability and Qualifications & Community Relations

Refer to sections 4.2.3.6 and 4.2.3.8

- Provide information to assess the Offeror and its Project Team including:
 - Organizational approach
 - Organizational chart and staffing plan
 - Identification of all key personnel and resumes
- Philosophy and specific approach to managing community relations
 - Provide an integrated communications strategy
 - Exhibit an understanding of dealings with public entities

Solicitation Process

Suggestions

- Include all of the information and data requested by the solicitation; when in doubt, ask by sending an email to eulmontrose@va.gov
- Review submittal for compliance with all requirements including page limitations and font size
- Pages over page count limitations will be excluded
- Be specific when describing past performance and experiences (provide clear descriptions of projects completed); VA will not try to “interpret” the proposal
- Acceptable to include company brochures and websites as background, however, no guarantee they will be reviewed
- Reference documents and RFP are available online at:

<http://www.va.gov/assetmanagement/enhanceduse/montrose>



Thank you