

PROCUREMENT SUMMARY

JOINT DEVELOPMENT REQUEST FOR QUALIFICATIONS #1 – DEVELOPERS

1.	Contract Number: Joint Development Request for Qualifications – Developers #1	
2.	Recommended Vendor: See Section B. below.	
3.	Type of Procurement (check one): <input type="checkbox"/> IFB <input type="checkbox"/> RFP <input type="checkbox"/> RFP–A&E <input type="checkbox"/> Non-Competitive <input type="checkbox"/> Modification <input type="checkbox"/> Task Order <input checked="" type="checkbox"/> Joint Development	
4.	Procurement Dates:	
	A. Issued: August 30, 2023	
	B. Advertised/Publicized: August 31, 2023 – October 11, 2023	
	C. Pre-Submittal Conference: September 18, 2023	
	D. Applications Due: October 11, 2023	
	E. Pre-Qualification Completed: N/A	
	F. Conflict of Interest Form Submitted to Ethics: October 12, 2023	
	G. Protest Period End Date: March 25, 2024	
5.	Solicitations Picked up/Downloaded: N/A. The RFQ and application were made available on the Joint Development website. Staff encouraged potential applicants to submit an Interest Form. 194 Interest Forms were received.	Proposals Received: 89 (5 non-responsive)
6.	Contract Administrator: Nicole V. Avitia	Telephone Number: 213-314-8060
7.	Project Manager: Nicole V. Avitia	Telephone Number: 213-314-8060

A. Procurement Background

This Board Action is to approve adding the qualified developers listed in Section B to the Joint Development (JD) Developer Bench. Board approval of the Developer Bench is subject to resolution of any properly submitted protest.

In order to expedite the completion of JD projects, staff released a Request for Qualifications (RFQ) on August 30, 2023 to identify potential developers based on general qualifications, community development experience, financial capacity and experience, and demonstrated experience as a Community-Based Development Organization (CBDO). In concert with the joint development acceleration strategies adopted by the Metro Board of Directors in April 2023 and with the support of the Chief Executive Officer (CEO), JD staff led this RFQ using specific and well-defined protocols consistent with Metro’s Acquisition Policy (AQ-1 and ACQ-2).

If the Board approves creating the Developer Bench, staff will execute a Bench Agreement with the Qualified Developers and issue site-specific Request for Proposals (RFPs) for the joint development of 10K Sites. Only Qualified Developers on the Developer Bench may respond to those site-specific RFPs. The RFPs will require applicants to submit a development plan for each site along with a financial proposal, project team composition, and phasing schedule.

One amendment was issued during the solicitation phase of this RFP:

- Amendment No. 1, issued on October 4, 2023, clarified deadlines, who would be invited to comment on the template Exclusive Negotiations Agreement (ENA), and provided a revised RFQ Application Form with corrected formatting inconsistencies.

A pre-submittal conference for the RFQ was conducted virtually on September 18, 2023 and was attended by 258 people representing 176 firms. Over 130 questions were submitted by potential applicants and on October 4, 2023, staff issued a Frequently Asked Questions document via email to 6,700 recipients including the Joint Development Developer Opportunities and RFQ interest lists.

89 applications were received on October 11, 2023. Five of those applications were submitted after the deadline and/or were incomplete and therefore considered non-responsive. Metro’s staff received one written response on October 25, 2023, to challenge Metro’s rejection of their application. Through our review, it was determined that the applicant submitted a late and incomplete application that did not meet our initial threshold review. In accordance with Metro’s Protest procedures, the rejection of an application or proposal does not qualify as an action that can be protested. Therefore, the correspondence received did not constitute a formal protest. A written response was emailed to the applicant on December 14, 2023 to explain our findings.

B. Evaluation of Applications

A Proposal Evaluation Team (PET) consisting of staff from Metro Joint Development, Development Review, Program Management, Community Relations, and Office of Equity and Race was convened and conducted an evaluation of the 84 applications received.

The proposals were evaluated based on the following evaluation criteria and weights:

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| • Applicant/Principal’s Qualifications, Skills, and Experience | 45 percent |
| • Community Development Experience | 30 percent |
| • Financial Capacity/Experience and Compliance | 20 percent |
| • Community-Based Development Organization | 5 percent |

The evaluation criteria were appropriate and consistent with criteria developed for other, similar Joint Development procurements. Several factors were considered when developing these weights, giving the greatest importance to experience in housing/mixed-use projects, design, transit integration, experience working with public agencies, and community development expertise.

A PET meeting was held on December 14, 2023. JD staff provided an overview of the RFQ including the evaluation criteria and instructions. Given the volume of applications, staff summarized submittal information into one spreadsheet. This spreadsheet along with the evaluation form was provided to the PET on December 19, 2023. The PET submitted their initial scores on January 8, 2024. The PET met on January 18, 2024 and decided that of the 84 applications evaluated, 80 were determined to “meet expectations.” The intent of this RFQ is to identify firms that meet a critical threshold of expertise and experience in order to expedite the evaluation of proposals to be submitted in the RFQ phase. Thus, for most of the criteria, the PET scored only whether the firm’s response: a) did not meet expectations; b) met expectations; or c) exceeded expectations. Firms that met expectations were deemed to be qualified to respond to a future RFP. The 80 firms within the competitive range are listed below in alphabetical order:

1. A Community of Friends*
2. Abode Communities*
3. Affirmed Housing Group LLC
4. Akin Co.
5. Alliant Strategic Development
6. American Family Housing*
7. Azure Community Development*
8. Baker Tilly US, LLP — Jeff Oviedo & Associates Inc.
9. BRIDGE Housing Corporation
10. Brilliant Corners*
11. California Landmark Group
12. Camden Securities Company
13. Century Affordable Development*
14. Cesar Chavez Foundation*
15. Cityview
16. Civic Enterprise
17. Clifford Beers Housing (Holos Communities)*
18. Coalition for Responsible Community Development*
19. Community Corporation of Santa Monica*
20. Community Development Partners
21. Community HousingWorks
22. Cowley Real Estate Partners
23. CTY Housing
24. Cypress Equity Investments
25. Decro Corporation*
26. Decro-RMG*
27. Develop With Skill
28. DignityMoves*
29. EAH Housing
30. Eden Housing
31. Ethos Project Holdings LP
32. GHK Properties, LLC

33. Hollywood Community Housing Corporation*
34. Innovative Housing Opportunities
35. Jamboree*
36. JPI
37. LA Family Housing*
38. Laing Companies LLC
39. Lendlease Development Inc.
40. Linc Housing Corp*
41. Lincoln Property Company
42. Lowe
43. MacFarlane Partners
44. McCormack Baron Salazar
45. Menorah Housing Foundation*
46. Mercy Housing
47. MSquared
48. National Community Renaissance of California*
49. New Economics for Women*
50. Orion Capital
51. PATH Ventures
52. Praxis Development Group
53. Primestor Development
54. Republic Metropolitan
55. Self-Help Ventures Fund
56. SoLa Impact
57. SRM Development
58. SuperLA
59. The Kelsey
60. The Max Collaborative
61. The Michaels Development Company
62. The Olson Company
63. The People Concern*
64. The Pinyon Group
65. The Related Companies of California
66. The Roberts Group
67. The Urban Coalition
68. The Urban House
69. Thomas Safran & Associates Development
70. Trammell Crow Company
71. Treehouse
72. Ulysses Development Group
73. USA Properties Fund
74. Venice Community Housing*
75. Wakeland Housing
76. Waterford Property Company
77. Weingart Center Association*
78. West Hollywood Community Housing Corporation*

- 79. Women Organizing Resources, Knowledge and Services (WORKS)*
- 80. WPH Holdings

* Denotes applicant is a CBDO. As described in the Board Report, applicants who believed they met the established CBDO definition were asked to complete a self-certification form and awarded additional points in RFQ application evaluations if they met the established CBDO definition.

The PET determined that four of the applicants did “not meet expectations” and are not included in staff’s recommendation to be added to the Developer Bench. Some of these firms’ application narratives failed to demonstrate experience incorporating transit-oriented features into developments, developing adjacent to transit infrastructure, public/private partnerships, and/or implementing comprehensive community engagement strategies. Most of these narratives failed to provide adequate details or specific examples required to be considered in the competitive range. The four firms determined to be outside the competitive range are listed below in alphabetical order:

1. [oo-d-a] studio, inc
2. 1010 Development
3. Center for Pacific Urbanism
4. Keyvan Moradian

Qualifications Summary of Firms within the Competitive Range:

The 80 firms determined to be within the competitive range were chosen based on their experience expeditiously constructing and/or operating housing/mixed-use projects, high-quality project design, transit integration, experience working with public agencies, and/or community development expertise. These firms provided detailed narratives highlighting engagement strategies with significant stakeholder outreach for development projects in Los Angeles County or other diverse communities. Firms also demonstrated financial capacity through experience securing financing for multiple phases of real estate development, including innovative financing strategies.

D. DEOD Summary

Metro strongly encouraged CBDOs that are rooted in the communities in which the 10K Sites are located to respond to the RFQ and conducted targeted outreach to CBDOs to promote the July 2023 Developers Industry Forum discussed in the Board Report. By harnessing the local expertise of CBDOs, Metro can effectuate meaningful community engagement and develop JD projects that include elements that benefit and enhance the surrounding communities. Applicants who met Metro’s CBDO definition and/or demonstrated experience successfully creating opportunities for community-based organizations (CBOs), Metro-certified Small/Disadvantaged Business Enterprises (SBE/DBE), Disabled Veterans Business Enterprises (DVBE)

firms and/or local businesses were awarded additional points in the RFQ application evaluations. In future site-specific RFPs, proposals will be awarded additional points in evaluations if a CBDO is the lead developer, or if a non-CBDO has committed to a partnership with a CBDO. Metro will also encourage Qualified Developers to create opportunities to include Metro-certified SBE/DBE/DVBE firms and/or local businesses in their projects, through professional or construction services.