

**City Council of New Orleans, Louisiana  
Request for Proposals  
Tax Increment Financing Consulting Services  
Issued August 15, 2008**

**Purpose**

The City Council of New Orleans (Council) desires to obtain consulting services associated with a review of proposed Tax Increment Financing (TIF) policies for the City of New Orleans (City). Based upon the review and associated recommendations the consultant will be expected to prepare a draft ordinance which codifies a TIF policy into law.

As provided below, the Council requests proposals from experienced firms to provide the required services.

**Scope of Work**

Services Needed & Required Submission: Attachment "A" describes the services which may be needed and outline of the statement of services required for submission.

**Proposal Contents**

Concise responses are encouraged. All responses are to include the following elements:

1. A description of the qualifications of the consultant team to perform the tasks described above including the professional training and relevant experience within the past five years of each professional and firm which is proposed to be involved in the provision of services;
2. Designation of the principal consultant, with contact information including name, title, address, email address, phone and fax numbers. If the respondent is a partnership, team effort, or joint venture; a description of the legal relationship among the parties and information on previous experience which the parties have had working together;
3. Provide each proposed consultant's 2008 hourly fee schedule, including overhead and profit ("full loaded rates"), for each professional proposed as part of the team;
4. As a minimum requirement of the contract; provide an indication that the Project Manager for the consultant team has at least ten years of experience managing municipal community development and TIF related projects;

5. Provide a maximum of four references for clients for whom work has been performed within the past five years, with contact information including name, title, organization, address, phone number, and email address;
6. If any member(s) of the professional group have had a professional relationship (contractual or otherwise) with public agencies or with private for-profit or not-for-profit sector clients providing services to public agencies in Orleans Parish since June 1, 2003; disclose the nature of that relationship and the time period involved;
7. If any members of the professional group are domiciled in New Orleans, have offices in New Orleans, or are members of disadvantaged groups, please identify those members and their status as it relates to local office, local domicile, and disadvantaged group status; and,
8. Not more than five samples of work done by the professional(s) who would be assigned to this contract.
9. This RFP states (below) that "upon mutual agreement between the Council and the Contractor, the contract term may be extended for one additional one-year period.' Please include as a section of the proposed budget the terms under which the Contractor would be willing to renew for an additional one-year period.
10. A sworn affidavit listing all persons with an ownership interest in the respondent. An "ownership interest" shall not be deemed to include ownership of stock in a publicly traded corporation or ownership of an interest in a mutual fund or trust that holds an interest in a publicly traded corporation. This affidavit is public record.
11. A sworn affidavit stating that no other person holds an ownership interest in the respondent via a counter letter.
12. A list of all persons, natural or artificial, who are retained by the respondent at the time of the application and/or who are expected to perform work as sub-contractors in connection with the respondent's work for the City Council. The Council may require information on employees or sub-contractors of or ownership interests in the sub-contractor. This list is public record.

### **Schedule of Costs and Expenses**

Proposals are to include a schedule of estimated costs and expenses, including:

1. Estimated number of hours and hourly rate for each level of staff anticipated or an alternative flat rate for total work to be performed.

2. All expenses must be billed at cost and in accordance with U.S. GSA per diem limits.
3. The contract with the Consultant will be for a period not to exceed one year (1) and include a maximum not-to-exceed total dollar limit.
4. Upon mutual agreement between the Council and the Contractor, the contract term may be extended for one additional one-year period.

### **Conflicts of Interest**

Any firm or individual providing a response to the RFP shall provide a clear and unambiguous indication of any potential or real conflicts of interest it may have with respect to performing work on behalf of the City Council on this project. For any such work performed, the respondent shall indicate why the respondent deems such work to be or not to be in conflict with the interests of the City or its agencies. The Council shall make the final decision as to whether any conflict of interest exists.

### **Questions and Due Date**

**Instructions:** Applicants shall submit the following to the Council Fiscal Office, Attention: Calvin J Aguilard, Council Fiscal Officer, Room 1E06, 1300 Perdido Street, New Orleans, LA 70112, 504-658-1093, [cjaguillard@cityofno.com](mailto:cjaguillard@cityofno.com), not later than September 5, 2008 4:00 pm CDT:

- a) Signed proposals in Microsoft Word format or as a pdf file, marked "**TIF Consulting**";
- b) **Ten** hard copies of the proposal enclosed in a sealed envelope, marked "**TIF Consulting**".

Proposals should clearly demonstrate the applicant's qualifications to perform the needed services and attend all factors applicable in a professional relationship. Proposals should include all of the elements under the "Statement of Qualifications" included as part of Attachment "A" detailed resumes or curricula vitae for the principals performing the services. The Council will reasonably attempt to answer questions submitted in advance. Copies of the solicitation and related information are available from the Council's website at <http://www.nocitycouncil.com>.

The Council will not accept proposals submitted by fax. All proposals **must be received** by the Council on or before the Delivery Deadline. The Council will not accept proposals delivered after the deadline. The Council will not credit delivery claims not clearly documented by original receipt. The respondents shall submit a completed Tax Clearance Certificate with the proposal (see Attachment "B").

If the Council identifies a likely service provider, it may negotiate a final agreement with the provider and fix the relationship by Professional Services contract generally according to Rule 45 of the City Charter.

It is policy of the City of New Orleans to practice nondiscrimination based on social and economic disadvantage, race, color, sex, gender, disability or national origin.

### **Evaluation Criteria**

Selection: The Council will select an applicant generally according to the procedures described in Rule 45 of the Council's Rules (attached). In brief, the procedure applies a "Selection Review Panel" to evaluate proposals and refer proposals best meeting the criteria for the Special Development Projects and Economic Development Committee consideration. The Committee will apply the following selection criteria and weighting factors to evaluate proposals:

- (30%) Specialized experience and technical competence;
- (30%) Performance history, including, without limitation: competency, responsiveness, cost control, knowledge of New Orleans and its specific TIF issues and programs, work quality and the ability to meet schedules and deadlines;
- (10%) Maintenance of an office, residence or domicile in Orleans Parish; and,
- (30%) Cost as indicated by staff hourly rates.

The Committee may make recommendations to the Council; the contractor is selected by motion of Council.

### **Inspector General**

Section 9-1120, Chapter 2 of the Code of the City of New Orleans, relative to the Office of Inspector General, provides in part as follows:

"Every city contract and every bud, proposal, application, or solicitation for a city contract, and every application for certification of eligibility for a city contract or program shall contain a statement that the corporation, partnership, or person understands and will abide by all provisions of this chapter."

The Inspector General shall be notified in writing prior to any meeting of a selection or negotiation committee relating to the procurement of goods or services by the city, including meetings involving third party transactions. The notice required shall be given to the Inspector General as soon as possible after a meeting has been scheduled, but in no event later than twenty-four hours prior to the scheduled meeting. The Inspector General may attend all city meetings relating to the procurement of goods or services as provided herein, and may pose questions and raise concerns consistent with the functions, authority, and powers of the Inspector General. An audio recorder or court

stenographer may be utilized to record all selection or negotiation committee meetings attended by the Office of the Inspector General.

### **Additional Information**

The City of New Orleans is not liable for any costs incurred prior to entering into a formal written contract. Any costs incurred in the preparation of the statement of qualifications, interview, or other pre-contract activity are the responsibility of the respondent. All submissions become the property of the City and, as such, are public information.

The City Council reserves the right to accept or reject any and all responses submitted and to cancel the RFP, in whole or in part, for any reason, in its sole judgment.

It is anticipated that the contractor will invoice the City monthly, when billable activities have occurred within the month. Work shall be detailed in increments of one tenth/hour.

Professional staff may be substituted for those listed in the proposal only with the approval of the Chairman of the Special Development Projects and Economic Development Committee and only if the replacement staff provides qualifications and experience at least equal to those staff members being replaced.

The contract with the City Council shall contain a provision that any sub-contractor proposed to be retained by the respondent to perform work on the contract with the City Council must be approved in accordance with the provisions of Council Rule 45. The Council may require information on ownership interests in the sub-contractor.

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**Attachment "A"**

**NEEDED SERVICES & STATEMENT OF QUALIFICATIONS**

**Required Services**

The New Orleans City Council (Council) is soliciting proposals from consultants who can provide technical assistance to the Special Development Projects and Economic Development Committee, the Council, and its staff related to a Tax Increment Financing (TIF) policy and preparation of an ordinance which codifies that policy.

Since 2002, when the first TIF project was approved by the Council, the City and Council have been struggling to develop a universal set of guidelines and policy associated with the future use and approval of TIF. Currently the City has three (3) TIF projects or districts. The Council is now reviewing a draft TIF policy document which has been developed by City staff. The Council requires assistance in reviewing this draft, making recommended changes and revisions to the proposed policy based upon reasonable standards and practices from other large municipalities throughout the United States, and preparation of an ordinance which mirrors the proposed policy as it may be revised.

The consultant/team should be experienced in working at the policy as well as project level associated with TIF in multiple jurisdictions throughout the United States. The team should also be familiar with State of Louisiana legislation and applicable local law associated with TIF. Additionally, consultants should be significantly familiar with New Orleans and its neighborhoods and the issues and challenges associated with economic development and investment facing both the flooded and un-flooded neighborhoods of the City.

Specifically, the Council expects Consultant may be asked to provide some or all of the following services during the term of the contract:

- Review the status and performance of existing TIF projects in New Orleans and several general policy proposals promulgated since 2003;
- Based upon the review of current proposals and given experience with the implementation of TIF in New Orleans and other municipalities, provide recommendations for a generalized policy which guides the Council's decision to approve or deny the formation of specific proposed TIF projects and districts;

- Recommend changes to state legislation and/or applicable local law associated with TIF which the City may want to pursue to improve the effectiveness of TIF in the City;
- Consult with Council staff and members related to specific questions regarding proposed policies and recommendations;
- Prepare a draft ordinance which mirrors the proposed and recommended policies and procedures associated with the approval of TIF districts or projects; and,
- Review specific TIF requests as needed and requested by the City Council.

**Attachment**

**Consulting Services Questionnaire**

1. Project name
2. Date Submitted
3. Specify type of ownership and indicate if applicable:  
 Private corporation     Public corporation     Proprietorship  
 Partnership     Small business     Minority owned business  
 Woman owned business     Limited Liability Company  
 Other (specify \_\_\_\_\_)
- 4a. Firm (or joint venture) name, mailing address, telephone number and e-mail address
- 4b. Firm=s owners
- 4c. Name, title, telephone, fax number, and e-mail address of principal to contact
- 4d. Name, title, telephone, fax number, and e-mail address of proposed project manager
5. Full time personnel assigned to project

Number      Position/Title

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Is submittal a joint venture?
  - a. If so, has joint venture worked together before?
  - b. If a joint venture, name of lead firm.
7. Summary of professional service fees received in (insert index number)

2007	2006	2005	2004	2003
( )	( )	( )	( )	( )

Use index below:

Index

- |                               |                               |
|-------------------------------|-------------------------------|
| 1. less than \$250,000        | 4. \$3,000,000 to \$6,000,000 |
| 2. \$250,000 to \$1,000,000   | 5. \$6,000,000 or greater     |
| 3. \$1,000,000 to \$3,000,000 |                               |



8. Brief resumes of key persons anticipated for this project. Please indicate male/female, minority/majority and parish of domicile.
  - a. Name and title
  - b. Project assignment
  - c. Name of firm by which employed full time and location of office
  - d. Years experience with this firm  
With other firms in the New Orleans market \_\_\_\_\_
  - e. Highest Academic Degree: \_\_\_\_\_ Year Received \_\_\_\_\_  
Institution \_\_\_\_\_  
  
Specialization  
Other Professional Training
  - f. Experience and qualification relevant to the proposed project
  - g. Names of public officials and/or public agencies, especially in Louisiana for which the firm has provided service since July 1, 2003, with dates of the service and brief description.
  - h. Contracts using public funds (city, state or federal) administered by firm.
9. Work by firm=s personnel members to be assigned to this job which best illustrates current qualifications relevant to this project (list not more than 5 projects including experience with governmental issues).
  - a. Project Name & Location and Owner=s Name
  - b. Project Description
  - c. Nature of Firm=s Responsibilities
  - d. Completion Date (Actual or Estimated)
  - e. Estimated Fees for Entire Project
10. Provide any additional information or description of resources supporting your firm's qualifications for the proposed project.
11. Provide four references including name/title, phone number, mailing address and e-mail address.