



**LOUISIANA
STATE
MUSEUM**



**STATE OF LOUISIANA
DEPARTMENT OF CULTURE, RECREATION AND TOURISM
OFFICE OF STATE MUSEUM
REQUEST FOR INFORMATION
PROPERTY MANAGEMENT, LEASE MANAGEMENT, AND LEASING
OF THE LOWER PONTALBA BUILDING**

I. INTRODUCTION

A Public Private Partnership, or a P3, is a contract between a public agency and a private sector entity that grants a private sector entity the privilege and responsibility of providing a public good, facility, or service that has traditionally been provided and managed by a public entity. The goal of a P3 is to provide benefits to the public through value-added private sector engagement and to reduce the public agency's reliance on tax revenue. The benefits of P3s include job creation, design innovation, cost savings, revenue generation, transfer of risk, and optimization of resources and capabilities. P3s can be used for long-term operation and maintenance of infrastructure. Through a P3, public and private sectors can share skills, assets, resources, risks, and rewards in the improvement of services, facilities, and operations that fall within public agency's mission and statutory responsibility.

The Louisiana State Museum (the "LSM") is a statewide complex of facilities under the management and supervision of the Office of State Museum (the "OSM") in the Department of Culture, Recreation and Tourism (the "DCRT"). A continuing downward trend in public funding for the LSM and the anticipated continuing rise in the cost of other core functions of government has caused the DCRT to focus on the goal of becoming more self-sustaining and collaborative with the private sector to achieve public benefits. Thus, in order to improve the services, public amenities, and financial stability of the LSM, there is a need for creative, collaborative, and entrepreneurial initiatives developed and implemented within the framework of the public and governmental functions and purposes of the OSM.

Like many public entities, the OSM often receives unsolicited responses for projects to improve its facilities and operations. Under the leadership of Lieutenant Governor Billy

Nungesser, the OSM proposes to formally invite private and public sector entities to submit their project ideas to add or improve facilities and/or services in the LSM and/or increase revenue or improve cost savings and efficiencies for the LSM. Through the establishment and implementation of this Procedure, the OSM hopes to cast a wide net, to encourage the submission of interesting and innovative concepts and ideas that will move the OSM toward greater self-sustainability and establish the LSM as one of the best in the country.

Pursuant to and in accordance with a motion of the LSM Board of Directors at its Nov. 18, 2024 meeting, the OSM seeks to outsource property management, lease management, and leasing services of the Lower Pontalba Building (the “LPB”) in New Orleans, Louisiana to private sector entities.¹ Thus, in this specific Request for Information (“RFI”), the OSM formally invites private sector entities to submit their project ideas for property management, lease management, and leasing services of all apartment and retail spaces currently being leased or that are available for lease at the LPB (the “Project”).²

II. Background – The Lower Pontalba Building

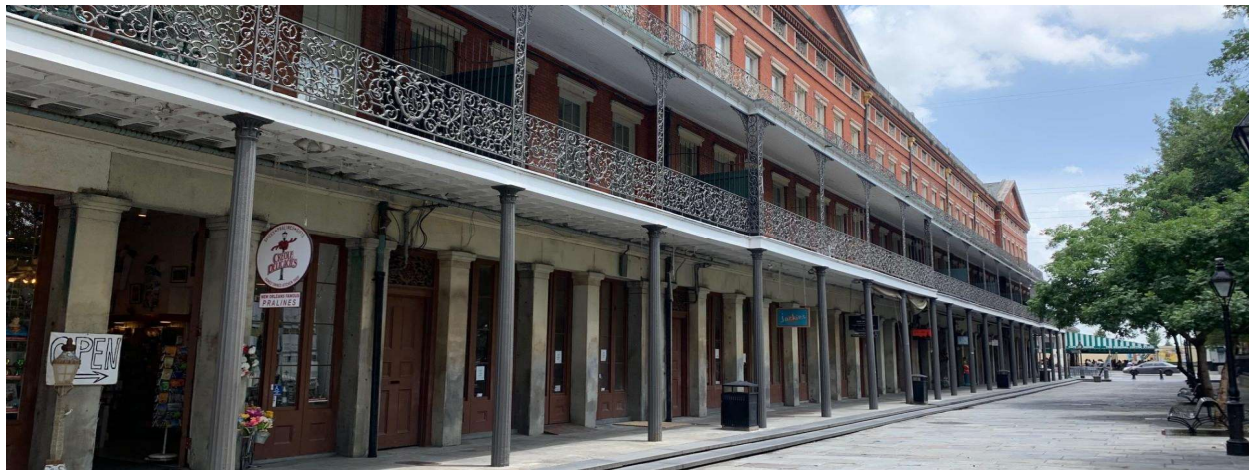
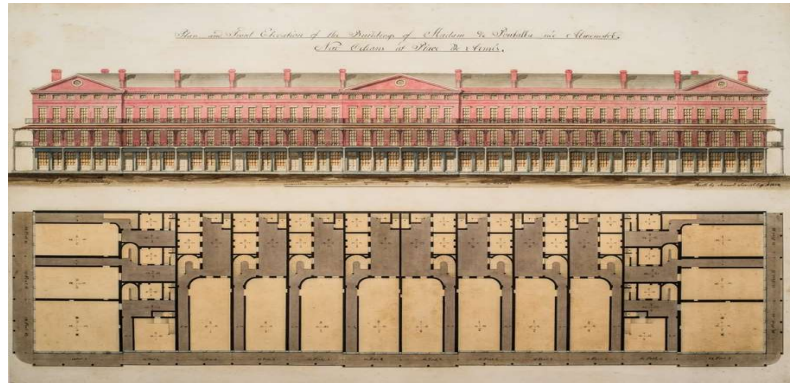
Standing on opposite sides of Jackson Square in New Orleans, Louisiana, the Upper and Lower Pontalba buildings were designed and financed between 1849-1851 by the Baroness Micaela Almonester de Pontalba. Baroness Pontalba was the wealthiest woman in New Orleans at the time and in many ways set the standard for the French Quarter architecture. Her father, Don Andrés Almonester y Roxas, was a Spanish colonial landowner who helped finance the Cabildo, St. Louis Cathedral, and Presbytère. Inspired by the imposing Parisian architecture the Baroness favored, the distinctive rowhouses were intended to serve as both elegant residences and retail establishments. In 1921, the Pontalba family sold the LPB to philanthropist William Ratcliffe Irby, who then bequeathed it to the LSM in 1927. The Upper Pontalba building is currently owned by the City of New Orleans.

Within the LPB are twenty-eight (28) apartments, 40,843 total square feet, and thirteen (13) retail spaces, 19,526 total square feet, that are currently managed and maintained by the OSM. Additionally, the 1850 House Museum is located within the LPB. The 1850 House Museum represents mid-nineteenth-century life in New Orleans. Visitors to the 1850 House encounter stories of Baroness Pontalba and the people who lived there in the 1850s, including enslaved workers and Irish immigrant servants. Other highlights of the 1850 House Museum include furniture and decorative objects made in New Orleans and a kitchen with a cast-iron range. At the

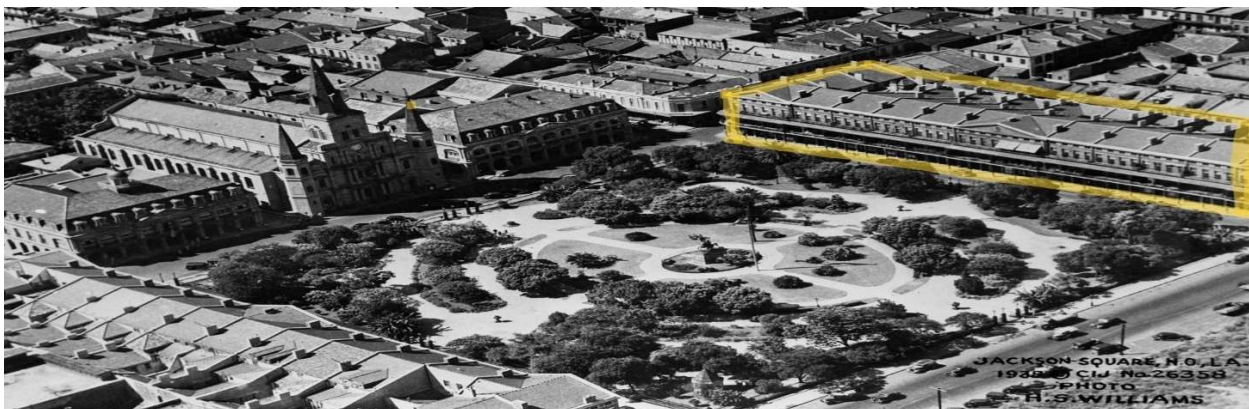
¹ Outsourcing is the “contracting out” of a service traditionally delivered by public employees. The LSM Board of Directors serve as the Trustees of the W.R. Irby Trust, i.e., the Lower Pontalba Building and all revenue derived from it.

² The lease program is governed by R.S. 25:349 (commercial) and 25:350 (residential). The Irby will place certain limitations about what type of services can and should be performed at the LPB. Thus, this RFI is limited strictly to property management, lease management, and leasing services project ideas.

front of the museum, the 1850 House Museum Store helps support the LSM through sales of daily tours and merchandise. The 1850 House Museum and Museum Store are currently managed by the Friends of the Cabildo pursuant to a Cooperative Endeavor Agreement.



Below please find an aerial photograph of Jackson Square that identifies the LPB highlighted in yellow:



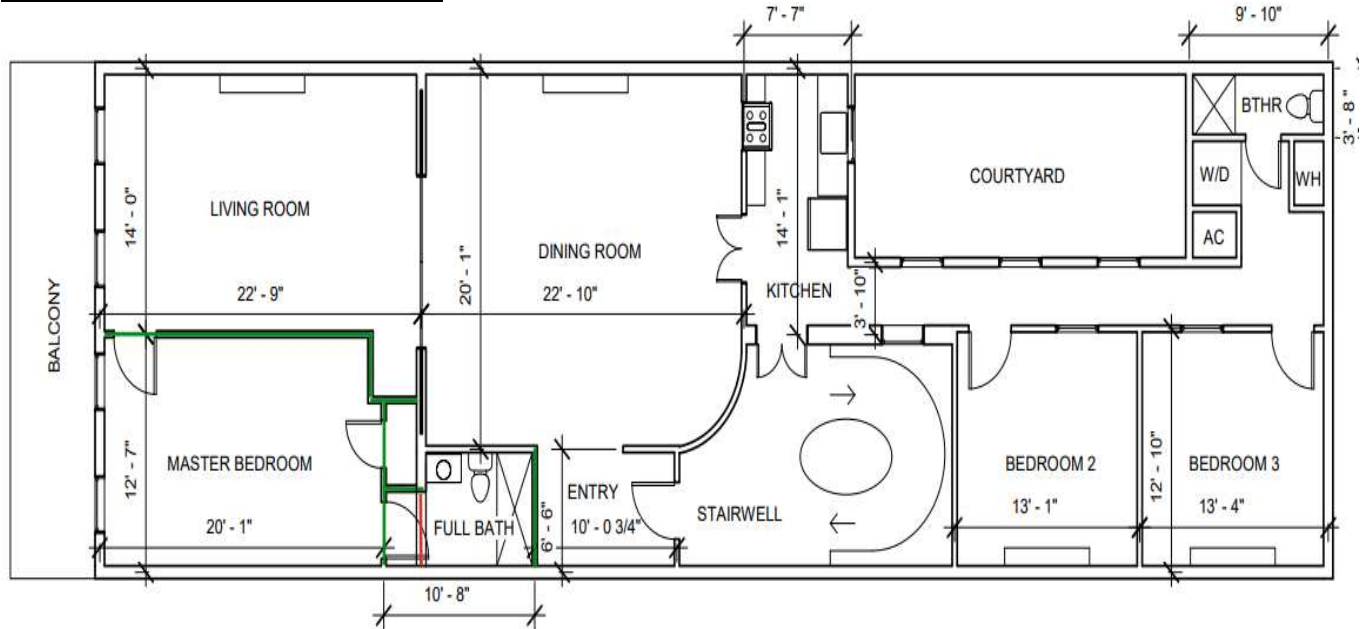
Currently, there are seven (7) apartments at the LPB available for rent, but only two (2) retail spaces available for rent. The apartments at the LPB range from 942 square feet to 1,727 square feet. The retail spaces range from 353 square feet to 3,036 square feet. See below for a listing of apartments and retail spaces within the LPB:

Apartments:

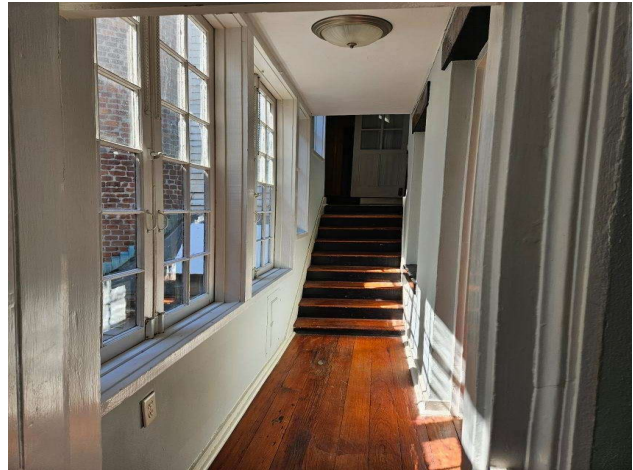
Retail Spaces:

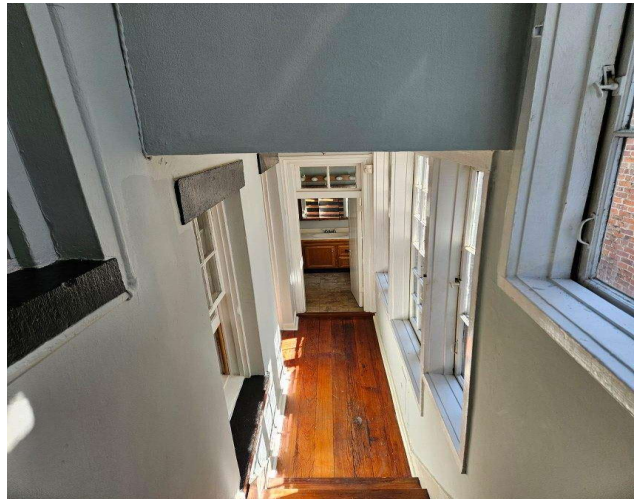
<u>Street</u>	<u>Apartment #</u>	<u>Size(SF)</u>		<u>Address</u>	<u>Tenant</u>	<u>Size (SF)</u>
St. Ann	503-2	1,510		507 St. Ann	Pop City	353
	503-3	1,453		513 St. Ann	Little Toy Shop, Inc.	1,254
	509-T	1,013		517 St. Ann	Ma Sherie Amour, Inc.	1,316
	511-2	1,547		521 St. Ann	Waffle Time LLC	1,290
	511-3	1,597		525 St. Ann	VACANT	1,165
	515-2	1,681		809 Decatur	Pro-Image Sports	1,078
	515-3	1,644		533 St. Ann	Creole Delicacies	1,210
	519-2	1,693		537 St. Ann	C'est Bon	1,210
	519-3	1,727		547 St. Ann	Stanley of New Orleans LLC	2,970
	527-2	1,608		801 Decatur	Monty's on the Square	2,405
	527-3	1,687		808 Chartres	Crescent Collection	974
	531-2	1,682		529 St. Ann	Fives Raw Bar	1,266
	531-3	1,550				
	535-2	1,622				
	535-3	1,526		Project Costs	for this space to be itemized	separate
	539-2	1,603		539 St. Phillip	VACANT	3,036
	539-3	1,586				
	541-1	942				
	543-2	1,548				
	543-3	1,508				
Chartres	806-2	1,269				
	806-3	1,300				
	810-2	1,202				
	810-3	1,295				
Decatur	807-2	1,325				
	807-3	1,295				
	811-2	1,200				
	811-3	1,230				

Floor plans at each apartment differ, but see below for the floor plan of apartment 515-2 St. Ann Street of the LPB:



Photos of 810-3 Chartres Street of the LPB, which is currently undergoing renovations and available for lease:





III. OVERVIEW OF THE PROCEDURE

A. In this RFI, the OSM is undertaking a process of soliciting property management, lease management, and/or leasing company(ies) that could benefit the LPB, the OSM, and, as a result, the citizens of and visitors to Louisiana.

B. This RFI informs interested parties how to submit their property management, lease management, and leasing services project ideas.

C. The OSM will review the responses to the RFI. For the purposes of this RFI, Project ideas shall be limited to those eligible projects as specified below.

IV. SCOPE OF SERVICES FOR ELIGIBLE PROJECTS AND OSM OBJECTIVES

A. SCOPE OF SERVICES FOR ELIGIBLE PROJECTS - Responses should fulfill one or more of the OSM Objectives (as defined below) for the LPB, and may include, without limitation, the following scope of services for the Project:

1. Property management –

Property management services should include, at minimum:

- (a) Conducting regular property inspections.
- (b) Providing keys and key(s) replacement (key management) for all tenants as necessary.
- (c) Reviewing and implementing preventative and emergency management programs.
- (d) Handling maintenance and repair requests for tenants in accordance with the OSM policies.
- (e) Soliciting and analyzing competitive bids, negotiating contracts, managing contracts, and supervising all services applicable to maintenance of the LPB, including but not limited to: (i) janitorial services contracts, (ii) general repair and maintenance contracts (iii) HVAC maintenance contracts, (iv) landscaping and ground maintenance contracts, (v) security contracts, (vi) pest control contracts, and (vii) waste management contracts. (Project costs for managing security contracts, pest control contracts, and waste management contracts to be priced separate from other property management services in this section of the scope of services.)
- (f) Providing prompt and professional services to aid in the retention of current and future tenants and vendors.
- (g) Communicating with current and prospective tenants in a professional and timely manner.
- (h) Operating a twenty-four (24) hour hotline to support maintenance and repair operations for LPB tenants.
- (i) Assisting with long-term budget and strategic capital planning.
- (j) Hiring, supervising, and managing on-site personnel.
- (k) Providing information to the OSM as necessary for the efficient operation of the LPB.

2. Lease management –

Lease management services should include, at minimum:

- (a) Enforcing rent collections, other fees due under the lease, and any other lease terms or provisions as necessary.
- (b) Providing a schedule of lease terms that are set to renew or expire.

- (c) Structuring and drafting leases and lease amendments, and obtaining all necessary approvals for leases and lease amendments.
- (d) Delivering annual lease reconciliations.
- (e) Preparing annual budget for income and expenses, including capital improvements.
- (f) Providing accurate financial statements and monthly financial reports.
- (g) Invoicing and auditing amounts due from tenants.
- (h) Contracting out a bi-annual rent study for residential apartments.
- (i) Maintaining current floor plans for all apartments and retail spaces.

3. Leasing –

Leasing services should include, at minimum:

- (a) Providing strategic planning for maximizing and improving lease programs and asset value.
- (b) Advertising and marketing apartment(s) and retail space(s) available for lease, which shall include development of a proactive marketing and leasing plan and creating marketing materials, with final approval of its contents by the OSM.
- (c) Receiving and analyzing commercial bids from potential commercial tenants.
- (d) Providing tours of apartment(s) and retail space(s) available for lease to potential tenants.
- (e) Defining, targeting, and maintaining a list of potential tenants.
- (f) Performing background and credit checks on prospective tenants.
- (g) Performing fair market value analysis of apartment and retail space to determine reasonable monthly base rent amounts on an ongoing basis.
- (h) Negotiating and closing new leases, lease renewals, and lease expansions in a timely and efficient manner.

- 4. The Responder shall provide reports and presentations to the Irby Committee and LSM Board of Directors upon request.
- 5. The response shall provide a revenue sharing plan for the Project, which will be accomplished through a Cooperative Endeavor Agreement (“CEA”) with the OSM. The response should also explain any discounts or cost saving benefits offered, if any.
- 6. Master Plan to Guide the Project –

The OSM encourages responses that demonstrate a thorough understanding of the nature of the Project and what the Responder must do to get the Project done properly. To this end, the Responder should submit a Project Master Plan that the

Responder will use to guide the Project. The Project Master Plan should include sufficient details to give the OSM an understanding of how the Responder's knowledge and approach will:

- (a) Manage the Project;
 - (b) Guide Project execution;
 - (c) Document planning assumptions and decisions;
 - (d) Facilitate communication among the Contractor, the OSM, and LPB tenants;
 - (e) Define key management review pertaining to content, scope, and schedule; and
 - (f) Demonstrate cutting edge expertise in asset management, value maximization strategies in real estate and broad-based real estate consulting services including the ability to underwrite, facilitate, and execute on the analysis necessary to determine the financial feasibility of renovation and rental of any and all spaces within the Project, and with particular focus and expertise in the use of State and Federal Historic Tax Credits.
7. The Responder shall fill out the attached Schedule of Values (Exhibit A) for the OSM to consider.

B. OSM OBJECTIVES - The OSM Objectives in soliciting information for this RFI are:

- 1. To promote the OSM mission;
- 2. To achieve the proper balance of preservation and utilization of the LPB to allow the OSM to better fulfill its mission while also becoming more financially self-sustaining;
- 3. To better serve the needs of the tenants, vendors, customers, and visitors of the LPB through collaborations between public officials and entities, private individuals and organizations, businesses, nonprofits, and other interested parties and stakeholders;
- 4. To demonstrate efficient long-range planning, resource management and innovative approaches to delivering first-class, customer-friendly services and activities with sustainable, fiscally-sound business practices to the LPB and the OSM;
- 5. To increase the public awareness of the apartments, retail spaces, amenities and resources of the LPB and the OSM;
- 6. To generate additional revenues or cost savings for the LPB and the OSM;

7. To be a laboratory for innovation and creativity in providing property management, lease management, and leasing services that are sustainable, appropriate to the OSM's purpose, and otherwise improve the LPB;
8. To engage Louisiana resources and employees in connection with the proposed project or as a result of the proposed Project;
9. To ensure additional competitive processes are utilized in connection with the implementation of the Project (such as the use of competitive processes in the selection of subcontractors and other parties to be engaged in the Project);
10. To avoid disruption and/or any adverse or harmful impact on the LPB and/or local businesses; and
11. To generate other public benefits for the LPB within the parameters of the OSM's authority and responsibility.

V. REQUESTS FOR INFORMATION (RFI) PROCEDURE

A. PURPOSE – The purpose of this RFI is to obtain competitive responses from qualified Responders who are interested in the Project.

B. WEBSITE - The OSM maintains www.louisianastatemuseum.org, which maintains information on the OSM Properties for public access. Prior to issuance of an RFI, the OSM shall verify the website has been fully reviewed and updated to ensure that interested parties have the most current and complete data regarding the LPB and other OSM properties.

C. PROJECT SUGGESTIONS – The RFI response should provide and explain the following:

1. A description of the Project, including variations and alternatives that may include innovative concepts and/or add-ons;
2. Identification and description of how the Project will satisfy the Project's scope of services and meet one or more of the OSM's Objectives, the OSM's public purposes, and is otherwise eligible for consideration through this Procedure;
3. The proposed term for a CEA resulting from the RFI and schedule for implementation of the Project within that term;
4. The Responder's approach and methodology to develop and implement the Project, including, as necessary or useful, market research, community outreach, use of competitive processes to select sub-contractors, systems for quality control, financial management and reporting, etc.;
5. A description or list of the licenses, permits, regulatory requirements necessary to develop and implement the Project;

6. The Responder's security for performance and implementation of the Project;
7. The projected financial and economic impact of the Project on the LPB and the OSM, the state and local communities, Louisiana businesses, etc;
8. All applicable Project fees necessary to implement the Project. The response should also explain any discounts or cost saving benefits offered, if any.
9. The proposed revenue sharing agreement; and
10. Other relevant information to fully describe the proposed Project.

D. RESPONDER'S QUALIFICATIONS FOR RFI RESPONSE – The RFI response should explain why the Responder is qualified to implement the project ideas, such as:

1. Background information about the Responder's qualifications and experience, including experience with other P3 projects generally and the Project specifically;
2. A description of the Responder's team structure and the team members' relevant qualifications, experience, licenses, and certifications required or useful to develop and implement the Project;
3. Attestation and/or verification that the Responder is eligible and able to enter into a CEA with the OSM.

For example, the Responder must be in good standing with the Louisiana Secretary of State; must not be delinquent on taxes; must not be debarred, must possess insurance of the types and in the amounts set forth in the *Louisiana Office of Risk Management Procedures Manual for Insurance Requirements in Contracts and Indemnification Agreements*; must agree to the standard provisions and requirements of state contracts; must agree to comply with applicable provisions of law, including but not limited to public records law, the provisions of the Code of Governmental Ethics, the legal restrictions that pertain to the use of OSM properties, etc.

E. ANTICIPATED CONTRIBUTION FROM OSM –The RFI response should also include what OSM resources are required for the project, such as:

1. Use of the LPB or the OSM property or space (e.g., through a right of use agreement);
2. Connection to the LPB or OSM utilities, including Wi-Fi;

3. Assistance with marketing, promotions, and communications; technical assistance with leasing strategies; etc.

F. CONFIDENTIAL INFORMATION - If the Responder's response contains confidential information, the Responder should also submit a redacted copy of their response along with their original response. The redacted copy of the response will be the copy produced by the OSM if a person seeks review or copies of the Responder's response. **If the Responder does not submit a redacted copy, it will be assumed that any claim to keep information confidential is waived.**

Responder shall be prepared to defend the reasons why the material should be held confidential. By submitting a response with data, information, or material designated as containing trade secrets and/or privileged or confidential proprietary information, or otherwise designated as "confidential," the Responder agrees to indemnify (including attorney's fees) the OSM and State of Louisiana and hold the OSM and State of Louisiana harmless against all actions or court proceedings that may ensue, which seek to order the OSM and/or State of Louisiana to disclose Responder's information.

G. CONSENT AND RELEASE - The RFI responses will become public record unless the Responder designates certain contents of its response as confidential and the document(s) fit within an exemption or exception under public records law.

H. OBLIGATION - The RFI does not obligate the OSM to enter into any type of agreement to carry out the Project.

I. ADMINISTRATIVE INFORMATION - Responders may submit written inquiries to the RFI Coordinator via email according to the Schedule of Events provided herein.

The OSM shall provide responses to all written inquiries, according to the Schedule of Events, in the form of an RFI addendum, posted to the OSM website at: www.louisianastatemuseum.org

1. Requests for copies of the RFI and written questions or inquiries must be directed to the RFI coordinator:

Brett Sandifer, Attorney
Department of Culture, Recreation and Tourism
P.O. Box 44426
Baton Rouge, LA 70804-4426
Phone: 225-342-1426
Fax: 225-342-8107
Email: bsandifer@crt.la.gov

2. All communications relating to this RFI must be directed to the RFI Coordinator named above. All communications between Responders and the OSM staff members concerning this RFI will be strictly prohibited.

3. This RFI is available in PDF format at the following web link:

www.louisianastatemuseum.org

J. SCHEDULE OF EVENTS - All responses must be received according to the following schedule. The OSM reserves the right to revise this Schedule of Events at any time.

Schedule of Events		
Public Notice of RFI	March 1, 2025 – March 31, 2025	
Deadline for Responder Inquiries	April 15, 2025	4:00 PM CT
Deadline for the OSM Response to Inquiries	April 30, 2025	
Deadline for Receipt of RFI Responses	May 15, 2025	4:00 PM CT

1. Response Submission

Response submissions must include two (2) hardcopies and two (2) flash drives submitted via U.S. Mail, courier, or hand-delivered to:

If courier mail or hand-delivered:

Brett Sandifer, Attorney
Office of State Parks
1051 N. Third Street, Suite 321
Baton Rouge, LA 70802

If delivered by U.S. Mail:

Brett Sandifer, Attorney
Office of State Parks
P.O. Box 44426
Baton Rouge, LA 70804-4426

If electronic submission:

Please submit directly to Brett Sandifer at bsandifer@crt.la.gov or follow the instructions listed at www.louisianastatemuseum.org.

All responses must be received by the due date and time indicated on the Schedule of Events. Responses received after the due date and time may not be considered. It is the sole responsibility of each Responder to assure that its response is delivered at the specified location prior to the deadline. Responses which, for any reason, are not so delivered may not be considered.

All responses become the property of the OSM/DCRT and will not be returned to the Responder. The OSM/DCRT retains the right to use any and all ideas or adaptations of ideas contained in any document received in response to this solicitation. All responses received become subject to the Louisiana Public Records Act.

2. Format of Response

All responses shall be submitted in hardcopy and digital format (PDF or Word is required), not to exceed 90 pages, in 12pt. or larger size font according to the following outline:

- Administrative Information

Responder shall provide the following administrative information:

- Company Name
- Division/Location
- Headquarters Location
- Total Number of Employees
- Contact Name
 - Title
 - Email Address
 - Phone Number

- Corporate Background and Experience

Responder shall provide a brief description of their company, including a brief history, corporate structure, and organization and the number of years in business.

- Business Model for Contracting of Services

Responder shall describe its approach to a contract for its services should it be awarded a contract through this RFI.

- Approach and Methodology

Responder shall describe its proposed solution including delivery of services.

- Implementation Timeframe of Solution

Responder shall indicate the minimum timeframe from contract execution to full implementation for its project, inclusive of hardware and software acquisition, configuration, design, development and testing.

K. OPTIONAL DISCUSSION SESSION

To solicit feedback and ask follow-up questions based upon RFI responses, the OSM reserves the right at its sole discretion to conduct a structured “discussion” for Responders to this RFI only. If the “discussions” are scheduled to take place, the discussion session will begin with a presentation by the OSM. Following the presentation, OSM representatives and the Responder will participate

in a structured question and answer session. An agenda, specific questions and other expected topics for discussion will be e-mailed to the Responder prior to the discussion. Responders may be asked to give a presentation/demonstration.

VI. EVALUATION (Scoring Scale)

<u>Criteria</u>	<u>Maximum Score</u>
Company Background & Experience	10
Approach & Methodology	10
Localized Expertise Grading	20
Historic Building Expertise: Construction	20
Historic Building Expertise: Real Estate	20
Cost	10
Louisiana Veteran and/or Hudson Initiative	10
<u>Total Score</u>	<u>100</u>

EXHIBIT A

SCHEDULE OF VALUES

<u>Trade</u>	<u>Vendor Name</u>	<u>Cost Per Hour</u>
Basic Electrical Repairs (switches, outlets, fixtures, breakers, appliance installation, etc.)		
Basic Plumbing (faucets, leaks, clogs, water heaters, appliance installation, fixture repair, etc.)		
Basic HVAC (capacitors, yearly cleaning, filters, fan motors, etc.)		
Carpentry Repairs (sticking doors/windows, trim, interior/exterior, cabinet repair, etc.)		
Painting/Repair (walls, ceiling, doors, windows, plaster/sheet rock repair)		
Locksmith Services (Re-Keying, lock repair/replacement, etc.)		

Parts and supplies will be invoiced on each repair with itemized receipt from vendor + 10% for overhead (includes travel time, fuel, etc.)