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SOQ 24-16-Provide Various Professional Legal Services for Jefferson Parish

Jefferson Parish Government

Project documents obtained from www.CentralBidding.com
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Professional Legal Services Questionnaire Instructions

- The Professional Legal Services Questionnaire shall be used for outside legal services.
- **The Professional Legal Services Questionnaire should be completely filled out. Complete and attach ALL sections. Insert “N/A” or “None” if a section does not apply or if there is no information to provide.**
- Questionnaire must be signed by an authorized representative of the Firm. Failure to sign the questionnaire shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- All subcontractors must be listed in the appropriate section of the Questionnaire. Each subcontractor must provide a complete copy of the Professional Legal Services Questionnaire, applicable licenses, and any other information required by the advertisement. Failure to provide the subcontractors' complete questionnaire(s), applicable licenses, and any other information required by the advertisement shall result in disqualification of proposer pursuant to J.P. Code of Ordinances Sec. 2-928.
- If additional pages are needed, attach them to the questionnaire and include all applicable information that is required by the questionnaire.

Professional Legal Services Questionnaire

A. Person or Firm Name & Principal Address:

Adams and Reese LLP
701 Poydras Street, Suite 4500
New Orleans, LA 70139

B. Name, Title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, who is licensed to practice law in the State of Louisiana with a minimum of five (5) years' experience:

David Wolf, Counsel
Adams and Reese LLP
701 Poydras Street, Suite 4500
New Orleans, LA 70139
david.wolf@arlaw.com
504-585-0117

Philip Sherman, Counsel
Adams and Reese LLP
701 Poydras Street, Suite 4500
New Orleans, LA 70139
philip.sherman@arlaw.com
504-585-0175

Johnny Domiano, Jr., Partner
Adams and Reese, LLP
701 Poydras Street, Suite 4500
New Orleans, LA 70139
johnny.domiano@arlaw.com
504-585-0192

B. Location of the principal:

701 Poydras Street, Suite 4500
New Orleans, LA 70139

D. Please check the legal field or fields in which Firm is qualified to perform services for Jefferson Parish and include the number of years of experience in that particular field.

<p><input checked="" type="checkbox"/> Bond Services (Years: <u>42</u>)</p> <p><input checked="" type="checkbox"/> Elections (Years: <u>42</u>)</p> <p><input type="checkbox"/> Administrative & Regulatory (Years: <u> </u>)</p> <p><input type="checkbox"/> Antitrust Law (Years: <u> </u>)</p> <p><input checked="" type="checkbox"/> Business Law (Years: <u>22</u>)</p> <p><input type="checkbox"/> Criminal Justice (Years: <u> </u>)</p> <p><input type="checkbox"/> Dispute Resolution (Years: <u> </u>)</p> <p><input type="checkbox"/> Environmental, Energy & Resources (Years: <u> </u>)</p> <p><input type="checkbox"/> Health Law (Years: <u> </u>)</p> <p><input type="checkbox"/> Intellectual Property (Years: <u> </u>)</p> <p><input type="checkbox"/> International Law (Years: <u> </u>)</p> <p><input type="checkbox"/> Labor & Employment Law (Years: <u> </u>)</p> <p><input type="checkbox"/> Public Contract Law (Years: <u> </u>)</p>	<p><input type="checkbox"/> Science & Technology Law (Years: <u> </u>)</p> <p><input checked="" type="checkbox"/> State & Local Government Law (Years: <u>42</u>)</p> <p><input type="checkbox"/> Taxation (Years: <u> </u>)</p> <p><input type="checkbox"/> Tort Trial & Insurance Practices (Years: <u> </u>)</p> <p><input type="checkbox"/> Complex Litigation (including asbestos litigation) (Years: <u> </u>)</p> <p><input type="checkbox"/> Securities (Years: <u> </u>)</p> <p><input type="checkbox"/> Ethics Law (Years: <u> </u>)</p> <p><input type="checkbox"/> Civil Service Matters (Years: <u> </u>)</p> <p><input type="checkbox"/> Civil Rights & the Constitution (Years: <u> </u>)</p> <p><input type="checkbox"/> Municipal Representation (including liability & intergovernmental conflicts) (Years: <u> </u>)</p> <p><input type="checkbox"/> Code Enforcement Matters (Years: <u> </u>)</p>
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Professional Legal Services Questionnaire

__ Public Utilities Law (Years: _____) __ Communications Law (Years: _____) __ Transportation Law (Years: _____) X_ Property (Years: _18____) __ Trust & Estate Law (Years: _____) __ Other/specific project as required by the advertisement (Years: _____)	__ Oil Spill Litigation (Years: _____) X_ Public Finance (Years: __42____) X_ Land Use, Planning & Zoning Law (Years: _18____) X_ Economic Development (Years: __42____) __ Construction Law (Years: _____)
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E. List all subcontractors anticipated for this Project. Please note that all subcontractors must submit a fully completed copy of this questionnaire, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.

Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. N/A		
2.		
3.		
4.		

Professional Legal Services Questionnaire

F. Professional Training and experience in relation to the type of work required for the outside legal services.

Philip Sherman, Counsel, has practiced in the field of real estate and general business law since 2006 and has created and implemented payment in lieu of tax (PILOT) arrangements and tax increment financing (TIF) arrangements. His experience includes:

1. Representing sellers and purchasers in the purchase of immovable property.
2. Representing landlords and tenants in lease negotiations.
3. Representing developers in land use matters, including zoning, subdivisions and permitting matters.
4. Issuing title policies for real estate transactions.

David M. Wolf, Special Counsel, has practiced in the field of Louisiana public finance since 1982. This experience includes:

1. Handling elections for local government propositions.
2. Serving as bond counsel to all kinds of local governments on general obligation bonds, sales tax bonds, limited tax bonds, revenue bonds, certificates of indebtedness, assessment certificates, revenue anticipation notes, bond anticipation notes, grant anticipation notes, refunding bonds, industrial revenue/private activity bonds, GOZone Bonds and other types of municipal debt.
3. Structuring and implementing payment in lieu of tax (PILOT) arrangements for economic development projects.
4. Structuring and implementing tax increment financing (TIF) arrangements for economic development projects, including creation of economic development districts, and preparation of necessary documentation and ordinances.
5. Serving as special tax counsel on bond issues requiring special expertise in federal tax laws relating to tax-exempt bonds, arbitrage issues, use of proceeds and other similar tax questions.
6. Performing yield and arbitrage calculations, including arbitrage rebate, advance refunding analysis, preparation of debt service schedules and projections, and other kinds of bond-related analytics.
7. Representing Louisiana Drinking Water Revolving Loan Fund and Clean Water Revolving Loan Fund in all loans and state match transactions since 2003.
8. Representing private businesses in TIF financings.
9. Assisting in the creation of industrial development boards, economic development districts, other kinds of special school and special service districts and other units of local government.
10. Drafting local resolutions/ordinances as well as state legislation relating to public finance issues (see in particular Act 569 of 2018, the Consolidated Local Government Public Finance Act, which completely rewrites and consolidates the local public finance laws in Louisiana).

G. Size of Firm and capacity for timely completion of newly assigned work considering the number of professional and support personnel required to perform the type of outside legal services tasks and the Firm's current unfinished workload.

Adams and Reese LLP employs approximately 300 attorneys in twenty offices across ten states and the District of Columbia.

Approximately 10 attorneys in the firm handle public finance work, including four in the New Orleans office (David M. Wolf, Philip Sherman, Lee Reid and Cate Creed). Philip Sherman handles the majority of the real estate work in Louisiana.

The attorneys on the Public Finance Team and Real Estate Team are able to handle, on a timely and competent basis, any public finance assignments for which the firm might be selected, and also have access to attorneys in other practice areas within the firm, on an as-needed basis, should there be legal issues or workload for which consultation or assistance is required.

To the best of our knowledge, there is no unfinished workload on Jefferson Parish business.

Professional Legal Services Questionnaire

i. Please specify the total number of support staff that may assist in the completion of a matter for each area of the law selected above: _____		
ii. List any attorneys that may assist in the completion of a matter for each area of the law selected above. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's attorneys that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.		
Name:	Legal Field:	Years of Experience in Legal Field:
1. David Wolf	Bond services Elections State and Local Government Law Public Finance Economic Development	42 (since 1982)
2. Philip Sherman	Real Estate Land Use Public Finance Economic Development	18 (since 2006)
3. Lee Reid	State and Local Government Law Public Finance Economic Development	25 (since 1999)
4. Cate Creed	Elections State and Local Government Law Public Finance Economic Development	3 (since 2021)
5. Johnny Domiano, Jr.	State and Local Government Law	28 (since 1996)

Professional Legal Services Questionnaire

H. Past performance by person or Firm on Parish contracts. Please attach additional pages if necessary.

We created an economic development district entitled "Elmwood Economic Development District No. 1" and amending the boundaries thereof. This employment is pursuant to a resolution adopted by the Parish Council on September 19, 2018, and is ongoing.

We worked on a matter involving the creation of another economic development district entitled "Lafreniere Area Economic Development District," which is pursuant to a resolution adopted by the Parish Council on November 6, 2019.

Other than the foregoing, we are not aware of the firm being selected to handle any public finance matters for Jefferson Parish, although David Wolf does work on an ongoing and occasional basis with Parish Attorneys on multiple loans from the Drinking Water Revolving Loan Fund and the Clean Water Revolving Loan Fund.

The firm currently handles certain Governmental Relations work for Jefferson Parish under a separate contract for such services.

I. Adversarial legal proceedings between the Parish and the person or Firm performing professional services, in which the Parish prevailed, and excluding those instances or cases where the person or Firm was added as an indispensable party, or where the person or Firm participated in or assisted the public entity in prosecution of its claim. In the event that the person or Firm fails to provide accurate and detailed information regarding legal proceedings with the Parish, including the absence of legal proceedings, the person or firm shall be deemed unresponsive with regard to this category, and zero (0) points shall be awarded. Please attach additional pages if necessary.

In the matter "Parish of Jefferson v. Atlantic Richfield Company" (24th JDC, No. 732-768, Division "N") Adams and Reese LLP represents a party that is adverse to the Parish in a legal proceeding.

This Parish has previously executed waiver letters relative to this case in connection with a previous SOQ response relating to Governmental Relations work for the Parish. A copy of the waiver letter is available upon request.

The letter is dated November 15, 2013, was signed by then-Parish President John Young and should also be on file with the Parish Attorney's office.

Professional Legal Services Questionnaire

J. Prior successful completion of projects of the type and nature of legal services, as defined, for which Firm has provided verifiable references. (List no more than 10 projects.)

1.

PILOT Structuring and Implementation - JEDCO (numerous projects)

Reference: Executive Director Jerry Bologna

2.

PILOT Structuring and Implementation - New Orleans Industrial Development Board (numerous projects)

References: IDB President Darrel J. Saizan, Jr.

3.

TIF District Structuring & Financing - City of Opelousas (Tanger Mall EDD; Conway EDD)

References: Mayor Barney Arceneaux; City Clerk Scot Byr

4.

Land Use Matters - Development of self-storage facilities in Jefferson and Orleans Parish

Reference: Danny Montelepre, Brookwood Properties, LLC

5.

Lease Review and Negotiation - Review tenant and landlord leases and negotiate terms

Reference: David Guzan, In and Out Urgent Care, LLC

Professional Legal Services Questionnaire

6.

Purchase and Sale of Numerous Commercial Properties - Draft purchase agreement, conduct due diligence and issue title policies.

References: Frank DellaCroce, M.D., Triton Holdings Two, LLC; Srinivas Kata, M.D., Doctor's After Hours

7.

Development of Second Phase of Gabriel Subdivision - Handle all phases of the development of Gabriel Subdivision

References: Bryan Krantz, Gabriel Properties, LLC

8.

Coordinating and handling paperwork for local government bond, tax, and local option elections (Kenner & Westwego, numerous elections).

Reference: Mayor Robert E. Billiot, Sr.

9.

10.

Professional Legal Services Questionnaire

K. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.

David Wolf is a recognized expert state-wide in this area and has in the last few years spoken on the subject to numerous groups including a LIDEA Workshop for Elected Leaders, the North Louisiana Economic Partnership, the LIDEA 2017 Annual Meeting, the 2016 Mid-Size City Conference and others.

As one of only a handful of attorneys in Louisiana with experience utilizing PILOTs and TIFs for economic development projects, Mr. Wolf is especially qualified to handle these matters for Jefferson Parish.

L. To the best of my knowledge, the foregoing is an accurate statement of facts.

Signature:  _____ Print Name: Philip Sherman

Title: Counsel Date: June 7, 2024