

**Request for Proposal
Real Estate Consultant to Provide Space and Costs Estimates for Capital Project**

City Lore, a non profit 501(c)3 organization seeks proposals to provide space and cost estimates for a proposed capital project among a group of nonprofits entitled CATCH (the Center for Art, Tradition, and Cultural Heritage).

On behalf of the CATCH consortium, City Lore is seeking a real estate consultant to a) provide space programming and cost estimates, which will be incorporated into the CATCH Strategic plan; and b. articulate potential appropriate sites and opportunities;

**City Lore, Inc.
Steven Zeitlin, Executive Director
Henry Chalfant, Chair**

February 5, 2007

Deadline for response: March 9, 2007

Questions must be submitted in writing no later than February 28, 2007 to Steven Zeitlin, Executive Director, by e-mail, to steve@citylore.org

I. The CATCH Initiative

A. Mission Statement

CATCH is a consortium of four organizations -- City Lore, the Center for Traditional Music and Dance, World Music Institute, and the Society for Educational Arts -- dedicated to the preservation and presentation of New York City's living cultural heritage.

B. Background Information

City Lore in collaboration with the Center for Traditional Music and Dance (CTMD), the Society of the Educational Arts/Sociedad Educativa de las Artes, Inc. (SEA), and World Music Institute (WMI) have recently received planning grants of over \$300,000 from Downtown Alliance, Lower Manhattan Cultural Council, the Mertz-Gilmore Foundation, and the Lower Manhattan Development Corporation to develop a strategic plan for a major new arts center dedicated to New York City's Living Cultural Heritage. Housing a theater, gallery, library, café, gift shop, music school, study center, and archive of historic images and recordings, CATCH, the Center for Art, Tradition, and Cultural Heritage, will serve as the site for musical concerts, conferences, children and adult theater, exhibitions, storytelling, and poetry presentations. In addition, the Center will include smaller offices, subsidized facilities for emergent ethnic-specific groups. These may include Badenya, an African immigrant organization; Trova, a Puerto Rican group dedicated to the *décima* tradition; La Troupe Makandal, a Haitian music and dance group; and Nashi Traditsii, an arts organization of the Jewish diaspora community from the former Soviet Union.

New York has a number of history museums and historical societies. Yet, until now, there has been no physical space, no centerpiece for the wide variety of activities highlighting New York City's immigrant cultures and diverse heritages. Although the four organizations anchoring CATCH have produced hundreds of cultural programs, these have been scattered throughout the City. For the first time, the CATCH partners will be able to present the City's many immigrant cultures and their richly diverse and compelling art forms in one central location; they will highlight poetry, dance, and music traditions from many parts of the world, and offer young people places to study and explore those traditions. It will be a Center where many languages are spoken, and where the city's diverse cultural arts can be nurtured and cross-fertilized.

Anchoring the new Center for Art, Tradition, and Cultural Heritage (CATCH) are four established, vital arts groups which, over the past three decades, have brought a new awareness of the value of traditional arts, folklore, and ethnic and immigrant cultures to New York City. With combined annual budgets of over five million dollars, these four institutions have demonstrated remarkable staying power, creativity, and administrative excellence. City Lore, the lead partner, is renowned for its programs in grassroots preservation (*Place Matters*), poetry (*People's Poetry Gathering*), documentary film (they served as fiscal sponsor for Ric Burns' *New York*), and celebrating ordinary New Yorkers (*The People's Hall of Fame*). The Center for Traditional Music and Dance has been sponsoring performances of traditional music for over 30 years, and is nationally acclaimed for its multi-year *Community Cultural Initiatives* projects that highlight and strengthen performing arts among ethnic and new immigrant cultures including the

African, Dominican, Arab, Albanian, Filipino, and Mexican communities, among others. World Music Institute is the City's premier presenter of music and dance traditions from around the world. Operating a major children's theater, The Society of the Educational Arts is a burgeoning not-for-profit Hispanic/Bilingual Arts-in-Education Organization dedicated to the empowerment and educational advancement of children and young adults. The stature and respect enjoyed by all four core groups is underscored by the substantial support they have received over many years from public granting organizations including the National Endowment for the Arts, the New York State Council on the Arts, and the National Endowment for the Humanities, as well as the Ford and Rockefeller Foundations.

C. Background of City Lore, lead organization, CATCH

City Lore is a cultural center dedicated to the documentation, preservation and presentation of New York City -- and America's -- living cultural heritage. City Lore was founded in 1986, and our budget has grown from about \$125,000 our first year to about \$2,000,000 in the past several years. Begun with funding from the National Endowment for the Arts and NYSCA, we have been able to diversify our funding base to include, among many others, The Rockefeller Foundation, NY Community Trust, and the Lower Manhattan Development Corporation.

II. Planning To Date

A. CATCH Task Force

The CATCH Task Force is comprised of the Executive Directors and Chairs of the Board of each of the anchor partner, along with two additional Board members from each group. The Task Force is responsible for overseeing the process and working with consultants.

B. Strategic plan

CATCH has contracted AEA Consulting, Director Adrian Ellis, to devise a Strategic Plan for CATCH. The Strategic Plan includes Phase 1: Governance Plan, an articulation of the project's concept, rationale and strategy. Phase 2: Financial Plan includes assessing the costs of the new facility, with the real estate consultant(s) selected by this RFP, and AEA's Final Concept Development Plan for the project.

1. Phase One

AEA is conducting research, interviewing key CATCH representatives (board and staff), facilitating three planning meetings, and preparing a Governance Plan. The Governance Plan will consist of:

*A crystallized vision and concept for the CATCH;

*CATCH's strategic goals, mission, purpose, rationale and underlying philosophy;

*Proposed partnership structure.

In addition, AEA will collect and analyze data relevant to the concept development of the Center. The due diligence will involve reviewing resources such as: (a) Existing data from the four partner organizations, including current programming schedules, operating budgets, audience and market information, funding patterns and other relevant data; (b) Existing planning studies; (c) The working assumptions about the facility program and any preliminary space program produced by the project's architectural advisers; (d) Information on existing cultural resources in Lower Manhattan; (e) Tourism, economic development and economic impact studies relevant to Lower Manhattan, as well as demographic information about the area and the greater New York City area.

During Phase I, AEA will also undertake a benchmarking study to identify models for the proposed Center nationally, as well as potential competitors and collaborators locally. This "competitor scan" will identify areas of potential overlap and synergy, articulate the Center's distinctive competitive advantage, and provide benchmark figures on attendance, annual operating budget, sources of income, project budgets and primary funders.

ii. Phase Two

In the second phase, AEA will develop the Final CATCH Financial Plan. A key element on Phase 2, is the development of a preliminary space program with accompanying cost estimates. The real estate consultant hired through this RFP will develop that portion of the plan.

Using this information, in addition to their other research, AEA will develop preliminary capital and operating budgets by building an Excel-based financial model. This model will be a flexible tool capable of serving as an aid for all ongoing planning purposes. It will provide a context in which to identify and explore critical financial assumptions and sensitivities. The preliminary capital and operating budgets will be refined during later planning phases, after the selection of a final space and an architect.

Based upon our due diligence, site visits, competitive benchmarking, and interviews, AEA will develop a preliminary audience profile that includes annual attendance projections and audience segmentation based on current and projected local residents, national and international tourism markets, and the demographics and development context of Lower Manhattan.

III. Scope of Services Requested

On behalf of CATCH, City Lore is seeking a real estate consultant to coordinate with AEA Consulting to

- a. to provide space programming and cost estimates for Phase 2 of the Strategic plan;
- b. articulate potential appropriate sites and opportunities;
- c. assess the viability of these opportunities with regard to physical, financial, and organizational

requirements of the participating organizations;

d. examine collective space needs and develop preliminary program requirements in terms of: square footage, uses for spaces, street-level frontage, ceiling heights, column spacing, critical space adjacencies, etc.;

e. Develop in collaboration with AEA and the CATCH consortium a project timeline, and capital budget based on space requirements

f. Formulate site evaluation criteria that cover desired neighborhoods, transportation access options, proximity to target users and related programs/partners. Use criteria in assessment of identified potential sites.

g. Explore and present recommendations, including partnership possibilities, for securing a site such as acquisition on its own or in a joint venture, acquisition as part of a private development; and/or securing a long-term lease.

IV. Submission Process and Additional Requirements

The proposal should include consultant's experience with similar planning projects (please include references and contact information), approach, methods, availability, and fee structure.

The project is anticipated to commence on April 1 and a draft of the Cost and Space Estimates Plan must be submitted to City Lore by July 31. The material will be integrated into the Strategic Plan prepared by AEA Consulting which will be completed by October 31.

Proposals should be submitted no later than 5:00 PM EST on March 9, 2007. Deliver all proposals to:

Steve Zeitlin
Executive Director
City Lore, Inc.
72 East First Street
New York, NY 10003

Attn: Project RFP

City Lore reserves the right to reject any or all proposals submitted if such election is deemed to be in the best interest of CATCH. City Lore and CATCH assume no obligation, no responsibility and no liability for costs incurred by the responding firms prior to issuance of a contract.

Interested individuals or firms are invited to submit proposals that contain the following information:

A. Experience, Structure, and Personnel

1. A history of experience providing project management for capital projects for not-for-profit and civic organizations. Special consideration will be given to experience with performing arts and cultural facilities.
2. For firms: Résumés of the principals and staff who would work directly with City Lore and CATCH..
3. Samples of up to three major projects that have been completed in the area of service requested. Include the client, the name of the contact person who is able to provide a reference, a description of the nature of the work, and the complexity of the project.
4. Any other information that you believe would make your work on behalf of CATCH superior to that of other consultants.

B. Methodological Approach

1. A description of how you would approach the anticipated scope of services set forth in this RFP.

C. Fee

1. Total estimated fee for completion of the project and whether you would be willing to agree to a cap.
2. The normal hourly rate of each principle and staff member whose résumé is provided or whose job category may be required, and the rate used in the proposal.
3. Any reduced fees offered to other municipalities, governmental entities, economic development or nonprofit organizations.
4. Any other fees or charges.

Note: the fee proposal must be submitted in a separate, clearly marked, sealed envelope. The fees will not be opened until all the proposals have been initially evaluated. Although proposed fees will be taken into account, City Lore and CATCH reserve the right to negotiate a lower or different fee structure with any firm selected.

D. Contact information

On a single cover sheet in your proposal please provide:

1. The firm or individual name
2. The firm's contact person
3. All contact information, including e-mail, address, telephone and fax

4. The year the firm or practice was established
5. The MBW/WBE status of the firm
6. The signature of the lead individual, and the date of the signature

E. Conflict of Interest

Submit a statement describing any potential conflict of interest or appearance of impropriety, relating to other clients of the firm, or officers, directors, and employees of City Lore and CATCH, that could be created by providing services to the project.

1. Indicate what procedures will be followed to detect and notify City Lore and the CATCH team to resolve any conflicts of interest.
2. Indicate any pending litigation and/or regulatory actions by any oversight body or entity that could have an adverse material impact on the firm's ability to serve the CATCH project.
3. Indicate if the firm has ever had a prior contract with any governmental entity terminated for any reason, and provide an explanation.

F. Non-Discrimination Policy

1. Firms with 50 or more employees shall submit a copy of their nondiscrimination or affirmative action plan.
2. Firms with less than 50 employees shall submit a statement of their commitment to equal opportunity and affirmative action from their chief executive officer.

IV. Criteria for Selection

In evaluating proposals submitted pursuant to this request, City Lore and CATCH place high value on the following factors, not necessarily in order of importance:

- Experience with similar projects
- Availability for project completion
- Projected cost of services

V. Contract Terms and Requirements

The contents of the proposal prepared by the successful consultant, with any amendment approved by City Lore, Inc. will become a part of the contract that is signed as a result of this RFP process.

The selected firms will be required to:

- Work with City Lore, CATCH and their consultants on all matters that may arise in connection with the project.
- Assume sole responsibility for the complete effort as required by this RFP, and be the sole point of contact with regard to contractual matters.
- Refrain from assigning, transferring, conveying, subletting or otherwise disposing of the contract or its rights, titles or interest therein or its power to execute such agreement to any other person, firm, partnership, company or corporation without the prior consent and approval in writing of City Lore.
- Comply with applicable law governing projects initiated or supported by City Lore and CATCH's funder, the Lower Manhattan Development Corporation, including all applicable HUD requirements and regulations.

City Lore, Inc. reserves the right to terminate any contract entered into as a result of this RFP at any time, provided that written notice has been given at least thirty days prior to such proposed terminating date.

VI. Miscellaneous Conditions

The issuance of this RFP, submission of a response by any firm, and the acceptance of such response by City Lore and CATCH do not obligate the organizations in any manner. Legal obligations will only arise on the execution of a formal contract by City Lore and the consultant selected by City Lore and the CATCH Team. Response to this RFP will be prepared at the sole cost and expense of the proposing firms. No materials submitted in response to this RFP will be returned.