

**Philadelphia Municipal Authority**  
**Request for Proposal (RFP) for General Legal Services**

The Philadelphia Municipal Authority requests qualified General Counsel (hereinafter called the “Applicant”) to submit proposals to enter into a contract to perform Legal Counsel Services.

Sealed proposals will be accepted until Friday, September 5, 2025 at 5:00P.M.

Any changes or clarifications that may be made to this RFP will be noted in an addendum. All inquiries for information should be directed to: Lorna B. Gallman, Executive Director, [Lorna.Gallman@phila.gov](mailto:Lorna.Gallman@phila.gov)

The proposal should be emailed directly to:

[Lorna.Gallman@phila.gov](mailto:Lorna.Gallman@phila.gov)  
Subject: “Proposals – General Legal Services”

**PROPOSED SCHEDULE OF IMPLEMENTATION:**

<b><u>Date</u></b>	<b><u>Event</u></b>
<u>Wednesday, August 20, 2025</u>	RFP Posted
<u>Monday, August 25, 2025</u>	RFP Questions Due
<u>Friday, August 28, 2025</u>	RFP Answers Posted
<u>Friday, September 5, 2025</u>	RFP Submission Deadline
<u>Tuesday, Sept. 9, 2025-Thursday, Sept. 11, 2025</u>	Discussions with selected Applicants
<u>Wednesday, Sept. 17, 2025</u>	Applicant Selection
<u>Monday, Sept. 22, 2025</u>	Commencement of Work

## **BACKGROUND**

The Philadelphia Municipal Authority (hereinafter referred to as the “Authority”) is a body politic and corporate created by the Council of the City of Philadelphia under the Pennsylvania Municipality Act of 1945 as amended. The Authority provides lease financing to the City of Philadelphia (the “City”) for the acquisition of public facilities and selected equipment, serves as a conduit issuer of bonds and manages specified projects at the City’s direction. The financial statements of the Authority represent its financial activity. As a result of the activities with the City, the Authority’s financial activity is also included in the City’s Comprehensive Annual Financial Report (CAFR), as part of the City’s primary government activities. The City routinely issues a letter indicating the date by which the Authority’s financial statements must be received.

The Authority receives its administrative funding from the City under compensation agreements. Financings are accomplished by the issuance of tax exempt or taxable bonds; financing leases with third-party developers; and lease/sublease arrangements with private landlords. It can vary year to year the new deals the Authority gets assigned by the City.

Currently, the Authority is administering 31 lease/sublease agreements including three contracts for the Water Department. The Authority is the Escrow Agent on two City projects the Constitution Health Plaza – New Laboratory and Pharmaceutical Offices and the Riverview Wellness Village Phase 2. In addition, the Authority is task with overseeing three outstanding bond series totaling \$126.02 Million.

## **OFFICE OF ECONOMIC OPPORTUNITY PARTICIPATION**

There are no required participation ranges but applicants should use Best and Good Faith Efforts, as applicable, to further the Authority’s commitment to equal opportunity.

## **SCOPE OF WORK TO BE PERFORMED:**

- A. The Authority seeks to engage general legal counsel to provide advice to the Authority with respect to its activities as a City-created municipal authority. Counsel will advise the Authority on a variety of legal matters including, but not limited to:
  - 1. Board governance
  - 2. Contracting - in particular the Authority’s contractual relationship with the City and other contracts entered into by the Authority
  - 3. Municipal finance matters, including bond opinion letters
  - 4. Other legal matters such as real estate transactions

- B. Selected counsel shall communicate legal findings to the Authority's Board of Directors in person unless otherwise directed.
- C. Upon request, provide access to your legal documentation to the Office of City Controller, City of Philadelphia or other designated officials.

## **PROPOSAL PREPARATION AND SUBMISSION REQUIREMENTS:**

### A. General Requirements:

#### 1. RFP Response:

In order to be considered for selection, applicants must submit an electronic copy via email. Applicants must submit a complete response to this RFP. Email submissions should be sent to:

Lorna.Gallman@phila.gov

Subject: "Proposals – General Legal Services"

Mail, telegraphic or facsimile submission of proposals is not acceptable, and any such proposals will not be considered. Nothing herein is intended to exclude any responsible applicant or in any way restrain or restrict competition. All responsible applicants are encouraged to submit proposals. The applicant shall make no other distribution of the proposals.

#### 2. Proposal Preparation:

a) Proposals shall be signed by an authorized representative of the applicant. By signing this bid proposal, the applicant certifies that it will remain in full compliance with:

- i. The Federal Civil Rights Act of 1964, as amended.
- ii. The Federal Immigration Reform and Control Act of 1986.
- iii. Americans with Disabilities Act.
- iv. The Antitrust laws of the United States and the Commonwealth of Pennsylvania.

b) All information requested must be submitted. Failure to submit all information requested may result in The Authority requiring prompt submission of missing information and/or giving a lowered evaluation of the proposal. Proposals that

are substantially incomplete or lack key information may be rejected by the Authority. Mandatory requirements are those required by law or regulation or are such that they cannot be waived and are not subject to negotiation.

- c) Proposals should be prepared simply and economically, providing a straightforward, concise description of capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content.
- d) Ownership of all data, materials and documentation originated and prepared for The Authority pursuant to the RFP shall belong exclusively to The Authority and be subject to public inspection in accordance with the Pennsylvania Right-to-Know Act.

### 3. Oral Presentation:

Applicants who submit a proposal in response to this RFP may be required to give an oral presentation of their proposal to the Authority. This will provide an opportunity for the Applicant to clarify or elaborate on the proposal but will in no way change the original proposal. The Authority will schedule the time and location of these presentations. Cost of the presentations is the responsibility of the Applicant. Oral presentations are an option of the Authority and may not be conducted; therefore, proposals should be complete.

The top two or three Applicants will most likely be invited for interviews.

### B. Specific Requirements:

Proposals should be as thorough and detailed as possible so that the Authority may properly evaluate the Applicant's capabilities to provide the required services. Applicants are required to submit the following items as a complete proposal:

1. Title Page: Show the RFP subject; provide an overview of the services being sought and proposed scope of services, the name of the Applicant's firm, business identification information, local address, telephone number, fax number, website address, name of contact person, job title and date.
2. Table of Contents
3. Introduction/Executive Summary: Provide an overview of the services being sought and proposed scope of services.
4. Applicant Profile:  
Provide a narrative description of the Applicant itself, including the following:

- a) Applicant's business identification information, including name, business address, telephone number, website address, and federal taxpayer identification number or federal employer identification number;
  - b) A primary contact for the Applicant; including, name, job title, address telephone and fax numbers and email address;
  - c) A description of Applicant's business background, including if not an individual, Applicant's business organizational (corporation, partnership, LLC, for profit or not for profit, etc.) whether registered to do business in Philadelphia and/or Pennsylvania, country and state of business formation, number of years in business, primary mission of business, significant business experience, whether registered as a minority-, woman-, or disabled-owned business or as a disadvantaged business and with which certifying agency, and any other information about Applicant's business organization that Applicant deems pertinent to this RFP.
5. Project Understanding:  
Provide a brief narrative statement that confirms Applicant's understanding of, and agreement to provide, the services and/or tangible work products necessary to achieve the objectives of the project that is the subject of this RFP. Applicant shall describe how the Applicant's business experience will benefit the project.
6. Proposed Scope of Work: Provide a proposed scope of work, including a cost proposal and project timetable (schedule), in accordance with Section II, "Scope of Work" of this RFP.
7. Statement of Qualifications: Relevant Experience  
Provide a statement of qualifications and capability to perform the services sought by this RFP, including a description of relevant experience with projects that are similar in nature, size and scope to that which is the subject of this RFP.
- If any minimum qualifications for performance are stated in this RFP, Applicant must include a statement confirming that Applicant meets such minimum requirements.
8. References: Provide at least three references, preferably for engagements that are similar in type, scope, size and/or value to the work sought by this RFP. If applicable, Applicant should provide references for engagements with other municipal authorities that are similar in size and nature to the Authority. For each reference, include the name, address, and telephone number of a contact person.
9. Disclosure of Litigation: Disclosure of Administrative Proceedings State, for the 5-year period preceding the date of this RFP, a description of any judicial or administrative proceeding that is material to Applicant's business or financial capability or to the subject matter of this RFP, or that could interfere with Applicant's performance of the work requested by this RFP, including, but not limited to, any civil, criminal or bankruptcy litigation; any debarment or

suspension proceeding; any criminal conviction or indictment; and any order or agreement with or issued by a court or local, state or federal agency. For each such proceeding, state the name of the case or proceeding, the parties involved, the nature of the claims involved, its current status and the final disposition, if any. Provide the same information for any officer, director, principal, or partner of Applicant's organization.

10. Defaults: Provide a description, in detail, of any situation occurring within the past five (5) years in which the Applicant, or a joint venture or partnership of which Applicant was a part, defaulted or was deemed to be in noncompliance of any contractual obligations, explaining the issues involved in the default, the outcome, the actions taken by Applicant to resolve the matter. Also provide the name, title and telephone number of the party to the contract who asserted the event of default or noncompliance or the individual who managed the contract for that party.
11. Disclosure Requirements: The Applicant shall disclose all information required under Chapter 17-1400 of the Philadelphia Code, including any local and state political campaign contributions, on the forms provided with this RFP, and all eligibility requirements under the Chapter 17-1400 are applicable to all applicants.

## **TRANSITION**

1. Please specify the anticipated impact of a transition should we select your firm in terms of both costs and time requirements on our part.
2. How long do you anticipate that a transition would take?
3. Please provide a timeline listing all relevant transition steps, showing when these steps will begin and be completed.

## **PROPOSED FEES AND STATEMENT OF FINANCIAL CAPACITY**

1. Please propose competitive alternative billing and/or cost approaches that will provide the highest quality services required by the RFP at the lowest costs. Any alternative approaches should be accompanied by an alternative budget, staffing and schedule.
2. Submit billable rates for attorneys and legal assistants. The billable rates or other cost determination such as an estimated total cost shall be determined on a competitive basis at the sole discretion of the Authority. The actual billable

rates shall not exceed the City of Philadelphia pre-approved rates for legal services set forth below:

Eighty percent (80%) of the firm's standard rates to maximums of :

Two Hundred Twenty-Five Dollars (\$225.00) for partners five (5) or more years;  
Two Hundred Dollars (\$200.00) for other partners;  
One Hundred Seventy Dollars (\$170.00) for associates practicing law five (5) years or more;  
One Hundred Fifty-five (\$155.00) for other associates; and  
One Hundred Thirty-five (\$135.00) for paralegals.

Or

The Authority may consider a quarterly retainer of \$5,000.00 to be drawn upon based on rates negotiated between the applicant and the Authority.

Counsel fees relating to work performed and/or opinions provided in the context of a bond issuance by the Authority shall be paid in accordance with applicable trust indenture or other agreement directing costs of issuance to be paid from the proceeds of the bonds issued.

Any contract resulting from this RFP will provide for a not-to-exceed amount in the compensation section of the contract.

3. Within the Authority's sole discretion, consideration may be given to a flat rate.

## **ORGANIZATION AND PERSONNEL REQUIREMENTS**

The proposal must identify all personnel who will perform work on the project, by education level, skill set (described in detail), experience level, and job title. Resumes of all personnel so identified should be included in Applicant's proposal. The Authority expects the following with respect to the successful Applicant's organizational structure and personnel:

1. Applicants should provide up-to-date resumes of all lawyers who will work on the matter.
2. Applicants should describe the organizational structure: the management, administrative or technical project staff structure.

3. Applicants should describe organization history and experience, including experience with projects with similar issues and similar size and scope.

## **SELECTION PROCESS**

These are the selection criteria by which the Authority will choose a winning applicant.

1. Cost
  - a) Cost-effectiveness, cost-efficiency, proposed savings, expense reduction
  - b) Price, fee caps and other cost control measures
2. Experience
  - a) Specialized experience
  - b) Documented prior experience in handling matters of similar size and scope
  - c) Demonstrated ability to meet deadlines
3. Proposed plan of action/strategy/solution for Authority's project(s)
  - a) Ability to meet project deadlines under proposed project
4. Vendor capacity
  - a) Staffing qualifications (e.g., staff prior experience, education, licenses, professional achievements)
  - b) Technical, administrative, financial capacity
  - c) Specific licensure requirements for organizations/businesses

## **QUESTIONS RELATING TO THE RFP**

All questions concerning this RFP must be submitted in writing via email to Lorna Gallman at [Lorna.Gallman@phila.gov](mailto:Lorna.Gallman@phila.gov), no later than Monday, August 25, 2025, at 5 pm. The Authority will provide written responses to the submitted questions no later than Friday, August 28, 2025 at 5 pm. These responses will be posted on the RFPs Online website (<http://www.phila.gov/rfp/>) with the original RFP details notice. Oral responses by any Authority employee or agent of the Authority are not binding and shall not in any way be considered as a commitment by the PMA.

## **GENERAL RULES GOVERNING RFPS/PROPOSAL; RESERVATION OF RIGHTS; CONFIDENTIALITY; AND PUBLIC DISCLOSURE:**

### **A. Revisions to RFP**



The Authority reserves the right to change, modify or revise the RFP at any time. Any revision to this RFP will be posted on RFPs Online website with the original Opportunity Details. It is the Applicant's responsibility to check the website frequently to determine whether additional information has been released or requested.

**B. Philadelphia Municipal Authority Employee Conflict Provision**

The Philadelphia Municipal Authority employees and officials are prohibited from submitting a proposal in response to this RFP. No proposal will be considered in which an Authority employee or official has a direct or indirect interest.

**C. Proposal Binding**

By signing and submitting its proposal, each Applicant agrees that the contents of its proposal are available for establishment of final contractual obligations for a minimum of 180 calendar days from the application deadline for this RFP. An Applicant's refusal to enter into a contract which reflects the terms and conditions of this RFP or the Applicant's proposal may, in the Authority's sole discretion, result in rejection of Applicant's proposal and shall be grounds for the Authority to call on any proposal security furnished by the Applicant.

**D. Reservation of Rights**

By applying for a notice of contract opportunity, the Applicant understands and agrees to the reservation of rights set forth below.

**E. The Philadelphia Municipal Authority Reservation of Rights in Connection with the Notice of Contract Opportunity Process**

The Authority reserves and may exercise any one or more of the following rights and options with respect to its notice of contract opportunity process:

1. To reject any and all proposals and to reissue a notice of contract opportunity at any time prior to execution of a final contract;
2. To issue a new notice of contract opportunity with terms and conditions substantially different from those set forth in a previous notice of contract opportunity;
3. To issue a new notice of contract opportunity with terms and conditions that are the same or similar as those set forth in a previous notice of contract opportunity in order to obtain additional proposals;

4. To extend a notice of contract opportunity in order to allow for time to obtain additional proposals prior to the notice of contract opportunity application deadline; or,
  5. To cancel a notice of contract opportunity with or without issuing another notice of contract opportunity.
- F. Proposal Selection Process and Authority's Reservation of Rights in Connection with Selection of Proposal(s) for Review

The Authority reserves and may exercise any one or more of the following rights and options with respect to its selection process:

1. To reject any proposal if, in the Authority's sole discretion, the proposal is incomplete, the proposal is not responsive to the requirements of a notice of contract opportunity, or it is otherwise in the best interest of the Authority to reject the proposal.
2. To supplement, amend, substitute or otherwise modify a notice of contract opportunity at any time prior to the award of one or more Applicants for negotiation.
3. To reject the proposal of any Applicant that, in the Authority's sole judgment, has been delinquent or unfaithful in the performance of any contract with the Authority, or with the City of Philadelphia or is financially, or technically incapable or is otherwise not a responsible Applicant.
4. To reject as informal or non-responsive, any proposal which, in the Authority's sole judgment, is incomplete, is not in conformity with applicable law, is conditioned in any way, deviates from the notice of contract opportunity or contains erasures, ambiguities, alterations or items of work not called for by the notice of contract opportunity.
5. To waive any informality, defect, non-responsiveness and/or deviation from the notice of contract opportunity that is not, in the Authority's sole judgment, material to the proposal.
6. To permit or reject, at the Authority's sole discretion, amendments (including information inadvertently omitted), modifications, clarifying information, alterations and/or corrections to proposals by some or all of the Applicants following proposal submission and before contract award and/or contract execution.
7. The Authority further reserves the right to conduct on-site investigations of the Applicants' facilities or of those facilities where the Applicant performs its services. Proposals will be evaluated, in part, according to whether the Applicant

meets the minimum qualifications and submits a proposal complying with all of the requirements of the notice of contract opportunity.

8. The Authority reserves the right to enter into negotiations with any or all Applicants regarding price, scope of services, or any other term of their proposals, and such other contractual terms as the Authority may require, at any time prior to execution of a final contract.
9. The Authority may, at its sole election, enter into simultaneous, competitive negotiations with multiple Applicants or negotiate with individual Applicants either together or in a sequence. Negotiations with Respondent(s) may result in the expansion or reduction of the scope of services, or changes in other terms and the submitted proposals. In such event, the Authority shall not be obligated to inform other Applicants of the changes, or to permit them to revise their proposals in light thereof unless the Authority, in its sole discretion, determines that doing so is in the Authority's best interest. The Authority may accept or reject any or all of the items in any proposal and award the contract in whole or in part if it is deemed in the Authority's best interest.
10. In the event negotiations with any Applicant(s) are not satisfactory to the Authority, the Authority reserves the right to discontinue such negotiations at any time; to enter into or continue negotiations with other Applicants; to reissue the notice of contract opportunity in order to solicit new Applicants. The Authority reserves the right not to enter into any contract with any Applicant, with or without the re-issuance of a notice of contract opportunity, if the Authority determines that such is in the Authority's best interest.

#### G. Confidentiality and Public Disclosure

The successful Applicant shall treat all information obtained from the Authority, which is not generally available to the public as confidential and/or proprietary to the Authority. The successful Applicant shall exercise all reasonable precautions to prevent any information derived from such sources from being disclosed to any other person. The successful Applicant agrees to indemnify and hold harmless the Authority, its officials and employees, from and against all liability, demands, claims, suits, losses, damages, causes of action, fines and judgments (including attorney's fees) resulting from any use or disclosure of such confidential and/or proprietary information by the successful Applicant or any person acquiring such information, directly or indirectly, from the successful Applicant. By submission of a proposal, while the Authority is not a City Agency and is not subject to the same rules and regulations governing City Agencies: Applicants acknowledge and agree that the Authority does abide by the City public disclosure policies and, as such, will disclose to the public documents, including proposals, to the extent that City agencies would have been required thereunder. Without limiting the foregoing sentence, the Authority's legal obligations shall not be limited or expanded in any way by an Applicant's assertion of confidentiality and/or proprietary data.

