



**Website:**  
BeaumontCa.gov

**Address:**  
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Beaumont, CA 92223

**Phone:**  
951.769.8520

# **Request for Proposals**

## *Professional Services*

### *FOR A RETAIL MARKET ANALYSIS*

**Proposals Due By:**  
12:00 p.m. (Noon)  
Wednesday, September 30, 2020

**Contact:**  
Kyle Warsinski – Economic Development Manager  
kylew@beaumontca.gov

**RFP Available:**  
[www.publicpurchase.com](http://www.publicpurchase.com)

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## 1. INTRODUCTION

The City of Beaumont ("City") requests written responses to a Request for Proposal (RFP) for selection of a qualified firm ("Consultant") to provide professional services for the preparation of a high-quality and comprehensive Retail Market Analysis for the City of Beaumont. It is expected that the selected firm will prepare a Market Analysis containing specific retail recruitment related metrics the City will utilize to develop a Retail Recruitment Strategy. The selected consultant will be one that has demonstrated experience in the preparation of retail market analysis for local jurisdictions.

The City of Beaumont invites interested and qualified consulting firms and/or individuals to provide consultant services to develop a market analysis that will be used to create a retail development strategy that maximizes the retail and restaurant potential for Beaumont as well as provides business retention tools. The City is issuing this Request for Proposal (RFP) in order to attract consultant proposals that focus on facilitation of retail growth and retention in the City, understanding the retail landscape and customers of the City, and identification of retail gaps. The City invites all consultants interested in conducting proposals for this analytic assessment to submit a sealed proposal to the City.

Responses must conform to the requirements of this Request for Proposal (RFP). The City reserves the right to waive any irregularity in any proposal or reject any proposal that does not comply with this RFP or City policies. Modifications to the RFP, including, but not limited to the scope of work, can be made only by written addendum issued by the City.

## 2. THE CITY OF BEAUMONT

The City was incorporated in November 1912 and is located in the San Geronio Pass portion of western Riverside County. It is bounded on the west by Calimesa and unincorporated areas, on the north by unincorporated county areas (Cherry Valley), on the south by unincorporated county areas and the City of San Jacinto, and on the east by the City of Banning. The land area within the City's boundary is approximately 30 square miles.

The City of Beaumont is also rated one of the safest cities in southern California. The City has its own police department. Fire and paramedic services are contracted through Riverside County. The City of Beaumont has been one of the fastest growing cities in California over the past 15 years and has a current population of 48,237. An average of 500 new homes have been permitted annually since 2013 and the population has grown by approximately 1,500 residents each year. Beaumont has seen significant growth in its quality of workforce with educational levels and technical skills. The community has also seen growth in its household income levels. As a result of these demographic shifts, Beaumont has become a regional retail hub. The City has started to realize new retail and service sector opportunities that were previously not viable.



### 3. PURPOSE

The purpose of this RFP is to select a consultant or a team of consultants (Consultant Team) who will prepare a retail market analysis that builds on the Economic Development Strategic Plan (EDSP) and other economic development work previously completed or underway in Beaumont. The Consultant Team will work with the City Council and staff to understand the community's economic development concerns and interests. It is expected that the selected firm will conduct a site assessment of the City's market trade area and profile the customer's demographic makeup, buying habits, lifestyle characteristics and media habits. The results of the assessment will be used to guide the elected officials and City staff to make decisions and commitments to grow the City's retail sector and achieve the goals and vision contained within the EDSP.

### 4. RELATED CITY PROJECTS

Connected to the efforts of this Retail Market Analysis, Beaumont is nearing the adoption of a comprehensive General Plan Update (GPU) that establishes a new vision founded on an economically balanced community and creating a vibrant downtown. The GPU includes a Downtown Specific Plan. In addition to these planning documents, the City recently developed and approved an EDSP which outlined strategies for business attraction, retention and expansion, as well as identified business targets for different areas of the City. Highlights of these plans include:

#### **DRAFT Downtown Specific Plan**

- Facilitates the creation of a downtown by focusing on roadway and pedestrian improvements.
- Design improvements for parking, access and urban design.
- Encourages mixed-use buildings.

#### **General Plan Update**

- Emphasizes creation of an economically balanced community with a healthy sustainable balance of residential, retail and service commercial, as well as industrial employment centers.
- Emphasizes a mix of housing types and densities.
- Designates land for up to 40,000 housing units with up to 10,000 acres of open space.
- Up to 9,400,000 square feet of commercial space, 1,800,000 square feet of office space and 21,000,000 square feet of industrial space.

#### **Economic Development Strategic Plan**

- Collaborative strategic planning process.
- Plan includes an industry cluster analysis, real estate market analysis.
- Evaluation of a range of "foundational issues" including infrastructure, workforce, housing, and quality of life.
- Preparation of a strategic Action Plan which provides a road map" for maximizing quality economic growth in Beaumont.



## 5. SCOPE OF WORK

The City of Beaumont seeks the support of a team capable of developing a Retail Market Analysis which builds off the work contained within the EDSP. The Consultant Team's overall responsibility and scope of work is to conduct a site assessment of the City's market trade area and profile the customer's buying habits, lifestyle characteristics and media habits. The results of the assessment will be used to guide the City Council and staff to make decisions and commitments to grow the City's retail sector and shape goals and policy long term. This Retail Recruitment Analysis should take into consideration and include the following key points:

The Consultant Team shall provide professional services to support the following tasks:

- Market Analysis Report
  - Population and household increases
  - Consumer and Household Demographic Profiles
  - Consumer Demand and Market Supply Assessment
  - Drive Time Analysis for five areas in the City
  - Competition
- Existing retail firms
- Retail leakage and surplus
- Retail development in similar cities
- Market cannibalization
- Retail trends
- Key psychographics
- Market Viability
- Report tools for existing and local retailers

## 6. OPTIONAL SCOPE OF WORK ITEMS:

The City is seeking separate line item proposals for the optional tasks contained in this section. The City will have the ultimate discretion whether to include any, all, or none of these tasks into the contract with the firm selected to perform the core Market Analysis detailed in Section 5.

- A. Assess the retail potential of commercial sites in the City and unique demographics attributes.
- B. Match the City's customer profiles with profiles of specific retailers and restaurants that would consider the City for a location or expansion.
- C. Conduct outreach efforts for each of the retailers and restaurants identified, including the preparation of custom marketing materials as appropriate.



Items in this section shall provide a separate line item cost for each task which includes a detail of work hours.

D. Meetings:

1. The Consultant Team will be expected to regularly interface with staff (in-person meetings or conference calls) concerning approach and tasks throughout the project. The Consultant Team should have frequent interaction with staff to ensure that the City's desired objectives are met, and that Beaumont's unique concerns are addressed.
2. Briefing with the City's Economic Development Team. These will range from bi-weekly updates to meetings to review and discuss project progress at key benchmarks.
3. Attendance (or virtual attendance) of at least one (1) Beaumont City Council meeting and one (1) Economic Development Committee meeting to discuss findings and present the final Retail Market Analysis.

## 7. AVAILABLE DOCUMENTS

The following documents are available for Consultants responding to the Request for Proposals (RFP) and can be found on the City's website.

- A. [2007 General Plan](#)
- B. [2018 General Plan Update Website](#)
- C. [2008 DRAFT Downtown Specific Plan](#)
- D. [2018 Comprehensive Communications Plan](#)
- E. [Economic Development Strategic Plan](#)

## 8. ADDITIONAL CONSULTANT RESPONSIBILITIES

The Consultant Team shall be responsible for completing the specified services in accordance with the City's Professional Services Agreement (Attachment A).

## 9. TERM

The initial term of the agreement shall be determined upon need of services and consistent with City's policies.



## 10. PROPOSAL REQUIREMENTS

The proposal shall clearly address all the information requested herein. To achieve a uniform review process and obtain the maximum degree of comparability, it is required that proposals be organized and contain all information as specified below.

- A. Cover Letter: Maximum of two (2) pages serving as an Executive Summary which shall include an understanding of the scope of services. The RFP shall be transmitted with a cover letter that must be signed by an official authorized to bind the consultant contractually. The letter accompanying the RFP shall also provide the name, title, address, and telephone number of individuals with the authority to negotiate and contractually bind the consultant. The cover letter constitutes certification by the consultant, under penalty of perjury, that the consultant complies with nondiscrimination requirements of the State and Federal Government. An unsigned proposal or one signed by an individual unauthorized to bind the consultant may be rejected.
- B. Introduction/Information: Introduction of the service proposal, including a statement of understanding for the types of services contemplated. Provide a discussion on how the objectives of the scope of services will be accomplished. Provide the name of the firm submitting the proposal, its mailing address, telephone number, and the name of the individual to contact if further information is required. Any participating firms and proposed sub-consultants shall be identified and included in the proposal (all sub-consultants must be approved by City prior to signing the agreement with City).
- C. The firm's approach to delivering the scope of services. Provide a description of the firm's approach to communicating effectively with City staff and officials, other jurisdictional stakeholders, and the public, to facilitate successful delivery of assigned tasks.
- D. Firm Profile: Provide a description of the firm, including number of professional personnel, years in business, office location(s), organizational structure (e.g., corporation, partnership, sole practitioner, etc.), areas of particular expertise, etc.
- E. Firm Experience/Qualifications:
  1. A list of the five (5), most recent, similar projects by the proposed project team. Include at least three (3) projects on which all the principal team members, including key sub-consultants, worked together. Do not list any projects that were performed by key team members when they were employed by other firms. Each description shall include:
    - The name of the client and a contact name, address, and telephone number.



- The scope of the consultant's involvement in the project.
  - The month and year the projects started and the month and year they were completed.
  - The total value of the services provided.
  - The key personnel involved, and the sub-consultants employed.
2. A list of any consultant's contracts terminated (partially or completely) by clients for convenience or default within the past seven years. Include contract value, description of work, client, contract number, and the name and telephone of the contracting entity.
- F. Location of principal office that will be responsible for the implementation of this contract.
- G. Proposed Team: Provide a summary description of all personnel who will be involved in this project, their roles and responsibilities, and their experience in similar past projects. The proposal must name a project manager. In addition to this summary, full resumes must be provided.
- H. References: Provide at least three (3) references from previous cities, counties or other agencies for Retail Market Analysis work completed within the last 5 years, and also provide web links to appropriate examples of recent Retail Market Analysis work products. All submitted materials shall become the property of the City of Beaumont.
- I. Scope of Services: Provide a description of the tasks, sub-tasks, and deliverables that will be provided. The Scope of Work Program should be presented in a logical format that can be easily attached to the Professional Services Agreement. Any additional items not mentioned above in the list but needed to get to full design and construction shall be included in the proposal as additional items for consideration.
- J. Project Schedule: Provide a comprehensive Critical Path Method (CPM) schedule describing the nature and estimated timeline of proposed work objectives and milestones.
- K. Cost proposal: Provide detailed cost of services in a separate sealed envelope.
- Costing should include:
- Fixed prices, including out-of-pocket expenses, for all costs associated within the scope of this proposal
  - Detailed hourly rates of all members of the project
  - Additional billable costs for non-specified tasks
  - Total fees and expenses for the entire scope of the project
  - Any area which proposers believe should be included in the scope of work in this proposal, but which is not stipulated in this RFP, and identifies the costs



- associated with the services rendered
- Separate Cost proposals for core Market Analysis and optional tasks

- L. List of all current/outstanding contracts, their status and the completion date for each contract.
- M. Any other information which should be considered, such as any special services or customer service philosophy which define your firm's practice.
- N. The firm will be required to have professional liability insurance including liability at a minimum of one million per occurrence, worker's compensation, and vehicle coverage including comprehensive and collision insurance naming the City of Beaumont as additional insured. The proposal shall state whether such insurances will be in force at time of contract execution.

## 10. SUBMITTAL

Six (6) bound copies, one (1) unbound copy and one (1) color digital pdf copy (flash drive) of the proposal must be submitted no later than 12:00 p.m. Noon Wednesday, September 30, 2020. Postmarks and faxes are not acceptable. Proposal must be titled "RFP Professional Services for RETAIL MARKET ANALYSIS." All proposals and questions regarding this RFP shall be directed in writing to:

Kyle Warsinski  
[kylew@beaumontca.gov](mailto:kylew@beaumontca.gov)  
City of Beaumont  
550 E. 6th Street  
Beaumont, CA 92223

No postmarked proposals will be accepted. Once submitted, proposals, including the composition of the consulting staff, cannot be altered without prior written consent of the City.

All costs associated with preparation of any proposal shall be the sole responsibility of the proposer. Each proposal shall be limited to a maximum of 25 pages, using minimum 12-point font size. Electronic submittals of the proposal will not be accepted.

**\*DUE DATE FOR QUESTIONS IS SEPTEMBER 30, 2020, AT 12:00 p.m. (Noon)**

All questions shall be submitted on PublicPurchase.com. Answers will be posted on the same website to allow all users to review the City's responses to all questions within one (1) week of the question due date.

## 11. CONFIDENTIALITY

Prior to the proposal submittal deadline, all proposals will be designated confidential to





the extent permitted by the California Public Records Act. After the proposal submittal deadline, all responses will be regarded as public record and will be subject to review by the public. Any language purported to render confidential all or portions of the proposals will be regarded as non-effective and will be disregarded.

## **12. AMENDMENTS TO REQUEST FOR PROPOSALS**

The City reserves the right to amend the RFP by addendum prior to the final proposal submittal date.

## **13. CITY OF BEAUMONT RIGHTS AND OPTIONS**

This RFP does not commit the City of Beaumont to award a contract or to pay any cost incurred with the preparation of a proposal or contract for services described herein. The City may, in its sole discretion and without any obligation to act reasonably, reject any and all proposals, waive informalities and minor irregularities in any proposal reviewed, negotiate with any qualified source submitting a proposal, extend deadlines, and/or request additional information. Subsequent to negotiations, prospective consultants may be required to submit revisions to their proposals. The City may reject any proposal that does not conform to the instructions provided in this RFP. Additionally, the City reserves the right to negotiate all final terms and conditions of any proposal received before entering into final contract.

The City reserves the right to postpone selection for its own convenience, to withdraw this RFP at any time, and to reject any and all proposals without indicating any reason for such rejection. As a function of the RFP process, the City of Beaumont reserves the right to remedy technical errors in response to the RFP and to modify the published scope of services and scope of work. Proposals submitted in response to the RFP will not be returned.

## **14. CONFLICT OF INTEREST**

The Consultant shall disclose any personal or professional financial, business, or other relationships with the City that may have an impact on the outcome of this contract or any resulting project. The consultant shall also list current clients who may have a financial interest in the outcome of this contract.



### 15. PROPOSAL EVALUATION/SELECTION

The City intends to engage the most qualified consultant available that demonstrates a thorough understanding of the City's needs. City staff will use the following criteria to evaluate the proposals:

- |    |   |                                     |
|----|---|-------------------------------------|
| 1. | Understanding the scope of services             | Available Points = 20               |
| 2. | Related Experience and Demonstrated skills      | Available Points = 30               |
| 3. | Approach to performing this type of service     | Available Points = 20               |
| 4. | Familiarity with City, County, State procedures | Available Points = 5                |
| 5. | References                                      | Available Points = 15               |
| 6. | Proposed Fee                                    | Available Points = 10               |
|    |   | <b>Total Points Available = 100</b> |

The City may request a qualification interview with the highest ranked consultant(s) prior to determining the final ranking. This selection will be conducted according to the City's adopted procedures. The City reserves the right to reject any and all proposals.

#### Attachments

- A. Exhibit A- Professional Services Agreement



**Exhibit "A"**  
**Professional Service Agreement**