

AGREEMENT FOR PROFESSIONAL SERVICES BY INDEPENDENT CONTRACTOR

THIS AGREEMENT FOR PROFESSIONAL SERVICES BY INDEPENDENT CONTRACTOR is made and effective as of the 2nd day of September 2025, by and between the CITY OF BEAUMONT (“CITY”) whose address is 550 E 6th St, Beaumont, California 92223 and TIP STRATEGIES, INC., whose address is 13492 N Hwy 183, Suite 120-254, Austin, TX 78750 (“CONTRACTOR”).

RECITALS

This Agreement is entered into on the basis of the following facts, understandings and intentions of the parties to this Agreement:

A. CITY desires to engage CONTRACTOR to provide consulting services to update to the City’s Economic Development Strategic Plan; and

B. CONTRACTOR has made a proposal (“Proposal”) to the CITY to provide such professional services, which Proposal is attached hereto as Exhibit “A” and incorporated herein by this reference; and

C. CONTRACTOR agrees to provide such services pursuant to, and in accordance with, the terms and conditions of this Agreement, and represents and warrants to CITY that CONTRACTOR possesses the necessary skills, licenses, certifications, qualifications, personnel and equipment to provide such services.

AGREEMENT

NOW, THEREFORE, in consideration of the foregoing Recitals and mutual covenants contained herein, CITY and CONTRACTOR agree as follows:

1. Term of Agreement. This Agreement is effective as of the date first above written and shall continue until terminated as provided for herein. Notwithstanding anything in this Agreement to the contrary, this Agreement shall automatically terminate after one (1) year(s) unless extended by the parties with the approval of the City Council of the CITY.

2. Services to be Performed. CONTRACTOR agrees to provide the services (“Services”) per Exhibit “A”. All Services shall be performed in the manner and according to the timeframe set forth in the Proposal. CONTRACTOR designates Jeff Marcell as CONTRACTOR’S professional(s) responsible for overseeing the Services provided by CONTRACTOR.

3. Associates and Subcontractors. CONTRACTOR may, at CONTRACTOR’S sole cost and expense, employ such competent and qualified independent associates, subcontractors and consultants as CONTRACTOR deems necessary to perform the Services; provided, however, that CONTRACTOR shall not subcontract any of the Services without the written consent of CITY.

4. Compensation.

4.01 CONTRACTOR shall be paid at the rates set forth in the Proposal and shall not increase any rate without the prior written consent of the CITY. Notwithstanding anything in this Agreement to the contrary, total fees and charges paid by CITY to CONTRACTOR under this Agreement shall not exceed One Hundred Ten Thousand dollars (\$110,000 00.).

4.02 CONTRACTOR shall not be compensated for any Services rendered nor reimbursed for any expenses incurred in excess of those authorized unless approved in advance by the CITY, in writing.

4.03 CONTRACTOR shall submit to CITY, on or before the fifteenth (15th) of each month, itemized invoices for the Services rendered in the previous month. The CITY shall not be obligated to pay any invoice that is submitted more than sixty (60) days after the due date of such invoice. CITY shall have the right to review and audit all invoices prior to or after payment to CONTRACTOR. This review and audit may include, but not be limited to CITY's:

- a. Determination that any hourly fee charged is consistent with this Agreement's approved hourly rate schedule;
- b. Determination that the multiplication of the hours billed times the approved rate schedule dollars is correct;
- c. Determination that each item charged is the usual, customary, and reasonable charge for the particular item. If CITY determines an item charged is greater than usual, customary, or reasonable, or is duplicative, ambiguous, excessive, or inappropriate, CITY shall either return the bill to CONTRACTOR with a request for explanation or adjust the payment accordingly, and give notice to CONTRACTOR of the adjustment.

4.04 CONTRACTOR shall receive payment by the CITY for the services provided as specified in Exhibit "A".

- a. CONTRACTOR shall submit all invoices to the City of Beaumont's Accounts Payable at the email address listed below.

- b. CONTRACTOR will send the original invoices to:
City of Beaumont
Attn: Finance Department-Accounts Payable
at
ap@beaumontca.gov

c. Each invoice shall contain a minimum of the following information: invoice number and date; PO number (once issued by the CITY), remittance address; bill-to and ship-to addresses of ordering department/division; Agreement number (24-118), quantities; item descriptions, unit prices, extensions, sales/use tax if applicable, an invoice total, and any other information requested by the City.

4.05 If the work is satisfactorily completed, CITY shall pay such invoice within thirty (30) days of its receipt. Should CITY dispute any portion of any invoice, CITY shall pay the undisputed portion within the time stated above, and at the same time advise CONTRACTOR in writing of the disputed portion.

5. Obligations of CONTRACTOR.

5.01 CONTRACTOR agrees to perform all Services in accordance with the terms and conditions of this Agreement and the Proposal. In the event that the terms of the Proposal shall conflict with the terms of this Agreement or contain additional terms that purport to bind the CITY other than the Services to be rendered and the price for the Services, the terms of this Agreement shall govern and said additional or conflicting terms shall be of no force or effect.

5.02 Except as otherwise agreed by the parties, CONTRACTOR will supply all personnel, materials and equipment required to perform the Services. CONTRACTOR shall provide its own offices, telephones, vehicles and computers and set its own work hours. CONTRACTOR will determine the method, details, and means of performing the Services under this Agreement.

5.03 CONTRACTOR shall keep CITY informed as to the progress of the Services by means of regular and frequent consultations. Additionally, when requested by CITY, CONTRACTOR shall prepare written status reports.

5.04 CONTRACTOR is responsible for paying, when due, all income and other taxes, fees and withholding, including withholding state and federal taxes, social security, unemployment and worker's compensation, incurred as a result of the compensation paid under this Agreement. CONTRACTOR agrees to indemnify, defend and hold harmless CITY for any claims, costs, losses, fees, penalties, interest, or damages suffered by CITY resulting from CONTRACTOR's failure to comply with this provision.

5.05 In the event CONTRACTOR is required to prepare plans, drawings, specifications and/or estimates, the same shall be furnished in conformance with local, state and federal laws, rules and regulations.

5.06 CONTRACTOR represents that it possesses all required licenses necessary or applicable to the performance of Services under this Agreement and the Proposal and shall obtain and keep in full force and effect all permits and approvals required to perform the Services herein. In the event CITY is required to obtain an approval or permit from another governmental entity, CONTRACTOR shall provide all necessary supporting documents to be filed with such entity.

5.07 CONTRACTOR shall be solely responsible for obtaining Employment Eligibility Verification information from CONTRACTOR's employees, in compliance with the Immigration Reform and Control Act of 1986, Pub. L. 99-603 (8 U.S.C. 1324a), and shall ensure that CONTRACTOR's employees are eligible to work in the United States.

5.08 In the event that CONTRACTOR employs, contracts with, or otherwise utilizes any CalPERS retirees in completing any of the Services performed hereunder, such instances shall be disclosed in advance to the CITY and shall be subject to the CITY's advance written approval.

5.09 Drug-free Workplace Certification. By signing this Agreement, the CONTRACTOR hereby certifies under penalty of perjury under the laws of the State of California that the CONTRACTOR will comply with the requirements of the Drug-Free Workplace Act of 1990 (Government Code, Section 8350 et seq.) and will provide a drug-free workplace.

5.10 CONTRACTOR shall comply with all applicable local, state and federal laws, rules, regulations, entitlements and/or permits applicable to, or governing the Services authorized hereunder including, but not limited to California Department of Industrial Relations (Cal/OSHA) regulations; and the U.S. Department of Transportation Omnibus Transportation Employee Testing Act, related to their scope of work and operations. In case of conflict in regulations, the most stringent shall apply.

6. Insurance. CONTRACTOR hereby agrees to be solely responsible for the health and safety of its employees and agents in performing the Services under this Agreement and shall comply with all laws applicable to worker safety including but not limited to Cal-OSHA. Therefore, throughout the duration of this Agreement, CONTRACTOR hereby covenants and agrees to maintain insurance in conformance with the requirements set forth below. Attached hereto as **Exhibit "B"** are copies of Certificates of Insurance and endorsements as required by Section 7.02. If existing coverage does not meet the requirements set forth herein, CONTRACTOR agrees to amend, supplement or endorse the existing coverage to do so. CONTRACTOR shall provide the following types and amounts of insurance:

6.01 Commercial general liability insurance in an amount of not less than \$1,000,000 per occurrence and \$2,000,000 in the aggregate; CONTRACTOR agrees to have its insurer endorse the general liability coverage required herein to include as additional insured's CITY, its officials, employees and agents. CONTRACTOR also agrees to require all contractors and subcontractors to provide the same coverage required under this Section 6.

6.02 Business Auto Coverage in an amount no less than \$1 million per accident. If CONTRACTOR or CONTRACTOR's employees will use personal autos in performance of the Services hereunder, CONTRACTOR shall provide evidence of personal auto liability coverage for each such person.

6.03 Workers' Compensation coverage for any of CONTRACTOR's employees that will be providing any Services hereunder. CONTRACTOR will have a state-approved policy form providing statutory benefits as required by California law. The provisions of any workers' compensation will not limit the obligations of CONTRACTOR under this Agreement. CONTRACTOR expressly agrees not to use any statutory immunity defenses

under such laws with respect to CITY, its employees, officials and agents. Sole proprietors with no employees, LLCs, or partnerships using the services of members or partners who do not carry workers' compensation acknowledge that they are not subject to the Workers' Compensation Act of the State of California and agree to complete a signed workers compensation exemption form.

6.04 Optional Insurance Coverage. Choose and check one: Required X /Not Required ; Errors and omissions insurance in a minimum amount of \$2 million per occurrence to cover any negligent acts or omissions committed by CONTRACTOR, its employees and/or agents in the performance of any Services for CITY.

6.05. Cyber Liability Insurance REQUIRED IF CHECKED HERE ONLY [] (Technology Professional Liability – Errors and Omissions), with limits not less than \$2,000,000 per occurrence or claim, and \$2,000,000 aggregate or the full per occurrence limits of the policies available, whichever is greater. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by CONTRACTOR in this Agreement and shall include, but not be limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion and network security. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations. CONTRACTOR will file with DISTRICT, before beginning professional services, certificates of insurance (Acord Form 25 or equivalent) satisfactory to DISTRICT evidencing.

6.06. If Claims Made Policies (applies only to professional liability and cyber liability policies):

1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.

2. Insurance must be maintained, and evidence of insurance must be provided for at least five (5) years after completion of the contract of work.

3. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the CONTRACTOR must purchase "extended reporting" coverage for a minimum of five (5) years after completion of contract work.

7. General Conditions pertaining to Insurance Coverage

7.01 No liability insurance coverage provided shall prohibit CONTRACTOR from waiving the right of subrogation prior to a loss. CONTRACTOR waives all rights of subrogation against CITY regardless of the applicability of insurance proceeds and shall require all contractors and subcontractors to do likewise.

7.02. Prior to beginning the Services under this Agreement, CONTRACTOR shall furnish CITY with certificates of insurance, endorsements, and upon request, complete copies of all policies, including complete copies of all endorsements. All copies of policies and endorsements shall show the signature of a person authorized by that insurer to bind coverage on its behalf.

7.03. All required policies shall be issued by a highly rated insurer with a minimum A.M. Best rating of "A:VII"). The insurer(s) shall be admitted and licensed to do business in California. The certificates of insurance hereunder shall state that coverage shall not be suspended, voided, canceled by either party, or reduced in coverage or in limits, except after thirty (30) days' prior written notice has been given to CITY.

7.04 Self-insurance does not comply with these insurance specifications. CONTRACTOR acknowledges and agrees that that all insurance coverage required to be provided by CONTRACTOR or any subcontractor, shall apply first and on a primary, non-contributing basis in relation to any other insurance, indemnity or self-insurance available to CITY.

7.05 All coverage types and limits required are subject to approval, modification and additional requirements by CITY, as the need arises. CONTRACTOR shall not make any reductions in scope of coverage (e.g. elimination of contractual liability or reduction of discovery period) that may affect CITY's protection without CITY's prior written consent.

7.06 CONTRACTOR agrees to provide immediate notice to CITY of any claim or loss against CONTRACTOR or arising out of the Services performed under this Agreement. CITY assumes no obligation or liability by such notice, but has the right (but not the duty) to monitor the handling of any such claim or claims if they are likely to involve CITY.

8. Indemnification.

8.01 CONTRACTOR and CITY agree that CITY, its employees, agents and officials should, to the extent permitted by law, be fully protected from any loss, injury, damage, claim, lawsuit, cost, expense, attorneys' fees, litigation costs, defense costs, court costs or any other costs arising out of or in any way related to the performance of this Agreement by CONTRACTOR or any subcontractor or agent of either as set forth herein. Accordingly, the provisions of this indemnity are intended by the parties to be interpreted and construed to provide the fullest protection possible under the law to CITY. CONTRACTOR acknowledges that CITY would not enter into this Agreement in the absence of the commitment of CONTRACTOR to indemnify and protect CITY as set forth herein.

a. To the fullest extent permitted by law, CONTRACTOR shall defend, indemnify and hold harmless CITY, its employees, agents and officials, from any liability, claims, suits, actions, arbitration proceedings, administrative proceedings, regulatory proceedings, losses, expenses, damages or costs of any kind, whether actual, alleged or threatened, actual attorneys' fees incurred by CITY,

court costs, interest, defense costs, including expert witness fees and any other costs or expenses of any kind whatsoever without restriction or limitation incurred in relation to, as a consequence of or arising out of, or in any way attributable actually, allegedly or impliedly, in whole or in part to the performance of this Agreement. CONTRACTOR's obligation to defend, indemnify and hold harmless shall include any and all claims, suits and proceedings in which CONTRACTOR (and/or CONTRACTOR's agents and/or employees) is alleged to be an employee of CITY. All obligations under this provision are to be paid by CONTRACTOR as they are incurred by CITY.

b. Without affecting the rights of CITY under any provision of this Agreement or this Section, CONTRACTOR shall not be required to indemnify and hold harmless CITY as set forth above for liability attributable solely to the fault of CITY, provided such fault is determined by agreement between the parties or the findings of a court of competent jurisdiction.

8A. Indemnification Design Professionals.

8A.01 In the event that CONTRACTOR is a design professional under California Civil Code Section 2782.8 this Section 8A shall apply instead of Section 8. To the fullest extent permitted by California law and in accordance with California Civil Code section 2782.8, CONTRACTOR shall indemnify, and hold harmless the City, its officers, employees, trustees and members ("Indemnified Parties") from any and all actions, assessments, counts, citations, claims, costs, damages, demands, judgments, liabilities (legal, administrative or otherwise), losses, notices, expenses, fines, penalties, proceedings, responsibilities, violations, attorney's and consultants' fees and causes of action including, but not limited to those for, injury to property or persons, including personal injury and/or death ("Claim(s)"), to the extent that the Claim(s) arises out of, pertains to, or relates to the negligence, recklessness, or willful misconduct of CONTRACTOR, its directors, officials, officers, employees and consultants arising out of, connected with, or resulting from the performance of the Services, the Project, or this Agreement. This indemnity excludes liability caused by the negligence or willful misconduct of any of the Indemnified Parties. The cost to indemnify, hold harmless, and defend charged to CONTRACTOR shall not exceed CONTRACTOR'S proportionate percentage of fault.

9. Additional Services, Changes and Deletions.

9.01 In the event CONTRACTOR performs additional or different services than those described herein without the prior written approval of the City Manager and/or City Council of CITY, CONTRACTOR shall not be compensated for such services. CONTRACTOR expressly waives any right to be compensated for services and materials not covered by the scope of this Agreement or authorized by the CITY in writing.

9.02 CONTRACTOR shall promptly advise the City Manager and Finance Director of CITY as soon as reasonably practicable upon gaining knowledge of a condition, event or accumulation of events which may affect the scope and/or cost of Services. All proposed changes, modifications, deletions and/or requests for additional services shall be reduced to writing for review and approval by the CITY and/or City Council.

10. Termination of Agreement.

10.01 Notwithstanding any other provision of this Agreement, CITY, at its sole option, may terminate this Agreement with or without cause, or for no cause, at any time by giving twenty (20) days' written notice to CONTRACTOR.

10.02 In the event of termination, the payment of monies due CONTRACTOR for undisputed Services performed prior to the effective date of such termination shall be paid within thirty (30) business days after receipt of an invoice as provided in this Agreement. Immediately upon termination, CONTRACTOR agrees to promptly provide and deliver to CITY all original documents, reports, studies, plans, specifications and the like which are in the possession or control of CONTRACTOR and pertain to CITY.

11. Status of CONTRACTOR.

11.01 CONTRACTOR shall perform the Services in CONTRACTOR's own way as an independent contractor, and in pursuit of CONTRACTOR's independent calling, and not as an employee of CITY. However, CONTRACTOR shall regularly confer with CITY's City Manager as provided for in this Agreement.

11.02 CONTRACTOR agrees that it is not entitled to the rights and benefits afforded to CITY's employees, including disability or unemployment insurance, workers' compensation, retirement, CalPERS, medical insurance, sick leave, or any other employment benefit. CONTRACTOR is responsible for providing, at its own expense, disability, unemployment, workers' compensation and other insurance, training, permits, and licenses for itself and its employees and subcontractors.

11.03 CONTRACTOR hereby specifically represents and warrants to CITY that it possesses the qualifications and skills necessary to perform the Services under this Agreement in a competent, professional manner, without the advice or direction of CITY and that the Services to be rendered pursuant to this Agreement shall be performed in accordance with the standards customarily applicable to an experienced and competent professional rendering the same or similar services in the same geographic area where the CITY is located. Further, CONTRACTOR represents and warrants that the individual signing this Agreement on behalf of CONTRACTOR has the full authority to bind CONTRACTOR to this Agreement.

12. Ownership of Documents; Audit.

12.01 All draft and final reports, plans, drawings, studies, maps, photographs, specifications, data, notes, manuals, warranties and all other documents of any kind or nature prepared, developed or obtained by CONTRACTOR in connection with the performance of Services performed for the CITY shall become the sole property of CITY, and CONTRACTOR shall promptly deliver all such materials to CITY upon request. At the CITY's sole discretion, CONTRACTOR may be permitted to retain original documents, and furnish reproductions to CITY upon request, at no cost to CITY.

12.02 Subject to applicable federal and state laws, rules and regulations, CITY

shall hold all intellectual property rights to any materials developed pursuant to this Agreement. CONTRACTOR shall not such use data or documents for purposes other than the performance of this Agreement, nor shall CONTRACTOR release, reproduce, distribute, publish, adapt for future use or any other purposes, or otherwise use, any data or other materials first produced in the performance of this Agreement, nor authorize others to do so, without the prior written consent of CITY.

12.03 CONTRACTOR shall retain and maintain, for a period not less than four years following termination of this Agreement, all-time records, accounting records and vouchers and all other records with respect to all matters concerning Services performed, compensation paid and expenses reimbursed. At any time during normal business hours and as often as CITY may deem necessary, CONTRACTOR shall make available to CITY's agents for examination all of such records and shall permit CITY's agents to audit, examine and reproduce such records.

13. Miscellaneous Provisions.

13.01 This Agreement, which includes all attached exhibits, supersedes any and all previous agreements, either oral or written, between the parties hereto with respect to the rendering of Services by CONTRACTOR for CITY and contains all of the covenants and agreements between the parties with respect to the rendering of such Services in any manner whatsoever. Any modification of this Agreement will be effective only if it is in writing signed by both parties.

13.02 CONTRACTOR shall not assign or otherwise transfer any rights or interest in this Agreement without the prior written consent of CITY. Unless specifically stated to the contrary in any written consent to an assignment, no assignment will release or discharge the assignor from any duty or responsibility under this Agreement.

13.03 CONTRACTOR shall timely file FPPC Form 700 Conflict of Interest Statements with CITY if required by California law and/or the CITY's conflict of interest policy.

13.04 If any legal action or proceeding, including an action for declaratory relief, is brought to enforce or interpret the provisions of this Agreement, the prevailing party will be entitled to reasonable attorneys' fees and costs, in addition to any other relief to which that party may be entitled.

13.05 This Agreement is made, entered into and shall be performed in the County of Riverside in the State of California and shall in all respects be interpreted, enforced and governed under the laws of the State of California. The parties agree that venue in any litigation between them shall be in Riverside County, California.

13.06 CONTRACTOR covenants that neither it nor any officer or principal of its firm has any interest, nor shall they acquire any interest, either directly or indirectly, which will conflict in any manner or degree with the performance of their Services hereunder. CONTRACTOR further covenants that in the performance of this Agreement, no person having such interest shall be employed by it as an officer, employee, agent, or

subcontractor.

13.07 CONTRACTOR has read and is aware of the provisions of Section 1090 et seq. and Section 87100 et seq. of the Government Code relating to conflicts of interest of public officers and employees. CONTRACTOR agrees that they are unaware of any financial or economic interest of any public officer or employee of the CITY relating to this Agreement. It is further understood and agreed that if such a financial interest does exist at the inception of this Agreement, the CITY may immediately terminate this Agreement by giving notice thereof. CONTRACTOR shall comply with the requirements of Government Code section 87100 et seq. and section 1090 in the performance of and during the term of this Agreement.

13.08 Improper Consideration. CONTRACTOR shall not offer (either directly or through an intermediary) any improper consideration such as, but not limited to, cash, discounts, services, the provision of travel or entertainment, or any items of value to any officer, employee or agent of the CITY in an attempt to secure favorable treatment regarding this Agreement or any contract awarded by CITY. The CITY, by notice, may immediately terminate this Agreement if it determines that any improper consideration as described in the preceding sentence was offered to any officer, employee or agent of the CITY with respect to the proposal and award process of this Agreement or any CITY contract. This prohibition shall apply to any amendment, extension or evaluation process once this Agreement or any CITY contract has been awarded. CONTRACTOR shall immediately report any attempt by any CITY officer, employee or agent to solicit (either directly or through an intermediary) improper consideration from CONTRACTOR.

13.09 Severability. If any portion of this Agreement is declared invalid, illegal or otherwise unenforceable by a court of competent jurisdiction, the entire balance of this Agreement not so affected shall remain in full force and effect.

13.10 Prevailing Wages. If the Services include work performed during the design, site assessment, feasibility study, and other preconstruction phases of construction, including, but not limited to, inspection and land surveying work, regardless of whether any further construction work is conducted, and work performed during the post-construction phases of construction, CONTRACTOR shall be responsible to comply with applicable prevailing wages laws. As a condition of payment, CONTRACTOR shall show proof of payment of wages under applicable state and federal laws and regulations relating to prevailing wages in accordance with the "General Wage Determination Made By the Director of Industrial Relations Pursuant To California Labor Code, Part 7, Chapter 1, Article 2, Sections 1770, 1773 and 1773.1", for Riverside County and/or 40 U.S.C. Section 276a, et. seq. Such wage rates shall conform with those posted at DISTRICT offices and the project site. In the event that the CONTRACTOR fails to pay the prevailing wages, the CONTRACTOR shall be solely liable for penalties and for the shortfall in wages and shall indemnify, defend and hold harmless DISTRICT under Section 8.01 against any of the same. The following Labor Code sections are hereby referenced and made a part of this Agreement:

1. Section 1775 - Penalty for Failure to Comply with Prevailing Wage Rates.

2. Section 1777.4 - Apprenticeship Requirements.
3. Section 1777.5 - Apprenticeship Requirements.
4. Section 1813 - Penalty for Failure to Pay Overtime.
5. Sections 1810 and 1811 - Working Hour Restrictions.
6. Section 1775 - Payroll Records.
7. Section 1773.8 - Travel and Subsistence Pay.

[signatures on following page]

IN WITNESS WHEREOF, the parties hereby have made and executed this Agreement to be effective as of the day and year first above written.

CITY:

CITY OF BEAUMONT

By: _____

CONTRACTOR:

TIP STRATEGIES, INC.

By: 

Print Name: Tom Stellman

Title: CEO

EXHIBIT “A”

REQUEST FOR PROPOSAL

(insert behind this page)



Request for Proposals for Economic Development Strategic Plan

Due Dates:

Questions due on Planetbids: 07/03/25 12 pm PST

Proposals due on Planetbids: 07/11/25 12 pm

Contact:

Raveena Chara – Procurement Contract Specialist
rchara@beaumontca.gov



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 update to the City's Economic Development Strategic Plan (EDSP). The selected firm is expected to prepare an EDSP containing specific economic development goals, strategies, and an implementation plan. The selected consultant will be one with demonstrated experience in the preparation and implementation of economic development strategic plans for local jurisdictions.

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

Located in the San Geronio Pass portion of western Riverside County, the City was incorporated in November 1912. 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 has its own police department, with fire and paramedic services 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 55,388. 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 the educational levels and technical skills of its workforce. With this increase in workforce quality, 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. BACKGROUND

Beaumont is ideally located in the valley of the San Geronio Pass, the gateway to the Pacific West Coast. Beaumont's roots began in the early 1850's when settlers found that Beaumont was an ideal route for the transportation of goods and services. Those origins still prove true today as Beaumont is situated at the intersections of Interstate 10, Highway 60, and Highway 79. Beaumont is a premier community with a high quality of life and attractive residential and commercial areas.

The City's strategic location offers exceptional opportunities for a variety of development and investments across all industry sectors.

Staff is soliciting proposals for a consultant to assist the City in developing an updated EDSP. The City's most recent comprehensive EDSP was finalized in July 2019. In April 2025, the City Council adopted a citywide strategic plan, which broadly identified the City's current economic development vision in Goal 3.1, Actions 1-13. The City hopes to identify specific economic development strategies and implementation actions to expand upon and capitalize on these previous and existing efforts.

The successful Consultant for the EDSP will need to work in concert with City Economic Development Staff and with other Consultants who are working on behalf of the city.

4. PURPOSE

The purpose of this RFP is to select a consultant or a team of consultants (Consultant Team) who will prepare an updated Economic Development Strategic Plan that builds on the economic development work already completed or underway in Beaumont. The Consultant Team will work with the community to understand the community's economic development concerns and interests and to help guide the discussion about what is feasible in Beaumont with respect to economic development. It is expected that the selected firm will prepare an EDSP that contains specific economic development goals, strategies and an implementation plan, outlining timing, anticipated costs and funding source for each implementation action. The City views effective public and business community outreach, and high-quality, user friendly, graphic design documents, as important to the creation of this plan.

The major objective of this project is to update the EDSP from 2019 to reflect current and long-term economic development strategies, opportunities, and challenges. The updated EDSP will provide the City and community stakeholders with a framework to budget resources and utilize staff capacity to achieve the recommendations of the plan, with an emphasis on programs and policies that facilitate head-of-household job creation and investments in the community.

The City seeks to attract new industries and create jobs to remain competitive: generating sustainable city revenues, attracting new residents, and providing opportunities for current residents.

Prospective Consultant(s) should recognize the City's vision of establishing a thriving "Main Street" Downtown and related elements within the overall analysis/plan and be mindful not to duplicate work conducted as part of the City's Downtown Revitalization Plan, which was completed in late 2024.

5. RELATED PROJECTS

Connected to the efforts of this EDSP update, several related plans are recently adopted

or are currently in progress. Together, these plans create a cohesive vision for the future of the City, establishing guidelines, design standards, and strategies to accomplish the goals of the City Council. The Consulting Team should take note of the recommendations and direction of these existing projects as they will inform the updated EDSP. Highlights of these projects include:

City of Beaumont Strategic Plan (2025)

- Economic development goals include attracting businesses, improving the downtown district, and developing a citywide marketing strategy.
- Encourages proactive recruitment of new businesses and industries that align with the City's economic vision, create quality jobs, and expand the local tax base.

Downtown Revitalization Plan (2024)

- Facilitates the creation of a downtown plan by focusing on roadway and pedestrian improvements and traffic flows.
- Design improvements for parking, access and right-of-way areas.
- Encourages mixed-use buildings.

Strategic Communications Plan (2024)

- Increase public awareness of the City's brand and the services the city provides.
- Achieve coordinated and consistent communications both internally and externally through "one clear voice".

General Plan Update (2020)

- 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.
- Includes Downtown Area Plan (Chapter 11).

Economic Development Strategic Plan (2019)

- Blueprint for attracting targeted new development and business investment, creating jobs, and contributing to the City's long-term fiscal health.
- Other action items focusing on development streamlining, establishment of business incentive programs, and encouragement of downtown redevelopment and revitalization.
- Includes components on closely related issues such as infrastructure, land use and workforce development.

Riverside County Economic Development Strategic Plan (in progress)

- Riverside County covers nearly 7,303 square miles and includes five distinct regions: Northwest, Southwest, Hemet-San Jacinto Valley, the San Geronio Pass Area, and Eastern.
- Stakeholder input from the Pass Area is gathered at a series of three Economic

Development "summit" meetings held between January and June 2025.

- The San Geronio Pass Area, which includes Beaumont, will receive high-level recommendations at the conclusion of the County's strategic planning process in mid-2025.

Beaumont Zoning Code Update (in progress)

- Update the Zoning Code to be easier for City staff to administer and user-friendly for the public, including modernizing language (e.g., clear definitions) and standards.
- Ensure the Zoning Code is internally consistent with itself and implements various City policy documents (e.g., General Plan, Downtown Beaumont Revitalization Plan, Economic Development Strategic Plan, Parking Management Master Plan, etc.).
- Update the Zoning Code to be more succinct and better organized.
- Create design standards for industrial and commercial uses, particularly warehouses, to address aesthetic impacts and compatibility with surrounding uses.

6. SCOPE OF WORK

Overview / Introduction

The City of Beaumont seeks the support of a team capable of updating the EDSP through research, analysis, trend forecasting, and defined community outreach described below. The Consultant's overall responsibility and scope of work is to prepare an Economic Development Strategic Plan containing goals, objectives and implementation measures. The result should be a concise work plan for implementing recommended strategies and established metrics to measure the outcomes. The Consultant shall provide professional services to support the following tasks:

- A. Review and analysis of existing demographic and socioeconomic data, labor force characteristics, sales tax revenue and other key economic data.
- B. Preparation of key demographic trends and forecasts, social factors, economic factors and financial indicators for inclusion into the strategic plan. This task should include preparation of a market segmentation of the City's retail/commercial and industrial sectors.
- C. Provide understanding and consensus of the City's primary strengths, weaknesses, opportunities, and threats (SWOT analysis) that directly impact the economic competitiveness of the City.
- D. Significant stakeholder engagement is a critical input for the EDSP. This task should identify a multi-pronged approach to engagement, leveraging multiple methods of soliciting community feedback, with an emphasis on making opportunities for engagement accessible to the community.



- E. Preparation of a customized, locally based economic development strategy setting forth goals and objectives with measurable outcomes for taking advantage of the opportunities and solving the economic development challenges of the area, including suggested activities, projects and programs to implement objectives and goals set forth in the strategy.
- E. Create an implementation plan that identifies issues/items which require action in the short or long-term. Specific issues to be studied include but are not limited to:
 - a. Recommendations on light industrial, distribution/fulfillment centers, office, and retail commercial centers – whether to preserve existing square footage, increase, or decrease. Include geographic locations for focus.
 - b. Specific recommendations regarding the prioritization of industries, business types, and services for business recruitment.
 - c. Research and analysis of mobile services – current practices and impacts on local brick-and-mortar businesses and strategies to leverage them to bring business into the City.
 - d. Preparation of business attraction and retention strategies incorporating results from Beaumont's SWOT analysis.
 - e. Preparation of performance measures and progress reviews with timelines that will be used to evaluate whether and to what extent plan goals and objectives have been or are being met.
 - f. Provide specific recommendations on funding and resource allocation to meet plan objectives.
- F. Meetings:
 - a. The consultant will be expected to regularly interface with staff (in-person meetings and conference calls) concerning approach and tasks throughout the project. The consultant should have frequent interaction with staff to ensure that the City's desired objectives are met and that Beaumont's unique concerns are addressed. The consultant will also be expected to consult with the City's legal counsel.
 - b. Preparation and facilitation of up to two (2) Community Visioning workshops with business community leaders, the business community in general, the Chamber of Commerce and other leaders/citizens in the Beaumont community.
 - c. Briefing with the City's Economic Development Team.



- d. In person attendance of at least two (2) meetings and/or study sessions with the Economic Development Committee and two (2) meetings with Beaumont City Council to discuss findings and present the draft and/or final EDSP.

G. Deliverables

- a. Full Economic Development Strategic Plan Document
- b. Visual Aids (charts, maps, infographics, etc.)
- c. Public Presentation Materials
- d. Digital Toolkit for use by City of Beaumont Public Information Officer

This RFP is intended to be as descriptive as possible. However, Proposers (interested firms or consultants) may not take advantage of omissions or oversights in this document. Proposers must supply products and services that meet or exceed the requirements of this RFP. In the event of a dispute over installation or performance, the needs of the City of Beaumont will govern.

All documents prepared for the Beaumont EDSP Update will become the property of the City of Beaumont.

General Requirements:

The successful Proposer will be required to maintain an active City of Beaumont Business License and maintain all required insurance coverage as stipulated in the final contract.

Work Plan:

Prior to the beginning of the work, the successful proposer must provide the City a schedule and work plan for approval.

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. [Downtown Revitalization Plan 2024](#)
- B. [Beaumont Economic Development Strategic Plan - 2019](#)
- C. [Elevate Beaumont 2040 General Plan](#)
- D. [Strategic Communications Plan](#)
- E. [City Council Strategic Plan - 2025](#)



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 in a manner 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. Methods: 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 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 number 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 economic development strategic planning work completed within the last 10 years, and also provide web links to appropriate examples of recent work products.
- 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 logical format that can be easily attached to the Professional Services Agreement. Any additional items not mentioned above should 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. Gantt chart preferred.
- 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
- 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.

11. SUBMITTAL

One (1) color digital pdf copy of the proposal with cost must be submitted no later than 12:00 p.m. July 11, 2025 to planetbids. Postmarks and faxes are not acceptable. Proposal must be titled "RFP Professional Services for BEAUMONT ECONOMIC DEVELOPMENT STRATEGIC PLAN UPDATE."

Once submitted, proposals, including the composition of the consulting staff, cannot be altered without prior written consent of the City. All submitted materials shall become the property of the City of Beaumont.

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 July 03, 2025 at 12:00 p.m.***

All questions shall be submitted to planetbids.



12. 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.

13. AMENDMENTS TO REQUEST FOR PROPOSALS

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

14. 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.

15. 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.

16. 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;
and completeness of RFP | 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 = 10 |
| 6. | Cost and Cost Effectiveness | Available Points = 15 |
| Total Points Available = 100 | | |

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.

EXHIBIT “B”

VENDOR’S PROPOSAL

(insert behind this page)

RFP Professional Services for BEAUMONT ECONOMIC DEVELOPMENT STRATEGIC PLAN UPDATE

A PROPOSAL FOR THE CITY OF BEAUMONT, CA
DUE JULY 11, 2025, 12:00 PM LOCAL



A. Cover Letter

July 11, 2025

Raveena Chara, Procurement Contract Specialist
City of Beaumont
Submitted via PlanetBids portal

Dear Ms. Chara:

TIP Strategies is pleased to present our proposal for the preparation of an economic development strategic plan for the City of Beaumont. As you evaluate proposals, we invite you to consider the advantages of our team.

AN EXTENSIVE PORTFOLIO

Since 1995, TIP has completed more than 600 engagements in 44 states and 7 countries, including projects for major metropolitan areas throughout California and the US. A list of select clients is included below. Additional information about these projects, as well as our broader portfolio, can be found by visiting our website: <https://tipstrategies.com/portfolio/>.

- City of San Luis Obispo, CA – Economic Development Strategic Plan Update
- City of Rancho Cordova, CA – Economic Development Strategic Plan & Implementation Plan
- Fresno County, CA – Comprehensive Economic Development Strategy (CEDS)
- REACH (San Luis Obispo & Santa Barbara Counties, CA) – Comprehensive Economic Development Strategy (CEDS)
- Eastern Kern County, CA – Diversification Study

A PROVEN PROCESS

Our mission is to engage and inspire community leaders to help the people they serve thrive economically, financially, and socially. During 30 years in business, our three-phase Theory Into Practice planning model has proven flexible enough to address the variety of challenges that clients face. Beyond its value as an organizing structure, the TIP model reinforces our commitment to getting it right. The Discovery phase reflects our interest in learning what makes a community or region unique. The Opportunity phase ensures a focus on identifying the “big ideas” that will contribute to the community’s economic vitality and garner support for the planning process. Finally, the Implementation phase keeps us focused on the desired outcome and the steps needed to turn ideas into action.



AN EXPERIENCED TEAM

I (TIP senior partner Jeff Marcell) will serve as the principal-in-charge of this project and contribute my expertise in competitive analysis and positioning. Joining the team as strategic advisor, VP John Karras will contribute his expertise in target industry analysis and urban planning. At TIP, principals are assisted by consultants experienced in managing projects similar in scope to the requested work. Project manager and consultant Mishka Parkins has a strong portfolio of metropolitan planning projects. She will be assisted by senior consultant, Elizabeth Scott, who will contribute her experience with stakeholder engagement.

In addition, TIP's research team is well-versed in analytical techniques and finding innovative approaches to provide clients with the information they need for decision-making. Our lead analyst has three decades of experience using public and proprietary data sets to create clear and compelling analyses. He has also overseen the development of our widely cited data visualization tools, which are featured on our website:

<https://tipstrategies.com/visualizations/>.

In summary, TIP is a full-service economic development consulting firm with the experience and resources needed to carry out the requested scope of work.

AUTHORIZED REPRESENTATIVES

This cover letter constitutes certification by TIP Strategies, Inc., under penalty of perjury, that the firm complies with nondiscrimination requirements of the State and Federal Government.

Names and titles of the individuals authorized to negotiate and contractually bind the Consultant	Tom Stellman, founder and CEO Jeff Marcell, senior partner
Address	13492 N Hwy 183, Suite 120-254, Austin, TX 78750
Telephone number	512.343.9113

Our team is excited by the prospect of working with you. We appreciate the opportunity to present our firm and our team members, and we encourage you to contact our references. Please feel free to call me at 512.343.9113 if you have any questions concerning our submittal.

Sincerely,

A handwritten signature in black ink, appearing to read 'Jeff Marcell', is written over a light blue background.

Jeff Marcell, Senior Partner

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30
Years

TIP Strategies, Inc., is a privately held Austin-based firm providing consulting and advisory services to public and private sector clients. Established in 1995, the firm has spent 30 years partnering with communities, turning insights into strategies that shape tomorrow. Its core competencies are strategic planning for economic development, talent strategies, organizational development, resiliency planning, and equity initiatives.

+1 512 3439113

www.tipstrategies.com

13492 N Hwy. 183, Ste 120-254
Austin, TX 78750

B. Introduction/Information

TIP Strategies, Inc. (TIP) is submitting this proposal to assist the City of Beaumont (City) with an economic development strategic plan. Our team members are experienced in 1) leading economic development planning projects across the US and internationally; 2) structuring effective and sustainable organizations; 3) identifying appropriate target industries and designing effective marketing strategies to recruit them; 4) crafting talent retention, development, and attraction strategies; and 5) assisting with the implementation of economic development plans for cities, counties, regions, and states.

Project Approach & Understanding

As a desirable community that offers a high quality of life and an ideal location at the intersection of major highways, Beaumont has experienced rapid expansion and continues to attract a well-educated workforce. The City's retail sector, already a focal point in the region, is primed to continue to flourish with the recently announced multi-million-dollar state investment in City infrastructure projects that will ease congestion. Beaumont is at a pivotal moment as it prepares for its next phase of growth, which the City recognizes in the 13 Action Items identified in its recent Strategic Plan to address economic development by amping up business and industry recruitment. TIP is well-positioned to collaborate with the City to meet these goals. During 30 years in business, TIP has established our Theory Into Practice (TIP) planning model that combines analytical tools with the latest thinking in economic development and community-based principles to create innovative and publicly supported strategies.

During the **DISCOVERY** phase, team members use both qualitative (stakeholder engagement) and quantitative methods (data analysis) to develop a full understanding of the local economic landscape. The Discovery phase culminates in the preparation of an analysis of the community and economy's strengths, weaknesses, opportunities, and threats (SWOT analysis). Findings from the Discovery phase serve as the basis for the identification of potential strategies in the **OPPORTUNITY** phase. Our team will build a better understanding of the community's opportunities which will allow us to determine a range of potential solutions that can be implemented on a local level. This phase culminates in a workshop designed to build consensus on prioritized strategies and focus areas.

Finally, the **IMPLEMENTATION** phase prioritizes recommended strategies and identifies the resources and partnership opportunities to make them a reality. In generating actionable next steps for the City, we will provide the requested strategic recommendations that inform the next chapter of the City's approach to economic development. In addition to the strategic plan, TIP will provide an implementation plan that outlines actions, priorities, and guidelines for measuring success. By the conclusion of our collaboration, Beaumont will have gained the insights, tools, and resources it needs to support better economic outcomes for its community.

Required Information

Legal name of the Consultant	TIP Strategies, Inc.
Mailing address	13492 N Hwy 183, Suite 120-254, Austin, TX 78750
Contact	Jeff Marcell, senior partner
Telephone number	512.343.9113

C. Methods

Using our three-phase planning process—Discovery, Opportunity, Implementation—described in greater detail in the previous section, TIP will collaborate with the City throughout the process with these imperatives always in mind:

1) learning all we can about the community and your organization, 2) using that knowledge to prioritize the opportunities most likely to be successful, and 3) ensuring we provide the tools needed to implement the strategies that result from the economic development strategic plan.

TIP employs the following project management protocols to ensure clear communication, a quality product, and the ability to quickly address any concerns. This ensures we meet—and exceed—client expectations on time and within budget. Our commitment to getting it right is demonstrated by numerous repeat clients over the life of the firm.

- **PROJECT GUIDE.** As part of the project launch, we will prepare our *Project Startup Guide*, which sets clear, mutually agreed upon expectations for the engagement. The guide includes anticipated client tasks by phase as well as a detailed list of items we typically request at the outset of the project.
- **TEAM MEETINGS.** We will meet with staff regularly to report on findings and discuss upcoming tasks. These meetings will allow us to achieve consensus on specific goals and provide the opportunity to refine our work product as we go. The frequency of these meetings will be agreed upon during the project launch.
- **STEERING COMMITTEE.** For this effort, we recommend utilizing the Economic Development Committee (EDC) as a steering committee, which we will meet with regularly to help guide and shape the plan. Members are responsible for attending monthly meetings, providing input on strategies, and reviewing deliverables. If the EDC is not utilized in this way, we will hold at least two meetings with the EDC as stipulated in the RFP.
- **DATA COLLECTION & ANALYSIS.** To minimize errors, we adhere as closely as possible to reputable, primary sources and use an internal peer review process when creating new products and methodologies. Quantitative work is reviewed by the R&D and Production teams, lead consultant, and principal-in-charge before it is submitted to the client.
- **QUALITY CONTROL.** TIP's Production team will ensure that deliverables are clear, concise, and meaningful. We review all deliverables before submittal to the client or the public. Final deliverables are professionally proofread and prepared in a graphically pleasing and user-friendly manner. This process should be factored into timelines for deliverables.
- **CLIENT INVOLVEMENT.** Our team will work closely with the City and seek assistance in a number of areas.
 - Designating a point person responsible for assisting with scheduling project meetings, helping with stakeholder input (meeting logistics, advertising, translation services), and coordinating deliverables review.
 - Providing economic development plans, budget and staffing for economic development, major employer list, recent surveys, a list of partners and initiatives, and information on special districts and recent prospects.
 - Identifying key stakeholders and helping to bring them to the table.
 - Providing information on current economic conditions, as well as historical and future trends.
 - Providing input and feedback on deliverables throughout the process.

D. Firm Profile

TIP is an independently owned Austin-based firm providing consulting and advisory services to public and private sector clients. Established in 1995, the firm's core competencies are strategic planning for economic development, talent strategies, organizational development, resiliency planning, and equity initiatives. Specific topics in which TIP has deep experience include entrepreneurship, target industries, workforce analytics, and defense industries/communities. TIP is based in Austin, Texas, with team members in Colorado, Maryland, Massachusetts, Michigan, Vermont, and Washington.

For 30 years, TIP has delivered strategies that shape tomorrow through our future-ready Talent–Innovation–Place framework. Together with community leaders across the US, we craft innovative publicly supported strategies that establish a clear vision for sustainable economic growth and shared prosperity.

Leadership & Structure

TIP is a C Corporation led by four principals who are ideally suited to assist the City with an economic development strategic plan. They are joined by a staff of 19 fulltime analysts, consultants, and production professionals experienced in managing projects similar in scope to the requested work. The TIP team also includes an extensive network of associates and partners whose multidisciplinary skills can be brought to bear on this project.



TOM STELLMAN, CEO/FOUNDER, brings a wealth of experience working with communities and businesses. As developer of TIP's Talent–Innovation–Place model, he has helped clients identify sustainable strategies to promote workforce and economic health.



TRACYE MCDANIEL, PRESIDENT, has earned a reputation for creating mutually beneficial partnerships across a broad spectrum of industries as a widely recognized strategist with experience in all facets of economic development and travel marketing.



JON ROBERTS, MANAGING PARTNER, is a nationally recognized leader in regional economic development. He has overseen projects throughout the US, as well as in Europe and Asia, and is a frequent speaker for the International Economic Development Council.



JEFF MARCELL, SENIOR PARTNER, leads high-profile national consulting engagements and provides input from the practitioner's point of view. Prior to joining the firm, he spent a decade leading the Economic Development Council of Seattle and King County.

E. Firm Experience/Qualifications

Please see the following projects that showcase our similar work in California and across the US.

1. Recent Team Projects

GRUNDY COUNTY ECONOMIC DEV. COUNCIL (IL) ECONOMIC DIVERSIFICATION AND RESILIENCY PLAN	
REFERENCE	Nancy E. Norton, President & CEO, GEDC 112 E. Washington Street, Morris, IL 60450 PH 815.942.0163 nnorton@gedc.com
SCOPE	Sole consultant
TIMEFRAME	April 2024–December 2024
BUDGET	\$184,500
PROJECT TEAM	Jeff Marcell, principal-in-charge Mishka Parkins, lead; Elizabeth Scott, assisting
PORT AUTHORITY OF THE CITY OF BLOOMINGTON (MN) ECONOMIC DEVELOPMENT STRATEGIC PLAN	
REFERENCE	Holly Masek, Port Authority Administrator 1800 West Old Shakopee Road, Bloomington, MN 55431-3027 PH 952.563.8879 hmasek@bloomingtonmn.gov
SCOPE	Sole consultant
TIMEFRAME	January 2024–March 2025
BUDGET	\$175,000
PROJECT TEAM	Jeff Marcell, principal-in-charge Elizabeth Scott, lead; Mishka Parkins, assisting
CHARLESTON AREA ALLIANCE (WV) ECONOMIC DEVELOPMENT STRATEGIC PLAN	
REFERENCE	Mara Boggs, President & CEO, Charleston Area Alliance 1116 Smith Street, Charleston, WV 25301 PH 304.340.4253 mboggs@charlestonareaalliance.org
SCOPE	Sole consultant
TIMEFRAME	January 2024–December 2024
BUDGET	\$150,000
PROJECT TEAM	Jeff Marcell, principal-in-charge Mishka Parkins, lead
CITY OF SAN LUIS OBISPO, CA ECONOMIC DEVELOPMENT STRATEGIC PLAN UPDATE	
REFERENCE	Molly Cano, Vice President of Marketing, Visit SLO CAL (fmr. Economic Dev. & Tourism Manager, City of San Luis Obispo) 81 Higuera Street, Suite 220, San Luis Obispo, CA 93401 PH 805.541.8000 (main office) molly@slocal.com
SCOPE	Sole consultant
TIMEFRAME	December 2022–September 2023
BUDGET	\$100,000
PROJECT TEAM	Jeff Marcell, principal-in-charge Alex Cooke, lead; Mishka Parkins, assisting
FRESNO COUNTY, CA COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDs)	
REFERENCE	Lauren Nikkel, Director of Business Services, Fresno County Economic Dev. Corp. 1060 Fulton St, 4th Floor, Fresno, CA 93721 PH 559.721.2241 lnikkel@fresnoedc.com
SCOPE	Sole consultant
TIMEFRAME	June 2024–present
BUDGET	\$210,000
PROJECT TEAM	Jeff Marcell, principal-in-charge Elizabeth Scott; Victoria Wilson, assisting

2. Terminated Contracts

TIP has not had any contracts terminated (partially or completely) by clients for convenience or default within the past seven years.

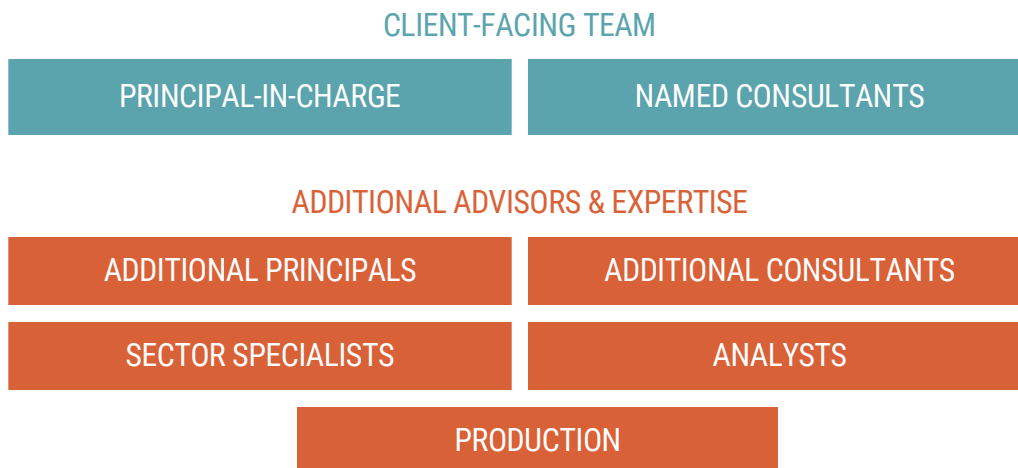
F. Location of Principal Office

This contract will be administered from TIP's headquarters in Austin, Texas.

G. Proposed Team

At TIP, the work of our consulting team is conducted under the direct supervision of a senior member of the firm. The **principal-in-charge** is actively involved in every phase. TIP senior partner **JEFF MARCELL** will act as principal-in-charge and serve as the primary point of contact for this work. In this capacity, he will participate in the scoping of the project and provide technical and strategic input during each phase.

The principal-in-charge receives input from other senior members of our staff who serve as **strategic advisors**. VP **JOHN KARRAS** will serve as an advisor. In addition, a **lead consultant** is assigned to manage each engagement and is responsible for day-to-day client communication, directing project research, and report writing. Consultant **MISHKA PARKINS** will serve as lead consultant, or project manager, for this work and will be assisted in these duties by senior consultant **ELIZABETH SCOTT**. As shown in the staffing diagram, the project leads are assisted by a team of **analysts** and **production professionals**, who have extensive experience preparing thought-provoking analyses and engaging deliverables. A summary of qualifications and resumes for key TIP personnel is provided in the remainder of this section. Additional resumes are available upon request.



Key Personnel Qualifications



JEFF MARCELL, Senior Partner, has more than two decades of experience in economic development as a practitioner and consultant. His client portfolio includes facilitating the Governor of Delaware's taskforce that established a new public-private partnership for economic development and supporting the Detroit Regional CEO Group in a review of employer-led solutions to workforce challenges. Prior to joining TIP in 2014, he was with the Economic Development Council of Seattle and King County for a decade, first as executive VP and COO and then as the president and CEO. Jeff holds a law degree from the South Texas College of Law, a BA in political science from the University of Illinois at Chicago, and a certificate in Nonprofit Management from the University of Washington.



JOHN KARRAS, VP, has two decades of experience as a national economic development strategist, working in 40 US states, Mexico, and Canada. He is known for his insights on urban revitalization and its economic impact. As VP of business development, he builds client relationships and helps communities strengthen urban vitality. Before joining TIP, John worked at the NYC Department of

Transportation's Division of Planning & Sustainability and as an urban planning/GIS specialist with AECOM. He holds an MS in Community & Regional Planning from the University of Texas at Austin and a BS in Geography from Texas State University.



MISHKA PARKINS, Consultant, has experience managing economic development technical assistance and research projects. Her recent work includes the preparation of economic development strategies for the Greater Baltimore Committee (Maryland); the City of San Luis Obispo, California; and the City of Clovis, New Mexico. Prior to joining TIP in 2021, Mishka facilitated peer learning and supported professional development at the International Economic Development Council. She received a Master of Public Administration from Washington Adventist University and a Bachelor of Science in Marketing from the University of Maryland, College Park.



ELIZABETH SCOTT, Senior Consultant, has nearly 20 years of experience managing projects that include business recruitment and retention, economic and workforce development strategies, socioeconomic impact analyses, and land use studies. Before joining TIP in 2019, Elizabeth directed business recruitment, retention, and expansion efforts for the Columbia River Economic Development Council (CREDC) in Clark County, Washington. While at CREDC, she also managed several multi-million-dollar grant programs across the Greater Portland-Vancouver region. She received a Master of Natural Resources from Virginia Tech and a BA in History and Sociology from the University of Tampa.



BRENT MCELREATH, AICP, SVP, Research & Development, oversees three analysts with expertise in regional labor market, statistical, and geospatial analyses; data visualization; machine learning; big data management; urban Informatics; and land use planning. He has more than 25 years of experience in comparative urban economic analysis. Brent is an AICP-certified planner and a member of the American Planning Association. Brent received a Master of Community and Regional Planning and Bachelor of Business Administration in Finance from the University of Texas at Austin.



KAREN BEARD, SVP, Production, has held roles ranging from research to managing client engagements to deliverable production during her 25 years with TIP. As SVP of Production since 2020, she oversees two designers who collectively have 40 years of experience in graphic design and are responsible for creating attractive, user-friendly and accessible content across multiple platforms. She received a Master of Community and Regional Planning and a BA in Sociology from the University of Texas at Austin.

Key Personnel Resumes



JEFF MARCELL

Senior Partner

jeff@tipstrategies.com

EDUCATION

- Juris Doctorate, South Texas College of Law
- Bachelor of Arts, Political Science, University of Illinois at Chicago

EXPERTISE

- Policy development
- Competitive analysis and positioning
- Organization fundraising
- Change management
- Process reengineering

AFFILIATIONS

- Past Chair, Washington Economic Development Association
- Board and Executive Committee Member (former), Puget Sound Economic Development District Board
- Founding Board Member, Aerospace Futures Alliance
- Board Member (former), Washington Aerospace Partnership
- Board and Executive Committee Member (former) Seattle-King County Workforce Development Council
- Board Member (former), Seattle Metropolitan Chamber of Commerce
- Member (former), Multi-cultural & Small Business Task Force, Seattle Metro Chamber

ABOUT

As a principal, Jeff Marcell leads high-profile national consulting engagements and contributes to the strategic planning of the business.

EXPERIENCE

Before joining TIP, Jeff served as the president and CEO of the Economic Development Council of Seattle and King County (EDC). He was responsible for the organization's mission of business and job creation, retention, expansion, and recruitment in King County. Jeff joined the EDC in 2004, and during his tenure, rebuilt the organization's client-based economic development program.

Prior to joining the EDC, Jeff was an economic development consultant with Angelou Economics, and a marketing executive in the Economic Development Division of the Greater Houston Partnership. He was responsible for retaining and recruiting corporate expansions and relocations by marketing and promoting the Houston region nationally and internationally. During his term with the Partnership, the organization brought in over 25,000 jobs to the Houston region with \$3.4 billion in annual economic impact to the community.

In 2007, Jeff was named one of the Puget Sound Business Journal's 40 Under 40. In 2013, he received the MacArthur Award for Leadership from the Washington State Department of Commerce. He has been recognized by the IEDC for his efforts in Technology-Led Economic Development and Clean Technology and was the recipient of an Outstanding Board Service Award from the Seattle-King County Workforce Development Council, 2012.

SIGNIFICANT PROJECTS

- Conducted strategies for regions in California's Central Coast (Santa Barbara and San Luis Obispo Counties); the Chicago, Illinois, area; East Central Michigan; North Iowa; Northwest Indiana.
- Conducted strategic planning for San Luis Obispo, CA; Miami-Dade County, FL; Minneapolis-St. Paul, MN; Detroit, MI; City of Auburn, WA; City of Corning, NY; Missouri City, TX; and City of Shelton, WA.
- Supervised the recruitment, retention, and expansion of 65 companies representing nearly 7,000 primary jobs in the Seattle region.



JOHN KARRAS

VP Business Development

john.karras@tipstrategies.com

EDUCATION

- Master of Science, Community & Regional Planning, University of Texas at Austin
- Bachelor of Science, Geography, Texas State University-San Marcos

EXPERTISE

- Strategic planning
- Target industry analysis
- Economic and fiscal impact analysis
- Marketing and digital lead generation
- Downtown revitalization
- Urban planning and transportation policy
- GIS mapping and spatial analysis
- Real estate trends
- Community brand and image

AFFILIATIONS

- Instructor, Texas Basic Economic Development Course
- Instructor, International Economic Development Council (IEDC) Strategic Planning
- Adjunct Faculty, Sustainable Urban Economic Development Planning course, Master of Science, Community & Regional Planning, University of Texas at Austin
- Member, International Economic Development Council
- Member, Texas Economic Development Council

ABOUT

John Karras has devoted his career to the bold idea that every community has the potential to become a more vibrant place. As VP of business development with TIP Strategies, John channels his energies to empower economic development professionals and civic leaders with the knowledge and tools needed to make their communities more vibrant.

EXPERIENCE

John has spent nearly two decades working as a national economic development strategist. John's economic development work has taken him to 40 US states, as well as Mexico and Canada. In addition to his consulting portfolio, John has built a reputation as a leading thinker on urban revitalization trends and their impact on economic development. He founded urbanSCALE.com in 2013, which introduced the first comprehensive measure of how urban a city is on a scale of 1 to 10. Blog posts and other content from urbanSCALE have been featured in Planetizen, Outside Magazine's annual "Best Places to Live" feature, and dozens of local media outlets around the US. John is a frequent keynote speaker at economic development conferences and serves as an instructor of training and professional development courses for economic development professionals on the topics of strategic planning, and data analysis.

Before entering the economic development field, John worked in the New York City Dept. of Transportation's Division of Planning & Sustainability. Prior to his work with the NYC DOT, John worked as an urban planning/GIS specialist with AECOM.

SIGNIFICANT PROJECTS

- **Regional and statewide economic development planning:** Texas Higher Education Foundation; Mississippi; Northeast Indiana; Minneapolis-St. Paul, MN; Delta Regional Authority (multi-state); Coastal Mississippi; East Kern County, CA.
- **Citywide economic development strategies:** San Antonio, TX; Fort Worth, TX; Arlington, TX; Irving, TX; Brownsville, TX; Pasadena, TX; San Angelo, TX; Missouri City, TX; Pflugerville, TX; Del Rio, TX; Alvin, TX; Buda, TX; Kaufman, TX; Yoakum, TX; Sahuarita, AZ; North Miami, FL; Corning, NY; Bartlesville, OK; Richmond, VA.



MISHKA PARKINS

Consultant

mishka@tipstrategies.com

EDUCATION

- Master of Public Administration, Washington Adventist University
- Bachelor of Science, Marketing, University of Maryland, College Park

EXPERTISE

- Content development and dissemination
- Program design and implementation
- Project management
- Stakeholder engagement

ABOUT

Mishka Parkins has experience managing economic development technical assistance and research projects. She has led engagements with economic development practitioners, consultants, subject matter experts, and other stakeholders in support of economic recovery projects.

EXPERIENCE

Prior to joining TIP, Mishka spent more than seven years in nonprofit sector research, programming, content development, and project management. At the International Economic Development Council, she facilitated peer learning and supported professional development through various knowledge management activities, including content development for webinars, workshops, and technical assistance projects. She has authored and co-authored several educational resources for economic development practitioners. Experienced in working with membership organizations, she has supported nonprofits in achieving their missions and goals by creating timely and relevant content, member programming, networking, and partnership opportunities.

In addition to her nonprofit experience, Mishka has worked in private sector marketing and commercial real estate research roles. She has supported the successful launch of campaigns for new sub-brand positioning that included brand identity guidelines and internal/external communication policies. Mishka has also managed a client portfolio and database of commercial property listings and served as a primary point-of-contact and liaison for commercial brokers.

SIGNIFICANT PROJECTS

- Managed preparation of economic development strategic plans for San Luis Obispo, CA, and Clovis, NM.
- Helped facilitate the first two cohorts of the International Economic Development Council's (IEDC's) Equitable Communities Initiative.
- Managed economic recovery projects in Puerto Rico and the US Virgin Islands.
- Led research efforts and authored report about collaborative strategies for economic developers and philanthropic organizations.



ELIZABETH SCOTT

Senior Consultant

elizabeth@tipstrategies.com

EDUCATION

- Master of Natural Resources, Environmental & Land Use Policy, Virginia Tech
- Bachelor of Arts, History and Sociology, University of Tampa

EXPERTISE

- Regional & Comprehensive Economic Development Strategic Plans (CEDs)
- Economic development organizational strategic plans
- Domestic & international business recruitment
- Talent attraction strategy
- Project management
- Target industry & industry cluster analysis
- Policy analysis
- Socioeconomic & fiscal impact analysis

AFFILIATIONS

- Member, Michigan Economic Developers Association
- Former member, Port of Portland International Air Service Executive Committee
- Former vice chair, Leadership Clark County
- Former member, Clark County Railroad Advisory Board

ABOUT

Elizabeth Scott has nearly 20 years of experience managing a wide range of projects including business recruitment and retention, economic and workforce development strategy, socioeconomic impact studies, and land use studies. She works closely with community, business, and academic leaders to develop comprehensive strategies that advance equitable economic growth and foster a high quality of place.

EXPERIENCE

Prior to joining TIP, Elizabeth spent seven years with the Columbia River Economic Development Council (CREDC) in Clark County, WA. As the director of business development, she led the business services team executing the strategy for business recruitment, retention, and expansion efforts. In this role, she managed over 20 successful projects including Vigor Industrial, Banfield Pet Hospital Corporate Headquarters, RealWear, and GTMA. Areas of focus include site selection, permitting processes, incentives negotiation, higher education engagement, and workforce development. During her tenure with CREDC, she successfully managed a number of grant programs, including a four-year, \$5 million grant from five federal agencies as part of the Advanced Manufacturing Jobs and Innovation Accelerator Challenge (AMJIAC) program for the five county, bi-state Greater Portland-Vancouver Region.

In addition to her economic development expertise, she has experience in business development, project management, and research and data analysis. Early in her career, she supported BRAC/NEPA projects by providing socioeconomic analysis for environmental assessments and environmental impact statements.

Elizabeth resides in Houghton, Michigan.

SIGNIFICANT PROJECTS

- Large scale regional economic development plans for urban and rural communities across the US, including San Luis Obispo-Santa Barbara (CA), Jacksonville (FL), Oklahoma City (OK), Indianapolis (IN), and Spokane (WA).
- Led and supported over 20 successful recruitment and expansion projects, including corporate headquarters relocations.



BRENT MCELREATH, AICP
SVP, Research & Development
brent@tipstrategies.com

EDUCATION

- Master of Science, Community & Regional Planning, University of Texas at Austin
- Bachelor of Business Administration, Finance, University of Texas at Austin

EXPERTISE

- Regional and metropolitan economics
- Economic development strategy
- Real estate and property market fundamentals
- Infrastructure analysis
- Capital and financial analysis

AFFILIATIONS

- Member, American Institute of Certified Planners
- Member, American Planning Association
- Past Member, Urban Land Institute

ABOUT

Brent McElreath has more than 25 years of experience in comparative urban economic analysis. He has managed research teams in both the public and private sectors and has extensive work experience in real estate and infrastructure markets, with a focus on their cyclical and structural drivers. During his career he has spearheaded innovations in scenario modeling, fiscal impact analysis, and data collection and reporting systems. Brent has authored, co-authored, and edited numerous white papers, articles, and serial reports on global property and infrastructure markets during his career.

EXPERIENCE

As a vice president at MSCI, Brent designed and implemented performance monitoring systems for metropolitan property markets. He also developed and authored publications explaining differences in investment risks across property types, metropolitan areas, and national markets. His graphical analysis became a fixture of MSCI's annual property market review presentations in North America, Europe, and the Asia Pacific region.

While at PPR (now CoStar), Brent supervised the publication of 250+ quarterly property market forecasts. He also oversaw the modernization of PPR's data collection systems and led the firm's initial groundwork in global risk analysis.

Brent's career began in economic development in Texas in the 1990s. He brings this background to his current role at TIP, combined with extensive experience in the dynamics of real estate, infrastructure, and capital markets.

Brent is a member of the American Planning Association and an AICP-certified planner.

SIGNIFICANT PROJECTS

- **Strategic planning:** Greater Baltimore Committee (2024); Chicago Metropolitan Agency for Planning (2022); Indianapolis Metropolitan Planning Organization (2022); Virginia Beach, VA (2021); Tampa Bay Economic Dev. (2019); Fort Worth, TX (2017).
- **Selected publications:** *Global Property Performance* (2016); *The Road to a Seamless Global Real Estate Portfolio* (2016); *Sectoral Aspects of Global Infrastructure Investment* (2015).



KAREN BEARD

SVP, Production

karen@tipstrategies.com

EDUCATION

- Master of Science, Community & Regional Planning, University of Texas at Austin
- Bachelor of Arts, Sociology, University of Texas at Austin

EXPERTISE

- Survey research
- Regional economic analysis
- Workforce and higher education analysis
- Writing and editing

AFFILIATIONS

- Instructor, Texas Basic Economic Development Course

ABOUT

Karen Beard has 30 years of experience thinking about economic development and community planning from a data, policy, and strategy perspective. Since joining TIP in 2000, she has filled both client-facing and “home team” roles for the firm. As a research associate and then a consultant, she managed client engagements in Texas and across the US, including a focus on helping clients understand their workforce. In her current role as senior vice president of production, Karen helps coordinate the firm’s client deliverables.

EXPERIENCE

Prior to joining TIP, Karen held the position of senior research analyst at the Texas Department of Economic Development. During her tenure at TDED, she was involved in a number of projects, including the design and maintenance of the agency's "one stop" economic development web sites. In this capacity, she served as the principal developer of the Texas Business & Community Economic Development Clearinghouse, a searchable database of economic development resources.

As a research associate for the State Bar of Texas, Karen analyzed subjects of interest to the legal services industry and participated in dozens of law-related survey research projects, including an extensive annual report on attorney fees and compensation, as well as an award-winning survey on the concerns of minorities in the legal profession. She has also conducted research on the disability community for the Texas Rehabilitation Commission and led a major household travel survey as a research manager for NuStats, an Austin-based transportation research firm. Other topics that she has addressed include the evaluation of manufacturing technology centers and the effect of regulation on the cost of land development.

SIGNIFICANT PROJECTS

- **Regional economic development planning:** Green River Area Development District, KY; WIRED 26-county region, KY/IN; Racine County EDC, WI.
- **Workforce projects:** Workforce Solutions of Central Texas; Western Kentucky Workforce Investment Board; Pearland Economic Development Corporation (TX); Workforce Solutions Lower Rio Grande Valley (TX).

H. References

The following are selected examples of TIP's work, along with corresponding contact information and links to online deliverables (where available). These clients can speak to our team's ability to deliver a quality, professional product on time and within budget. Additional details about these and other projects can be found via our [online portfolio](#).



Image Credit: Hagan Park with a lake, river, and fall trees by Coruscating Images courtesy of City of Rancho Cordova.

CITY OF RANCHO CORDOVA, CA | ECONOMIC DEVELOPMENT STRATEGIC PLAN

TIP's [economic development plan](#) for the City of Rancho Cordova was built around three goals. The business development goal focuses on expanding the city's employer base, while centering businesses attraction efforts on target industries. The placemaking and real estate goal supports community objectives including development of priority nodes, redevelopment and activation of underutilized spaces, and increasing mobility. The workforce goal seeks to build regional partnerships to address talent pipeline challenges and reduce barriers to employment.

Reference: Amanda Norton, Economic Development Manager | 2729 Prospect Park Drive, Rancho Cordova, CA 95670 | PH 916.851.8783 | anorton@cityofranchocordova.org



Image Credit: Panorama from Terrace Hill, San Luis Obispo, CA via AdobeStock_237485251.

CITY OF SAN LUIS OBISPO, CA | ECONOMIC DEVELOPMENT STRATEGIC PLAN UPDATE

The City engaged TIP to update its [economic development strategic plan](#). Five guiding principles emerged as a result: 1) maintaining a dynamic economic and business environment, 2) expanding economic opportunities for all residents and businesses, 3) ensuring economic vitality through climate- and system-focused sustainable growth, 4) enhancing internal and external collaboration, and 5) expanding partnerships across the region.

Reference: Molly Cano, VP of Marketing, Visit SLO CAL (former Economic Development & Tourism Manager, City of San Luis Obispo) | 81 Higuera Street, Suite 220, San Luis Obispo, CA 93401 | PH 805.541.8000 (main office) | molly@slocal.com

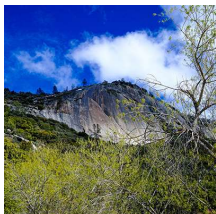


Image Credit: Fresno Co., Tollhouse Rock.

FRESNO COUNTY, CA | COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)

TIP is completing a comprehensive economic development strategy (CEDS) that will help guide Fresno County officials, community stakeholders, private industry, and public investment toward building an inclusive and resilient economy. The strategic plan will address equitable economic growth, identify infrastructure investments, and provide a roadmap for a more sustainable economy that can withstand economic disruptions.

Reference: Lauren Nikkel, Director of Business Services, Fresno County EDC | 1060 Fulton St, 4th Floor, Fresno, CA 93721 | PH 559.721.2241 | lnikkel@fresnoedc.com

Work Samples

The following examples of TIP's work have been made available online by our clients.

- [Advancing Grundy: Grundy County Economic Diversification and Resiliency Plan](#), Grundy County Economic Development Council (IL) | December 2024
- [Resilience Roadmap: A Comprehensive Economic Development Strategy for the Counties of San Luis Obispo and Santa Barbara](#), REACH (California Central Coast) | January 2024
- [Comprehensive Economic Development Strategy](#), Lake County Partners (IL) | April 2022

I. Scope of Services

TIP will provide the following tasks, sub-tasks, and deliverables to the City, as follows.

1. DISCOVERY

We begin by reviewing available materials, visiting with knowledgeable sources, and conducting a targeted analysis of relevant trends to create a common foundation for the planning process.

- 1.1 PROJECT LAUNCH.** At the outset of the engagement, we focus on establishing clear and effective communication, which is the cornerstone of a successful project. This includes delivery of the *Project Startup Guide* and facilitation of a kickoff meeting. The kickoff meeting provides the opportunity to discuss objectives, define success factors, identify stakeholders and partners, formalize the outreach strategy, and review the team's expectations.
- 1.2 PLANNING ALIGNMENT.** We will examine policies, relationships, and organizational priorities that influence the planning process. Work on this task will be expanded in later phases and help shape recommendations.
 - ▶ **Policies.** Reviewing background documents (e.g., documents listed on pages 3 and 4 of the RFP) allows us to build on existing knowledge and to better understand current initiatives and programs that may be relevant to this work.
 - ▶ **Relationships.** A scan of the partner network will help define existing relationships (e.g., Beaumont Chamber of Commerce, Riverside County Office of Economic Development) within the Beaumont market and identify potential partnerships.
 - ▶ **Priorities.** Discussions with the appropriate staff will ensure our team has a full picture of the organization's economic development initiatives and core functions. We will address the City's progress and priorities relating to the 13 Action Items connected to the Economic Development & Downtown Revitalization Goal 3.1 in the City's 2025-2027 Strategic Plan.
- 1.3 CITYWIDE BASELINE ANALYSIS.** Our analysts will prepare a targeted assessment of factors that define the area's overall competitiveness and are of greatest concern to economic decision makers. Our analysis will be tailored to meet project objectives, including tax base enhancement, business climate improvements, and entrepreneurial aspirations. This task will take advantage of available data resources to consider Beaumont's current economic position within Riverside County and identify broader economic trends that may impact the City's future economic position (e.g., population growth, housing, and labor shortages).
- 1.4 STAKEHOLDER ENGAGEMENT.** Engaging a diverse group of community members and stakeholders is integral to our planning model. Our team will design a custom engagement process that gathers meaningful information to the planning process, raises awareness of economic issues, and builds broad community support for the outcome. TIP encourages robust participation by holding a combination of in-person and virtual events; employing a mix of traditional and innovative user-friendly tools such as Zoom, Mentimeter (live polling), and Zoho (survey translation); and including staff that are either proficient or fluent in several languages (e.g., Spanish).
 - ▶ **Roundtables & interviews.** Roundtables are the linchpin of our stakeholder input process. These input sessions are designed to encourage productive discussions around a targeted set of topics. We will plan to

engage major employers, elected officials, human resources specialists, real estate professionals, mobile services providers, and other experts to gather information about trends, barriers, opportunities, and assets that will help shape our recommendations. Where appropriate, these sessions will be supplemented by one-on-one interviews to solicit feedback on issues that may not surface in a collective setting.

- ▶ **Tours.** During our in-person visit, the TIP team will explore Beaumont through the perspectives of visitors and economic development partners. We will seek recommendations from City staff on sites that offer promising opportunities, learn what makes Beaumont and its communities unique, and explore any potential placemaking approaches to help spur business and talent growth.
- ▶ **Community visioning workshops.** Our team will facilitate three workshops designed to engage the business community and its leaders and a larger, citywide group of stakeholders. These sessions will build energy around the planning process, provide additional insight into community issues, and obtain general direction regarding a guiding vision for Beaumont’s future economic development activities. We will conduct two in-person workshops, one during the day and one during the evening, as well as a virtual workshop, to ensure the events are accessible to all community members.
- ▶ **Interactive tools.** To expand participation in the process and ensure diverse perspectives are considered, we can facilitate the use of social media, online surveys, and other interactive tools as agreed upon with the client. These tools are effective mechanisms for engaging stakeholders, gathering anecdotal information about assets and challenges, and increasing buy-in among the broader community. Use of these tools can also set the stage for the City to solicit ongoing input and share updates with the public.

TIP’s role in community and stakeholder input sessions would be to prepare the materials and facilitate the discussion. Logistics for the meetings, including arranging the location(s), advertising the sessions, and the provision of any translation services, would be the responsibility of the client.

TARGETED ENGAGEMENT					
A successful planning effort should engage a broad constituency, provide meaningful information to the planning process, raise awareness of economic issues, and build support for the outcome.	OBJECTIVES	Raise awareness of the project, generate “buzz”	Identify strengths, weaknesses, opportunities, and threats (SWOT)	Refine issues, explore opportunities, increase stakeholder buy-in	Dedicate resources, engage other leaders
	TOOLS	Social media, press releases, networking	Resident & business surveys, town hall style meetings	Roundtable discussions, personal interviews	Steering committee, task forces, MOUs

1.5 COMPETITIVE POSITION. Findings from the Discovery phase will be used to summarize Beaumont’s competitive position. In addition to considering strengths, weaknesses, opportunities, and threats (SWOT) that emerge from this work, our analysis will highlight factors that differentiate the area from the competition. The results will suggest potential opportunities and strategic growth areas that will drive our work in subsequent phases.

2. OPPORTUNITY

Building on our Discovery phase findings and a review of best practices, we identify which opportunities are likely to have the greatest potential for success.

2.1 STRATEGIC DIRECTION. Working closely with the client, we will ensure the City's vision and mission statements align with the strategic direction that emerges from the Discovery phase. In addition, we will help craft a set of guiding principles that will embody the goals and objectives of the planning process. This step will provide a framework that both points to recommended actions and establishes priorities among available options.

2.2 INDUSTRY & WORKFORCE READINESS. TIP analysts will examine Beaumont's existing and emerging retail/commercial and industrial sectors and the extent to which the regional talent pipeline aligns with the needs of current and potential employers. This task will use a variety of public and proprietary data. Findings regarding opportunity sectors will support City marketing efforts.

- ▶ **Industry analysis.** To better understand the needs of current regional employers, we analyze recent job postings in the region to identify in-demand positions by occupation, industry, and job title. We then review other details, such as the intensity of postings over time and skill gaps between postings and worker profiles, and compare the regional patterns to state and national trends. This helps inform strategies and pose questions about the alignment of the talent pipeline with the current needs of employers.
- ▶ **Workforce alignment.** To document existing postsecondary offerings in the region (e.g., University of California-Riverside, Mt. San Jacinto College, San Bernardino Valley College) and illustrate the potential supply of graduates, we will compile published data from the National Center for Education Statistics' Integrated Postsecondary Education Data System (IPEDS) on the number of awards conferred for credit in relevant fields of study.

2.3 LAND DEVELOPMENT OPPORTUNITIES. TIP will prepare a countywide analysis of real estate fundamentals for major commercial or "investible" property types, including multifamily, office, industrial, and retail. These tasks will rely on a combination of public and proprietary data.

- ▶ **Fiscal patterns.** To better understand Beaumont's evolving tax base and fiscal position, we will analyze trends in the city's revenue and debt, with a focus on revenues generated by property and sales taxes.
- ▶ **Commercial property trends.** The analysis will cover supply and demand trends to identify market opportunities for the City's real estate product. We will review key real estate market indicators, including rents, vacancies, and construction deliveries, as well as the underlying drivers of demand in the key property types. Our analysts will examine the extent to which available sites and redevelopment opportunities align with targeted sectors and workforce capacity.
- ▶ **Site analysis.** Our analysts will examine the extent to which development and redevelopment opportunities align with industry investment trends and workforce capacity. Emphasis will be placed on strategic development sites in priority areas (e.g., the Downtown area). This analysis will inform recommendations regarding existing square footage and geographic locations to focus on for future development.
- ▶ **Perception study.** To understand how Beaumont is viewed as a place to develop property, and to further refine our understanding of potential opportunities, our consultants will interview approximately four to six local influencers. This task will involve engagement with developers, brokers, site selectors, and other key

players in the industry to ascertain their perception of Beaumont generally, as well as relative to other locations in Riverside County. Discussions with influencers in the regional site selection process will shed light on how Beaumont is viewed as a development opportunity in the region and any potential barriers created by current land use.

- ▶ **Future patterns of growth.** Building on this analysis of Beaumont's existing real property, we will identify opportunities for expanding the City's tax base. Among other things, we will consider business and resident needs as well as emerging demographic and business trends that may impact strategies pertaining to potential land use, infrastructure and transportation, building densities, and industry clusters.

2.4 OPPORTUNITY WORKSHOP. The culmination of this phase is a facilitated discussion of potential strategies and opportunities for consideration in the Implementation phase. The purpose of the workshop will be to build consensus on economic development priorities for Beaumont. The outcome of this task will be a set of prioritized strategies and focus areas, along with a collaborative framework for aligning available resources to accomplish them.

2.5 USE CASES. Throughout the strategic planning process, we will draw on our team's extensive network to identify and share with leadership national best practices that may be a fit for the City. Based on our work in prior tasks and the priorities that emerge from the Opportunity workshop, we will select the use cases most relevant to the City's economic development efforts moving forward. Research regarding mobile services and how other cities similar to Beaumont have successfully leveraged them to enhance business opportunities will be a focus. Insights into selected programs or initiatives will help shape recommendations and will be integrated into the final deliverable where appropriate.

3. IMPLEMENTATION

We provide a transparent, actionable plan for achieving the identified goals and objectives.

3.1 STRATEGIC PLAN. Using findings from prior phases, coupled with the experience of the consulting team, TIP will prepare a strategic plan. In addition to outlining specific goals and strategies, the plan will highlight key findings from our quantitative analyses and stakeholder input. Together with the implementation plan (see Task 3.2), the resulting document will provide specific recommendations and tools needed to implement a long-term economic strategy. We anticipate the plan would address a number of topics, including:

- Positioning Beaumont with prioritized industries and business types and identifying services for business recruitment.
- Aligning the talent pipeline with the needs of current and future employers.
- Identifying opportunities for development in priority areas.
- Recommending strategies regarding light industrial, distribution/fulfillment centers, office, and retail commercial centers square footage.
- Analyzing the City's mobile services sector and how to leverage them to enhance business opportunities.
- Evaluating potential public-private partnerships.
- Suggesting organizational frameworks for accomplishing the identified objectives.

3.2 IMPLEMENTATION PLAN. TIP will prepare an implementation plan in matrix format that accomplishes the following.

- Identifies responsible parties and potential partnership opportunities.
- Establishes timelines and sets priorities.
- Includes budget estimates (where applicable) and identifies potential funding sources.
- Defines meaningful and realistic performance metrics.

3.3 DIGITAL TOOLKIT. TIP will provide a toolkit that addresses messaging and key talking points to promote the adopted strategic plan and its implementation. The toolkit will be designed for use by the City Public Information Officer, and input from the Officer and City staff will inform its format and contents.

3.4 COUNCIL PRESENTATIONS. We will meet with the Beaumont City Council to discuss findings, present the draft of the strategic plan, and receive input. Once the strategy is finalized, we will present the recommendations to City Council.

3.5 IMPLEMENTATION WORKSHOP. To build momentum for implementation, we will also facilitate an Implementation workshop focused on near-term tasks (60 to 90 days) in conjunction with the final presentation. This step capitalizes on the energy that is present at the rollout and helps to jump start the process.

Deliverables

In the execution of this work, TIP will provide the following deliverables in the formats indicated in parentheses.

- *Project Startup Guide* (PDF of Word document).
- Facilitation of project meetings, such as team meetings, steering committee meetings, and workshops, including electronic versions of any presentations (PowerPoint) or other materials.
- Facilitation of stakeholder input sessions, such as roundtables, interviews, and community visioning workshops, including electronic versions of any presentations (PowerPoint) or other materials.
- Interactive data visualizations (Tableau Public) of the analyses outlined in the scope of work.
- Strategic plan (PDF of Word document) highlighting findings and recommendations, including selected graphics as applicable.
- Implementation matrix (Excel) with goals, strategies, and actions for use assigning roles and timeframes.
- Digital toolkit (PDF of Word document or other format as agreed upon by TIP and client) to assist in communications related to the strategies and recommendations of the strategic plan.

J. Project Schedule

The TIP team is available to begin work immediately upon agreement of terms. The timeline assumes an August 2025 start date and estimates seven months for project completion. It is intended to provide an overview of the process and can be adjusted to meet project objectives.

TASK	2025					2026	
	AUG	SEP	OCT	NOV	DEC	JAN	FEB
DISCOVERY							
1.1 Project launch	①						
1.2 Planning alignment							
1.3 Citywide baseline analysis							
1.4 Stakeholder engagement							
1.5 Competitive position			②				
OPPORTUNITY							
2.1 Strategic direction			③				
2.2 Industry & workforce readiness							
2.3 Land development opportunities							
2.4 Opportunity workshop				④			
2.5 Use cases							
IMPLEMENTATION							
3.1 Strategic plan					⑤		⑥
3.2 Implementation plan							
3.3 Digital toolkit							
3.4 Council presentations							
3.5 Implementation workshop							
ONGOING MEETINGS							
Steering committee meetings							
Staff team meetings							
SELECTED CRITICAL MILESTONES							
① Kickoff meeting							
② SWOT							
③ Strategic direction							
④ Opportunity workshop							
⑤ Draft strategic plan							
⑥ Final strategic plan							

NOTE: TIP has a production process that should be factored into timelines for the development of deliverables. This process includes professional proofreading and design. The time required for production may vary based on the type of deliverable, planned uses and audiences, and amount of content

K. Cost Proposal

The fee for completion of this work is \$100,000, plus expenses, with total costs not to exceed \$110,000. If we are selected based on our approach, qualifications, and experience, our team will work with the City to align the scope with the financial resources available for the execution of this project.

Fees

Per the RFP, we expect to bill on an hourly basis. The breakdown shown below is an estimate and is intended to reflect anticipated level of effort.

PHASE	NUMBER OF HOURS BY POSITION				TOTAL	
	<i>Principal</i> \$275	<i>SVP/VP/Sr</i> \$200	<i>Professional</i> \$150	<i>Associate</i> \$125	<i>Hours</i>	<i>Fees</i>
Discovery	40	65	80	0	185	\$36,000
Opportunity	35	60	75	0	170	\$32,875
Implementation	35	55	70	0	160	\$31,125
Total	110	180	225	0	515	\$100,000

Expenses

Expenses are subject to approval and are billed at cost. They include custom data purchases (if any) and travel and lodging associated with conducting this work.

- **Travel.** We anticipate a combination of virtual and in-person meetings for this work. The not-to-exceed amount provided above assumes between three to four in-person trips to the region. The per unit cost shown below are estimates only. Actual trips may include a mix of travel modes and varying levels of staffing, travel days, etc. The timing and number of trips would be discussed as part of the development of a project work plan.
- **Deliverables.** All deliverables will be in electronic format. If requested, TIP can provide printed copies at cost. All deliverables will be provided in TIP's color scheme and fonts unless custom branding is agreed upon in advance.

ESTIMATED TRAVEL EXPENSES PER TRIP	PER UNIT COST	TOTAL
Airfare (roundtrip fare for 2 staff members)	\$490	\$980
Parking	\$20	\$120
Car rental/ground transportation	\$100	\$300
Meals & incidentals	\$50	\$300
Lodging (2 nights)	\$200	\$800
Total Estimated Expenses Per Trip		\$2,500

L. Current Contracts

Status	Client Name (Contract)	Service (Contract)	Anticipated End Date
Current	Cobb, Fendley & Associates, Inc. (Subcontractor on project w/ Texas Comptroller of Public Accounts)	Broadband Network Planning and Design Consulting	December 2026
Current	Fresno County, CA	Comprehensive Economic Development Strategy (CEDS)	August 2025
Current	Workforce Solutions Greater Dallas (TX)	Three-year Strategic Plan	July 2025
Current	Workforce Solutions Rural Capital Area (TX)	Data Study	July 2025
Current	Cooper's Steel Fabricators, Inc / Shelbyville/Bedford TN	Community Impact Economic Development Blueprint	September 2025
Current	Alexandria Economic Development Partnership (VA)	Economic Development Strategic Framework and Summit	September 2025
Current	Invest Aurora / Elevate Aurora (IL)	Strategic Plan	August 2025
Current	Fort Collins Area Chamber of Commerce (CO)	Workforce Data Profile	July 2025
Current	Prince William County, VA	Workforce Development Study	August 2025
Current	Indian River County, FL	Economic Development Strategic Action Plan	September 2025
Current	Greater Brownsville Incentives Corporation (TX)	Economic Development Strategic Plan	September 2025
Current	University of North Texas	Workforce Demand Analysis	July 2025
Current	Tampa Bay Economic Development Council (FL)	Economic Development Strategic Plan	October 2025
Current	City of Grand Prairie, TX	Target Industry Analysis	July 2025
Current	Greater St Louis, Inc. (MO)	Advanced Manufacturing National Horizon Scan & Technical Report	October 2025
Current	Frederick County, MD	Economic Opportunity Strategic Action Plan	November 2025
Current	City of College Station, TX	Economic Development Master Plan Update	January 2026

M. Additional Information: Our Differentiators

Our decades-long experience in strategic planning for economic and workforce development, combined with hands-on program management experience, brings significant value to the City's efforts.

- **PROVEN TRACK RECORD.** We have an extensive [national portfolio](#) comprised of more than 600 engagements in 44 states and 7 countries, including strategic planning projects in California. TIP's work in the state includes engagements for the cities of San Luis Obispo and Rancho Cordova, Fresno County, and REACH (Santa Barbara and San Luis Obispo Counties).
- **HIGH-GROWTH EXPERTISE.** Our team has national expertise in strategic planning for rapidly growing communities like Beaumont. Examples of our work for fast-growth communities include projects for Sahuarita, Arizona (Tucson area); Forsyth County, Georgia (Atlanta area); Georgetown, Texas (Austin area); and Redmond, Washington (Seattle area).
- **INNOVATIVE SOLUTIONS.** Our expansive portfolio affords understanding of national and international best practices, command of the latest industry trends, and close relationships with real estate professionals and corporate site selectors across the US. We leverage this deep well of knowledge to create innovative solutions that give our clients a competitive edge.
- **CROSS-FUNCTIONAL ENGAGEMENT.** We engage the appropriate groups to gather meaningful information, raise awareness of economic issues, and build support for the outcomes. TIP's projects are typically guided by leadership teams comprised of representatives from multiple jurisdictions and areas of interest, including corporations, economic development, higher education, and workforce. We know how to balance competing interests and identify shared goals within communities and organizations to create consensus-based visions for the future.
- **HOLISTIC APPROACH.** Our years of experience and national portfolio have taught us that Talent, Innovation, and Place are essential to economic resilience and prosperity. We recognize that investment decisions consider a range of factors, including the available workforce, the presence of well-prepared sites, a climate that fosters innovation, and a quality of place that will support the retention and recruitment of talent. Rooted in the understanding that economic vitality is dependent on these three key factors, our holistic approach provides future-ready strategies that ensure communities are prepared to compete for businesses, people, and funding successfully.
- **CUSTOMIZED DELIVERABLES.** We pride ourselves on providing data-driven insights, which means translating large amounts of information and ideas into practical tools customized for the client to aid in their decision-making. We provide visually stimulating and professional documents and [interactive data visualizations](#) that tell a story and speak to all audiences, providing the clear and intentional direction that is pivotal to successful implementation.

In short, our team has the capability, creativity, and commitment to get it right. Hiring TIP to lead your strategy process will result in 1) a shared vision for economic resilience; 2) clear strategies to support the vision; and 3) an actionable plan for moving forward.

N. Insurance

TIP maintains professional liability insurance, including liability at a minimum of one million per occurrence, worker's compensation, and vehicle coverage including comprehensive and collision insurance. At the time of contract execution, a certificate of insurance naming the City of Beaumont as additional insured will be in provided and in force.



Addendum #1

RFP: ECONOMIC DEVELOPMENT STRATEGIC PLAN

Questions & Answers

1. So that we can best tailor our response, can you share the budget range that has been established for this project?
 - A budget range has not been established.
2. Can you clarify the submittal instruction in section 11 - "11. SUBMITTAL One (1) color digital pdf copy of the proposal with cost must be submitted no later than 12:00 p.m. July 11, 2025 to planetbids. Postmarks and faxes are not acceptable. Proposal must be titled "RFP Professional Services for BEAUMONT ECONOMIC DEVELOPMENT STRATEGIC PLAN UPDATE." Once submitted, proposals, including the composition of the consulting staff, cannot be altered without prior written consent of the City. All submitted materials shall become the property of the City of Beaumont. 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." The last sentence states Electronic submittals will not be accepted.
 - Please ignore the language in regard to not accepting electronic submittals. Please submit 1 electronic color pdf copy of your proposal and the cost proposal by 12:00 pm July 11, 2025 on planetbids
 - Please name the title of the proposal "RFP Professional Services for BEAUMONT ECONOMIC DEVELOPMENT STRATEGIC PLAN UPDATE.
 - All costs associated with preparation of any proposal shall be the sole responsibility of the proposer.
 - Please note: Once submitted, proposals, including the composition of the consulting staff, cannot be altered without prior written consent of the City. All submitted materials shall become the property of the City of Beaumont.
 - Each proposal shall be limited to a maximum of 25 pages, using a minimum 12-point font size.
3. Will the City be providing a budget range for this engagement? Having that guidance would be very helpful as we scope the project.
 - A budget range has not been established
4. Page 8 of the RFP states the cost of services should be provided in a "separate sealed envelope" while Page 10 states "One (1) color digital pdf copy of the proposal with cost must be submitted...to planetbids." Additionally, Page 9, Section 11 says "Electronic submittals of the proposal will not be accepted" but earlier in the section the direction is to submit via PlanetBids. Could you kindly confirm that submittal is via PlanetBids and clarify if the cost of services needs to be included in a separate PDF file from the main proposal?



BEAUMONT
550 E. 6th Street
Phone (951) 572-3236
BeaumontCa.gov

City of Beaumont

- Please ignore the language in regards to not accepting electronic submittals. Please submit 1 electronic color pdf copy of your proposal and the cost proposal by 12:00 pm July 11, 2025 on planetbids.
 - Costs can be submitted along with the technical proposal on planetbids.
5. Page 9 Section 11 Submittal states that “Each proposal shall be limited to a maximum of 25 pages, using minimum 12-point font size.” Does the page limit include the table of contents and appendices?
- Yes
6. Will the City accept a fixed monthly installment payment schedule?
- No
7. Is there an ideal timeline for this project?
- An ideal timeline would not exceed 9 months in total.
8. On page 5, Item E. c. in the Scope of Work, could you clarify how the City defines “mobile services”?
- “Mobile services” include professional and other services that are provided from a non-fixed location. Examples include but are not limited to: pet grooming, automotive cleaning and detailing, beauty services, notary public services, and other professional services.
9. Our firm would like to work with a third-party contractor, but we've only completed two previous projects together. How rigid is the three previous projects requirements?
- City would accept two previous projects for this requirement.
10. Can you provide any information on the budget for this project?
- No – see response to Question No. 1
11. 10 K under the proposal requirements indicates that the cost proposal is to be provided "in a separate sealed envelope". Can you clarify how the cost proposal is to be submitted? Thank you.
- Please ignore the language in regard to not accepting electronic submittals. Please submit 1 electronic color pdf copy of your proposal and the cost proposal by 12:00 pm July 11, 2025 on planetbids.
 - Costs can be submitted along with the technical proposal on planetbids.

Acknowledgement of Addendum #1 (To be included with proposal)

Signature

07/07/2025

Date

Tom Stellman

Print Name



512.343.9113 | TIPStrategies.com | 13492 N Hwy. 183, Ste 120-254, Austin, TX 78750

EXHIBIT “C”

CERTIFICATES OF INSURANCE AND ENDORSEMENTS

(insert behind this page)



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

08/13/2025

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER IAAT INC PO BOX 1188 MINEOLA, TX 75773	PATRICK WATKINS	CONTACT NAME: DAN FERCH PHONE (A/C, No, Ext): 512 750 9546 E-MAIL ADDRESS: DAN@FERCHINSURANCEGROUP.COM FAX (A/C, No): INSURER(S) AFFORDING COVERAGE NAIC #
INSURED TIP STRATEGIES, INC. 8459 LYNDON LANE AUSTIN, TX 78729		INSURER A : HANOVER INS CO INSURER B : SENTINEL INSURANCE COMPANY LTD INSURER C : INSURER D : INSURER E : INSURER F :

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATION MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
B	☒ COMMERCIAL GENERAL LIABILITY CLAIMS-MADE ☒ OCCUR 1000 DEDUCTIBLE GEN'L AGGREGATE LIMIT APPLIES PER: ☒ POLICY ☐ PRO-JECT ☐ LOC OTHER:	X	X	65 SBA NZ6001 SC	8/27/24	8/27/25	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COM/OP AGG \$ 4,000,000
B	AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY HIRED AUTOS ONLY ☒ SCHEDULED AUTOS NON-OWNED AUTOS ONLY	X	X	65 SBA NZ6001 SC	8/27/24	8/27/25	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
B	☒ UMBRELLA LIAB ☒ OCCUR EXCESS LIAB CLAIMS-MADE DED ☒ RETENTION \$ 10000	X	X	65 SBA NZ6001 SC	8/27/24	8/27/25	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A				PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	PROFESSIONAL LIABILITY	X	X	LHD J487684 01	9/14/24	9/14/25	2,000,000 EAC OCC 2,000,000 AGGREGATE

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER IS AN ADDITIONAL INSURED FOR CONTRACT BUSINESS LIABILITY COVERAGE FORM SS0008

ATTACHED TO THIS POLICY. AI ENDORSEMENT APPLIES TO GENERAL LIABILITY AND AUTO POLICY

WAIVER OF SUBROGATION IN FAVOR OF CERTIFICATE HOLDER.

30 DAYS NOTICE OF CANCELLATION PROVIDE TO CERTIFICATE HOLDER

POLICY IS PRIMARY AND NONCONTRIBUTORY

THE CITY OF BEAUMONT, ITS ELECTED AND APPOINTED OFFICERS, EMPLOYEES, AGENTS AND VOLUNTEERS ARE NAMED AS ADDITIONAL INSURED AS REQUIRED BY WRITTEN CONTRACT WITH RESPECT TO GENERAL LIABILITY AND AUTO LIABILITY. 30 DAYS' NOTICE OF CANCELLATION TO CERTIFICATE HOLDER, 10 DAYS FOR NON-PAYMENT OF PREMIUM APPLIES.

CERTIFICATE HOLDER

CITY OF BEAUMONT 550 E. 6TH STREET BEAUMONT, CA 92223	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE PATRICK WATKINS
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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
08/13/2025

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PRODUCER AUTO DATA PROCESSING INS AGCYINC 76250717 71 HANOVER ROAD FLORHAM PARK NJ 07932	CONTACT NAME:	
	PHONE (800) 524-7024 (A/C, No, Ext):	FAX (800) 524-4013 (A/C, No):
	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A: Hartford Fire and Its P&C Affiliates	
INSURED TIP STRATEGIES DBA TIP STRATEGIES 8459 LYNDON LN AUSTIN TX 78729-3706	NAIC# 00914	
	INSURER B:	
	INSURER C:	
	INSURER D:	
	INSURER E:	
	INSURER F:	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

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INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/Y YYY)	LIMITS												
	COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☐ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☐ PRO-JECT ☐ LOC OTHER:						EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG												
	AUTOMOBILE LIABILITY ☐ ANY AUTO ☐ ALL OWNED AUTOS ☐ HIRED AUTOS ☐ SCHEDULED AUTOS ☐ NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)												
	UMBRELLA LIAB EXCESS LIAB ☐ OCCUR ☐ CLAIMS-MADE DED ☐ RETENTION \$						EACH OCCURRENCE AGGREGATE												
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N ☐	N/A	76 WBG GE2765	03/26/2025	03/26/2026	<table border="1"><tr><td>X</td><td>PER STATUTE</td><td>OTH-ER</td></tr><tr><td>E.L. EACH ACCIDENT</td><td></td><td>\$1,000,000</td></tr><tr><td>E.L. DISEASE - EA EMPLOYEE</td><td></td><td>\$1,000,000</td></tr><tr><td>E.L. DISEASE - POLICY LIMIT</td><td></td><td>\$1,000,000</td></tr></table>	X	PER STATUTE	OTH-ER	E.L. EACH ACCIDENT		\$1,000,000	E.L. DISEASE - EA EMPLOYEE		\$1,000,000	E.L. DISEASE - POLICY LIMIT		\$1,000,000
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E.L. EACH ACCIDENT		\$1,000,000																	
E.L. DISEASE - EA EMPLOYEE		\$1,000,000																	
E.L. DISEASE - POLICY LIMIT		\$1,000,000																	

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Those usual to the Insured's Operations. Notice of Cancellation will be provided in accordance with Form WC990394, attached to this policy.

CERTIFICATE HOLDER

City of Beaumont
550 E 6TH ST
BEAUMONT CA 92223

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Susan L. Castaneda

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