



Website:
www.beaumontca.gov

Address:
550 E. 6th Street
Beaumont, CA 92223

Phone:
951.769.8520

Request for Proposals For Underwriter Services

CRITICAL DATES

| Item | Date |
|------------------------------------|--------------------------|
| RFP Issued | 08/13/25 |
| Questions Due | 08/20/25 at 11:00 am PST |
| Responses to questions provided by | 08/27/25 |
| Submittals Due | 09/03/25 at 11:00 am PST |

Contact:

Brittany Navas, Grants Analyst
550 E. 6th Street - Beaumont, California 92223
Bnavas@beaumontca.gov

RFP Available

Planet Bids Portal at
<https://vendors.planetbids.com/portal/66785/bo/bo-search>



Introduction

The City is in Riverside County, located at the summit of the San Gorgonio Pass, between the San Bernardino Mountains and Mount San Gorgonio to the north, and the San Jacinto Mountains to the south. As of 2025, the City has slightly more than 58,000 residents and covers an area of over 30 square miles. In recent years, the City and local region have experienced a steady and consistent marked increase in new construction in addition to increases in single family home sale prices.

The City established a CFD program in order to fund public infrastructure and services. The City has a very robust CFD program and currently has over \$150 million of CFD Bonds outstanding. The City has completed several CFD formations for which bond financing is expected to be completed in the fall of 2025. As part of this RFP, the City is requesting fee proposals for an upcoming bond sale for a CFD 2023-1 Improvement Areas 1 and 2 (Fairway Canyon).

Responses must conform to the requirements of this Request for Proposal (RFP). The City reserves the right to waive any irregularity in any proposal, withdraw or amend this RFP or reject any proposal that does not comply with this RFP or City policies. All services provided by the Contractor shall be performed by individuals who meet the qualifications, education, and certification/licensing requirements for the position. The successful Contractor shall also have the resources to provide cost-effective and timely services, including providing customer service to the CITY.

Qualified Contractors that submit a proposal will be evaluated in accordance with the requirements defined within this RFP. The City reserves the right to waive any irregularity in any proposal, withdraw or amend this RFP or reject any proposal that does not comply with this RFP or City policies.

Background

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

The City operates under a council-manager format of government which consists of a Mayor, Mayor Pro-Tem, three Councilmembers and the City Manager. The positions of Mayor and Mayor Pro-Tem are rotated among the elected Councilmembers. A City Clerk and Treasurer are elected positions, each for a four-year term. Regular City Council meetings are held on the first and third Tuesdays of each month.



Responsibilities

The Contractor shall be responsible for completing the specified services in accordance with the CITY's Professional Services Agreement (PSA) by Independent Contractor, a sample of which is attached (Exhibit).

Term

The term of the agreement shall be determined upon the need for services and consistent with the City's policies. It is expected that the initial period of the contract will be three (3) years, as approved by the City Council, subject to agreement terms and the Beaumont Municipal Code.

Proposal Requirements

Proposals shall clearly address all the information requested and describe the methodology to be used to accomplish each of the project tasks. Please note: this RFP cannot identify each specific, individual task required to successfully and completely implement this project. The CITY relies on the professionalism and competence of the selected Contractor to be knowledgeable of the general areas identified in the scope of services. The CITY will not approve addenda to the selected Contractor's agreement which do not involve a substantial change from the general scope of work identified in this RFP.

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. Contractors wishing to have their bid proposals considered for this project must submit completed, required forms as listed below and attached hereto. All forms should be signed by an authorized representative of the company and should be legible. Any Proposal submitted that does not include the required forms will not be considered.

A. Cover Letter: 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 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. Any participating firms and proposed sub-consultants shall be identified and included in the proposal (all sub-consultants must be approved by the City prior to signing the agreement with City).

**City of Beaumont
Request for Proposal**



C. 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 in Exhibit A- Scope of Services but required to obtain final approval, shall be included in the proposal as additional items for consideration. The fully recommended Scope of Services should be presented as an attachment to the proposal and shall be in a logical format that can be easily attached to the General Services Agreement (Exhibit A).

D. Approach: The proposal should set forth a detailed work plan, including an explanation of the methodology and process for providing the services required in this RFP. Detailed project schedule, identifying all tasks and deliverables to be performed, durations for each task, and overall time of completion.

E. Firm Profile: Provide a description of the firm based off of the information requested below.

The following information should also be included:

- Name
- Street Address
- City, State, Zip Code
- Corporate Structure
- State/Country of Incorporation
- Website
- Contact Information

In addition, any participating firms and proposed subcontractors shall be identified and included in the proposal (all subcontractors must be approved by the City prior to signing the agreement with the City).

F. Location: Location of the principal office that will be responsible for the implementation of this contract.

G. References: at least three (3) references from previous cities, counties or other agencies for similar work completed within the last five (5) years, which include: name, address, contact person and phone number for the agency, length of time services were provided, staff assigned to each project by your firm, and a description of the services provided. All submitted materials shall become the property of the City of Beaumont.

H. Any other information which should be considered, such as any special services or customer



service philosophy, which define your firm's practice.

I. Cost proposal: Submit the completed cost proposals attached with your proposal submission. Please note the proposed costs shall include full compensation for furnishing all labor, materials, supplies, tools, equipment, and incidentals necessary to complete all work contemplated and listed in the scope of services. This should include any not to exceed fee amount, fee schedule and hourly billable costs for the options discussed in Exhibit A- Scope of Services.

J. . The firm will be required to maintain an active City of Beaumont Business License and professional liability insurance including general 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 license and insurance will be in force at time of contract execution.

K. Page Limit / Font and Page Layout

10-page limit including the cover letter and exhibits. Per the fee proposal instructions above, the fee proposal is to be submitted separately and does not count against the page limit. No smaller than 11-point font with margins no smaller than 0.75".

Response Submittal

All questions or requests for clarifications regarding this RFP shall be submitted on planetbids by 11:00 a.m. PST August 20, 2025.

****DUE DATE FOR QUESTIONS IS, AUGUST 20, 2025 BY 11:00 A.M.****

Submit one (1) digital copy of proposal and one (1) digital copy of the cost proposal in PDF format on Planetbids in accordance with the proposal submission deadline, which is **11:00 am PST on SEPTEMBER 03, 2025**. Proposal must be titled "Proposal for services" and the cost proposal must be titled "Cost proposal for services" All costs associated with preparation of any proposal shall be the sole responsibility of the proposer.

****DUE DATE FOR PROPOSALS IS SEPTEMBER 03, 2025 BY 11:00 A.M.****

By proposing on this project, you indicate that you agree to all terms and conditions of the City's General Services Agreement, which is attached to this RFP as Exhibit F.

No RFC or questions will be accepted after **11:00 A.m. on May 20, 2025**. All RFC responses will be posted on the CITY's Planet Bids Portal by end of day May 27, 2025.

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

**City of Beaumont
Request for Proposal**



If prior to the date fixed for submission of Proposals, a prospective Company discovers any ambiguity, conflict, discrepancy, omission or other errors in this RFP or any of its appendices, exhibits or attachments, the Company shall immediately notify the City of such error in writing and request modification or clarification of the document. Modifications shall be made by written Addenda to the RFP.

If a Company fails to notify the City, prior to the date fixed for submissions of Proposals, of an error in the RFP known to the Company, or an error that reasonably should have been known to

the Company, the Company shall submit its Proposal at its own risk, and if the Company is awarded a Contract, it shall not be entitled to additional compensation or time by reason of the error or its later correction.

All communications regarding technical, scope, and/or project related questions and requests for clarifications, changes, exceptions, and deviations to the terms and conditions set forth in this RFP shall be submitted via “Q&A” through the City’s Electronic Bidding System, Planetbids, before the deadline and according to these specifications herein. Any and all other bidding communications shall only be with Brittany Navas, Grants Analyst, bnavas@beaumontca.gov

The Final day for receipt of questions from the Proposer shall be on or before the due date indicated in the RFP event schedule section below. To ensure fairness and avoid misunderstandings, all communications must be in written format and submitted only in the format set forth above. Any verbal communications will not be considered or responded to. All questions received by the due date will be logged and reviewed

RFP Project Schedule

| Item | Date |
|------------------------------------|--------------------------|
| RFP Issued | 08/13/25 |
| Questions Due | 08/20/25 at 11:00 am PST |
| Responses to questions provided by | 08/27/25 |
| Submittals Due | 09/03/25 at 11:00 am PST |

Proposal Evaluation/Selection

The City intends to evaluate the proposals based upon the scope of services presented in response to the RFP. The following general selection criteria will be used to evaluate each proposal:

The CITY intends to engage the most qualified Contractor available who demonstrates a thorough understanding of the CITY’s needs. CITY staff will use the following criteria to evaluate the proposals:



| Criteria | Points |
|--|---------------|
| Responsiveness to the RFP | 20 |
| Recent Experience in the Market Based on Completed Transactions & Spreads to Municipal Market Data (MMD) | 20 |
| Knowledge and Understanding of the City | 20 |
| Recommended Underwriting Team | 15 |
| Fee proposal/Pricing & marketing plan | 25 |
| Total | 100 |

The CITY may request a qualification interview with the highest-ranked Contractor(s) prior to determining the final ranking. This selection will be conducted according to the CITY’s adopted procedures. The CITY may select multiple Contractors and enter into negotiation. The CITY reserves the right to reject any and all proposals.

Disclaimers

This RFP does not commit to the City to award a contract, to pay any costs incurred in preparation of the proposal, or to procure or contract services and supplies. The City reserves the right to accept or reject any and all proposals received as a result of this RFP and/or to cancel in part or in its entirety this RFP if it is in the best interest of the City to do so. The award of a contract is dependent upon approval by the City. Questions regarding this request for proposal should be submitted on planetbids.

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 records 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.

Amendments to Request for Proposals

The CITY reserves the right to amend the RFP by addendum prior to the final proposal submittal date. The addenda will be posted on the CITY’s Planet Bids Portal:

<https://vendors.planetbids.com/portal/66785/bo/bo-search>



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 trustees 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.

The City of Beaumont reserves the right to reject any or all responses, to waive any informality in any responses, and to select the vendor that best meets the City's needs.

There is no expressed or implied obligation for the City to reimburse responding Contractor s for any expenses incurred in preparing proposals in response to this request. Materials submitted by respondents are subject to public inspection under the California Public Records Act (Government Code Sec. 6250 et seq.) unless exempt. Any language purporting to render the entire proposal confidential or proprietary will be ineffective and will be disregarded.

All property rights, including publication rights of all reports produced by respondents in connection with services performed under this agreement will be vested in the City. In addition, respondents will not publish or release any of the results of its examination without the express written permission of the City.

Responses must be submitted no later than the date and time stated on this RFP. Responses shall be reviewed and rated as set forth in the Selection Process section of this RFP. The City will then determine which Contractor best meets the City's requirements.

During the evaluation process, the City reserves the right (where it may serve the City's best interest) to request additional information or clarification from respondents. At the discretion of the City, Contractor s submitting proposals may be requested to make oral presentations as part of the evaluation process.

The City reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether the proposal was selected. Submission of a proposal indicates acceptance by the Contractor of the conditions contained in this Request for Proposals, unless clearly and



specifically noted in the proposal as submitted and confirmed in the contract between the City and the Contractor selected.

The City reserves the right to negotiate final pricing with the most qualified Contractor. The City may invite selected Contractors to meet with the evaluation team at no additional cost to the City.

The City’s standard Contract Services Agreement is included as a Exhibit . Upon award of the contract, it is expected that the successful proposer will accept the Agreement terms and conditions “as is” without modification. Any contract modifications are to be stated upfront, at the time of submittal.

Any costs incurred in the preparation of the response, presentation to the City, travel in conjunction with such presentations, or samples of items shall be the responsibility of the respondent. The City assumes no responsibility and no liability for costs incurred by respondents prior to issuance of a contract.

The proposer shall furnish the City with such additional information as the City may reasonably require.

General Terms and Conditions

FEDERAL, STATE, AND LOCAL LAWS

The Contractor and all Subcontractors shall comply with all applicable Federal, State, and local laws, rules, ordinances, and regulations.

DRUG-FREE WORKPLACE REQUIREMENTS

The Contractor shall comply with the requirements of the Drug-Free Workplace Act of 1990 (Government Code Sections 8350 et seq.).

AMERICANS WITH DISABILITIES

The Contractor shall comply with the Americans with Disabilities Act (ADA) of 1990, which prohibits discrimination, as well as all applicable regulations and guidelines issued pursuant to the ADA.

NON-COLLUSION AFFIDAVIT

All bids must be accompanied by a signed and notarized Non-Collusion Affidavit per the Public Contract Code Section 7106.

CITY OF BEAUMONT BUSINESS LICENSE

The awarded Contractor and subcontractors shall be required to be licensed in accordance with Title 5 of the City of Beaumont Municipal Code, entitled “Business Taxes, Licenses and Regulations”.

TERMINATION FOR CONVENIENCE

City may terminate this Agreement upon written notice to contractor. Contractor shall be paid for all services provided through termination date.



INDEMNIFICATION

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. 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.

PREVAILING WAGES

Contractor shall comply with all applicable laws and regulations relating to prevailing wages. Wage rates for this Project shall be 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.

FAILURE TO COMPLETE PROJECT

Should Contractor fail to complete project in the manner provided in the Scope of Services, City may elect to terminate the Agreement and proceed with the work in any manner deemed proper by City. The cost to the City to complete the work shall be deducted from any sum due to Contractor under the Agreement and balance, if any, shall be paid to Contractor.

CONFIDENTIALTY

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.

NON-COMMITMENT TO CITY

The City reserves the right to reject any and all proposals and to waive informalities and minor



irregularities in any proposal reviewed. 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.

WITHDRAWAL OF RESPONSE

Respondents may withdraw their submitted Proposal by notifying the City either in writing or in person through an authorized representative at any time prior to the submittal deadline. Individuals making the

withdrawal shall provide evidence of serving as an authorized representative of the Respondent. Once Proposals are submitted, they become the property of the City and will not be returned to Respondents even when they are withdrawn from consideration.

Proposals may not be withdrawn or modified once the City has opened them after the submittal deadline indicated on the cover page of this Solicitation has passed, except for any request from the City for clarifying information nor request for documents during Contract negotiations.

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.

PROPOSAL INFORMALITIES OR DEFECTS

The City of Beaumont reserves the right to waive any informality or technical defect in a proposal and to accept or reject, in whole or in part, any or all proposals and to seek new RFP's, as best serves the interests of the City.

PROPOSALS TO REMAIN OPEN

Firms responding to this RFP shall guarantee that all contents of their proposal shall be valid for a period of 120 calendar days from the due date of proposals.

SIGNED PROPOSAL AND EXEMPTIONS

Submission of a signed proposal will be interpreted to mean that the firm responding to this RFP has hereby agreed to all the terms and conditions set forth in all the sheets which make up this Request for Proposals. Exceptions to any of the requirements contained in the RFP documents will not be accepted.

Conflict of Interest

The Contractor 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 Contractor shall also list current clients who may have a financial interest in the outcome of this contract.

Exhibits

- A. Exhibit A- Scope of Services
- B. Exhibit B -Sample Professional Services Agreement (PSA)



----- END OF REQUEST FOR PROPOSAL -----

EXHIBITS TO FOLLOW