



PROPOSAL DOCUMENT REPORT

RFP No. 2023-RFP-211

Retail Market Analysis and Recruitment Services

RESPONSE DEADLINE: September 11, 2023 at 12:00 pm

Report Generated: Wednesday, September 27, 2023

The Retail Coach Proposal

CONTACT INFORMATION

Company:

The Retail Coach

Email:

nherbert@theretailcoach.net

Contact:

Nancy Herbert

Address:

86 Clark Blvd
Tupelo, MS 38804

Phone:

N/A

Website:

theretailcoach.net

Submission Date:

Sep 7, 2023 9:46 AM

ADDENDA CONFIRMATION

Addendum #1

Confirmed Sep 7, 2023 9:46 AM by Nancy Herbert

QUESTIONNAIRE

1. Proposal (WITHOUT COST)*

Proposals shall be concise, well organized and demonstrate qualifications and applicable experience. Proposals shall be organized and include page numbers for all pages in the proposal. The proposal shall be uploaded here, in the following order and shall include:

A. Cover Letter

1. This letter should briefly introduce the firm, summarize the firm's general qualifications, include an executive summary of the specific approach which will be used to deliver the work scope; and identify the individual(s) name, address and phone number authorized to negotiate Agreement terms and compensation. **NOTE: The City is requiring proposers to have a minimum 5-years of experience with market analysis for municipal governments.**

B. Experience and Technical Competence

1. **Background:** Provide history of the firm's consulting experience which specifically addresses the individual or firm's experience with similar Service as described in this RFP.
2. **References:** The proposal shall include a list of three (3) recently completed projects that are similar in scope and function to this RFP. Provide a description of the project, client name, and the name, title, and telephone number of the primary contact person.

C. Firm Staffing and Key Personnel

1. **Staffing:** Provide the number of staff to be assigned to perform the Services and the names/discipline/job title of each as well as your firm's capacity to provide additional personnel as needed.

2. **Key Personnel:** Identify key persons that will be principally responsible for working with the City. Indicate the role and responsibility of each individual.
3. **Team Organization:** Describe proposed team organization, including identification and responsibilities of key personnel.
4. **Subcontractors:** The Proposer shall identify functions that are likely to be subcontracted and identify the subcontractor that is anticipated to perform each function.

D. Proposed Method to Accomplish the Work

1. Describe the technical and management approach to providing the Services to the City. Proposer should take into account the scope of the Services, and general functions required. Include a draft first year schedule of tasks, milestones, and deliverables that will provide for timely provision of the Services. In reviewing the scope of Services and goals described herein, the Proposer may identify additional necessary tasks and is invited to bring these to the City's attention within the discussion of its proposed method to accomplish the work.

TRC_Proposal_-_PalmDesertCA_RFP_-_Sept2023.pdf

2. Fee Proposal*

Please provide a lump-sum, not-to-exceed fee proposal for the scope of Services. The fee proposal shall include hourly rates for all personnel for "Additional Work" (as such term is defined in the proposed Agreement attached herein).

TRC_Proposal_-_PalmDesertCA_RFP_-_Fee_-_Sept2023_.pdf

3. Non-Collusion Declaration*

The undersigned declares:

I am an authorized representative of my company, the party making the foregoing Bid, to certify the following.

The Bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The Bid is genuine and not collusive or sham. The Bidder has not directly or indirectly induced or solicited any other Bidder to put in a false or sham bid. The Bidder has not directly or indirectly colluded, conspired, connived, or agreed with any Bidder or anyone else to put in a sham bid, or to refrain from bidding. The Bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the Bid Price of the Bidder or any other Bidder, or to fix any overhead, profit, or cost

element of the Bid Price, or of that of any other Bidder. All statements contained in the Bid are true. The Bidder has not, directly or indirectly, submitted his or her Bid Price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a Bidder that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the Bidder.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Confirmed

4. SAM.gov*

Please enter your legal entity name for SAM.gov verification.

The Retail Coach, LLC

[Click to Verify](#) *Value will be copied to clipboard*

5. Type of Business*

Other

6. Litigation*

Provide litigation history for any claims filed by your firm or against your firm related to the provision of Services in the last five (5) years (or type "N/A").

N/A

7. Changes to Agreement*

The City standard professional services agreement contract is included as an attachment herein. The Proposer shall identify any objections to and/or request changes to the standard contract language in this section of the proposal (or type "N/A"). If you are

identifying changes here ALSO upload a copy of the redlined Language/Agreement with your Proposal. Changes requested may affect theCity's decision to enter into an Agreement.

N/A

8. No Deviations from the RFP*

In submitting a proposal in response to this RFP, Proposer is certifying that it takes no exceptions to this RFP including, but not limited to, the Agreement. If any exceptions are taken, such exceptions must be clearly noted here, and may be reason for rejection of the proposal. As such, Proposer is directed to carefully review the proposed Agreement and, in particular, the insurance and indemnification provisions therein (or type "N/A").

N/A

9. Project Team Resumes*

Submit resumes of all key personnel/support staff that will produce work product for the Services. Describe their qualifications, education, and professional licensing.

TRC_Proposal_-_PalmDesertCA_RFP_-_Staff_-_Sept2023_.pdf

10. List the Signatory(s) Authorized to Sign and Bind an Agreement.*

(If two (2) signatures are required, include the following information for both signatories)

- A. Full Name
- B. Title
- C. Physical Business Address
- D. Email Address
- E. Phone Number

Aaron Farmer

President

86 Clark Blvd, Tupelo, MS 38804

afarmer@theretailcoach.net

662-231-0608

11. Certification of Proposal*

The undersigned hereby submits its proposal and, by doing so, agrees to furnish services in accordance with the Request for Proposal (RFP), and to be bound by the terms and conditions of the RFP.

Confirmed

SEPTEMBER 2023



2023 - RFP - 211

Retail Market Analysis + Recruitment Services

Proposal for:

City of Palm Desert, California

Submitted by:



TheRetailCoach.net | Dallas, TX • Austin, TX • Tupelo, MS | (800) 851-0962





COVER LETTER

City of Palm Desert
Economic Development Department
73510 Fred Waring Drive
Palm Desert, CA 92260

September 6, 2023
Response for 2023- RFP-211

Proposal for Retail Market Analysis + Recruitment Services

The Retail Coach, LLC is pleased to present the following proposal in response to the City's request for retail market analysis and recruitment services.

Founded in 2000 and located at 86 Clark Blvd, Tupelo, MS 38804, our firm brings a national perspective and twenty-three years of experience. Having completed work in more than 650 communities, our firm offers the expertise, relationships, and manpower needed to grow your City's retail base. In the following proposal, you will find numerous examples highlighting a strong track record of success in communities across the country, around the Southern California region, and within the Coachella Valley area. Our firm brings unmatched experience and regional knowledge to this project.

As the nation's premier retail recruitment partner, our team of experts provides cutting edge market data, determines retail opportunities, and develops customized strategies that best position our client communities for retail recruitment and development success. No other consulting firm offers this level of comprehensive support that is uniquely tailored to your community's need with our level of expertise and regional experience. Our focus on tangible retail successes have resulted in ongoing, multi-year relationships with more than 90% of our clients.

We have addressed each service outlined in the RFP in a comprehensive manner in the following proposal, and - based on our experience and familiarity with the Coachella Valley - we are confident we can assist the City with achieving its retail development goals. Our approach includes a comprehensive look at the local/regional retail markets and trade areas, a review of the existing and potential commercial real estate inventory in Palm Desert, a collaborative strategy with local brokers and stakeholders, and an aggressive recruitment strategy of desired brands and concepts to the Palm Desert market. T

Charles Parker, one of our national Project Directors, will be your project lead and can be available as needed as the main point of contact for the duration of any agreement. Charles is an experienced Project Director, leading successful recruitment assignments and designing/executing retail training programs across the country. Our firm's current workload will have no negative impact on the team's ability to immediately begin work or to provide a first-class experience for the City of Palm Desert with an unparalleled level of customer service and expertise. This proposal and pricing is valid for 180 days.

We appreciate the City's consideration, and look forward to potentially entering a successful partnership to attract new businesses to Palm Desert and to best position the staff for long-term success. Please feel free to reach out to myself or Charles (cparker@theretailcoach.net; or cell 662-2231-9078) should you have any additional questions.

Sincerely,

Aaron Farmer
President | The Retail Coach
662.231.0608
afarmer@theretailcoach.net
PO Box 7272
Tupelo, MS 38804





Executive Summary:

Retail Recruitment

The Retail Coach is submitting this proposal for a
Retail Market Analysis for the City of Palm Desert, California.

Our goal is not only to aid The City of Palm Desert in preparing and executing a Retail Market Analysis + Recruitment Strategy, but to continue assisting the City via long-term partnership and to capture sales tax leakage and further improve quality of life for residents by bringing in new retail, restaurant, entertainment, and service options.

The most important aspect of any Retail Market Analysis is its ultimate application and resulting impacts. Our approach has always been action-oriented to ensure that market reports are not placed on a shelf to collect dust. Working with all project team members, local stakeholders, and public officials is a critical component in which The Retail Coach is experienced and well-equipped to execute.

Goals & Objectives:

- Research and analyze the Palm Desert retail market to identify retail gaps and growth opportunities.
- Determine Palm Desert's unique, viable retail market potential & its relationship with other industries.
- Identify key retail, restaurant, and entertainment concepts & targets that align with the City's vision.
- Proactively recruit new businesses to Palm Desert with transparency and dedication to communication
- Provide feedback on retail expansion, market trends, and the retail site selection process.
- Act as an extension of City staff to provide coaching for retail economic development initiatives, including retail recruitment training
- Represent, prepare, and assist the City of Palm Desert at ICSC and other industry events.



More Than 6 Million SF of New Retail Recruited in the Last 5 Years

Our proven Retail:360[®] Process has been instrumental in recruiting new retailers and developers to our client communities.

RECENT RECRUITMENT SUCCESSES



McKinney, TX



Lancaster, CA



Lancaster, CA & Pella, IA



Loguna Niguel, CA



Orange County, CA

PLUS HUNDREDS MORE THROUGHOUT THE COUNTRY





EXPERIENCE + TECHNICAL COMPETENCE

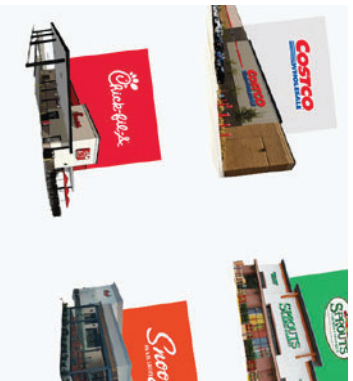
We Recruit Retail.

For more than 20 years, The Retail Coach has been the premier national retail recruitment partner for municipalities, economic development organizations, and development firms.

We are the nation's leading retail recruitment, market analysis, and development firm. Our approach combines **strategy, technology, and creative marketing** to execute high-impact retail recruitment strategies for local governments, chambers of commerce, and economic development organizations.

Having worked more than 650 assignments in more than 40 states, our recruitment approach is simple - **do what you say you are going to do, execute at the highest level possible, and constantly communicate findings and results to our clients.** This approach has proven successful, leading to multiple assignments with more than 90% of our clients.

PROVEN SUCCESS FOR CLIENT COMMUNITIES



6 Million +

**SQUARE FEET OF NEW
RETAIL RECRUITED**

We have recruited more than 6 million square feet of new retail to client communities in the past 5 years.

\$600 Million

**IN NEW SALES TAX
GENERATED**

Our work has generated more than \$600 Million in sales tax for our client communities in the past 5 years.

90%

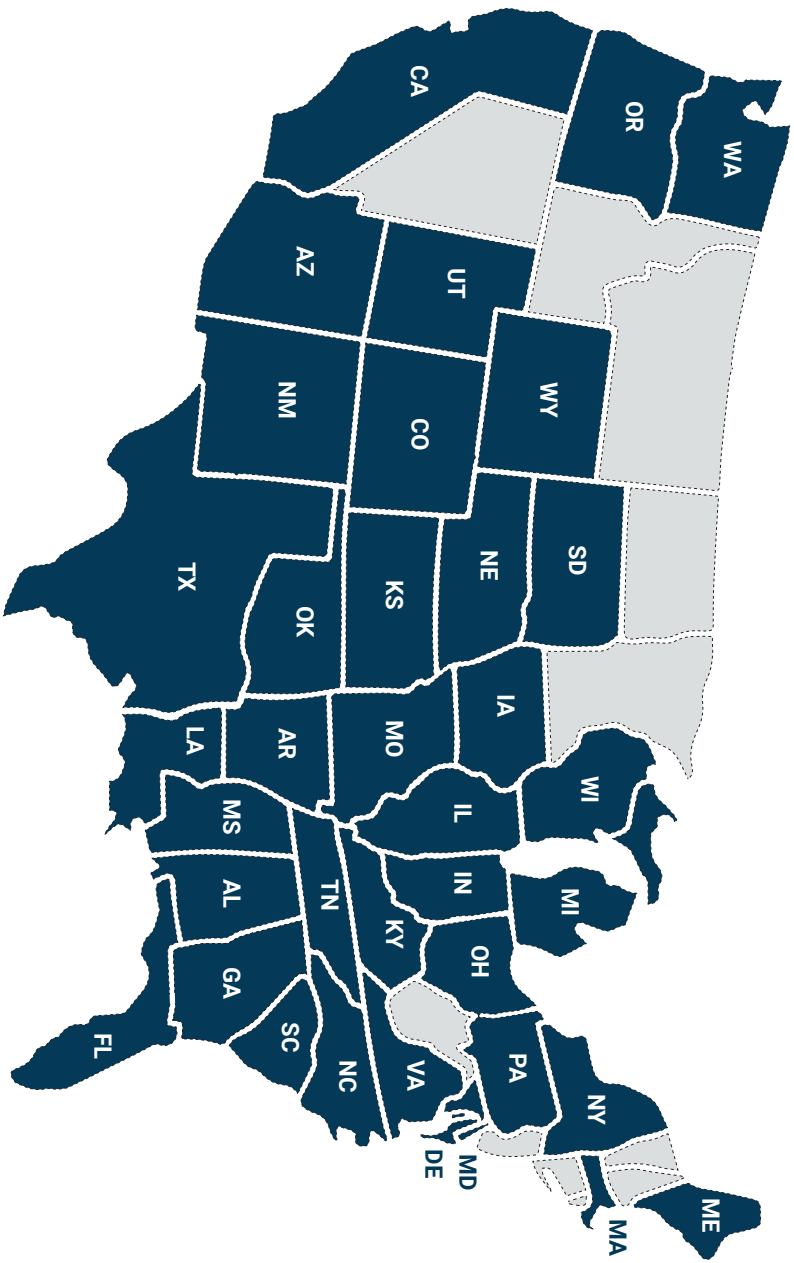
REPEAT CLIENT RATE

90% of our clients choose to continue working with us after the initial contract period.





EXPERIENCE + TECHNICAL COMPETENCE



We Have Served More than 650 Client Communities Across 40 states.

National Expertise. Local Focus.

Our work throughout the country allows our team to stay current on retail trends and deepen our relationships with national and regional brands.

These relationships create unique opportunities for our client communities. When brands begin planning to expand into new markets, we are often one of the first to know and retailers/brokers will often look to our client list or ask our team for prospective markets to consider.

650+
Communities
Served

40
States We've
Worked In

90%
Repeat Client
Rate



References

“The Retail Coach is the perfect solution for our needs. They provide high-quality data that helps us sell our market to retailers and helps supplement our economic development team. They truly are an extension of our team and have helped us land retailers that we’ve been trying to get to the market for years. They are also very responsive and help us get the data we need quickly.”

Scott Agajanian

Deputy Director of Economic Development
City of Murrieta, California
sagajanian@murrietaca.gov
o. 951-461-6003



“...The Retail Coach [have] proven themselves as a great partner for the City and helped open many doors with retailers and developers that we weren’t able to reach before. We have worked with other retail consultants and the level of expertise and support from The Retail Coach team has far exceeded what we’ve gotten from the other firms we’ve worked with. We already highly recommend them.”

Tara Magner

Economic Development & Special Projects Administrator
City of San Jacinto, California
tmagner@sanjacintoca.gov
o. 951-487-7330



“It is very refreshing to work with The Retail Coach. With some consultants, once you have paid, it becomes harder to get your phone calls returned. Not so with The Retail Coach team, who is always responsive to all of my needs. I appreciate how they set up retailer appointments for me, and help with the follow-up.”

Ray Dunlap

President
Terrell Economic Development Corporation, Texas
ray@terrelltexas.com
o. 469-534-2719



Other Recent Regional Experience:

Auburn, WA
Bakersfield, CA
Beaumont, CA
Bennett, CO
Canon City, CO
Coachella, CA

Corona, CA
Farmersville, CA
Firestone, CO
Calt, CA
Gilroy, CA
Gypsum, CO

Herriman City, UT
Indio, CA
Laguna Niguel, CA
Lakeport, CA
Naples City, UT
Pasco, WA





FIRM STAFFING + KEY PERSONNEL

Team Organization

PROJECT LEAD



Charles Parker
Project Director

Charles oversees The Retail Coach projects on the West Coast. In addition to the Retail Recruitment Training and Downtown Programs. He is located in our Dallas office and will be the primary contact for your project.

LEADERSHIP & PROJECT STRATEGY



Kelly Cofer
Founder & CEO



Aaron Farmer
President

With more than 50 combined years of retail development experience, Kelly and Aaron play an integral role in every project for The Retail Coach. This includes in-depth market analyses, recruitment strategies, and development plans for our clients.

RETAILER RECRUITMENT



Cary Everitt
Recruitment Specialist



Caroline Harrelson
Strategy Director

Cary and Caroline manage our relationships with national and regional retailers, brokers, site selectors, and developers. They execute our recruitment process, including the site submission process and capturing retailer feedback.

DATA & MARKET RESEARCH



Matthew Lautensack
Director of Data/Research

Matthew uses cutting-edge, GPS-based market data to pinpoint true opportunity in retail markets. He provides the latest retail trade area data and prepares our clients' market reports, data sets, and assists with GIS mapping.

ADMINISTRATIVE SUPPORT



Nancy Herbert
Director of Finance

Nancy supports all projects by managing client invoicing and contract needs as well as marketing, promotional, and graphic design support.

Staffing Notes + Capabilities:

- In addition to this highlighted team, The Retail Coach maintains the ability to provide supplementary project support and management as needed with additional in-house support staff.
- As the nation's premier consulting firm with a sole focus on retail recruitment services for municipalities, The Retail Coach is fully equipped to execute the proposed scope of service, without the need of any subcontractor or outside resources.





FIRM STAFFING + KEY PERSONNEL

Your Project Team



Charles Parker | Project Director

Charles oversees projects for The Retail Coach in nation wide, and will be the primary point of contact for this project. He has over ten years of experience in the fields of economic research, development, and entrepreneurship and his work in client communities has led to the recruitment of numerous brands including Hobby Lobby, Marshalls, Five Below, Planet Fitness, Eggs Up Grill, Popeyes, Sonic, and Publix. Additionally, Charles is the lead instructor of the MASc Retail Recruitment Training Program as well as annual instructor at multiple IEDC Basic Economic Development Courses across the country.

Prior to joining The Retail Coach, Charles served as a leading Researcher at Mississippi State University where he focused on economic impacts analyses of tourism and outdoor recreation on municipalities.

The McKinney, Texas native earned his Master of Business Administration and Master of Science degrees from Mississippi State University. Charles is an active member of the International Council of Shopping Centers and Main Street America, and is a frequent speaker at conferences, municipal leagues, and economic organizations.

PROJECT LEAD



Kelly Cofer | Founder & CEO

C. Kelly Cofer leads The Retail Coach with more than 30 years of experience in all aspects of retail real estate and economic development.

Kelly's professional background encompasses market research and site selection, advisory and leasing services, and property brokerage and development for leading national retailers and restaurants in more than 150 cities throughout the United States.

He has earned the prestigious Certified Commercial Investment Member (CCIM) designation from the Chicago-based Commercial Investment Real Estate Institute and attended the Economic Development Institute at the University of Oklahoma. Kelly holds a Bachelor of Science degree from Texas A&M University in College Station.



Aaron Farmer | President

With a degree in Marketing from The Mays Business School at Texas A&M University in College Station and an MBA from Texas A&M University - Commerce, Aaron brings to The Retail Coach knowledge of the most current research on retail and marketing trends.

Prior to joining The Retail Coach, Aaron was employed in marketing research and retail development where he worked on projects for some of America's leading retailers and restaurants including FedEx, Kinkos, Sally Beauty Supply, Adidas, Concentra and the National American Association of Subway Franchises (NAASF).

His expertise touches each step of a project from the initial trade area determination to the actual recruitment of retailers. Aaron is a sought after speaker for industry organizations throughout the country.



TheRetailCoach[®] Proposals: Retail Market Analysis + Recruitment Services



EXPERIENCE + QUALIFICATIONS

Your Project Team



Cary Everitt | Retail Recruitment Specialist

Cary Everitt manages The Retail Coach's relationships with retailers, site selectors, and key decision makers for retailers, restaurants, hotels, and developers.

He works with your Project Director to ensure that we are presenting the best information possible when recruiting for client communities and follows up with prospects to make sure that your community is staying at the top of mind as brands look for new markets.

Cary works throughout projects to provide monthly updates on recruitment activity and communicates feedback received throughout the process.



Caroline Harrelson | Strategy Director

Caroline Harrelson focuses on key strategic planning for clients and manages The Retail Coach relationships with commercial real estate professionals across the country.

Prior to joining The Retail Coach she was the Director of International Services at Mississippi State University, she managed various international projects bringing a broader approach to The Retail Coach retail economic development recruitment methods.

Caroline holds a Masters in Public Policy and Administration combined with almost 10 years in upper administration and project management.



Matthew Lautensack | Director of Research

New York native, Matthew Lautensack, brings a specialization in critical theory and technology integration to The Retail Coach team. During his tenure at The Retail Coach, he has brought efficiency to the operational processes, through automation, streamlining, and systematizing internal workflows. He was also the principal developer on a number of new products and services we are offering today.

Prior to joining The Retail Coach, Matthew was the Director of Information Technology at a natural soap company based out of upstate New York. A philosopher and self-taught programmer, Matthew is efficient in user experience, digital platform design, e-commerce, automation, digital advertising and GIS.



Recruitment Done Right.



**No Development.
No Brokerage.
No Conflicts of Interest.**

What Makes Us Different?

Experienced & Connected

We pioneered the retail recruitment industry more than 20 years ago and leverage more than two decades of experience and relationships to help drive retail growth in your community.

Our Team is Your Team

We take a partnership approach and become an extension of your team. Our clients are invited to participate in the recruitment process, allowing you to learn and expand your network.

Full Transparency

We track recruitment activity and prospect feedback in your custom retail recruitment dashboard and host monthly calls with your team to keep you updated on progress.

We are Consultants. Not Brokers.

We pride ourselves on being consultants, not brokers. **We only do what is in the best interest of our client communities and their future growth. We don't take shortcuts or go with the path of least resistance to fill retail spaces.**

RECOGNIZED AS LEADING INDUSTRY EXPERTS AND FEATURED PRESENTERS FOR:





Retail Market Analysis

Custom Retail Trade Area Analysis + Mobile Location Data

Mobile Location Data has become a powerful tool for retail, restaurant, and entertainment concept site selection processes. We will utilize data to confirm the primary retail trade area, but also to evaluate specific location consumer draw and performance. This can also be helpful for existing businesses to know how they stack up against their competition and to visualize cannibalization.

Demographic + Psychographic Analysis

Our demographic profiles include population and projected population growth, ethnicity, average and median household incomes, median age, households and household growth, and educational attainment. We will create comprehensive 2020 Census, 2023, and 2028 Demographic Profiles for the Retail Trade Area and Palm Desert community. Psychographic reports (i.e., ESRI Tapestry Segmentation) will be executed for the primary retail trade area.

Peer & Competing Community Analysis

A community must have a clear understanding of the competitive nature of retail recruitment. We will look at competing and peer communities across the region to identify a competitive advantage via economic and market forces that have a direct impact on retail recruitment and development in Palm Desert.

Retail GAP + Demand Analyses

One way to quantify its retail demand through a Retail Demand Analysis, which provides a summary of the primary projected retail demand growth — or opportunities — for 68 retail sectors. The analysis is ultimately used to identify recruitment targets for the community. The Retail Coach will also compare the demand to current sales projects to generate a GAP or retail leakage report. This will help identify which sectors are strengths or currently under served by the existing retail market.

Submarket/Corridor Analysis

Every community has multiple retail submarkets. Having a strong understanding of your community's submarkets and what drives retail in each submarket is vital to overall retail recruitment success. We will provide a Submarket Analysis highlighting at least three (3) key areas of focus for retail growth, development, or redevelopment and analyze existing retail, cannibalization effects of new businesses, and submarket viability in relation to Palm Desert as a whole.





Retail Recruitment Strategy

SWOT Analysis

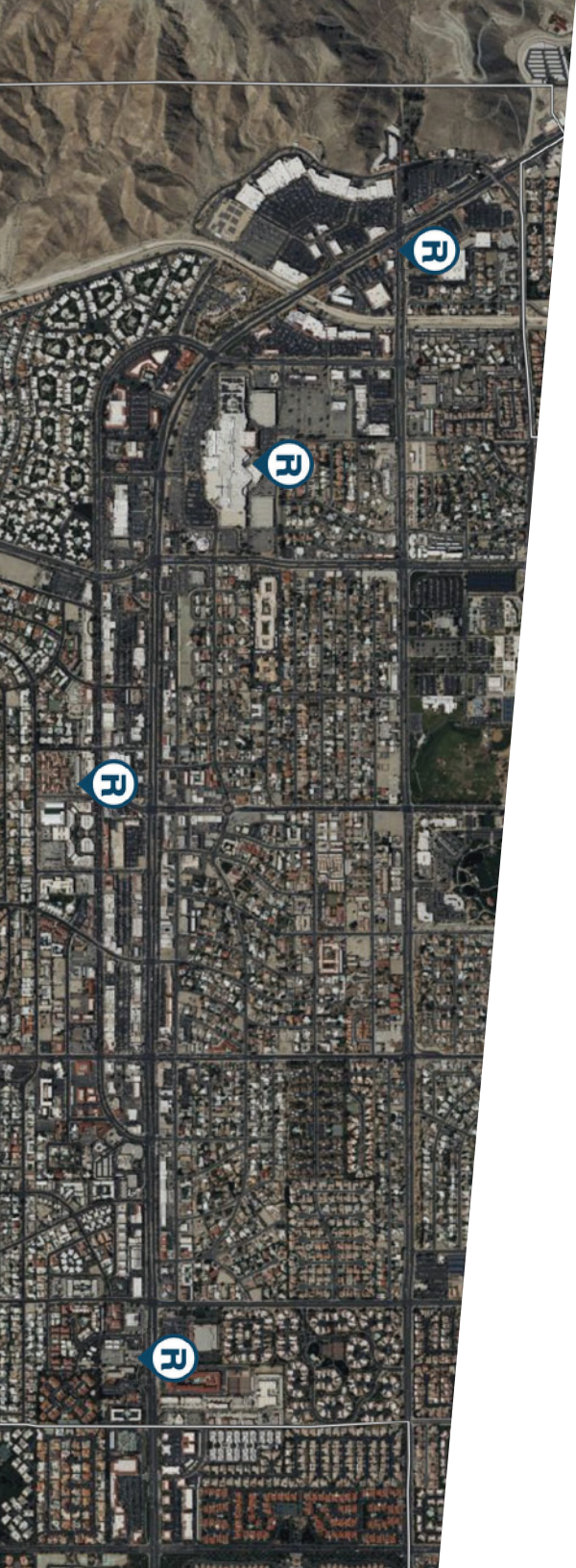
An effective retail recruitment strategy is built upon a strong narrative of the market and its opportunity and competitive advantage. Understanding how Palm Desert measures up - both favorably and where there is room for improvement - is critical to the message used to attract new development. The Retail Coach will present a SWOT Analysis to City staff to understand what Palm Desert's top selling points are, and how to mitigate potential new development hurdles.

Retail Match List

The Retail Coach will target national and regional retail brands that are a good "fit" for the community. This means that the Retail Trade Area population, disposable incomes, consumer spending habits, and education levels meet the retailers' ideal location criteria. We will develop and review a master list of (at least 30) potential retailers and restaurants with Palm Desert staff and work together to prepare a final target list.

Site Identification and Highest + Best Use Analysis

Retailers are interested not only in the market data on your community, but also in evaluating all available property vacancies and sites that fit their location preferences. Successful retail recruitment begins to happen with the introduction of available sites. We will identify priority retail vacancies and development/redevelopment sites to market, as well as evaluate their highest and best use.





Marketing + Recruitment

Proactive Retailer, Restaurant, Entertainment + Developer Recruitment

The Retail Coach is the first national retail recruitment firm to introduce retailer and developer recruitment specifically for communities. Twenty years and 650 projects later, the recruitment of retailers remains one of the primary metrics of success. Today, our experience has proven that a community must move beyond just gathering data sets, and proactively recruit retail.

- We will actively recruit retailers on Palm Desert's behalf. Our retailer recruitment process includes:
- Introductory emails and retail market profile are sent to each targeted retailer
- Personal phone calls are placed to measure interest level
- Personal emails and retailer feasibility packages are sent to each targeted retailer
- Personal emails and retail site profiles for prime vacancies are sent to the appropriate targeted retailers
- Personal emails are sent to inform targeted retailers of significant market changes
- Follow-ups are sent to decision makers once per quarter to continue engagement

Commercial Real Estate Conference Representation

Recruitment is a relationships business, and retail conferences are essential to getting in front of and forging relationships with key site selectors and decision holders. Having a prominent presence at ICSC and Retail LIVE events has been a staple for The Retail Coach for over 20 years. In our partnership with the City, we will assist in marketing Palm Desert - and its vacancies and site - to retailers, developers, and brokers at retail industry conferences. For any Palm Desert Staff attending, TRC will assist with conference planning and setting appointments.

Key Events: ICSC Las Vegas, ICSC Western, ICSC Monterey

Recruitment Toolkit + City Liaison

Having effective marketing material is essential. The Retail Coach will prepare concise, impactful deliverables that properly illustrate the potential in Palm Desert that staff can use to assist ongoing recruitment efforts. Additionally, The Retail Coach Team will serve as liaison between the City and interested retail prospects.





Coaching + Ongoing Support

Local Stakeholder Engagement + Focus Groups

Local buy-in is a must have for communities looking to build a comprehensive recruitment program. The Retail Coach will meet with local property owners, franchisees, brokers, and other stakeholders to assist with their ongoing projects or goals and to make direct introductions with targets brand representatives.

Monthly Update Calls

To keep clear and open lines of communication, The Retail Coach will set monthly Zoom meetings with City staff to discuss updates, retailer feedback, and strategy. Additionally, our team is always available on demand to brainstorm, connect with personnel, or otherwise be a resource to City staff.

Retail Recruitment Tracking

To ensure transparency, The Retail Coach will provide a Live Retail Tracking form for City staff to access 24/7 that shows the status of ongoing recruitment discussions, points of contact (along with contact information), deliverables, and overall project progress.

Visible Presence

Being a part of your team means being seen. The Retail Coach will make at least three trips to Palm Desert during the 12 month engagement to meet with city staff, prospective retail site selectors, developers, local property owners, and to host workshops for stakeholders.

Local Business Workshop

The healthiest retail markets have a strong presence of national, retail, and local businesses with a strong downtown core. In addition to targeting chain brands, The Retail Coach will host a workshop and be available for local and existing businesses to share market findings, best practices, and exchange ideas to ensure the local market is poised for success.

Retail Recruitment Training Workshop

Our team is highly experienced in educating economic development professionals on retail recruitment strategy and tactics. We lead statewide organizations Retail Recruitment Training Programs and are instructors at numerous IEDC Basic Economic Development Courses across the country. To promote long-term retail recruitment success, The Retail Coach will host a workshop for staff that will include topics like: retail trends; site selection criteria; crafting a perfect pitch; and how to talk to tenant reps and brokers.



Deliverables & Timeline

<p>Retail Market Analysis</p> <ul style="list-style-type: none"> Mobile Location Data Analysis Custom Retail Trade Area Sub-Market Analysis Demographic / Population Profile Psychographic Profile 	<ul style="list-style-type: none"> Peer + Competing Community Analysis Retail Demand + GAP Analysis Existing Retailer Map
<p>Retail Recruitment Strategy</p> <ul style="list-style-type: none"> Retail Void Analysis Retail Fusion Analysis Retail Match List (at least 30 prospects) Palm Desert Retail Market SWOT Analysis 	<ul style="list-style-type: none"> Retail Site Inventory Assessment Retail Site Highest + Best Use Analysis
<p>Marketing + Recruitment</p> <ul style="list-style-type: none"> Proactive Retail Recruitment (12 months) National + Regional Retail Conference Representation Retail Marketing Profiles 	<ul style="list-style-type: none"> Retail Site Flyers Retail 360 Dashboard Retailer-Specific Feasibility Packages
<p>Coaching + Ongoing Support</p> <ul style="list-style-type: none"> Monthly Update Conference Calls Retail Recruitment Tracking Form Three Trips to Market by TRC Staff Unlimited Access to TRC Staff 	<ul style="list-style-type: none"> Engagement with Local Stakeholders Local Business Workshop Retail Recruitment Training Workshop



EXHIBIT "C"
COMPENSATION

A. One-Year Contract (including travel expenses) (Not-to-Exceed Amount)	\$55,000
B. OPTIONAL "Year 2": One-Year Contract Extension (Not-to-Exceed Amount)	\$40,000
C. OPTIONAL "Year 3": One-Year Contract Extension (Not-to-Exceed Amount)	\$40,000

All originals of plans, notes, data/calculations, reports, communication summaries and feedback, electronic files, etc... will be turned over to the City upon completion of work.

Note: If additional work is deemed necessary and approved, The Retail Coach Billing Rates are as follows:

- Executive: \$275**
- Director \$250**
- Manager: \$215**
- Specialist \$175**
- Associate: \$125**



FIRM STAFFING + KEY PERSONNEL

Your Project Team



Charles Parker | Project Director

Charles oversees projects for The Retail Coach in nation wide, and will be the primary point of contact for this project. He has over ten years of experience in the fields of economic research, development, and entrepreneurship and his work in client communities has led to the recruitment of numerous brands including Hobby Lobby, Marshalls, Five Below, Planet Fitness, Eggs Up Grill, Popeye's, Sonic, and Publix. Additionally, Charles is the lead instructor of the MASc Retail Recruitment Training Program as well as annual instructor at multiple IEDC Basic Economic Development Courses across the country.

Prior to joining The Retail Coach, Charles served as a leading Researcher at Mississippi State University where he focused on economic impacts analyses of tourism and outdoor recreation on municipalities.

The McKinney, Texas native earned his Master of Business Administration and Master of Science degrees from Mississippi State University. Charles is an active member of the International Council of Shopping Centers and Main Street America, and is a frequent speaker at conferences, municipal leagues, and economic organizations.

PROJECT LEAD



Kelly Cofer | Founder & CEO

C. Kelly Cofer leads The Retail Coach with more than 30 years of experience in all aspects of retail real estate and economic development.

Kelly's professional background encompasses market research and site selection, advisory and leasing services, and property brokerage and development for leading national retailers and restaurants in more than 150 cities throughout the United States.

He has earned the prestigious Certified Commercial Investment Member (CCIM) designation from the Chicago-based Commercial Investment Real Estate Institute and attended the Economic Development Institute at the University of Oklahoma. Kelly holds a Bachelor of Science degree from Texas A&M University in College Station.



Aaron Farmer | President

With a degree in Marketing from The Mays Business School at Texas A&M University in College Station and an MBA from Texas A&M University - Commerce, Aaron brings to The Retail Coach knowledge of the most current research on retail and marketing trends.

Prior to joining The Retail Coach, Aaron was employed in marketing research and retail development where he worked on projects for some of America's leading retailers and restaurants including FedEx, Kinkos, Sally Beauty Supply, Adidas, Concentra and the National American Association of Subway Franchises (NAASF).

His expertise touches each step of a project from the initial trade area determination to the actual recruitment of retailers. Aaron is a sought after speaker for industry organizations throughout the country.





EXPERIENCE + QUALIFICATIONS

Your Project Team



Cary Everitt | Retail Recruitment Specialist

Cary Everitt manages The Retail Coach's relationships with retailers, site selectors, and key decision makers for retailers, restaurants, hotels, and developers.

He works with your Project Director to ensure that we are presenting the best information possible when recruiting for client communities and follows up with prospects to make sure that your community is staying at the top of mind as brands look for new markets.

Cary works throughout projects to provide monthly updates on recruitment activity and communicates feedback received throughout the process.



Caroline Harrelson | Strategy Director

Caroline Harrelson focuses on key strategic planning for clients and manages The Retail Coach relationships with commercial real estate professionals across the country.

Prior to joining The Retail Coach she was the Director of International Services at Mississippi State University, she managed various international projects bringing a broader approach to The Retail Coach retail economic development recruitment methods.

Caroline holds a Masters in Public Policy and Administration combined with almost 10 years in upper administration and project management.



Matthew Lautensack | Director of Research

New York native, Matthew Lautensack, brings a specialization in critical theory and technology integration to The Retail Coach team. During his tenure at The Retail Coach, he has brought efficiency to the operational processes, through automation, streamlining, and systematizing internal workflows. He was also the principal developer on a number of new products and services we are offering today.

Prior to joining The Retail Coach, Matthew was the Director of Information Technology at a natural soap company based out of upstate New York. A philosopher and self-taught programmer, Matthew is efficient in user experience, digital platform design, e-commerce, automation, digital advertising and GIS.



TheRetailCoach.

Proposdl: Retail Recruitment Consulting Services