

Proposal of Qualifications  
**Downtown Master Plan Update**  
**The City of Monroe, NC**  
February 26, 2025

Submitted to:  
Lisa Stiwinter, Director  
City of Monroe  
Planning and Development Department



Submitted by:

**shook kelley**<sup>sm</sup>

In conjunction with:

 **GANNETT  
FLEMING**

**Gibbs**  
Planning Group

 **Integral**



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26 February 2025

Lisa Stiwinter, Director  
City of Monroe  
Planning and Development Department  
300 W. Crowell Street  
Monroe, NC 28112

Re: Request for Qualifications, City of Monroe Downtown Master Plan Update

Lisa,

On behalf of Shook Kelley and our assembled consultant team, I am pleased to submit the following proposal of qualifications for the City's Downtown Master Plan Update RFQ dated January 24, 2025.

We believe that our experience is particularly relevant to your project. Shook Kelley has over 32 years invested in highly livable and market responsive urban places across the U.S. and abroad. As planning professionals and as urban advocates, we work for both public interests and the development community to establish successful urban environments, ones that constantly grow in complexity and interdependency, with many converts and loyal supporters. We have a long history of engagement with local communities in order to address potentially contentious issues and chart a course shared among elected officials, developers and citizens. We are very familiar with the public process and with the kinds of engagement and consensus-building methodologies required to champion many great ideas and to bring them into alignment. Most of our work is performed with a larger purpose - indeed, a greater cause - in mind. We do not simply facilitate processes as a means to an end itself, nor do we engage in projects and allow the possible outcomes to be marginalized. Moreover, our success has been founded upon creating real, workable, actionable and sustainable solutions to design and implementation challenges that have been set before us.

Our tagline is We Convene. Our specialty is our process—of bringing together the various viewpoints, experiences, insights and aspirations in order to create a compelling approach for a better future that has broad support. We look forward to the opportunity to discuss our approach in greater detail with you, and hopefully working with you in charting a sustainable and supported course for Monroe.

Respectfully,



Charles Terry Shook FAIA  
Shook Kelley  
tshook@shookkelley.com

**We Convene.**

## Roles: Land Use / Master Planning, Urban Design, Public Engagement

Shook Kelley specializes in strategic consulting and design services, focused upon the creation of innovative planning approaches and designs for new communities and infill projects, in both suburban settings and urban cores, that reflect timeless patterns of building while responding to modern aspirations for a better life. Through strategic branding, design and planning, our focus is on how places and spaces convene humans in meaningful ways. In center cities – where shopping streets are enlivened by the recasting of forgotten zones into new neighborhoods – to the urban fringe – through the establishment of new towns, Shook Kelley creates places where people convene to live better lives. Our process is grounded in convening citizens and public bodies, convincing both that the private sector development world is a crucial player in the realization of these new shared places for a better city, and a better life for all. We dig deep into the dynamics of human behavior, sifting and analyzing for those beliefs, hopes, dreams and even fears that lie below the surface of our relationship with a particular place—building, park, neighborhood or city. In our view, planning and design are merely one component in our convening of all manner of views and understandings that define cultures, that inform our creation of highly valued places.

**Year Founded:** 1992

## Type of Business

Shook Kelley CLT PLLC (d/b/a Shook Kelley) is a North Carolina Limited Liability Company authorized to practice Architecture in North Carolina: License #50631

FEIN: 87-3993281

Professional Affiliations: AIA, CNU, ULI, IIDA, ICSC, USGBC, CEFPI

## Total Staff: 23

14 (Charlotte); 9 (Los Angeles)

Authorized Agent to execute contract:

Charles Terry Shook FAIA / Direct: 704-944-2395 / Email: [tshook@shookkelley.com](mailto:tshook@shookkelley.com)

## Offices

1545 West Trade St\*  
Charlotte NC 28216  
T 704-377-0661  
F 704-377-0953

953 Cole Avenue  
Los Angeles, CA 90038  
T 310-659-9482  
F 310-659-9528

*\*All services by Shook Kelley for the City of Monroe will be performed within our Charlotte office location.*

## Areas of Practice

Master Planning / Architecture / Interior Design / Urban Design / Brand Strategy / Graphic Design

## Website

[www.shookkelley.com](http://www.shookkelley.com)



## Key Personnel



### **Terry Shook, FAIA** - Founding Partner - Project Oversight & Public Engagement

Terry is co-founder of Shook Kelley. His focus is on how places convene humans in meaningful ways, with an emphasis upon the creation of new communities and restorative acts in urban cores that reflect timeless patterns of building. The common thread among his efforts is a focus upon the intersection of history, culture, the natural environment and the everyday needs and aspirations of people for a better life.

Through the firm's real estate consulting platform known as Chotomy, he is filling "the gap" between the aspirations of towns, cities, non-profits, churches, community-minded landowners and the often limited perspective of the real estate development world. Chotomy does this by exploiting the realities of contemporary real estate development for a different outcome, one for the common good. Terry has lectured for many organizations and institutions over his career, including a 26 year position in the Executive Education program within the Graduate School of Design at Harvard University.

### **Education**

Bachelor of Arts/Architecture  
University of North Carolina at Charlotte  
Cum Laude 1976

Graduate Studies, NC State University  
1977-78

### **Registrations**

Registered Architect in North Carolina #3761  
NCARB Certificate No. 37933



### **Larry Zinser** - Partner - Project Management, Master Planning & Public Engagement

Larry plays an important role in the concept and creation of transit-oriented developments, town centers, and large scale mixed-use projects, ranging from the development of the Charlotte Trolley vision plan in the late 1990s – a project credited with initially spurring more than \$500 million worth of development; a traditional neighborhood development for Monteith Park in Huntersville, NC; the master plan, architectural design and, project management of a 40-acre retail-office-civic core for Biltmore Park Town Square in Asheville, NC; to the emerging Lexington (NC) Depot District, being designed as an urban TOD around future passenger rail service on the site of a former manufacturing facility.

### **Education**

Bachelor of Arts/Architecture  
University of North Carolina at Charlotte  
1997

### **Additional Staff**

Teamwork is not just a word at Shook Kelley. This is because we are not a hierarchical organization. Our management model is more akin to a medical practice than a bank, meaning that we embrace a network model, where partners are not merely management, but actually are planners and architects. So, our pyramid is upside down, with more Principals that are seasoned professionals than a firm filled with interns and the like. For this reason we have five (5) additional Partners and nine (9) Associates in our Charlotte office who can provide leadership and services for the project if the need arises.

## **Subconsultant Project Team**

Shook Kelley will serve as the primary firm leading with Master Planning and Public Engagement, with an assembled team of subconsultants that will bring tremendous value to this effort. Shook Kelley has extensive experience with each of these subconsultants for multiple towns and cities.

### **Gannett Fleming - Transportation and Infrastructure Analysis & Planning**

As one of the country's premier consulting firms, Gannett Fleming will provide Transportation Planning services, Parking Analysis, and Streetscape Design components of the new Downtown Master Plan. Shook Kelley and Gannett Fleming have collaborated on multiple projects in this region. For the Town of Huntersville's 2022 Downtown Master Plan, Gannett Fleming provided Multi-Modal Transportation and Infrastructure Planning services. For a new 83-acre Lakeside Pointe development located on Lake Norman, Gannett Fleming prepared the traffic impact analysis and coordinated with NCDOT for the site entrance into the development from NC-150, a future 'super street' via a reduced conflict intersection. This will help provide a pedestrian-friendly crossing across the future widening of NC-150 to a four-lane divided highway. Pedestrian access will allow safe passage to the future multi-use path to be constructed by NCDOT on the north side of the highway and linkage to a new 600 acre+ county park facility two miles away. For a 1300 acre family tract in Anderson, SC, Gannett Fleming prepared a traffic impact analysis in coordination with Shook Kelley on an initial zoning package. Shook Kelley & Gannett Fleming coordinated with Anderson's Planning Department on all proposed roadway infrastructure for the total development deeded to the Anderson Family (the property has no current zoning as it has been in the same family dating back to the year 1664.)

### **Gibbs Planning Group - Retail Market Analysis**

The practices of Shook Kelley and Gibbs Planning Group (GPG) are both focused upon large scale land planning, based upon the principles of the Congress for the New Urbanism. Bob Gibbs is a charter member of the CNU. Since inception, GPG has been active in developing innovative yet practical methods for applying modern trends in commercial development of town centers and historic districts here and abroad. GPG has pioneered many of the sustainable and community-oriented principles of traditional town planning and smart growth. Bob literally wrote the book on Main Street and town center retail market analysis and planning, titled *Principles of Urban Retail Planning and Development*.

### **The Integral Group - Consultant on Housing Initiatives**

For more than 30 years, Integral has earned a solid reputation for bringing innovative community, housing and infrastructure solutions to strengthen and revitalize urban communities. Offering a range of master development and consulting services, including programming, construction, property and asset management for mixed-use master planned communities, transit-oriented development, multifamily and senior living communities—Integral's community transformations produce successful social, economic and physical environments, while delivering solid returns to investors and partners.

## Qualifications: Subconsultant Firm Profile



### Roles: Transportation and Infrastructure Analysis & Planning

#### Gannett Fleming, Inc.

Gannett Fleming has played a part in shaping the transportation infrastructure that connects people and communities around the world, providing public and private industries with extensive planning, design, and construction management services of transportation systems and facilities. They specialize in natural resources, transportation, water, power, and facility-related projects, embracing sustainability and innovation in their projects and internal activities, and achieving results as responsible stewards of the environment.

#### Office Location

One Glenwood Avenue  
Suite 900  
Raleigh, NC 27603  
Tel 919 420 7660

#### Website

[www.gannettfleming.com](http://www.gannettfleming.com)

#### Key Personnel



##### **Rick Tipton** PE, PLS - Roadway Engineer

Rick is skilled in roadway design, estimating, scheduling, budgeting, contract development, and contract administration. His expertise also includes planning, design, maintenance, and construction of roadway projects. With 33 years of experience, Rick has a proven track record of collaborating with local, state, and federal agencies to deliver interstate, rural, urban, spot safety, high-hazard elimination, and bridge replacement projects. He will review deliverables to ensure FHWA grant standards are met and complete to insure reimbursement and future grant success.



##### **Lance Hartland** PE - Traffic Engineer

Lance has worked in the traffic engineering and transportation planning fields in various technical and managerial roles for 30 years. He has vast experience in the analysis and design of multimodal, development, and roadway projects in Western North Carolina. Projects have included traffic impact analysis, roadway lighting design, signal design, roadway pavement marking and signing design, feasibility studies, corridor studies, safety studies, parking studies, and circulation studies. Lance worked on both design-build and conventional roadway projects. His clients included state DOTs, cities, towns, counties, and private developers.



##### **Angel Pridgen** PE, ENV SP - Sidewalk / Multi-Use Trail / Roadway Design

Angel has 30 years of experience, including seven years with NCDOT's Roadway Design Unit. She provides project oversight, planning, design, cost estimating, technical review, and quality assurance. As the assistant project manager for our 2019 feasibility studies contract and project manager for our 2021 contract, she has overseen transportation projects from conceptual and functional design through ROW acquisition, final roadway plans, and implementation. Angel has experience with key industry design standards, including AASHTO, NCDOT, and municipal specifications. She is an excellent quality control/assurance resource.

# Qualifications: Subconsultant Firm Profile



## Roles: Transportation and Infrastructure Analysis & Planning

### Key Personnel



#### **Baohong Wan** PhD, PE - Traffic Forecast Analysis

Baohong brings 19 years of expertise as a senior traffic engineer and project manager, specializing in advanced traffic modeling and quantitative analysis. His skill set spans traffic operations, capacity studies, simulation, complete street design, unconventional intersection and roadway design, transit signal priorities, safety planning, and pedestrian/bike operations. Baohong excels not only as a technical expert but also as a leader in project quality and cost control, team building, and public outreach.



#### **Adam Archual** - Environmental / NEPA

Adam has worked on and managed transportation projects since 2012 with a focus on National Environmental Policy Act (NEPA) compliance, including the completion of categorical exclusions (CE), environmental assessments (EA), and environmental impact statements (EIS), as well as state equivalents. He has assembled and managed multidisciplinary planning, environmental, and engineering teams to deliver several state and federal transportation projects. Adam is proficient in the management of transportation projects, including scope, budget, and schedule maintenance.



#### **Sierra Browder** AICP - Public Involvement

Sierra has extensive knowledge of ArcGIS Pro; Arc Map; MicroStation V8; Power GEOPAK; Bluebeam Revu; Adobe Pro; TNM 2.5; Microsoft Office Suite; ProjectWise; and Adobe Photoshop. She has assisted in development of tools for a wide variety of clients, including several departments of transportation and local and state government. Sierra has worked in local government and is well versed in the needs and business functions of several aspects of local government. Sierra creates base drawings using survey information and CAD program(s), plot/print plans, reports, and presentation materials. Sierra conducts noise measurement field work and prepares project and presentation graphics.

# Qualifications: Subconsultant Firm Profile

## Role: Retail / Commercial Market Analysis

Gibbs Planning Group (GPG) is an urban consulting firm and one of the leading authorities on the research and planning of historic commercial districts, neighborhoods, mixed-use town centers and resorts. GPG specializes in analyzing and planning complex historic and urban commercial centers and offers planning and real estate advisory services for the public and private sectors. Founded in 1988, GPG has consulted for hundreds of cities, institutions, new town centers, resorts and universities across the Americas, Europe and the Pacific Rim.

A partial list of public-sector clients include Albuquerque, Alexandria, Auckland, Dublin, Cambridge, Charleston, Grand Rapids, Houston, Knoxville, Madison, Miami, Naples, Palm Desert, Portland, San Juan, Santa Cruz and Seattle. Private-sector clients include Bedrock Real Estate, Big Sky Resorts, EDS, General Motors, Harbour Town, Home Fed Corporation, Rosemary Beach, Seabrook, Steiner Associates, The St. Joe Company, Taubman Centers, the Queensland Investment Company, the Disney Company and the Weyerhaeuser Company. GPG has also provided real estate advisory services for Brown University, Johns Hopkins University, The University of Pennsylvania, The Florida Hospital, Wayne State University, the University of Miami and William Beaumont Hospital.

### Office Location

Gibbs Planning Group  
240 Martin Street  
Birmingham, MI 48009

### Website

[www.gibbsplanning.com](http://www.gibbsplanning.com)

### Key Personnel



#### Robert Gibbs FASLA, AICP

Bob is considered an authority on the market analysis and planning of complex urban commercial centers. As founder and managing director of GPG, his retail planning excellence lies in advising public and private sector clients on the psychology of commerce - the practical science of analyzing and adjusting all elements that affect a shopper's mood in the marketplace. He is renowned for applying fundamental retail and merchandising principles for reviving retail in downtowns and for instilling robust commerce in new town centers, and is considered a leading urban planning consultant by some of the most respected mayors, architects and developers in America.

### Education

Master of Landscape Architecture & Urban Design  
University of Michigan

Bachelor of Arts in History  
Doctor of Arts, Honoris Causa  
Oakland University, Michigan

### Books

*Principles of Urban Retail Planning and Development*  
John Wiley and Sons, 2011

### Affiliations

American Institute of Certified Planners  
American Planning Association  
American Society of Landscape Architects Michigan  
Congress for the New Urbanism, Charter Member  
CNU-Michigan, Board Member  
Form Based Code Institute, Board Member  
International Council of Shopping Centers  
Urban Land Institute

# Qualifications: Subconsultant Firm Profile



## Role: Residential Analysis

Integral serves as a strategic partner to Shook Kelley and the firm's development arm, Chotomy, helping to realize the full potential of real estate investment and community development assets with comprehensive market analysis, feasibility studies, tailored development strategies, meticulous project planning, risk mitigation, and investor relations. They are committed to creating vibrant communities that foster a strong sense of belonging by incorporating affordable, workforce, and market-rate housing. Thoughtfully designed developments prioritize cohesion, sustainability, and support services. Through collaboration with community stakeholders, Integral will ensure the Downtown Master Plan will align with local market needs.

### Office Headquarters

191 Peachtree St. NE  
Suite 4100  
Atlanta, GA 30303

### Website

[www.integral-online.com](http://www.integral-online.com)

### Key Personnel



#### Jordan Jones

Jordan is a Development Executive with The Integral Group with experience in commercial real estate development and community economic development. He is responsible for execution of multi-component real estate development projects, from conception through stabilization. Prior to joining The Integral Group, Jordan led his own development company utilizing creative financing structures and public-private partnerships. He has also worked as a Development Advisor at the Development Finance Initiative at the UNC School of Government where he advised local governments across North Carolina on affordable housing, downtown revitalization, and public private partnerships.

### Education

Bachelors of Business and Enterprise Management  
Wake Forest University

Masters of Public Administration and City & Regional Planning  
University of North Carolina

## Project Approach

One of the hardest things in life can be figuring out what to do. Existential questions, such as: *What do I want to be when I grow up? ...How will I get to where I want to go? ...Who will help me get there? ...And, how will I know when I arrive?* ...can consume our private lives. Some of us, of course, set a clear vision for ourselves, and purposefully set out to achieve it. Of course, unforeseen setbacks and wondrous opportunities sometimes pop up out of nowhere along the way. However, the truly successful among us seem to have the ability to navigate around the obstacles, and quickly take advantage of the fleeting moments when opportunity knocks.

### **The same is true for villages, towns and cities.**

If you believe that civilizations represent the collective aspirations of individuals for a better life, it then follows that our organizations, and most importantly our villages, towns and cities, should be stewards of this as well. This includes the responsibility of being emotionally aware of what the place is, and in being charged to support its health and well-being. This includes holding on dearly to a vision of how each wants to live and grow, which is grounded in its collective reality. This includes struggling to find the right path and engaging in meaningful activities to achieve it as well as dealing with unforeseen circumstances, be they positive or negative, and overcoming the angst and anxiety that accompanies the moment. And, ultimately, this includes enjoying achievements, successes and planning for the next fulfillment.

As tough as setting a life course and staying on it is for an individual, it can be amplified to the extreme for municipalities. Just as an individual reconciles the influences of family, friends and the voices inside one's own head to get somewhere in life, successful places mirror a similar process. At the center, there is leadership that is willing and able to listen carefully to the many views and voices, and one yet that will ultimately craft the path and set out upon achieving it. This is true in the halls of successful businesses, big and small; in universities and other non-profits; as well as with governments. It is certainly true for many as they compete on the world stage for talent and for jobs, and to create a better place for those already there. To be sure, it is one thing to wrestle with relatives and the voices inside one's own head. It is quite another task to overcome this at the scale of the corporation or zip code. However, before we delve into a process, there are other factors to consider.

### **One of the most difficult tasks in this world is getting credit for the great things you are and do, and then leveraging these pre-existing qualities for an even better reality.**

This is true for products, people, places, and particularly towns and cities. Successful entities cut through the static of the greater world to achieve Top of Mind status for those seeking whatever it is they seek. Apple knows their customer—their dreams, their life, and their aspirations for a more fulfilled existence—and delivers products that are answers to needs and questions often never asked. Great universities—take Harvard, for example – have achieved such Top of Mind status to the point that, in some fields, they get credit where, frankly, it is not as deserved as others. Similarly, cities become shorthand for all manner of things. For example, some cities become places about which songs are written. Around 1,000 songs have been written about New York City. Many of course have dropped out of culture and memory. However, even picking the absolute Top of Mind “Top Ten” is an impossible task. With a vibrant, complex and clearly “Top of Many Minds” place like New York City, the “best” is clearly based upon one’s point of view.

*continued*

# Project Approach

This tour of relevant cultural phenomena—of Apple, of Harvard, and of New York City—point out the contradictions and the challenges that a place even like Monroe faces. On the one hand, all towns and cities aspire to have a honed and highly valued brand proposition such as the one Apple enjoys. Their products are easy to understand, relatively bullet-proof, insanely sought after and supported by a large populace willing to sacrifice other financial obligations in order to be a part of the relatively narrowly defined world of Apple. However, the reality of towns and cities is that they are highly complex organisms populated with a host of cultures that oftentimes have competing interests that by their actions send out confusing messages to each other and to the larger world. New York City is so complex, and a leader in many things, that a host of positives coalesce to create an overwhelmingly desirable perception of the city, so much so that it drowns out the negatives. Where most places realistically want to be, one might argue, is like Harvard: getting credit overall for a few deservedly Top of Mind programs that set the tone, and the perception, of the entire entity. Such a reality is arguably within the grasp of Downtown Monroe.

## YOUR OPPORTUNITY

Without a doubt, there's something special about a lively community. There is a human truth about these places that is visceral, that grabs and demands your attention. Sometimes this is due to a spectacular physical setting such as a coastal harbor, or wonderful historic architecture. All of them, however, speak to our greater need to convene, as citizens, in a place that leverages our potential to be better neighbors, citizens, merchants—indeed, better human beings acting in the best interest of this planet we share. When these elements come together, working in a self-sustaining manner, a somewhat magical thing happens. A town or city becomes a place, or as we say, a *PlaceBrand*, one that is hard to replicate anywhere else, and one that your citizens will band together to support in order to maintain its health and vitality. It is a complex ecosystem, with all manner of interdependencies that alternatively shout at you, and with others that are unseen. There are a number of PlaceBrands throughout the world...large cities, such as San Francisco, to medium-size places such as Boulder, CO, to even small ones such as Ellicott City, MD, and Country Club Plaza in Kansas City, MO. Many have existed for generations. Others are relatively new. Ellicott City is an old town that has only been broadly valued and supported since the 1980s. And Country Club Plaza, even though it is over 100 years old, is actually a private development!

We believe a PlaceBrand is the ultimate goal for Downtown Monroe. We recognize that planning, as an isolated event—no matter how creative or insightful, is only one facet of a complex process of establishing a sustainable place. As has been often said, a vision without a strategy is a hallucination. And a strategy without “buy-in” by the leaders we elect to represent us is a squandered opportunity. Crafting a strategy based upon a careful edit, consolidation and extension of your previous plans, and bonding it with your community’s leadership is at the core of the approach we propose to provide.

## WHAT SHOOK KELLEY CAN DO FOR THE CITY OF MONROE

We will not show up with a formulaic approach that leads to a canned solution. Because our consulting runs the gamut, we place great stock in getting to know a client, a product, a citizenry and/or a place before we launch into a defined program. Our process—or rather, our way of thinking—does follow a predictable and experience-worn path. That path will lead to the deliverables you request, including synthesizing the vast amounts of documentation that already exist, and providing a deeper level of thought and visualization, culminating in a design framework for Monroe that will sell the downtown to its inhabitants and those who choose to invest in it.

## Assessment & Design

*Attributes of our approach to assessment, planning and design of principle-based development*

Shook Kelley employs an open and engaging community assessment and planning process. As early as the late 70s, Terry Shook employed market study techniques and planning strategies in master planning of downtown Charleston, SC's Visitor Reception and Transportation Center, a landmark project that received an Honor Award from the National Endowment of the Humanities. Similar techniques were employed in downtown Greenville, SC for assessing and planning the Greenville Greenway and Reedy River Falls—arguably one of the most important public space developments in the country. At Shook Kelley, the community assessment process has evolved to encompass not only traditional market surveys but a creative public visioning process, which led to creation of Charlotte's Historic South End District, where developer-driven projects responded to a forward-looking market assessment.



Left to right: **Back to The City** Vision Poster prepared by Terry Shook and Ron Morgan to document the process of the 1979 charrette for the downtown Greenville, SC planning effort; The original logo for Charlotte's **Historic South End** district and the **Charlotte Trolley Vision Plan poster** as part of Shook Kelley's efforts over the course of a 35 year span working as community volunteers and as consultants on many initiatives in support of one of Charlotte's two Business Improvement Districts, including one that Shook Kelley advocated, established and initially managed: Historic South End.

The following outlines some attributes that explain the general nature of our approach:

### We establish clear roles and responsibilities.

Establishing clear roles and responsibilities for all entities involved at the beginning of the process is essential. The key is to carefully organize talent inside and outside the assessment and planning team. Problems that arise in public and/or private planning partnerships most often result from just a few organizational mistakes made at the very beginning. The first is ambiguous definition of who does what and when. This becomes obvious after the fact—once things are off track and multiple professionals have dropped the ball. Not everyone needs to be engaged at every moment, but every player must have a clear sense of what is expected. As important, is the identification of what we refer to as "Process Partners," those people or entities in the community that can add skills and value to the project. This can include providing useful design and development information; removing barriers or expediting critical decision and approval points. Our experience in identifying and managing a professional planning team and working with strong Process Partners is much like that of a political campaign. Shook Kelley will work with the City of Monroe and its Process Partners to forge an effective community planning process. Guiding this effort will be our initial master planning guidelines and the specific project goals.

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# Project Approach

## **We aggressively seek the very best ideas.**

In community ventures, many parties have information and ideas for successful development. Large-scale urban projects are not formulaic, whether at the program development stage or in terms of design issues. This is why the Principal-In-Charge of planning needs to function as a “sponge.” Observations from individuals or groups that often come out of left field may have the power to enhance a project – if followed. Open and inquisitive minds, along with the ability to assimilate information and move on, are basic team requirements. We state this need for flexibility in the beginning of every public assessment and planning process because it’s the key to effectiveness. Everyone involved needs to realize this is critical because engaging the public in planning can be a bit like handling dynamite. Reacting inflexibly and imposing design will surely cause a blow-up or perhaps even complete failure. Unlike many of our peers, we are not of the opinion that uncharted, open-ended public sessions are in anyone’s best interest—even that of the public, who will be the ultimate benefactor of a well-conceived, planned, designed and developed project. Unfocused and open-ended exercises can often frustrate a community, leading to citizen fatigue and creating something less than goodwill as an unintended consequence. Shook Kelley will work with the City to establish proper procedures, protocols, and venues that will constitute the formal exchanges with the community, within the team, and the Process Partners.

## **We construct and help judge imaginative and innovative alternative futures.**

Community design is more than a “take it or leave it” proposition. While many professionals practice as though this proposition were true, clients, communities and new residents all want and deserve as many choices as possible. With complex projects, there are often many proper planning and design responses that meet the intent of the program. The mere fact that there are multiple program elements means that there are multiple options that meet the fundamentals of the program, and yet may yield significantly different responses as to development costs and phasing. Important economic considerations such as TIF; SynTif, possibly even Federal Discretionary Grants; New Market Credits; operating costs and other factors may influence approach and direction. These are but a few of the factors, of course. Understanding this complex “soup” of options and alternatives—in design, management and operation—is a skill as critical to success as planning and aesthetic mastery. We take an “eyes wide open” approach to community assessments and master planning, employing financial modeling concepts that define highly sensitive and subtle market opportunities.

## **We establish and extend Brand.**

Effective design is about more than good luck. However, rarely does one think of real estate as being a brand, say, in the same sense that Nike, Apple and BMW are brands. When it does, it is usually a result of a series of unconscious factors that fall under the general category of “luck.” But what if one consciously approached real estate development as brand creation, with the same rigorous research and insight demanded by consumer product development? Within that framework of product branding, aesthetic decisions are not based upon whim or individual taste, but upon an in-depth understanding of the values and aspirations of the marketplace. A huge range of design decisions, particularly about how public space is shaped, formed and detailed, needs to be based upon real, observed human perception and specific desired outcomes, not simply current aesthetics and fashion. The success of true community development partnerships with the surrounding communities for public and/or private investments and participation can be strongly influenced by these subtle, often subliminal, design considerations. Brands are important to us and constitute an important dimension of our business. While many architects use these terms—as if they describe

simply a sticker to be applied—Shook Kelley has been and are actual brand developers for some of the world's most noteworthy: Harley-Davidson, Kraft Foods, SeaWorld, Cadbury-Schweppes and dozens of successful restaurants, grocery stores, and small businesses. At the core of our urban practice lie the skills and attitudes required to excel in the most competitive of all businesses: the cut-throat and competitive world of business branding. In fact, our attraction to this fine-edged discipline is a natural growth of our passion for great ideas, precision and refinement in design and the very most effective forms of communication.

## We Focus on Communications.

Skillfully coordinating the planning team, process partners, civic leaders and relationships with the general public is critical to success. Simply put, we encourage the development among the team of a formalized protocol for sharing and documenting information. This process is characterized as being deep in content, but narrow in scope. With the public, the sharing of information may be just the opposite, depending upon the audience and timing. Baseline tools, such as a website and a Brand Book, can be essential elements of the public communication program. Websites being the first communication effort, gain in strength and grow over time, giving out information on an as required basis. They also are great harvesters of information, opinions and beliefs from a general public. Social media and other social networking tools may also be employed. The Brand Book is more akin to a Final Report—a specific offering that is developed only at the end of the master planning process in order to document the good work among the team and the Process Partners to the public and other officials having an interest in or jurisdiction over the project.

Much of Shook Kelley's practice is based upon branding and communication design. This reflects our belief that perception can become reality, and hopefully transform for the better.

## Existing Conditions Analysis

The Shook Kelley Consultant Team will commence with an immersive, yet efficient process of organization and mobilization along with reconnaissance and evaluation of existing guiding documents and information, current plans and policies relative to the greater Monroe community and the project study area. We typically refer to analysis of the existing conditions as Discovery. In addition, a field study (photo recordation and mapping) of the downtown's infrastructure and context shall be conducted by the Shook Kelley Consultant Team in order to observe, inventory, document, and evaluate existing conditions. Together, these initial activities will become the basis for a preliminary assessment which will be produced in part by a 'layer stack' diagrammatic analysis along with annotated graphic exhibits and supporting case studies.

*continued*



## Project Approach

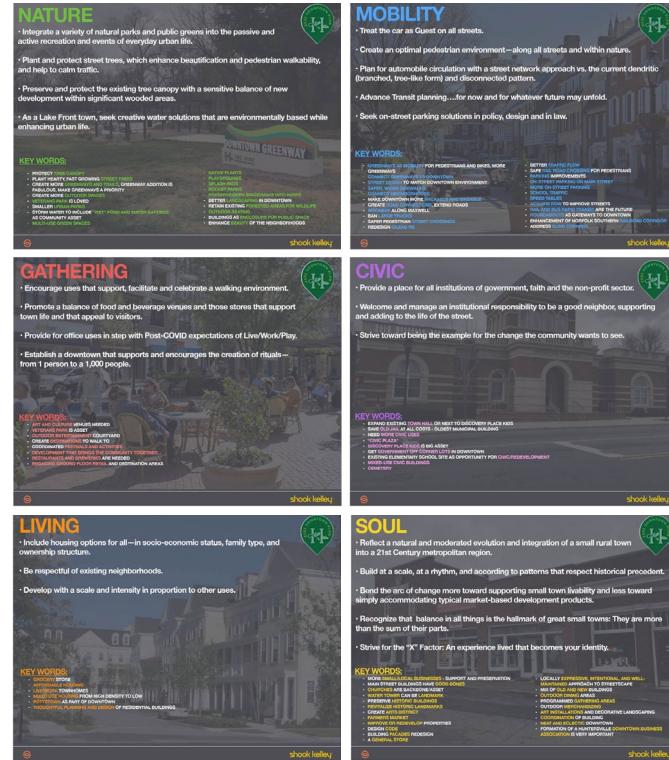
The SK Consultant Team will evaluate the City's current guiding documents along with ongoing capital improvement projects in order to compile a summary matrix of notes and key considerations about how specific elements of each document and project will guide and perhaps influence the development of the vision and master plan. We will also share other relevant planning and design references and case studies for the City to consider.

Together with a peer review of existing street and streetscape design plans, the existing conditions of designated downtown streets and existing parking supply will be evaluated by the SK Consultant Team for potential improvements (in accordance with existing City guiding documents and the potential adoption of Complete Streets, or other policies if deemed appropriate). Considerations will identify best practices and innovative design approaches and features, which may enhance community cohesion through connectivity and multimodal access focused on increasing pedestrian safety, walkability and accessibility within the project study area. Furthermore, we will explore appropriate design approaches that encourage multimodal linkages between community facilities and events within and around Downtown Monroe. The SK Consultant Team will also seek to understand and analyze the existing and emerging land uses and development patterns along with demographic trends in and around the City of Monroe.

## Organizing Principles

One of the most important parts of our process is establishment of the Organizing Principles. It is in this component that all of the information, insights, perceptions and beliefs are sorted and distilled into clear dictates for development. As this is the most important work, it is also the hardest, for debating and then determining what really is essential for the City of Monroe to set as goals that can be achieved can be contentious.

However, getting this part right—with clear and unambiguous statements of purpose and examples to back them up—will drive the process of planning, design, programming and management. Shook Kelley will take the City through a process of creating these Organizing Principles, including projecting out how each one should contribute to the creation of this new plan and its sustainability into the future. This process will also include case studies of other built and long occupied communities that embody ideas, techniques and development approaches that Monroe may—or may not—want to include in the Downtown Master Plan. This is very useful in the establishment of a shared understanding that can then be translated into a set of Organizing Principles.



**At right:** The Organizing Principles established by Shock Kelley for The Town of Huntersville, NC Downtown Master Plan.

## **Alternative Futures**

As all of us will discover, there will be a number of things that require attention, and an equal number of approaches for accomplishing them. Within any great mixed-use place there are a host of venues and experiences that allow it to claim the moniker of “great”—housing for many, cultural venues across the spectrum, food for all tastes and wallets, employment in abundance, plus an “X-Factor” that glues all of this and more into a memorable proposition. Clearly, you will not have the time nor the resources to do everything that you may wish to accomplish in order to manifest this new plan into everything you may desire. However, if you make the right choices, you can rise to status of “great.”

At this point you may be asking *“What kind of a thing is an Alternative Future?”* At the most basic level, they are different master plan approaches. But you know that the implications behind a master plan are so much more than where certain buildings, streets and other infrastructure will be located. The acceptance of a master plan puts in motion all manner of decisions, commitments, time frames, responsibilities and more, that play out beyond into the future. So, we will present more than a master plan. We will push the evaluation to go beyond the physical and into the many aspects that will track it into the future. We will construct, through scenario planning, a number of Alternative Futures for consideration for fulfilling the Vision. These Alternative Futures will vary in terms of a number of factors: 1) The message, and therefore the audience(s)/customers, you wish to focus upon; 2) Physical initiatives in alignment with the message and other ongoing or anticipated directions of others outside of the team; and 3) Available resources, in terms of manpower and/or dollars, that can be allocated to the effort, to name a few. Each Alternative Future will be presented in an equal fashion. Most likely, the process will dictate a revised Alternative Future and therefore the final selected Future will draw from the best of each Alternative. Shook Kelley will then refine this approach, which will be used as the basis for crafting an implementation strategy.

## **Master Plan**

Conceptual Planning considerations shall be developed by means of annotated diagrams, sketch plans and cross-sections, conceptual 3-D vignettes, and relevant case studies that demonstrate specific approaches. The process will establish the framework for the master plan for the Downtown Master Plan. Conceptual Planning will be advanced into a DRAFT and FINAL Downtown Master Plan through a structured and open planning process, which will include ongoing discussion and feedback from the general public, Key Stakeholders, City Staff and Board.

The Master Plan will be crafted to illustrate a clear vision based upon the characteristics established by the selected Alternative Future, expressed within the context of existing and potential blocks (buildings and open spaces) and development patterns. A Conceptual Vision Plan will also be created to demonstrate an ‘expression’ of potential block development patterns (build-out scenarios) based upon actual types of streets, buildings and open spaces, as well as locate and ‘test fit’ potential Key Catalytic Projects within the Downtown context.

Key notes and considerations shall be outlined to provide a general description of specific features and planning guidance for design, delineation, and development. Furthermore, a series of annotated 3-D visualizations and vignettes will be created to depict conceptual spatial enclosure (building frontage/form and site/street section) and streetscapes for various locations and conditions within the Downtown study area.

*continued*

# Project Approach

## Final Strategy

The Final Strategy will outline recommendations and action items, which together support implementation of the Final Downtown Master Plan. The SK Consultant Team will identify and prioritize the areas well-suited for capital improvement projects through the preparation of a conceptual phasing timeline along with concept/planning-level cost estimates for the improvements. The SK Consultant Team will also identify key initiatives to be advanced by the City for addressing the planning and/or policy elements that need to be adopted, amended, and/or written and adopted, all coupled to a strategy regarding how to approach implementation of the Downtown Master Plan.

## Financial Capacity

*Analysis of the marketplace with a specific focus on factors that influence future redevelopment*

Under this task, special emphasis will be placed by our team of sub-consultants on evaluating the ability of each site to create and/or enhance market support for various land uses such as retail, food & beverage, entertainment and cultural attractions, residential, governmental, educational, and other activity generating uses in the context of commuter service, as well as optimum pedestrian and vehicular connectivity.

A “top-down” analysis can examine local and regional trends with respect to demographics and economics, as well as the supply and demand characteristics of the various real estate sectors. A “bottom-up” analysis places a greater emphasis on the potential of the district for attracting new and desirable land uses. Current conditions, existing uses, proposed projects, public and privately owned opportunity sites, etc., would be evaluated in the context of supporting redevelopment. The market analysis would likely include the following categories:

- Economic and demographic trends:
  - Population and households
  - Income and employment
  - Business and industry characteristics
  - Housing characteristics
- Sector-based market assessment:
  - Commercial office
  - Light Industrial
  - Retail
  - Food, beverage, & entertainment
  - Meetings, conference, & civic space
  - Cultural space
  - Residential

## Assets, Challenges, and Opportunities

An assessment of the district’s assets, challenges, and opportunities will place a greater emphasis on the ability to attract private investment accommodate redevelopment. The Project Team can examine the existing physical and economic conditions of the district and will identify those factors that enhance and/or inhibit activity. The assessment of assets, challenges and opportunities will provide a baseline of existing conditions with which to provide background for identifying conceptual land use opportunities. Successful case studies in other comparable places would be used to develop a set of best practices to be applied in the recommendation of catalyst development projects.

## **Identification of Future Land Use Opportunities**

The findings of the market analysis will inform the identification of future land use opportunities in which could include, but not be limited to, new construction, adaptive reuse, or the re-tenanting of vacant space. The Project Team can identify two to three specific catalyst projects with potential to advance in the next development cycle (three to six years.) Projects would be expressed in descriptive terms using unit counts, square footage, etc., which can subsequently be used to estimate capital costs. Concepts for the Downtown Master Plan would be tested with the client group and other stakeholders to assess their compatibility with the emerging vision.

## **Preliminary Economic Analysis of Development Concepts**

Preliminary financial analyses can and should be conducted for development concepts to determine what, if any, incentives may be necessary to create an implemented project. The analyses should include the following elements:

- Capital cost estimates
- Operating revenues and costs
- Ten-year cash flow pro forma
- Determination of supportable debt and equity
- Calculation of residual land (or property) value

## **Fiscal and Economic Impact Assessment**

A fiscal and economic impact assessment of conceptual projects can and should be conducted to demonstrate the potential return on public investment, and should include the following elements:

- Fiscal revenues (property taxes, fees, other applicable taxes)
- Employment
- Salaries and wages
- Visitors' spending in the local economy
- Secondary economic impacts

## **Funding Source Assessment**

Based on input from the Town and other stakeholders, a determination can and should be made regarding acceptable levels of public and/or private investment to facilitate the components of the plan. Recommendations may seek to minimize the amount of public investment, while leveraging the maximum amount of private investment to achieve the desired objectives. Various sources of public funding can be examined to determine their availability and effectiveness in achieving both short- and long-term results, and may include:

- Grants
- Special taxing districts
- Tax credits and abatements
- Bank and CDFI
- Other public funding mechanisms

## **Phased Implementation Strategy**

The development strategy will be keyed to a series of action-oriented steps covering specific development or redevelopment projects that can be pursued concurrently or sequentially, including infrastructure improvements, the solicitation of private sector partners, and the development of real property improvements. The funding strategy for the overall phased implementation program will be developed by this time, with information regarding the funding and financing of key public and private components. A methodology for benchmarking progress will also be established, so that success can be measured and the timing of implementation steps tracked.

# Project Approach

## Transportation / Infrastructure

### Transit Planning

The area has experienced significant growth and is expected to continue in the coming years. As roadways become more congested, residents and business owners are seeking more modal options. Gannett Fleming has extensive experience ranging from concept development; travel demand forecasting; public and stakeholder engagement; environmental studies; transit route and station area planning; transit-oriented development planning and design; engineering; budget and schedule management; FTA coordination; to program management. Their transit planning and design successes are centered around strong collaboration with transit clients, municipalities, and stakeholders with the ultimate goal of providing safe and efficient transit options with high ridership which enhances the quality of life within the communities for all ages and abilities.

### Roadway Design, Access Management and Street Connectivity

Roadway design has been a core service at Gannett Fleming for 107 years. Their North Carolina staff has an extensive resume of successful NCDOT and municipal projects that share many of the scope elements of design coordination requested in the RFQ. Gannett Fleming will bring a multitude of lessons learned and best practices to share. Further, the team includes NCDOT veterans who have deep long-term relationships with NCDOT staff locally and in Raleigh. Gannett Fleming possesses a legacy understanding of design requirements and standards and have a strong history of proactively working with the DOT and municipal partners in solving challenges. They understand that a successful plan has a strong component of street connectivity that creates many options of motor vehicle, pedestrian and bicycle access and traffic distribution. The goal is to make the plan accommodating for all transportation modes while calming and mitigating vehicle traffic to create an urban oasis that is welcoming and has utility for users.

### Improved Mobility and Parking

Transportation networks are more connected and integrated than ever before. Well planned and designed infrastructure must consider multi-modal user experiences and create equitable transportation solutions that deliver safe, efficient, and reliable functionality. Gannett Fleming creatively approaches each of its projects with a focus on innovative enhancements and can help the City of Monroe to do the same. Solutions developed today must stand the test of time and perform in the future. Some of the considerations we take into account for the future of transportation include advancements involve integrated mobility options and technology, connected and automated vehicles, renewable energy sources and electric mobility. Gannett Fleming will apply its expertise to gain insight on how to plan, design, fund, construct, operate and maintain a more equitable, resilient, and sustainable transportation system for Monroe.

### Greenways/Sidewalks/Multi-use Trails

We understand that incorporation of multi-modal infrastructure into a downtown master plan is a foundational component for success. Our team will work with the public and City staff to optimize connectivity and availability to enhance the downtown experience. Gannett Fleming will work jointly to supervise the efforts on the greenway/multi-use, sidewalk and bikeway planning, design, and surveying services. They have recent greenway/multi-use trail experience for the City of Hickory, NC and the City of Morganton, NC.

## Technical Capacity

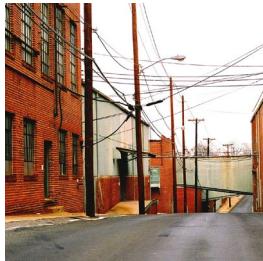
### Convening Focus Groups / Public Engagement

We believe that useful, functional places cannot be designed in a vacuum. The people for whom we craft strategic vision plans, design buildings, as well as create master plans have a unique perspective regarding the needs for a facility or place. It is fundamental that we—as architects and planners—and you, as managers, tap into the reservoir of knowledge and perception if we are to create places that contribute to—rather than simply contain—the process. Without question, the most straightforward and successful way to integrate this knowledge into design is through participatory programming, planning and design processes.

This is easier said than done. Since each project can vary, the extent and nature of the exercises will vary with the uniqueness of the program and the goals for the project. Where the program is very defined and the delivery model standard, participatory exercises may be very limited. However, if the goal is to respond to a “break the mold” model, the techniques can be extensive and diverse. Shook Kelley keenly believes in the value of meaningful feedback from special interests and from the public at large. Unqualified input for input’s sake can lead to either false expectations with the group being consulted; false feedback to the consultant team based upon the makeup of those participating (the red herring of participatory design), or at best “citizen fatigue,” where people turn a deaf ear to anything that is proposed.

We believe in assisting communities in that stewardship and in bringing to bear all of our expertise, resources and vision upon a process that results in a shared vision. We have conducted and participated in many successful community engagements, implementing public process efforts whereby the many voices and views of the community are heard, employing a variety of survey methods throughout the process. We are prepared to use an audience live-response system, commonly referred to as Turning Point technology, to sample opinion among many groups, to not only get useful feedback but to foster dialogue and excitement for what unfolds.

Shook Kelley led the master planning and public engagement process for the future Lexington (NC) Depot District, designed around future passenger rail service on the site of a former furniture manufacturing facility in the downtown. Engagement Activities used in the planning process included interviews with key stakeholders and groups, community-wide surveys via real time Turning Point clicker technology and also via website, outreach events and activities, public participation workshops.



## Historic West End / 5 Points Forward - Charlotte, NC

**Project Type:** Community Planning Initiative, Transit-Oriented Development

**Shook Kelley's Roles:** Site Analysis, Alternative Futures Site Planning, Community Engagement, Architectural & Urban Open Space Visioning, Modeling, Architecture.

**Dates of Involvement:** 2018 - Ongoing

5 Points Forward is a grassroots stakeholder initiative led by Historic West End Partners in partnership with the Knight Foundation. Shook Kelley is providing ongoing community engagement, master planning, and design to create a shared community vision for spurring equitable and innovative development in the West End. Through authentic community involvement, the goal is to create a blueprint that recognizes the historic past and progressive future of the community. Multiple building and active space concepts have been designed with the intent to support a range of activities, both passive and active, for people of all stages in life, gathering together the diversity of a new 5 Points. This is unlike any community development initiative ever undertaken within Charlotte. It will be owned long-term by community interests and not developers. Income derived from its realization will flow directly back into the community, assisting other initiatives to stabilize, support, and uplift the community and its residents. Built upon land that will be owned by a community land trust, ownership of the development once its debt is fully retired will revert to a community-based non-profit entity formed for the specific purpose of providing long-term affordability and food stability within the West End with a community-owned food market; multifamily residential units at diverse price points catering to individuals, young families and seniors; and a community center Mobility Hub with access to fractional car leases and micro-mobility options. As a stabilizing force it will serve as a bulwark against the negative aspects of gentrification while accommodating and integrating the inevitable change in cultures and incomes that attend growing urban neighborhoods.

Shook Kelley is also part of a consultant team community planning effort for the City of Charlotte, begun in 2025 as the result of a \$1M Reconnecting Communities Federal Grant received by the City to study the land surrounding the I-77 interchanges to the West End—with the goal of further revitalizing and reconnecting the West End of Charlotte that was once thriving until highway construction in the 1960s eliminated minority neighborhoods, displacing families, destroying businesses and community institutions.



## Reference:

Ms. J'Tanya Adams  
Executive Director  
Historic West End Partners  
Charlotte, NC 28216  
Phone: 980-205-1768  
Email: jtanyaadams@gmail.com

# Relative Experience

shook kelley™

## Lexington Depot District - Lexington, NC

**Project Type:** Transit-Oriented Development (TOD);  
Brownfield Redevelopment; Multimodal Passenger Rail Station

**Roles:** Master Planning, Station Area Planning, Architecture, Community Outreach & Marketing, Strategic Construction Phasing & Funding, City/County/State/Federal Agency Collaboration.

**Dates of Involvement:** 2011 - Ongoing

### Reference:

Ms. Tammy V. Absher, AICP  
Director of Business & Community Development  
City of Lexington  
31 West 1st Street  
Lexington, NC 27292  
Tel 336-479-0122  
TVAbsher@LexingtonNC.gov

In the face of unemployment and limited tax revenues, the City of Lexington took a bold initiative in 2011, purchasing 18 acres of abandoned manufacturing buildings to take destiny into their own hands. As a result of a USDOT Tiger II planning grant in support of The Southeast High Speed Rail Corridor, the City used funds to not only prepare for regional rail service, but to plan the next life of these industrial properties as a new mixed-use neighborhood. An engaging public process among the many communities and constituencies was employed to plan a future and to advance broad community support. Shook Kelley actively engaged with the City's Office of Community Development in advocacy and public engagement, as well as provided master planning for the future District, with the purpose of finding equitable mixed-use solutions for a growing community with innovative methods for creating a transit oriented neighborhood. Shook Kelley is continuing its services of Master Planning and Visioning for Transit Oriented Development along with Schematic Design for a new Multi-modal Transportation Station anchored within the urban core. We've also provided assistance to the City in the preparation of Grant proposals in pursuit of new Federal and State funding opportunities. In 2020, Shook Kelley helped the City secure the award of a \$25 million federal grant from the USDOT under its Better Utilizing Investments to Leverage Development (BUILD) discretionary grant program to help with final design and construction of the Phase I Station Project. Shook Kelley will provide final architectural design of the Interim Station facility (a renovation of the historic Southern Railways Freight Depot) along with the urban design of associated passenger and public site amenities and infrastructure in the surrounding Depot District. In Phase II, Shook Kelley will complete design of the new permanent Multi-modal Transit Station building along with the adjacent station area site amenities and public open spaces.



# Relative Experience

shook kelley™

## Huntersville Downtown Master Plan - Huntersville, NC

**Project Type:** Downtown Master Plan

**Roles:** Site Analysis, Alternative Futures Planning, Master Planning, Community Outreach & Marketing

**Dates of Involvement:** 2021 - 2023

### Reference:

Mr. Brian Richards  
Planning Director  
Town of Huntersville  
105 Gilead Road, 3rd Floor  
Huntersville, NC 28078  
Tel 704-766-2218  
brichards@huntersville.org

Shook Kelley, with Gannett Fleming and Gibbs Planning Group, provided the Town of Huntersville with Planning and Community Engagement services for its Downtown Master Plan, helping to shape the future of development in the Downtown. The emphasis of the new plan is to develop a set of sequenced and prioritized actions needed to build on past and current improvements. Over the course of the public engagement process, three downtown plan options consisting of low, medium, and high-intensity levels were presented, covering such areas as traffic circulation, parking, civic infrastructure, and private development. The final plan identifies the general infrastructure needed to support the forward vision and the actions needed to get there. Transportation is a key element in developing the type of streetscape needed to support Downtown activities in Huntersville and will be a determining factor in deciding how the 'public realm' will influence private development. The plan is also intended to encourage coordination of public actions with private investment and redevelopment/reuse decisions that help to realize a robust and attractive downtown, including convincing rationale to support putting 'skin in the game'. A development strategy that also respects the integrity of the surrounding neighborhoods was a topic that required careful attention throughout the process.

<https://www.letsplanhuntersville.org/downtown-plan-project-details>



## Relative Experience

shook kelley

### Gastonia Downtown Development Strategy - Gastonia, NC

**Project Type:** Urban Mixed-Use & Adaptive/Historic Re-Use and Infill Development Strategy

**Roles:** Vision Planning, Community Outreach & Marketing

**Dates of Involvement:** 2023-2024

Shook Kelley recently completed a development strategy for the Gastonia Business Association and downtown Gastonia to transform the 20th century downtown into a regional center of relaxation, living and gathering. This new strategic plan considers the next logical steps along a path to repositioning the traditional downtown to serve the expanding needs of a growing Gastonia and region. With an enviable stock of early 20th century historic mercantile structures and unbuilt public land, Gastonia is positioned to capitalize upon the continued growth of the region. This effort builds upon past planning efforts, taking the best from each—the proven and time-tested ideas—and brings them forward to our time. Unlike previous master plans, it is coupled to a bold and yet proven strategy for seeing the vision become a reality.

#### Reference:

Mr. Patrick T. Mumford, CEO  
Gaston Business Association  
601 W. Franklin Blvd.  
Gastonia, NC 28052  
Tel 704-864-2621  
Patrick@gastonbusiness.com



### Historic South End / Charlotte Trolley Vision Plan - Charlotte, NC

**Project Type:** Urban Mixed-Use & Adaptive/Historic Re-Use and Infill Development, Transit-Oriented Development

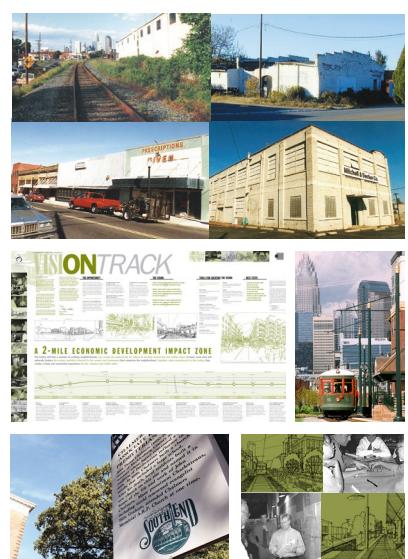
**Roles:** Vision Planning, Transit-Oriented Development Master Planning, Community Outreach & Marketing, Architecture & Interiors, Brand Development, Community Volunteering.

**Dates of Involvement:** 1992 - 2021

Shook Kelley was the brand author for an abandoned rail corridor in the 1990s with dilapidated lots and buildings, leading an effort to preserve, enhance and promote it as a dynamic, urban community offering diverse options. The goal was to create a unique and eclectic urban experience, characterized by icons of the past—brick industrial buildings, friendly streetscapes and the Charlotte Trolley—of which Shook Kelley led the effort to prepare a vision plan for in 1997 with the City of Charlotte. Shook Kelley formed a community organization for the area that was known then only as the South Boulevard Corridor. Shook Kelley next set about the pivotal process of branding the district as South End, built around a notion of preserving history while making it new, fresh and accessible. Then came the establishment of a physical forum to promote public participation and creation of a permanent funding mechanism passed by Charlotte City Council (Business Improvement District) that is still in effect today.

#### Reference:

Mr. Robert Walsh, Principal,  
JGSC Group  
(Former President, Charlotte  
Center City Partners)  
16 N Centre St  
Merchantville, NJ 08109  
Tel 917-912-3795  
Email: Rob.walsh@nyc.com



## Relative Experience



### Huntersville Downtown Master Plan - Huntersville, NC



#### Reference:

Mr. Brian Richards, Planning Director  
Town of Huntersville  
105 Gilead Road, 3rd Floor  
Huntersville, NC 28078  
Tel 704-766-2218  
brichards@huntersville.org

#### Project Status:

Completed 2022

#### Staff Involved:

Rick Tipton, PE, PLS  
Lance Hartland, PE

The objective was to evaluate potential roadway improvement scenarios in downtown that would be included in the master plan update. Analysis performed in accordance with NCDOT Congestion Management guidelines. The Future Year 2040 roadway conditions were analyzed assuming six downtown area road network scenarios. Analysis included traffic data review at 13 intersections in the downtown core, review of the modeling of existing, future nobuild and build conditions (3 configurations) utilizing Synchro 11 with SimTraffic software and performing a maximum queue length analysis.

### On-Call Professional Engineering and Architectural Design Services - Gastonia, NC



#### Staff Involved:

Rick Tipton, PE, PLS  
Angel Pridgen, PE, ENV SP  
Adam Archual  
Lance Hartland, PE  
Sierra Browder, AICP

#### Project Status:

Ongoing

#### Reference:

Emily Davis, PE  
704.854.6698

The City of Gastonia and greater region continue a strong pattern of growth, making it a priority for the City's infrastructure to keep pace to meet increasing safety, health, and mobility needs. Gannett Fleming was selected as a provider for services to achieve Gastonia's 2021–23 Strategic Plan, which outlines several projects to address the challenges of population increase, aging infrastructure, demand for transportation modal choice, and the desire for congestion relief. From our hands-on experience working with numerous local municipalities, we bring lessons learned from successful projects, understand how to be sensitive to the needs of the community, and how to deliver on time and budget.

### Moore Avenue Pedestrian & Streetscape Improvements - Mooresville, NC



#### Project Status:

Ongoing

#### Reference:

Ashton Walker  
704.799.4093  
awalker@mooresvillenc.gov

#### Staff Involved:

Angel Pridgen, PE, ENV SP  
Adam Archual  
Sierra Browder, AICP

This federally funded streetscape enhancement project aims to improve the aesthetics of Moore Avenue to create continuity with Main Street and help beautify downtown Mooresville by enhancing the pedestrian and bicycle experience, increasing mobility and connectivity. Gannett Fleming is preparing a Federal Categorical Exclusion NEPA document and construction bid documents to ensure the locally administered project is executed according to NCDOT and FHWA standards and procedures. A detailed traffic analysis and signal warrant study were conducted to ensure minimal impact on surrounding streets.

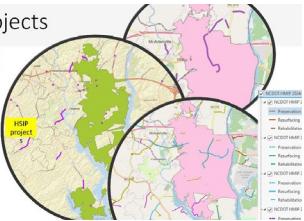
## Relative Experience



### Construction, Right-of-Way, & Utility Cost Development for Transportation Bond - Belmont, NC

#### GCLMPO – Other Projects

2 CMQ projects		
Proj. Name	Proj. Name	Proj. Name
C-5025	Trail	Belmont Rail Trail
C-5004A	Sidewalk	Belmont Mt. Holly Rd Sidewalk Connection
• 3 roadway segments and 5 intersections are under NC DOT RSP considerations		
PH. NAME * RANK	LOCATION	
35500110	113.12000 IN THE VICINITY OF SR 2022	
35500108	301.00000 IN THE VICINITY OF SR 2022	
35500051	0210.221 IN THE VICINITY OF SR 2022	
PH. NAME * RANK	LOCATION	
35500442	508.100 (IMP 17.70) AT SR 2020 (IMP 1.80)	
35500443	508.100 (IMP 17.70) AT SR 2020 (IMP 1.80)	
35500483	3005.273 (IMP 0.00) AT NC 239 (IMP 0.00)	
35500251	1807.379 (IMP 0.01) AT NC 240 (IMP 0.01)	



#### Reference:

Miles Braswell  
City Manager  
City of Belmont  
704.901.2067  
mbraswell@cityofbelmont.org

#### Project Status:

Ongoing

#### Staff Involved:

Rick Tipton, PE, PLS  
Baohong Wan, PhD, PE

Gannett Fleming is analyzing the City's demographic data and economic trends to gain insight on population dynamics and economic development patterns that impact the City. We are identifying the existing infrastructure's critical capacity gaps within the City's transportation systems, utilities, or other essential services and recommending improvements to enhance overall functionality and efficiency.

### West Gate City Boulevard Complete Streets Study and Conceptual Design - Greensboro, NC



#### Reference:

Chris Spencer, PE  
Engineering Division Manager  
336.373.4368  
Chris.Spencer@greensboro-nc.gov

#### Project Status:

Completed

#### Staff Involved:

Rick Tipton, PE, PLS  
Angel Pridgen, PE, ENV SP  
Adam Archual

As part of a mission to create a more equitable transportation system, the Greensboro Department of Transportation partnered with Gannett Fleming to perform a corridor feasibility study for a 1.8-mile section of West Gate City Boulevard, with the goal to maximize multimodal utility within the existing right-of-way. A traffic capacity analysis supported elimination of a third westbound lane and therefore a four-lane section will be carried through the entire project. The improvements will create a safer, more inviting streetscape that will strengthen existing investments and attract others. A 10-ft path along the north side of the roadway will accommodate bicyclists of all comfort levels and connect to a Downtown Greenway.

### On-Call Transportation Services - Durham, NC



#### Reference:

Leslie Tracey, PE, PTOE, RSP1  
Engineering Manager,  
City of Durham  
919.560.4366 ext 36437  
leslie.tracey@durhamnc.gov

#### Project Status:

Ongoing

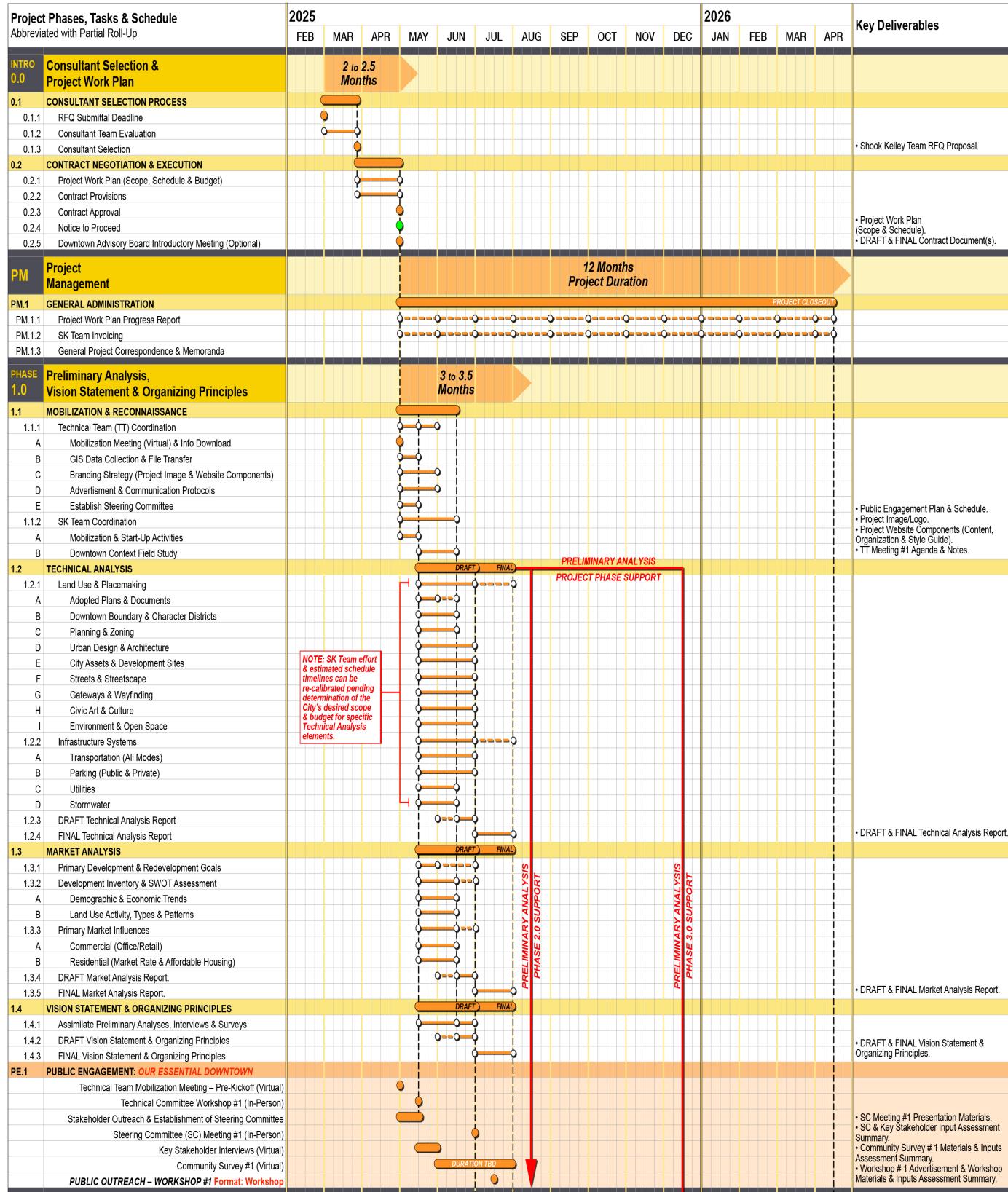
#### Staff Involved:

Rick Tipton, PE, PLS  
Adam Archual

Gannett Fleming is providing on-call professional transportation and engineering services for a variety of multimodal traffic volume locations throughout the area covered by the Durham Chapel Hill Carrboro Metropolitan Planning Organization and included: 48-hour vehicle volume and class counts at 405 locations throughout the MPO; 13-hour Turning Movement Counts at 63 intersections for vehicular, bicycle and pedestrian activity as well as Non-motorized (bicyclist and pedestrian) counts at intersections or midblock crossings at 90 locations; Rapid Rectangular Flashing Beacons installed at 8 school crossings and various trail crossings to enhance safety and visibility for pedestrians and bicyclists; and new traffic signals for enhanced multimodal connectivity and transit/bus service accessibility on the University Drive corridor.

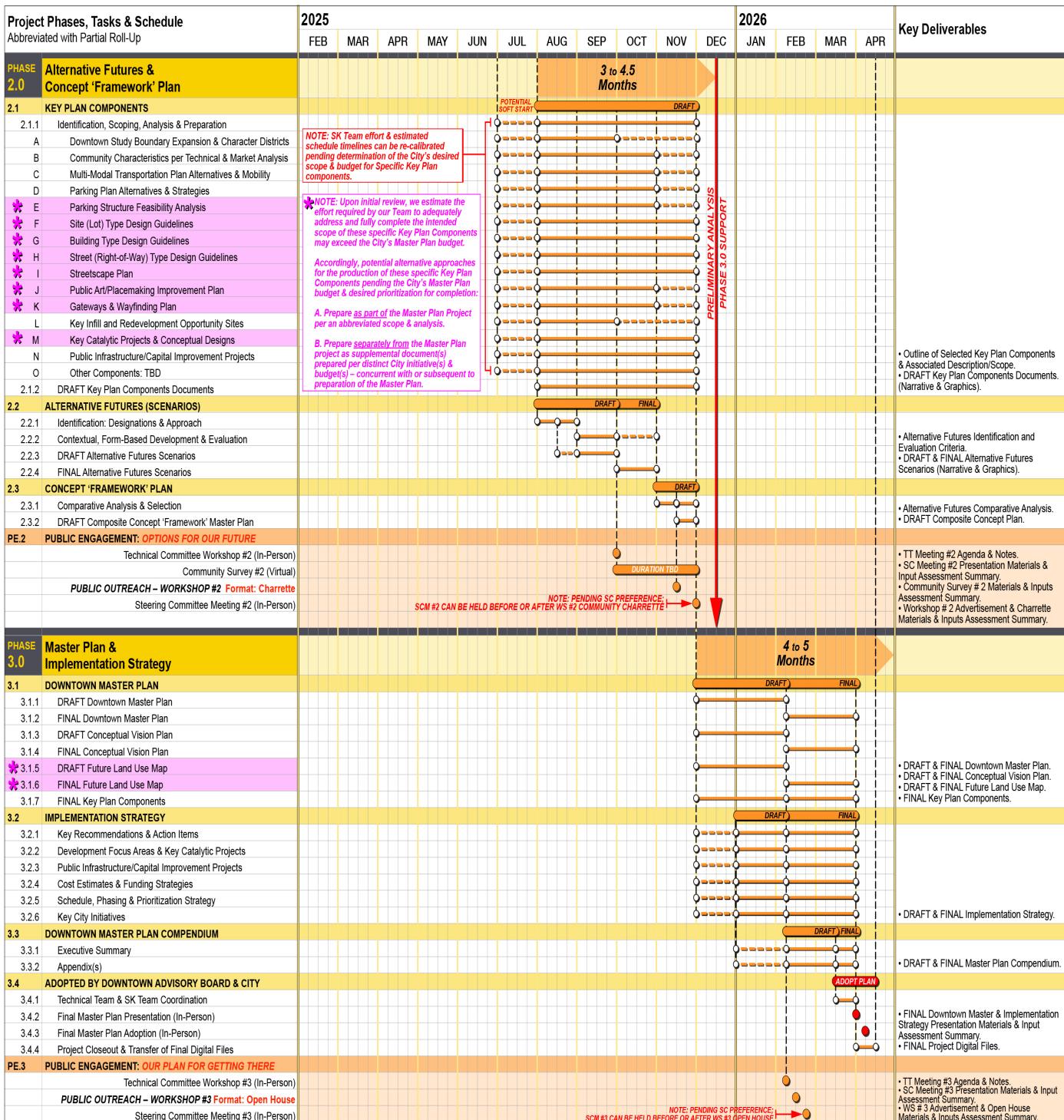
# Proposed Project Schedule Estimate Only - Subject to change based on final Scope of Services

Together with our consultant team, we have prepared the following preliminary Project Work Plan composed of the Project Phases, Tasks, Schedule, and Key Deliverables, which applies our Project Approach to the purpose and need established by the City of Monroe for the Downtown Master Plan Update.



continued on next page

Our proposed Project Scope is organized under a succinct framework defined by an introduction followed by three phases and associated tasks, which are tied directly to the estimated Project Hours on Pages 28 and 29. If selected, Shook Kelley will work diligently with the City to quickly refine and finalize the Project Work Plan as the basis for executing our contract.



The Project Schedule we propose charts a course that should deliver the final plan at or near a 12-14 month timeframe. Shook Kelley is confident that upon execution of a contract, our team can commence services within a 3-week window from a Notice To Proceed from the City of Monroe.

## Proposed Hours Estimate Only - Subject to change based on final Scope of Services

Project Phases, Tasks & Estimated SK Team Effort Abbreviated with Partial Roll-Up		Estimated SK Team Effort (Hrs)					
		Shook Kelley (SK)	Gannett Fleming (GF)	Gibbs Planning Group (GPG)	Integral Group (IG)	TOTAL SK Team Effort	Percent of Total (%)
<b>PM</b>	<b>Project Management</b>	36	0	0	0	36	3%
PM.1	GENERAL ADMINISTRATION (DURATION OF PROJECT)	36	0	0	0	36	
<b>PHASE 1.0</b>	<b>Preliminary Analysis, Vision Statement &amp; Organizing Principles</b>	276	38	53	55	440	35%
1.1	MOBILIZATION & RECONNAISSANCE	62	4	4	4	74	17%
1.2	TECHNICAL ANALYSIS	60	22	1	1	102	23%
1.3	MARKET ANALYSIS	12	0	40	40	92	21%
1.4	VISION STATEMENT & ORGANIZING PRINCIPLES	32	2	2	2	38	9%
PE.1	<b>PUBLIC ENGAGEMENT: OUR ESSENTIAL DOWNTOWN</b>	110	10	6	8	134	30%
	Technical Team Mobilization Meeting – Pre-Kickoff (Virtual)	6	2	0	0	8	
	Technical Committee Workshop #1 (In-Person)	16	2	2	2	22	
	Stakeholder Outreach & Establishment of Steering Committee	8	0	0	0	8	
	Steering Committee Meeting #1 (In-Person)	16	2	2	2	22	
	Key Stakeholder Interviews (Virtual)	8	0	0	0	8	
	Community Survey #1 (Virtual)	24	0	0	0	24	
	<b>PUBLIC OUTREACH – WORKSHOP #1 Format: Workshop</b>	32	4	2	4	42	
<b>PHASE 2.0</b>	<b>Alternative Futures &amp; Concept 'Framework' Plan</b>	312	110	10	20	452	36%
2.1	KEY PLAN COMPONENTS	128	86	4	4	222	49%
2.2	ALTERNATIVE FUTURES (SCENARIOS)	72	10	4	4	90	20%
2.3	CONCEPT 'FRAMEWORK' PLAN	32	4	2	2	40	9%
PE.2	<b>PUBLIC ENGAGEMENT: OPTIONS FOR OUR FUTURE</b>	80	10	0	10	100	22%
	Technical Committee Workshop #2 (In-Person)	16	4	0	4	24	
	Community Survey #2 (Virtual)	16	0	0	0	16	
	<b>PUBLIC OUTREACH – WORKSHOP #2 Format: Charrette</b>	32	4	0	4	40	
	Steering Committee Meeting #2 (In-Person)	16	2	0	2	20	
<b>PHASE 3.0</b>	<b>Master Plan &amp; Implementation Strategy</b>	244	47	4	25	320	26%
3.1	DOWNTOWN MASTER PLAN	64	16	0	6	86	27%
3.2	IMPLEMENTATION STRATEGY	44	23	4	13	84	26%
3.3	DOWNTOWN MASTER PLAN COMPENDIUM	40	1	0	1	42	13%
3.4	ADOPTED BY DOWNTOWN ADVISORY BOARD & CITY	32	3	0	1	36	11%
PE.3	<b>PUBLIC ENGAGEMENT: OUR PLAN FOR GETTING THERE</b>	64	4	0	4	72	23%
	Technical Committee Workshop #3 (In-Person)	16	2	0	2	20	
	<b>PUBLIC OUTREACH – WORKSHOP #3 Format: Open House</b>	32	0	0	0	32	
	Steering Committee Meeting #3 (In-Person)	16	2	0	2	20	
<b>TOTALS</b>		868	195	67	100	1,248	100%
		70%	16%	5%	8%		

# Proposed changes to the Project Scope (Appendix A)

Shook Kelley would like to propose the following changes to the Project Scope (Appendix A):

## Technical Team Mobilization Meeting

Conduct a virtual pre-kick-off Technical Team meeting with the City Team for introductions and to share initial information and documents with the Shook Kelley Team for use and review prior to the in-person Technical Team Meeting #1.

## Key Plan Components

Upon initial review, we estimate the effort required by our Team to adequately address and fully complete the intended scope of the following specific Key Plan Components\* **may exceed** the City's Master Plan budget:

- Parking Structure Feasibility Analysis.
- Site (Lot) Type Design Guidelines.
- Building Type Design Guidelines.
- Street (Right-of-way) Type Design Guidelines.
- Streetscape Plan.
- Public Art/Placemaking Improvement Plan.
- Gateways and Wayfinding Plan.
- Key Catalytic Projects and Conceptual Designs (pending desired quantity and scope of design).
- Future Land Use Map.

\* *Key Plan Components as we have identified per our understanding of the Project Scope (Appendix A).*

Accordingly, pending determination of the City's Master Plan budget and desired prioritization, potential alternative approaches for the production and completion of any of these specific Key Plan Components include:

- A. Prepare as part of the Master Plan Project per an abbreviated scope and analysis.
- B. Prepare separately from the Master Plan Project as Supplemental Document(s) prepared per distinct City initiative(s) and budget(s) – concurrent with or subsequent to preparation of the Master Plan.

## Non-Linear Services

Consider inclusion of a separate budget for Non-Linear Services by our Team related to supplemental activities which may arise during the course of the Master Plan process including, but not limited to:

- Peer Review of influential Downtown project proposals (public or private).
- Key Agency Stakeholder Meetings, such as North Carolina Department of Transportation Department, CSX Transportation, others.
- Grant support for potential relevant funding opportunities (state and federal).

*continued*

# Proposed changes to the Project Scope (Appendix A)

## City Support

Our Team envisions a collaborative approach to creating the Downtown Master Plan and will seek to attain and leverage collective insight and support from the City internal staff and other department leaders comprising the Technical Team as appropriate throughout each phase of the Project.

Furthermore, we embrace potential opportunities for the City Technical Team to support the Consultant Team related to the following tasks including, but not limited to:

- Lead SK Team on a tour of the Project Study Area.
- Identify known/designated 'opportunity development sites' and City-owned properties.
- Facilitate basic project-related City GIS coordination.
- Identify potential Key Stakeholders and their roles/properties in advance of the interviews.
- Host and manage the Project website and online community survey(s).
- Coordinate meeting agenda content and distribution.
- Craft and distribute announcements for Public Engagement events (via Project website, social media, flyers/posters, other TBD).
- Coordinate Public Engagement event venue location(s) and help set-up (tables/chairs, media equipment, etc.) per inputs from the Consultant Team.
- Participate at Public Engagement events (overview of department initiatives, table-side topical discussions, etc.).

## Shook Kelley References

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Project:  
**Huntersville Downtown Master Plan**

**Services:** Site Analysis, Alternative Futures Planning, Master Planning, Community Outreach & Marketing

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City of Lexington  
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Project:  
**Lexington Depot District & Multi-Modal Station**

**Services:** Transit-Oriented Development Master Planning, Station Area Planning, Architecture, Community Outreach & Marketing, City/County/State/Federal Agency Collaboration, Strategic Construction Phasing & Funding

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Project:  
**Five Points Charlotte**

**Services:** Site Analysis, Alternative Futures Site Planning, Community Engagement, Architectural Urban Open Space Visioning, Modeling, Architecture, Strategic Construction Phasing & Funding