

Response to Request for Proposals (RFP)

Comprehensive Plan



North Carolina

June 29, 2018

Cristina Shaul, Public Information Officer
216 South Main Street
PO Box 579
Davidson, NC, 28036
cshaul@townofdavidson.org

CLARION

planning
NEXT
moving communities forward.

 **DPFG**
DEVELOPMENT PLANNING & FINANCING GROUP, INC.

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Cristina Shaul
Public Information Officer
216 South Main Street
PO Box 579
Davidson, NC, 28036
cshaul@townofdavidson.org

RE: RFP for the Comprehensive Plan, Town of Davidson, North Carolina

Dear Ms. Shaul:

We are pleased to submit this response to the Town of Davidson's request for proposals (RFP) to prepare an update to the Town's Comprehensive Plan.

Clarion Associates is a national planning and zoning consulting firm with offices in Chapel Hill and Denver, and affiliate offices in Cincinnati and Philadelphia. Firm principals have decades of experience in assisting local governments prepare comprehensive and small area plans, growth management strategies, design approaches, and plan implementation strategies for communities throughout the Southeast and across the nation.

To provide Davidson with a complete array of planning services, Clarion Associates is joined by teaming partners **PlanningNEXT** that brings award-winning experience leading highly successful public engagement efforts and preparing design-based plans, and **Development, Planning, & Financing Group, Inc.** that will assist with framing the economic and fiscal opportunities and challenges that Davidson faces as it creates a renewed vision for the future.

Our team members have significant experience working with high-growth communities that value community character and design; well-educated and engaged citizenry that have high expectations for community planning; and town-gown issues and opportunities. We have assisted many communities in the region to develop plans and codes, including Charlotte, Mecklenburg County, Mooresville, Kannapolis, Iredell County, and others. We are actively working today to develop a comprehensive plan for neighboring Mooresville.

In reading our proposal, you will find that our team is well-positioned to assist the Town to develop an aspirational 21st century Comprehensive Plan that provides strategic guidance to achieve Davidson's vision for the future, and meets the intent set out in the RFP. We are very excited about the possibility of working with the Town of Davidson and welcome an opportunity to discuss our proposal with you in person.

Sincerely,

A handwritten signature in black ink, appearing to read "Leigh Anne King".

Leigh Anne King, AICP, LEED AP
Principal and Project Manager
919-967-9188 | laking@clarionassociates.com | www.clarionassociates.com

A. Firm Profile

CLARION

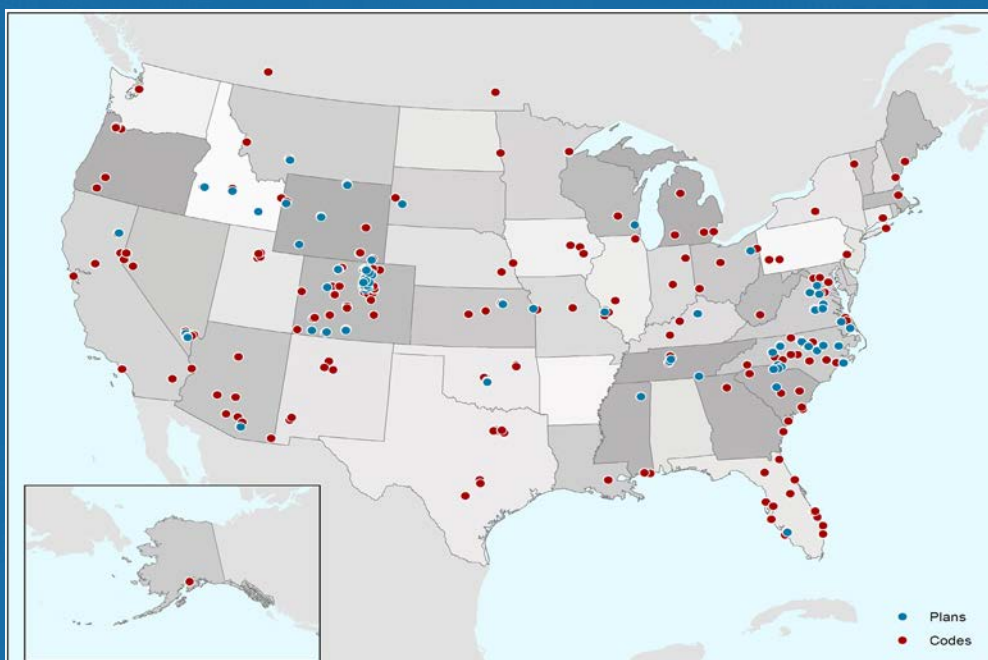
Clarion Associates, LLC is a nationally recognized, land planning and zoning consulting firm with offices in Chapel Hill and Denver. Since our founding in 1992, our firm has had a unique combination of talent that covers the fields of land use planning, design, code preparation, and land use law.

In association with our affiliate offices in Philadelphia and Cincinnati, we offer a complete package of planning, land use and scenario analysis, land use law, growth management, real estate economics, and community development services. This combination allows us to develop creative solutions to difficult land use challenges.

For 25 years, Clarion Associates has committed to providing quality services to our clients by ensuring that all projects are led and managed by experienced firm principals. Our size and experience allow us to both provide quality planning and zoning expertise to a wide range of communities, and to dive deeply in our work to focus on the interesting opportunities and challenges of each project. Clarion is a partner-owned firm that employs 17 practicing professionals.

We have represented public sector clients on a variety of land use planning and zoning matters. Our principals have written plans and drafted ordinances, regulations, and design standards throughout the United States, including nearly 200 zoning and development ordinances and more than 100 community plans.

Clarion will serve as the primary team leader, and will provide project management services, planning analysis, public engagement, policy development, implementation strategies, and meeting facilitation. Our Chapel Hill office will lead the planning effort, allowing our planning professionals quick and easy access to the Town of Davidson.



DEMONSTRATING PLANNING EXCELLENCE

Clarion is most unique among our competitors in that planning is our primary service area and we constantly renew our skills and knowledge of best practices in the public sector planning arena. We focus almost entirely on planning, growth management, plan implementation, and sustainability.

Clarion's planning division was established in 2000. Since that time, Clarion has successfully completed numerous comprehensive plans and other related planning projects as the lead firm. The vast majority of these projects have involved the coordination of multi-disciplinary teams, similar to our team for Davidson.

Clarion takes a "hands on" approach with all of its projects. Our ability to do this is supported by our emphasis on maintaining a relatively small, but highly skilled and efficient staff. We establish strong working relationships with our clients that extend from the first set of meetings through adoption. We have a proven track record of working with staff in other communities and organizations on collaborative planning projects of this nature. In these instances, our primary role as consultants is to provide the needed resources and expertise to support staff as we work together to develop cutting-edge outreach methods, identify and analyze issues, introduce new ideas and approaches in to the planning process, and assist decision-makers as they deliberate. We recognize that Town of Davidson staff and leadership will be the ones who ultimately carry out the plan, and we will work closely with you to ensure that you and the community "own" the final products.





planning-next.com
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Services

Pre-Planning
Visioning + Strategic Planning
Comprehensive Planning + Urban Design
Social Media + Web-Based Engagement
Visual Communication

Select Town Gown Planning Experience

- Amherst, Maryland (University of Maryland, Amherst College, Hampshire College)
- Athens-Clarke County, Georgia (University of Georgia)
- Columbia, South Carolina (University of South Carolina) ^(A)
- Columbus, Ohio (The Ohio State University)
- Dayton, Ohio (University of Dayton)
- Delaware, Ohio (Ohio Wesleyan University)
- Lee County, Alabama (Auburn University)
- Northfield, Montana (St. Olaf College, Charleton College)
- Montgomery, Alabama (Alabama State University)
- Oxford, Ohio (Miami University)
- Tuscaloosa, Alabama (University of Alabama)
- Valparaiso, Indiana (Valparaiso University)

^(A) Award-winning project

Planning NEXT

Great, livable communities don’t just happen—they’re created. For nearly 20 years we’ve helped communities come together to create plans that move them forward.

Here are some keys to our success.

Create an enduring place

Community character. It sets a place apart. It incites loyalty. It attracts business and growth. It draws people to call a place “home.” Every community has it; but not every community knows how to manifest it. That’s where we come in. We help communities understand and embrace their physical character. Then we create a character-enhancing plan rooted in quality development.

Invite genuine participation

When it comes to a community’s future, most agree that citizens should have their say. The problem, though, is getting a broad and fair enough representation—and then deciding what to do with the ideas. We attract participation from a cross-section of citizens and stakeholders, including those typically not involved in planning efforts, and ensure that involvement is a real choice to be excited about.

Manage the effort

Every project brings its share of complexity. Whether engaging diverse stakeholders, dealing with big or inflexible budgets, coordinating the efforts of multiple committees, or all of these at once, we’re known for skillfully facilitating, managing and bringing together personalities, ideas and possibilities into a single, actionable plan.

Communicate clearly

True understanding and acceptance are always more favorable than superficial buy-in or forced resignation. That’s why we believe in integrating insight into even the most complex community and planning issues. We help stakeholders make informed decisions about potential solutions while promoting dialogue and open communication among internal and external audiences.

Cultivate understanding

For real impact, a plan needs to include a strategic communications effort—one that informs and inspires. We help to clearly express the plan in a way that empowers participants and encourages community-wide support. From marketing material to web sites to social media, we leverage graphic design and collateral to educate stakeholders about the process while building emotional attachment to the plan.

Advance prosperity

Planning is about getting results. From the initiation of a project, we are focused on implementation. To get there, it takes envisioning what is possible, engaging at the grassroots and leadership levels, affirming direction, and developing a realistic action plan with clear implementation steps. To the extent a community’s prosperity is improved—individuals, business, institutions and government—so much else is possible.

Select Planning Experience

- Aiken, South Carolina
- Allen County, Indiana
- Amherst, Massachusetts
- Athens-Clarke County, Georgia
- Cary, North Carolina (pre-planning)
- Charleston County, South Carolina (A)
- Cincinnati, Ohio (A)
- Clark County, Ohio
- Columbia, South Carolina (A)
- Decatur, Alabama
- Delaware, Ohio
- Dublin, Ohio (A)
- East Central Indiana
- Elkhart County, Indiana (A)
- Franklin, Tennessee
- Greenville, North Carolina
- Grove City, Ohio (A)
- Hyattsville, Maryland
- Lancaster County, Pennsylvania (A)
- Lee County, Alabama
- Loudon County, Virginia
- Metropolitan Washington Council of Governments
- Mobile, Alabama (A)
- Morgantown, West Virginia
- Richland County, South Carolina (A)
- Rockville, Maryland
- Upper Arlington, Ohio (pre-planning) (A)
- Valparaiso, Indiana (A)
- Wayne County, Ohio (pre-planning)

(A) Award-winning project

Firm History

Planning NEXT, formerly known as ACP Visioning + Planning, is led by principal Jamie Greene, AIA FAICP—a nationally recognized leader in helping clients and communities to create a shared sense of purpose and place. Highlights from the firm's experience include:

National recognition

Planning NEXT has produced over a dozen award-winning plans for clients throughout the United States, including Alabama; Florida; Hawaii; Indiana; Ohio; Pennsylvania and South Carolina. In addition to these state APA chapter awards, the firm's work has garnered two national awards from APA—including the 2014 Daniel Burnham Award for a Comprehensive Plan for Plan Cincinnati and the Excellence Award for Innovation in Economic Development & Planning for the East Franklinton Creative Community District Plan—and one national award from the Congress for the New Urbanism in 2013.

Commitment to engagement

Planning NEXT has conducted record breaking community engagement events such as the largest public event in the history of Columbus, Ohio (nearly 2,000 participants at one town hall meeting) and management of its 230-member commission; the gathering of 19,000 ideas from New York City residents healing from the tragedy of September 11th; and perhaps the largest meeting in North Carolina, with over 800 participants, in the Town of Cary.

Results orientation

Planning NEXT has a proven track record of creating visions and plans rooted in a community's values and unique character. Our legacy has been felt throughout the country—in Franklin Tennessee, which recently celebrated 15 years of success in implementation; in Charleston County, South Carolina, which has prospered as the cultural capital of the southern United States; in Manatee County, Florida, which has sustained a commitment carefully directing development while protecting its fragile natural resources; and in Upper Arlington, Ohio who's first comprehensive plan in 40 years led to a continued culture of planning (zoning code update, area studies and redevelopment plans).



ABOUT DPFG

Development Planning & Financing Group, Inc. (“DPFG”) is a national real estate consulting firm specializing in fiscal and economic impact analysis, public infrastructure finance, entitlement services, development feasibility analysis, and capital markets advisory services. As such, DPFG’s professional services are provided throughout the development process—from the project’s conceptual stage through its execution. Along with DPFG’s comprehensive financial, fiscal, and economic impact experience, the firm’s respected reputation with public and private sector decision-makers demonstrate DPFG’s capability as a strategic partner.

OUR SERVICES

In addition to calculating billions of dollars in economic impacts throughout the United States, DPFG provides a targeted range of services to both public and private sector clients:

- Economic Impact Analysis
- Impact Fees and Utility Rate Studies
- Tax Increment Financing
- Fiscal Impact Analysis
- Land Secured Public Financing
- Entitlement Services
- District Management Services
- Incorporation Feasibility Studies
- Synthetic Tax Increment Financing
- Capital Budgeting
- Special Service Districts
- Stewardship Districts and SRAs
- Cash Flow Feasibility/Investment Risk and Return Analysis
- Investment Analysis of Development Projects and Pro Forma Modeling

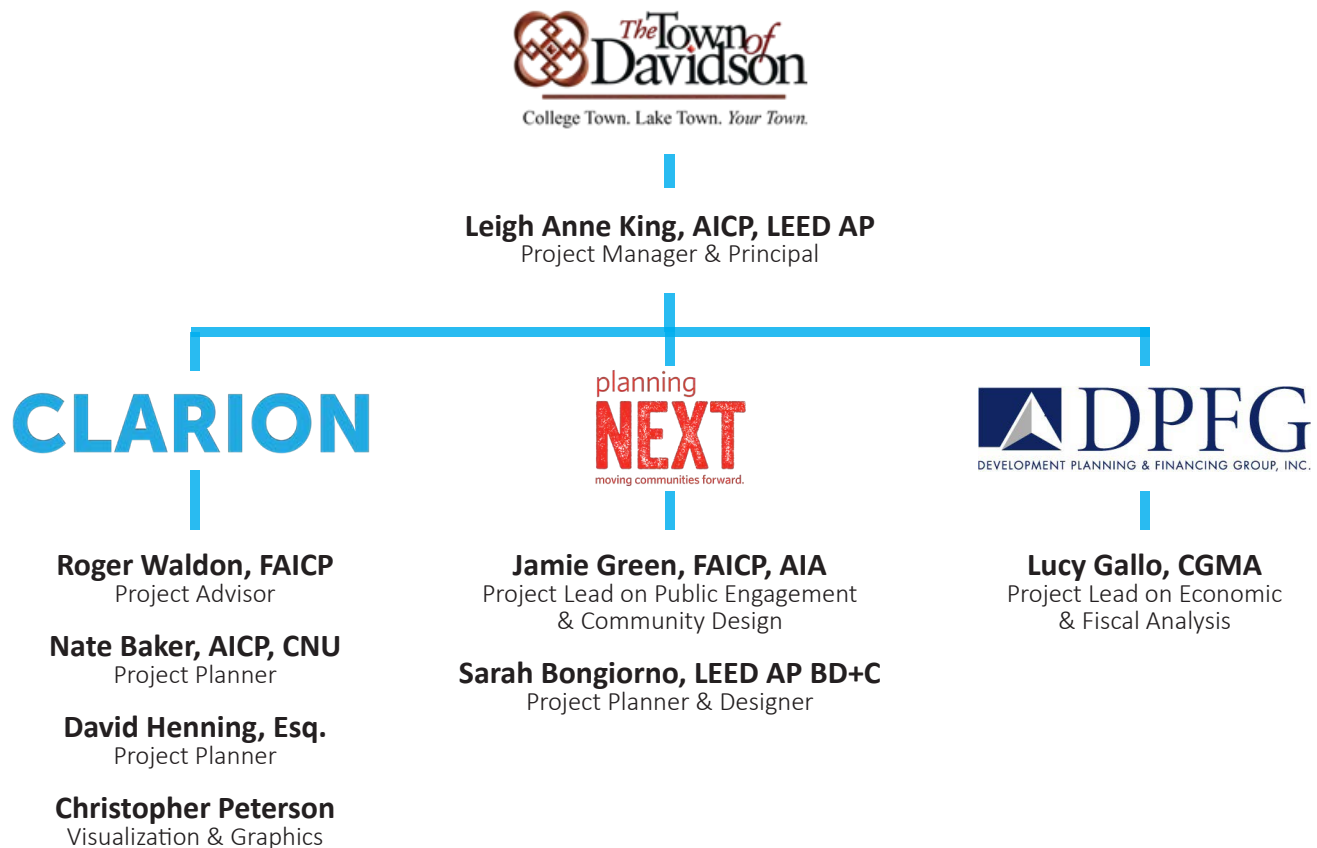


B. Project Team

We understand that the most critical aspects of this Comprehensive Plan Update are strategic in nature: managing growth in Davidson with the backdrop of significant regional development pressures, planning for adequate infrastructure to serve future residents, enhancing transportation mobility, reinforcing placemaking objectives, maintaining fiscal health, and promoting a positive environment for community residents, visitors, and Davidson College staff, faculty, and students.

With that in mind, we have created a team that provides expertise in the core service areas Davidson will need to create a high quality long range plan: land use planning, public engagement, community design, historic preservation, town-gown planning, and fiscal and economic assessments of growth options.

The principals of our collective team have long-standing relationships on a professional and personal level. In short, we know how to work together and have a successful track record of collaborating to develop actionable plans for our clients.



Clarion Associates

LEIGH ANNE KING, AICP, LEED AP | PRINCIPAL

Leigh Anne King is a Principal and planner in Clarion's North Carolina office. With over 17 years of experience, Ms. King has served as project manager on a variety of public sector planning projects: comprehensive plans, land use plans, growth management plans, neighborhood plans, affordable housing implementation programs and ordinances, design strategies, zoning ordinance updates, and impact fee support studies. Most recently she has led development of several plans in the Southeast, including the Cary (NC) Community Plan, the Greenville (NC) Horizons 2026 Plan, and the Kannapolis (NC) Comprehensive Plan. She is currently leading planning efforts in Mooresville and Wake County, NC. Her primary focus is on project management, developing public engagement strategies, and development of policy frameworks and implementation strategies. She was the primary author of seven award winning plans in the Carolinas. She frequently speaks at national and state conferences on the topics of comprehensive planning, affordable housing, local food systems, and sustainability. She served as planner and lead author on the award-winning Iredell County Comprehensive Plan.



Master of City and Regional Planning, University of North Carolina, Chapel Hill

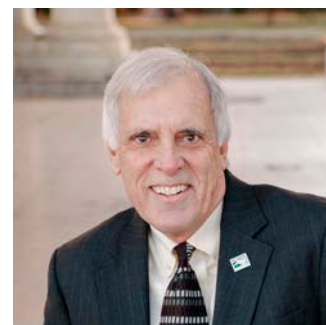
Bachelor of Arts, University of Tennessee, Knoxville

American Institute of Certified Planners

LEED AP

ROGER WALDON, FAICP | SENIOR CONSULTANT

Roger Waldon is a Senior Consultant with Clarion Associates, based in Clarion's North Carolina office, working with cities and counties (24 communities to date) in preparing plans and ordinances. Mr. Waldon led development of award-winning Comprehensive Plans in Iredell County and the City of Wilson, NC. Recent projects include work on the Greenville, NC, Horizons 2026 Plan, the NC Capital Area Metropolitan Planning Organization (CAMPO) Southeast Area Study, the Mecklenburg Livable Communities Plan, and planning assistance for Go Triangle on the Durham-Orange County Light Rail Project. Mr. Waldon served as Planning Director for the Town of Chapel Hill for 21 years, directing the Town's comprehensive planning and growth management functions, where he was described by the American Planning Association as "one of the nation's leading planning practitioners." His work has emphasized neighborhood conservation and growth management, including preparation of land use plans and special area plans, preparation and administration of design guidelines, transportation planning, annexation, capital improvements, housing and community development initiatives, evaluation of development applications, and writing zoning ordinances. Prior to his work for Chapel Hill, Mr. Waldon worked on regional initiatives as Director of Planning Programs for the Triangle J Council of Governments, a



Master of City & Regional Planning, University of North Carolina Chapel Hill

Bachelor of Science Urban Studies & Planning MIT, Cambridge

American Institute of Certified Planners, Fellow

regional planning organization based in the Research Triangle Park, North Carolina. He has also served as an elected official on the Chapel Hill-Carrboro Board of Education. Mr. Waldon is a frequent speaker at state and national planning conferences, and has lectured on planning topics at Universities in Massachusetts and North Carolina. His writing includes articles on planning processes and neighborhood conservation, and a book published by the American Planning Association, *Planners and Politics*. He is a Fellow of the American Institute of Certified Planners, and recognized as one of the Top 25 Most Influential Planners in the 50 year history of planning in North Carolina. He was recently honored with a Professional Achievement Award for significant contributions to the planning professional by the North Carolina Chapter of the American Planning Association.



Master of City and Regional Planning, University of North Carolina, Chapel Hill, NC

Fulbright Research Fellow Belo Horizonte, Brazil

Bachelor of Science Urban and Regional Studies, Cornell University, Ithaca, NY

American Institute of Certified Planners

NATE BAKER, AICP, CNU-A | ASSOCIATE PLANNER

Nate Baker brings to Clarion skills in sustainable, comprehensive, and neighborhood planning. His work focuses on developing future land use frameworks that integrate market realities, a community’s vision for character and design, and economic aspirations. Mr. Baker has recently worked on several projects to develop land use and character frameworks, including the Kannapolis, NC, Comprehensive Plan, the Cary, NC, Community Plan, and the Graham, NC, Comprehensive Plan. Mr. Baker also assists with development ordinances, and has a unique understanding of the translation between land use plans and zoning ordinances. He is currently working on the update to the State College, PA (Penn State) Zoning Ordinance. He leads the firm’s work on strategic analytics that inform policy development of client plans. Mr. Baker previously worked as a planner in El Paso, Texas, where he was a case manager for large subdivision projects, contributed to long term land use and transportation plans, and worked with the Planning Commission to write new development regulations and implement the newly adopted comprehensive plan. Since then he has contributed to multiple comprehensive plans, conducted research on development regulations, and performed urban growth analyses. He was awarded a Fulbright Research Fellowship in 2016 to study regional planning and interjurisdictional collaboration. Through his work, Mr. Baker seeks to help communities achieve safe, affordable, sustainable, resilient, and vibrant growth. Mr. Baker is fluent in Spanish and Portuguese and has helped communities provide outreach to Hispanic and Latino populations.

DAVID HENNING, ESQ. | ASSOCIATE PLANNER

David Henning is a planner and lawyer serving as an Associate with Clarion's Chapel Hill office. Most recently, David has worked on plans for Cary, NC, and Greenville, NC; zoning ordinances in Apopka, FL, Prince George's County, MD, and Richland County, SC; and a workforce housing study for Monroe County, FL. During his education he contributed to a vision plan for Chelsea, Massachusetts, including extensive community engagement, and developed a strategic framework for preservation and planning along the riverfront for Agra, India. Other projects delved into zoning, area planning, resilience, and affordable housing. Prior to his planning work, Mr. Henning performed agency monitoring for an environmental law firm in his home state of Florida. His academic projects have been recognized by the American Planning Association and the U.S. Department of Energy.



*Master in Urban Planning,
Harvard University,
Cambridge, MA,
Juris Doctor (Cum Laude)*

*Environmental Certificate Florida
State University, Tallahassee, FL*

*Bachelor of Science, Civil
Engineering, Northwestern
University, Evanston, IL*

CHRISTOPHER PETERSON | MARKETING & GRAPHICS COORDINATOR

Christopher Peterson serves as the Marketing and Graphics Coordinator for Clarion's Chapel Hill team. Chris holds a diverse background in both Communication Sciences, focusing on public relations, and Geospatial Science, focusing on GIS and remote sensing applications. Chris assists the team with various public engagement products including developing project websites, graphic design, 3D renderings, document design, GIS mapping, and drafting. In the Spring of 2017, Chris assisted the Town of Mooresville with reformatting and organizing the Town's current zoning code. After work was completed, Chris provided on site training for Town staff to maintain their zoning ordinance. Prior to joining Clarion, Chris worked with a civil engineering firm in Blacksburg, VA. There Chris performed similar duties with marketing, graphic design, and GIS applications. Chris was also highly involved with planning and participating in public meetings on multiple civil engineering projects. Other previous work experience includes working for as a contractor on the Norfolk Naval Base and with the U.S. Army Corps of Engineers aboard an oceanographic surveying vessel, charting waterways in and around the Chesapeake Bay.



*Bachelor of Science,
Geospatial Science, Radford
University, Radford, VA*

*Bachelor of Science,
Communication, Radford
University, Radford, VA*



*Masters of Urban and
Environmental Planning,
University of Virginia*
*Bachelor of Science in Architecture,
The Ohio State University*
*Fellow of the American Institute of
Certified Planners (FAICP)*
Registered Architect

Planning NEXT

JAMIE A. GREENE, AIA FAICP | PRINCIPAL

Jamie’s top priority is always to complete the mission and achieve outstanding results. Perhaps that comes from his time as an Army officer. It’s his passion for communities, however, that drives him and our work. As hands-on principal of our practice, Jamie spent the past 20 years being inspired by the voices and commitments of the communities we serve. Today he strives to help communities of all sizes and conditions answer their most fundamental question: “What’s next?”

Jamie has presented the work of Planning NEXT at many national, regional and local conferences, including: American Planning Association (APA), America Institute of Architects, Society of College and University Planners, and Railvolution. He has served as an adjunct faculty member of the Knowlton School of Architecture at The Ohio State University. Among other professional and civic activities, Jamie serves on the Collaborative Brand Marketing Committee for central Ohio, an extensive multi-year effort designed to advance the identity and prosperity of the region.



*Masters of Urban Design,
Columbia University*
*Bachelors of Architecture, Ball
State University*
*NCI Charrette System, National
Charrette Institute*
*LEED Accredited Professional:
Building Design and
Construction, USGBC*

SARAH BONGIORNO, LEED AP BD+C | SENIOR PROJECT MANAGER

When it comes to creating momentum and movement, Sarah knows a thing or two. Our clients say she “keeps the train running on time.” We say she’s not only well organized but positively passionate for design and quality places. Which explains why Sarah is able to simultaneously make every client feel like our only client while leading a range of civic initiatives.

In addition to her work with Planning NEXT, Sarah has served as an adjunct faculty member of the Knowlton School of Architecture at The Ohio State University. She also recently served on several committees for the Center for Architecture and Design including Design Week[s] and coordinated the Center’s Camp Architecture youth program. Sarah holds a Masters of Science of Architecture and Urban Design from Columbia University and a Bachelors of Architecture from Ball State University.

planning
NEXT
moving communities forward.

DPFG, Inc.

LUCY GALLO, CGMA | MANAGING PRINCIPAL, SOUTHEAST REGION

Lucy Gallo is the Managing Principal of the Southeast Region of DPFG and provides fiscal and economic impact analysis, real estate market analysis, benefit/cost modeling and public infrastructure finance (impact fees, tax increment financing, and special assessment districts) advisory services for urban development, redevelopment and comprehensive planning projects. With significant experience in community revitalization initiatives, Lucy has served as a lead fiscal consultant for numerous large-scale economic development and public/private partnership engagements.

Lucy understands that meaningful economic and fiscal impact analyses can successfully bridge the gap between traditional planning and economic reality to forge a cooperative, comprehensive community planning process. Over the years, she has assisted a diverse cross-section of communities, ranging from small towns and rural counties to large urban cities, with fiscal and economic analyses to evaluate important land-use planning initiatives. Regardless of the community's size, the goal of each engagement has been to address pertinent issues and concerns regarding long-term fiscal sustainability.

The ultimate goal of every modeling assignment is to help local governments, and their constituencies, in carrying out fiscal stewardship. Lucy's financial models are designed with utmost transparency; an approach that distinguishes her work in its field. Her studies have been subjected to the highest level of peer review, and those reviews consistently conclude that her approach to impact analysis is both thorough and comprehensive.

Lucy often collaborates with the UNC-Chapel Hill City and Regional Planning Department and the UNC School of Government on fiscal and economic impact related research, projects and publications.



*B.S., Accounting, University of
South Carolina*

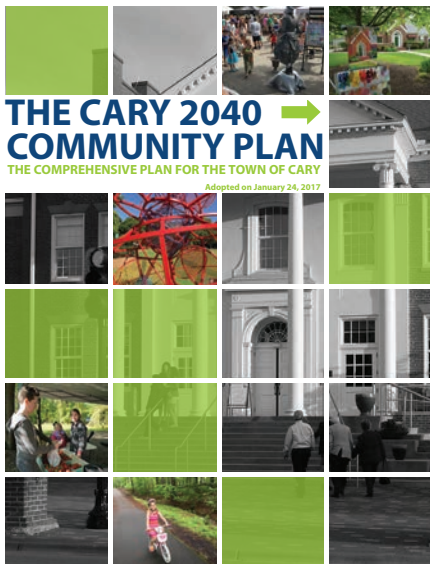
*Organizational Development
Certificate Program, UNC*

*CGMA - Chartered Global
Management Accountant*



C. Our Collective Project Experience

Clarion's Experience



Check out the award-winning plan online
at: [http://www.townofcary.org/projects-
initiatives/cary-community-plan](http://www.townofcary.org/projects-initiatives/cary-community-plan)

CONTACT

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Former Planning Director for
Town of Cary
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CARY, NC | CARY COMMUNITY PLAN (COMPREHENSIVE PLAN)

The Town of Cary has for decades been one of the premier communities in North Carolina and the Southeast, and is increasingly being recognized as one of the best places to live in the country. To address changing planning conditions, market preferences, and regional transportation initiatives, the Cary Town Council commissioned a complete review of all plans and the creation of a new comprehensive Community Plan. Clarion in partnership with PlanningNEXT was hired to lead a multidisciplinary team to prepare the Phase 1 Charter document (“the plan for the plan”), and to lead the multi-year Phase 2 effort to develop the Cary Community Plan. *The Cary 2040 Community Plan* is shaped by the most robust public engagement process in the Town’s history that integrated technical analysis and community values.

This process included development of a character-based approach to land use planning, providing greater flexibility for actual land uses and more guidance regarding the design and place making components to help guide new development and redevelopment. In addition to the town-wide land use and character plan, the plan included five special area plans, including the prominent Eastern Cary Gateway- the location of one of the last significant undeveloped areas with Interstate 40 interchange access in the Town.

The planning process included an in-depth integration of the updates to the Town's Comprehensive Transportation Plan and the Town's Land Use Plan. This included both high level testing of the Town's long range transportation plan to support the town-wide vision for future growth, and small area planning to create coordinated transportation and land use solutions that support community character objectives. The plan was unanimously adopted by the Cary Town Council January, 2017. The plan won a special recognition award by the North Carolina Chapter of the American Planning Association at the 2017 state conference.



KANNAPOLIS, NC | MOVE KANNAPOLIS FORWARD COMPREHENSIVE PLAN

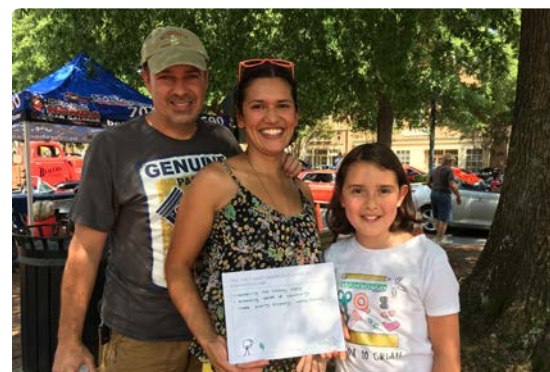
The Move Kannapolis Forward 2030 Comprehensive Plan builds off of the recent public and private investments transforming the former mill town and envisions a City where the strength of its historic heritage, growing connections to Charlotte, and burgeoning industries including high performance racing teams and medical research are harnessed for economic and environmental resilience in a way that is inclusive of all community members.

Outreach was a critical component of the planning process and public engagement took place via attendance at multiple community gatherings, discussions at local businesses, feedback at large public meetings, and online using social media and surveys. The plan established new direction for creating mixed use urban centers, revitalizing corridors, preserving the historic mill village neighborhood, prioritizing infrastructure in distressed areas, growing smart on the edges, and integrating high quality green space.

A key phase of the planning process included evaluating relationships between the draft Conceptual Growth Framework and Future Land Use and Character maps and proposed transportation system improvements. The analysis used the Metropolitan Regional Travel Demand Model as a screening tool and considered current conditions and opportunities for expanding multimodal infrastructure and enhancing connectivity, safety, aesthetics, and access management for all travel modes. The team also supported downtown revitalization by identifying the City's pressing parking, transit, and passenger rail needs and included tools for improving transit services.



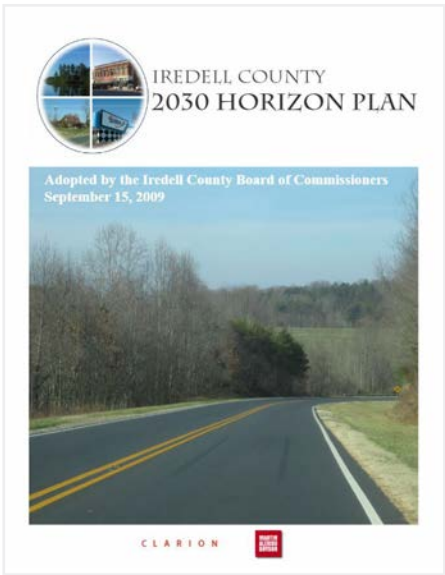
Check out the Move Kannapolis Forward plan at www.kannapolisnc.gov/MoveForward



CONTACT

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City of Kannapolis, NC
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(e) zgordon@kannapolisnc.gov





CONTACT

Ron Smith, Former Planning Director
Iredell County, NC
(p) 704.48.2703
(e) rsmith@centralina.org

NCAPA AWARD-WINNER

In 2010, the Comprehensive Plan was awarded the NC Outstanding Planning Award for the Large Community category by the North Carolina Chapter of the American Planning Association.

IREDELL COUNTY, NORTH CAROLINA | COMPREHENSIVE PLAN

Clarion Associates was hired by Iredell County, North Carolina, to develop the first county-wide comprehensive plan. Located just north of Charlotte and within the metropolitan planning area, the county has become home to many large regional employers because of its excellent regional transportation infrastructure, picturesque lakefront properties on Lake Norman, and affordable cost of living. Iredell is often called the “Crossroads to the Future” due to Interstates 40 and 77 connecting in the center of the county in the City of Statesville. These key assets have resulted in a growth pattern that has moved northward from Charlotte along I-77 and outward from the edges of the county’s southern towns: Mooresville, Troutman, and Statesville.

The plan framework built off plans developed by the towns and the county and established new urban service areas around the towns where formal agreements are needed. The plan included a new policy for extending extraterritorial jurisdiction to the municipalities, a formal policy approach for protecting northern rural and agrarian areas, updates to the county’s zoning ordinance, and other policy, funding, and educational initiatives.

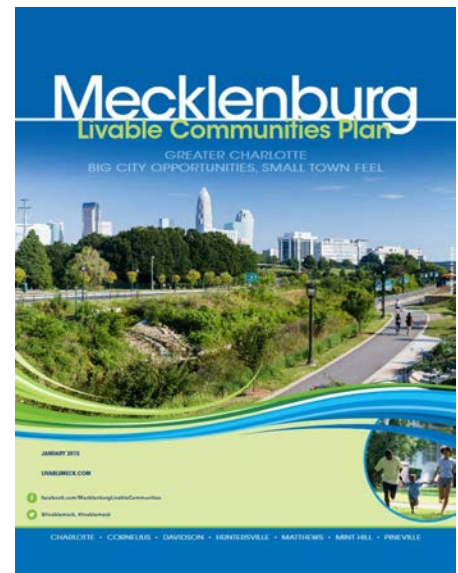
Because of the vast expanse of the planning area, Clarion worked with the county to develop a public participation approach that focused within four different geographies in the county. Public meetings and outreach were tailored to meet the needs and interests of these specific geographic stakeholders. Targeted public engagement garnered support for the plan which was adopted in the fall of 2009. The plan was awarded the NCAPA Marvin Collins Planning Excellence Award for a Large Community in 2010.



CHARLOTTE-MECKLENBURG, NC | LIVABLE COMMUNITIES PLAN

The Charlotte NC metropolitan area is a rapidly growing center of commerce and culture, nationally and internationally, made up of a network of individual communities. Eight local governments came together to construct a Livable Communities Plan. Clarion Associates, teamed with ICMA, worked with Mecklenburg County, Charlotte, Cornelius, Davidson, Huntersville, Matthews, Mint Hill, and Pine Level to prepare the Mecklenburg Livable Communities Plan. The team prepared a plan with a unified vision for the future, and a set of collaborative strategies and actions. The project included review of existing plans, programs, and policies currently in place in each of the eight jurisdictions, to identify common themes and strategies. A focus was to highlight areas where the current work of individual local governments can be better coordinated to achieve collaborative outcomes, and to highlight gap areas where new initiatives and discussions are needed.

Clarion prepared the evaluation of local plans, policies and programs, and assisted in designing/implementing an extensive community outreach effort to identify issues and test the viability of proposed new strategies. Outreach included community workshops, stakeholder meetings, presentations to elected governing boards, an interactive website, and use of social media. The completed Plan includes a Vision, Guiding Principles, Strategies, and Recommended Actions. The Actions identify implementation partners and performance measures to be able to monitor success over time. Implementation of the Plan is underway.



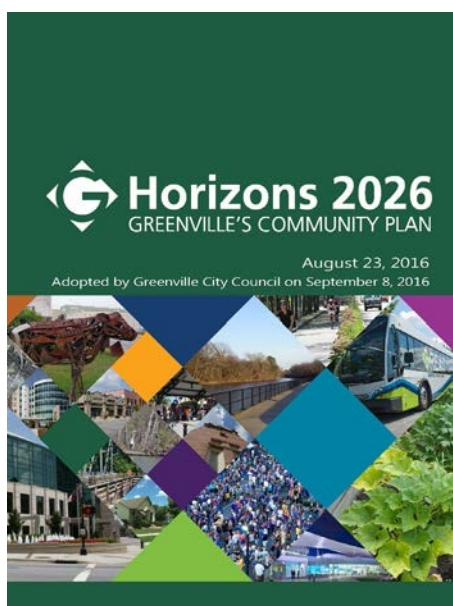
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GREENVILLE, NC | COMPREHENSIVE PLAN UPDATE (HORIZONS 2026 PLAN UPDATE) AND SPECIAL AREA PLANS

Where will the next 40,000 residents of Greenville live, work, and play? That is the critical question that was evaluated as part of the Horizons 2026 Plan update. In 2015, the City of Greenville hired the Clarion Associates team, including PlanningNEXT, to help shape the update to the city's comprehensive plan. Taking a new tailored approach, the Horizons 2026 planning process melded traditional land use planning with best practices for urban design and place making to develop a future growth framework for Greenville.

The thematically based plan was also designed to streamline the policy framework to make it more user-friendly and to create a strategic implementation approach that will allow the plan to guide future city actions and investments. This framework is now used to annually update the city's Strategic Plan.

Citizens, stakeholders, a leadership roundtable, and the Comprehensive Plan Committee actively engaged in the development of the plan. From the very beginning of the project, community members participated in various public engagement opportunities such as the Workshop for Our Future kickoff event, an online survey on community interests and values, a leadership roundtable breakfast meeting, the How Will We Grow? public workshop series, and nine Comprehensive Plan Committee meetings.

The new Horizons Plan also included four special area plans, including a plan for the northernmost section of the future Southwest Bypass Corridor. These area plans set out the planning influences, community aspirations, land use planning guidance, design and capital planning strategies for these key locations in the city. The Southwest Bypass Area Plan was unique in that it embraced a potential future planning effort for the corridor that would include all regional partners, and set out aspirations for this multijurisdictional effort.

The plan and the area plans were unanimously adopted without any public dissenting opinions by the City Council in the fall of 2016. A copy of the adopted plan can be found on the City's website: www.greenvillenc.gov.

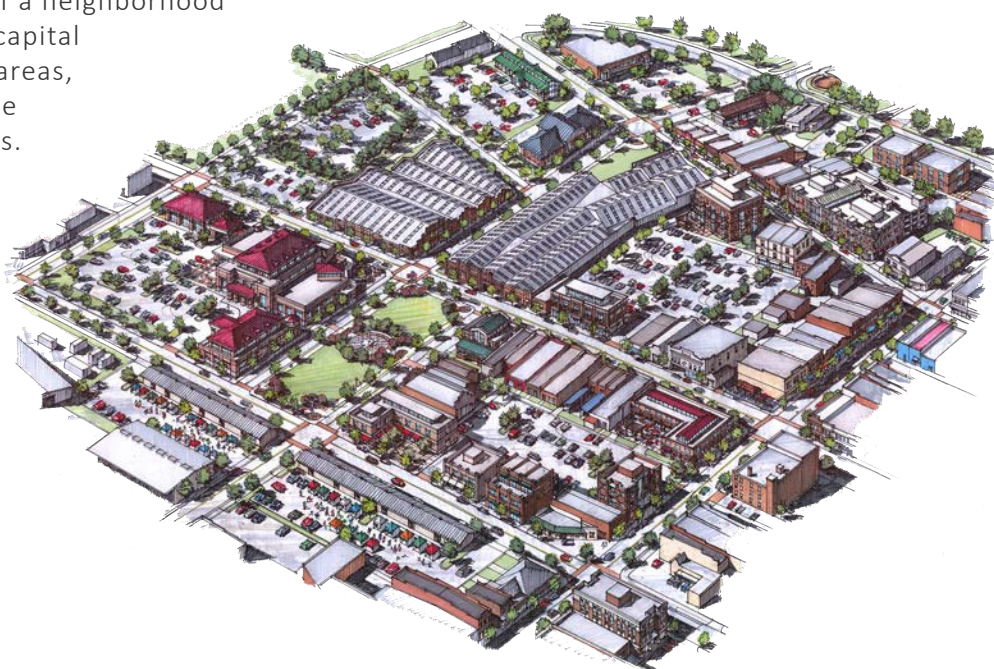


WILSON, NC | COMPREHENSIVE PLAN

Clarion Associates worked with Wilson, North Carolina, in 2008 to develop the city's first comprehensive plan. Located east of Raleigh on the edge of the Research Triangle region, Wilson was once the world's leading producer of golden leaf tobacco. The city has made great strides to adapt to the new economy but is challenged by disinvestment in the central city, the need to improve education and job skills of its citizens, declining inner-city neighborhoods, and aging commercial corridors with high vacancy rates. These challenges have resulted in a market draw to the northeast toward Raleigh and away from the historic core.

Building off a county-wide Wilson 20/20 Vision initiative, Clarion worked with the city to develop a new comprehensive plan that focuses on "One Wilson, Growing Together." To ensure that the plan was developed with direction from a broad-base of stakeholders, a four-tiered public engagement system was developed including a Steering Committee, a Plan Forum, the city's Leadership Team, and opportunities for the general public to engage in the process. Public events included a Symposium of Ideas kickoff event, two community design charrettes, and presentations of new policies and implementation strategies at key points in the process.

A multitude of new initiatives, planning approaches, and community investments were identified for Wilson. Key outcomes of the planning process include a focus on using sustainable development principles to promote compact growth and focused reinvestment in downtown, coordination with the county to develop a tiered development fee system to focus growth to the center city, establishment of a neighborhood planning process, targeted capital improvements to declining areas, and sustainable performance standards for city operations. The plan was adopted in the spring of 2010.



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NCAPA AWARD-WINNER

Following its adoption in the spring of 2010, the Comprehensive Plan was awarded the NC Outstanding Planning Award for the Small Community category by the North Carolina Chapter of the American Planning Association.

ADDITIONAL CLARION PROJECT EXPERIENCE

Clarion’s planning professionals are currently engaged in efforts to develop plans for Mooresville and Wake County, NC. In addition to the previous selected comprehensive plan experience, we provide here additional plans Clarion has prepared for Southeastern clients.

- Camden County, NC | Comprehensive Plan**
- Chapel Hill, NC | Neighborhood Conservation Districts
- Culpepper, VA | Comprehensive Plan**
- Eastern Orangeburg County, SC | Sustainability Study**
- Emerald Isle, NC | Small Area Plan
- Fredericksburg, VA | Comprehensive Plan
- James City County, VA | Strategic Plan
- Johnston County, NC | Comprehensive Plan
- Manassas, Virginia | Comprehensive Plan
- Orange County, NC | Comprehensive Plan
- Richland County, SC | Comprehensive Plan**
- Union County, NC | Comprehensive Plan
- Wake Forest, NC | Northeast Area Plan
- Washington, NC | Comprehensive Plan
- Waxhaw, NC | Comprehensive Plan
- Western Union County, NC | Local Area Regional Transportation Plan

** Received award from APA State Chapter or National Organization

Planning NEXT's Experience

Fairgrounds to Future Vision

CITY OF DAYTON, OHIO / PLANNING NEXT



REFERENCE

Dori Spaulding

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Premier Health and the University of Dayton are anchor institutions in the region with strong traditions of service and giving back to the Dayton community. Planning NEXT was selected by the two institutions to develop a vision for 38 acres on Dayton's South Main Street, the former home of the Montgomery County fairgrounds. This project was a once-in-a-generation opportunity to establish a vision that would serve the missions of the two anchors, align development of the 38 acres with downtown revitalization, and serve the broader interests of the Dayton community.

Interactive Engagement. The planning process kicked off in the fall of 2017 and is ongoing. Planning NEXT facilitated engagement workshops that included smartphone polling, paper surveys, and interactive stations where community members could talk with consultant team members. Online engagement opportunities were offered following each workshop. Over 850 people were engaged offering ideas, feedback and comments during the process.

Historic Structure Restoration. The 38-acre fairgrounds site contained a historic Roundhouse structure that dated back to the 1800's. During engagement efforts, the public indicated a strong desire to retain the Roundhouse, so the final vision considered plan for restoration of the structure. With implementation of the plan, the Roundhouse has potential to serve as an important community gathering space within the site where all people feel welcome to enjoy the historic landmark.

Realistic Implementation Initiatives. In addition to the final vision document, Planning NEXT has continued to work on vital implementation activities. During the process, a technical analysis was completed to translate development opportunities into realistic and financeable implementation initiatives. A physical assessment considered existing conditions and infrastructure needs. The planning team is currently working to develop an implementation manual as well as an investment prospectus and developer package.



Redevelopment Area Plans

CITY OF INDEPENDENCE, OHIO / PLANNING NEXT



REFERENCE

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Independence is a suburban community in the Cleveland region. While the city is mostly residential, four business districts developed during a period of regional growth and suburban expansion, ensured a long period of fiscal health and enviable quality-of-life. As these areas have begun to show their age and face growing competition for business in a struggling region, Planning NEXT helped the city create an Economic Development Strategic Plan to reassess its approach to economic development. With planning NEXT’s help, the city is now implementing the strategic plan by creating Area Plans to improve the competitiveness and viability of the city’s non-residential districts and in so-doing strengthen the city’s quality-of-life.



Public Enthusiasm. Community workshops brought approximately 200 people together to focus on key questions, such as how the city can leverage its non-residential land to generate revenue and how it can ensure the continued delivery of services and the maintenance of facilities.

Plans For Five Areas. The area planning effort developed distinct plans for five non-residential areas. The largest of these areas is the 1,000-acre Rockside Road area, home to nearly 1,000 businesses, 21,000 jobs, and approximately 4 million sqft. of office space. The Rockside Road effort brought Independence and the neighboring City of Seven Hills together in an unprecedented way to form a mutually-beneficial plan. The plan for Rockside Road will strengthen the district as a fiscal asset for both cities, and build a framework for a more dynamic and vibrant neighborhood for workers and residents alike.

Envision Athens

ATHENS-CLARKE COUNTY, GEORGIA / PLANNING NEXT



REFERENCE

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Athens-Clarke County, Georgia is a diverse and dynamic community that was experiencing demographic changes, including an increase in residents over 65 and a growing population. Home to the University of Georgia, the local economy benefits from its position as a university town. At the same time, the community is in transition, with a decline in manufacturing and the growth of the health care sector. The number of families living in poverty has been steadily rising. To ensure the community was prepared for this growth and change, a team led by Planning NEXT was engaged to help the community envision the future through a strategic Action Agenda. This process, Envision Athens, addressed core community issues to ensure future growth takes advantage of Athens-Clarke's assets and potential.

Vital Public Engagement. Envision Athens kicked-off in January 2016 and was guided by a 38-member Steering Committee. Public outreach and engagement was vital throughout the process. A series of publicized workshops attracted more than 600 participants and resulted in 4,000 unique comments and ideas. These meetings were coupled with 23 focus group interviews and a two-day stakeholder workshop. The themes derived from this input served as the foundation for the action plan and informed the community's ten goal statements. For the Community Summit, more than 250 people gathered to hear about major revelations of the process and affirm the plan's early direction.

An Aspirational Plan. The final plan was aspirational and represented the ideas of thousands of citizens and stakeholders. The Action Agenda prioritized projects, policies, and programs selected through the process. In five topical chapters, it addressed pressing challenges and key opportunities related to: land use, environment, neighborhoods, housing, agriculture, economic development, education, health, safety, social services, arts and culture, civic engagement, transportation, and infrastructure.

Making It Happen. During the process, Envision Athens team members began meeting with core institutional partners to discuss implementation activities. These partners have since met to finalize an agreement, two-year budget, and scope of work for implementation; and Planning NEXT has been re-engaged by Athens-Clarke County to assist with these implementation efforts.



ValpoNEXT Vision Process

CITY OF VALPARAISO, INDIANA / PLANNING NEXT



REFERENCE

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Valparaiso is a small but prosperous and growing community in the Chicago Region and home to Valparaiso University. The city has been proactive and deliberate in planning for its future (being the first Indiana community to adopt a comprehensive plan) and in following through on those plans. This legacy is evident in the city’s vibrant downtown, diverse and well-maintained neighborhoods, highly regarded park system, improving transportation system, and fiscal health. To make Valparaiso even better in the future, the city undertook its first community-driven effort to create a long-term vision and action plan.

AWARD

ValpoNEXT received the 2015 award for outstanding public outreach from the Indiana Chapter of the APA.

Extensive Publicity and Outreach. A large and diverse citizen steering committee was appointed to guide the process and substance of the vision. They branded the effort ValpoNEXT and helped conduct a publicity campaign that included traditional and online media, as well as personal word-of-mouth outreach.

An Engaged Community. At the first public event, over three nights in February, nearly 300 people braved sub-zero temperatures to think big about making their community even better. Over the entire course of the process, multiple face-to-face public workshops, small focus groups, as well as online activities reached over 880 people and gathered 2,090 pieces of input.

Broad Support. Following the one-year planning process, Valparaiso City Council approved the ValpoNEXT Vision Plan. A large number of community members turned out for the hearing and many spoke with glowing praise about the plan and the extensive community outreach process that led to its adoption. The final plan sets forth a vision statement and nine initiative areas that organize 43 actions (projects, programs or policies) that will advance the initiatives.



Vision, Comprehensive Plan Update, Urban Design Plans

CITY OF UPPER ARLINGTON, OH / PLANNING NEXT



REFERENCE

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Upper Arlington is a mature, first ring suburb in the Columbus region, well known for excellent schools, high quality residential areas, and proximity to The Ohio State University and downtown Columbus. The City, which occupies 10 square miles, is fully developed and there is virtually no way to grow via annexation. Further, it has very little land in commercial use and no industrial land. Upper Arlington had not undertaken a comprehensive planning process in nearly 40 years when it hired Planning NEXT to facilitate a vision and create a physical plan that reflected community needs and aspirations.

Robust Citizen Participation. Hundreds of citizens participated in the process that resulted in nearly 900 ideas, a goal for each element of the comprehensive plan, and a consensus on the future of land use.

Extensive Planning Effort. This extensive planning effort focused on redeveloping existing commercial areas in the community with greater intensity and mix of uses – especially office use. These areas—predominately retail uses only—offer the best opportunity for the City to broaden its tax base through economic redevelopment and to improve the overall community appearance and quality of life.

Commitment to Implementation. As tribute to the community's understanding, support, and commitment to implementation, in less than a year after adopting the Master Plan, Upper Arlington became one of the first communities in Ohio to adopt a unified development ordinance (UDO). Redevelopment in the target areas has been ongoing since the plan's adoption. According to the City's annual report, "commercial (construction) activity skyrocketed to an astounding \$39.9 million" as compared to slightly more than \$10 million five years earlier—prior to the study area plans.



D. Services Offered

Our multi-disciplinary team will provide the Town of Davidson with the spectrum of planning services needed to update the plan. We understand that the Mobility Plan may be incorporated into the Comprehensive Plan, and may need additional work to support the land use and character direction provided in the plan. Our breadth of experience includes several planning processes where we have developed transportation recommendations that align with land use planning and we have worked to incorporate comprehensive transportation plans into community comprehensive plans. We worked with Alta Planning on the Cary Community Plan and are ready to coordinate with Wade Walker and his team if we are offered the chance to work on this planning effort.

Our team's approach to collaboration is based on efficiently leveraging the unique skillsets of our team members to advance the planning work for our clients. As you can see from the table on the next page, our team professionals have overlapping skillsets, which allows us to innovate during our projects. For the purposes of guiding work, we set out the following plan for delivering services to Davidson.

Project Management - Leigh Anne King of Clarion Associates will provide day-to-day project management services, contract management, overall supervision of work flow, and monthly status reporting to the Town's project management staff. Key products will include the Project Management Plan, weekly or biweekly project management calls, and monthly project status reports.


Comprehensive Planning - Clarion Associates will lead the comprehensive planning process, including assessing current policy direction, engaging the Plan Advisory Committee in policy discussions, researching best practices to key planning issues, and managing the drafting and review process. We incorporate several other service areas as part of this work, including our knowledge of planning and code development for more than 100 communities around the nation, North Carolina planning law, graphic design, visualization of planning concepts, and geospatial mapping. Key products will include a Community Snapshot Report, reporting back to staff and the Plan Advisory Committee on best practices on salient topics, and multiple drafts of the comprehensive plan.

Public Engagement - PlanningNEXT led by Jamie Greene and supported by Sarah Bongiorno will lead work on public engagement, including website development, development of online engagement activities, leading the work of the citizen-based Publicity and Outreach Committees, designing the engagement strategies to get answers to hard questions in fun and engaging ways, and work with the Town's Public Information Officer to define the messaging for the project. Clarion Associates staff will assist with "boots on the ground" support at local public intercept events and workshops.

Community Design - PlanningNEXT will leverage their firm's architectural and urban design training and experience on other projects to further refine the design-based planning direction set by the Town. This will include development of conceptual future growth alternatives for a Town design charrette, and specific guidance to be incorporated in the plan on critical design requirements that can be translated later into code-based design standards.

Market, Economic, and Fiscal Analysis- Lucy Gallo of DPGF will assess the market and economic influences that could affect Davidson's future, and will evaluate the current fiscal balance achieved by the Town and how this structure may fare against different future growth alternatives. This will provide a fundamental understanding for fiscal realities that certain growth choices may lead to and will help to more fully inform citizens about growth choices and their tradeoffs and impacts. These assessments will be incorporated into the Community Snapshot Report.

Strategic Plan- Clarion Associates has experience preparing strategic plans for communities and will take this approach to develop the implementation plan for Davidson. This work will focus on prioritizing and developing a specific work plan for Town staff and clarifying funding needs for the Town government. The result will be a guidebook that will align with the Town's current Strategic Plan and can be used annually to update efforts and funding priorities in a coordinated, purposeful, community-based manner. Direct linkages to the Town's budgeted process and CIP will be critical.

	CLARION					planning NEXT moving communities forward.		DPFG
	Chapel Hill, NC					Cincinnati, OH		Raleigh, NC
								
	Leigh Anne King	Roger Waldon	Nate Baker	David Henning	Chris Peterson	Jamie Green	Sarah Bongiorno	Lucy Gallo
Project Management	✓	✓				✓	✓	✓
Public Engagement	✓	✓	✓	✓	✓	✓	✓	✓
Comprehensive Planning	✓	✓	✓	✓	✓	✓	✓	✓
Graphic Design & Mapping	✓		✓	✓	✓		✓	
Market & Economic Analysis			✓					✓
Fiscal Analysis								✓
Urban Design		✓	✓	✓		✓	✓	
Strategic Planning	✓	✓						
Scenario Planning	✓	✓	✓			✓	✓	

E. Project Understanding and Scope

Project Understanding



People love Davidson. Residents, visitors, commuter-employees, retirees, students, families, planners, academicians, designers, artists, authors, people of all persuasions-- enjoy the high quality of life offered by this community, and appreciate the history and culture that brought Davidson to where it is today. Truly a unique community, the Town of Davidson is a model studied by government leaders throughout North Carolina, the nation, and internationally.

There are many reasons to help explain the vibrancy of this place. Certainly the influence of Davidson College is a primary component of today's town-gown culture. The history here is important: starting with the founding of the College in 1837, the Davidson community grew up around the campus, with the Town of Davidson eventually becoming incorporated and gearing up to provide governance and municipal services. Lake Norman was created in the early 1960's, with an original purpose of providing water supply and flood control, and quickly became a destination. Growth in the 1960's and the building of I-77 expanded access and opportunities, and by the year 2000 the Town was facing rapid growth and a change in population, with more retirees and fewer people directly connected to the College. The challenges of finding new ways to maintain a sense of identity and community were significant.

Davidson's role in the Charlotte-Mecklenburg region has also been evolving, and regional trends in economic growth, population growth, land use patterns, and transportation/mobility enhancements have had a major impact on the Town. Ongoing efforts to coordinate plans and policies among Mecklenburg County's nine municipalities have been extensive and continue to be pursued.



Davidson's response to these dynamics of change has been to focus on quality, culture, innovation, and community character. Planning with an emphasis on design and civic engagement has been a hallmark of the Town's approach to growth. The rich array of plans and policies developed since 2000 have played a central role in guiding development, and the benefits of that purposeful approach to maintaining community character are clear.

We note this history because it is critically important to understand what has taken place in the Town and the region so far in order to plan purposefully for the next chapter. This new Comprehensive Plan will be focusing on where Davidson has been, where it is today, where it wants to be, and how it intends to get there. It needs to build on the foundation provided by past and recent plan, policy, and strategy initiatives, and hold true to the Town's commitments to high quality design, community character, and robust public engagement. The Town, region, state, and the world are moving along a path accompanied by dramatic changes. This new Comprehensive Plan needs to identify and address the challenges and opportunities, bringing together residents and stakeholders to craft a community-endorsed plan for moving forward.

We understand the challenges and opportunities because our consultant team has a familiarity with Davidson, familiarity with regional and national emerging trends, and direct experience with focusing on design-oriented strategies constructed via public engagement. We have been working with Mecklenburg communities, and most recently participated in development of the Mecklenburg Livable Communities Plan. We have worked in college towns throughout North Carolina and the Southeast. Members of our team speak regularly at state and national planning conferences to call attention to emerging themes and changes affecting US communities. We have helped communities prepare award-winning design-based comprehensive plans. And we have used an extensive toolkit of public engagement techniques to achieve community ownership of adopted plans.

We can help Davidson craft the new Comprehensive Plan that it needs and wants. We can help engage the community. We can help with the construction of a specific and actionable set of implementation measures. We will bring a team of seasoned, experienced, successful planning practitioners to the tasks.



Core Elements of Our Planning Approach



PROJECT OBJECTIVES AND RECOMMENDED SCOPE OF WORK

- Based on our understanding of the project, we have prepared a scope of work that sets out to achieve the following objectives:
- **Building Off Established Policy Direction** – Davidson has a long and successful history of planning to create the successful community it is today. We recommend exploring this policy direction early in the process to help educate the public about the guidance that is being used daily to make decisions in Davidson, and to provide a framework for guiding discussions about hot topics on the minds of residents.
 - **Public Engagement That Sets the Stage for a Renewed Plan** - Public engagement results will be the foundation for developing the policy direction of the plan. Due to its importance, our team will prepare a public engagement approach that offers all members of the community the choice to have a say in the future of Davidson. This approach includes four main touchpoints during the planning process: (1) Exploring Our General Planning Principles, (2) Conversations on Davidson’s Future, (3) Shaping Davidson’s Future Multi-Day Design Workshop, and (4) public hearings to review and provide comment on the draft plan. We will leverage the resident’s love of community by organizing a Publicity and Outreach Committee to “get the word out” about engagement opportunities.
 - **Preparing a Design Focused Plan that Is Supported by Policies and Actions** – This Comprehensive Plan will carry forward the Town of Davidson’s design-based approach to land planning. Design concepts and ideas will be incorporated throughout the planning process and engagement activities. Policy choice discussions and opportunities to explore and evaluate particular implementation strategies are also critical to creating a successful comprehensive plan. Our approach will evaluate these two priorities – design and the protection of community character and overall community policy direction – to ensure consistency of direction throughout the plan.
 - **Leadership Provided by Plan Advisory Committee** – Given the highly engaged nature of this community, we recommend establishing a citizen-based Plan Advisory Committee to provide an opportunity for community stakeholders and residents to play a direct role in shaping the plan for Davidson. We anticipate this committee will meet five times during the planning process, spending the majority of this time reviewing and providing feedback on the draft plan.

- **Systems Thinking Approach to Comprehensive Planning** – Undertaking a comprehensive plan update is an opportunity to think about the cross-connections and trade-offs to policy directions that are in practice today or being explored for inclusion in the plan. We recommend that the plan acknowledge these cross connections and share the challenges and trade-offs with the greater community as we work through the key community questions that will ultimately lead to the final policy direction included in the plan. This is also an opportunity to synthesize policy direction of individual town plans into a cohesive and consistent framework.
- **Focus on the End Game** - Our combined planning and code experience is unique and support a focus on implementation throughout the process. We will work with the community to explore policy alternatives with real and legally implementable options for implementation.
- **Scope of Work that Includes Resources for Innovation** – It is hard to know today what the opportunities will be to have the most successful community dialogue in Davidson. There will likely be points in the process when new ideas for engagement or education will surface. Given this likelihood, we have designed this scope of work to provide some flexibility to include additional meetings, research on planning topics, creation of white papers for Town leaders and the Plan Advisory Committee, additional engagement activities, or other planning actions.

The following Scope of Work aligns with the five phases of work set out in the RFP:

Phase 1: Education and Engagement

Phase 2: Testing Community Policy Direction

Phase 3: Plan Development

Phase 4: Plan Adoption

Phase 5: Implementation Plan Development



PHASE I: EDUCATION AND ENGAGEMENT

Phase 1 sets the foundation for the Comprehensive Planning effort. During this phase, our team will conduct project pre-launch work, prepare for and conduct a myriad of engagement activities, and analyze and define the critical educational messages that describe the community’s planning influences.

I.1: Develop Project Management Plan

The Clarion Team will prepare a memorandum that documents the agreed upon details of the project schedule, approach for communications, document and mapping standards, approach for monthly management responsibilities, roles and responsibilities of all engaged parties, and process for decision-making during the planning process. This includes scheduling, hosting, and preparing agendas for weekly or bi-weekly project management meetings with Town project managers to provide status updates and coordinate on preparation of upcoming deliverables and events. We will work with the Town’s project managers to refine and finalize this document, which will serve as our project management guide throughout the process. This Project Management Plan will be updated regularly for use by the project team.

I.2: Conduct Staff Kickoff Meeting and Reconnaissance Tour

The full project team (Town project managers and Clarion team) will hold a meeting to discuss and finalize the Project Management Plan, conduct a context and focus area mapping exercise, discuss the details of the public engagement effort, discuss any additional work to establish the Plan Advisory Committee, and tour the community focusing on areas in need of or prime for change.

I.3: Gather All Relevant Data and Plans

The Contractor will work with Town staff to secure digital copies of all relevant studies, plans, reports, and relevant planning data and GIS layers that are not available online. This may include assistance working with neighboring communities to gather GIS information on future land use plans in areas of common interest. Our work on the Mooresville and Kannapolis Comprehensive Plans can be leveraged to assist with this information gathering.

I.4 Prepare Brand and Identity for the Project

The Clarion Team will develop brand concepts (two to three) based on the research and discussions with staff, and will work with staff to define the final project branding. This will provide the graphic imagery and key messages for project communications.

I.5: Recruit Plan Advisory Committee Members

Clarion will work with Town staff to develop a recruitment request for Comprehensive Plan Advisory Committee members that will meet throughout the project and serve as a sounding board to guide development of the plan. The Town Board of Commissioners can be engaged in this process to ensure a broad spectrum of community stakeholder interests are included on the Plan Advisory Committee.

I.6 Finalize Membership of the Publicity and Outreach Committees

Two process committees will be formed by staff with guidance of the Clarion Team. One committee will be focused on communication/ publicity and the other will be focused on the outreach strategy. The committees will work intensively for the first three months of the project and then intermittently as the project proceeds (timed toward engagement events). The membership will come from the initial pool of Plan Advisory Committee applicants, referrals, and selective recruitment.

I.7 Complete and Execute the Communications Plan

We will complete the communications plan to guide public engagement communications and engagement efforts during this planning process. This will include a purpose statement and key messages to be used by the team. It will also include focus on the “targets” of the plan. Specific targets will be determined for attracting diverse participation, including looking at a range of attributes: psychographic, demographic, power (ability to stop, delay or change the project), reputation (opinion leaders), position, membership, and role in the decision-making process. We will work with the Town’s Public Information Officer to develop the approach and schedule for publicizing and providing outreach during the project, including the branding approach, schedule and plan for events, publicity coordination (social media, Town newsletter, establishments of project email listserv, etc.) This will be documented in a formal Communications Plan and shared with Town project managers for approval.

Example Facilitation Techniques for ways in which input may be gathered from participants during community meetings:

- **Trivia Night.** “So, you think you know Davidson?” This format asks participants, organized in small groups, a series of multiple choice questions related to the Town. Groups have 30 seconds to discuss and determine their answer before the correct answer is displayed. The answers will be elaborated on and provide comparable data. When appropriate, answers could contain graphs or charts. This is an opportunity for participants to learn about Davidson’s planning initiatives as well as existing conditions and trends, all in an interactive way.
- **Opportunities Mapping.** This exercise is a variation of the well-established SWOT (strengths, weaknesses, opportunities and threats) procedure. It uses a map of the area targeted for inquiry and asks participants to identify on the map specific locations that represent strong places, weak places, and places of opportunity.
- **Critical Questions.** The critical questions format is used to explore issues and ideas in depth. The process does not force agreement and consensus, rather it provides a snapshot of responses. This format can be used to test discrepancies that may exist between what the community wants and the findings of technical analysis.

The following is a menu of targeted engagement strategies:

- **Community Event Activities.** The Team could attend busy community events, such as festivals and farmer’s markets, to meet people where they are; and the Team could design specific activities to engage targeted populations, like children and teenagers.
- **Targeted Meetings.** The Team could conduct targeted meetings during the day at schools and/or retirement villages and senior centers making the process more accessible to populations who are less likely to participate otherwise.
- **Meeting-In-A-Box.** These kits are designed to be self-facilitated and will help fill-in the outreach holes by taking the messages and information to the people, especially the hard to reach members of the community. The “Meeting-In-A-Box” kit will include talking points, handouts, exercises and other engagement tools needed to communicate with the public about the project and gather input on specific items. This kit can be used by Town Staff and/or volunteers.

The following includes a menu of value-added web activity options:

- **Evaluating Principles and Values.** This activity asks participants to rate how strongly they support each of a series of statements about Davidson’s future.
- **Mapping the Future.** Using a map interface, this activity allows community members to share input on strong, weak and areas of opportunity. Maps feature custom base layers, custom markers and the ability to toggle different collections of feature information.
- **Expressing Priorities.** This activity, which could take place after an engagement event, would seek input on priorities for plan strategies once they have been drafted and would help to inform the plan for implementation.

1.8 Launch Project Website

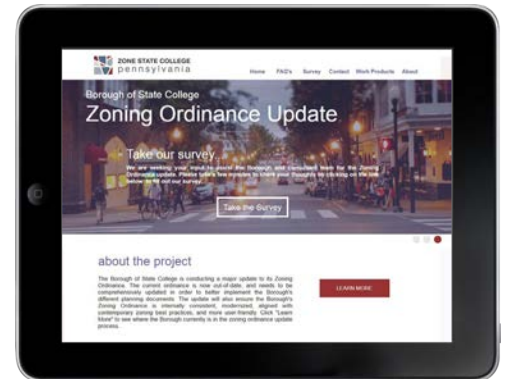
The consultant will develop a project website to provide thorough information on the project and community involvement opportunities. The project website will be linked off the Town's home page, <https://www.ci.davidson.nc.us/>. The Clarion Team can also assist the Town in developing content for existing web-based tools used by the Town, including electronic newsletters, and other on-line governmental services.

1.9 Engagement Part #1 – Exploring Our General Planning Principles

Working in coordination with Town staff and using the guidance of the Communications Plan, the Clarion Team will prepare public engagement publicity to generate excitement and visibility for the upcoming public engagement events. This can include notifications on the project website, social media “pushes”, a project video, targeted emails, earned media (i.e., local radio and news outlets). Social media content can include an opportunity to confirm current policy direction expected to be carried forward and provide a “flavor” of the type of activities to be available at workshops and online.

The Clarion Team will prepare materials for and facilitate the *Exploring Our General Planning Principles* event in Davidson. This event will achieve several objectives, including sharing information about the planning process and the purpose of Part #1 activities, gaining input on hot topics on the minds of residents organized by the Town's Strategic Plan goal topics, exploring the Town's General Principles for Planning in Davidson and soliciting feedback for how these can be further refined to better articulate the community's desires, and gaining preliminary inputs on the focus area to be explored at a charrette workshop in Task 2.4. This activity will focus on an online survey that residents can respond to on mobile devices or laptop computers at the meeting or elsewhere.

The Clarion Team will prepare for and facilitate up to five general community events (such as a farmers market, art walk, or other special event) or targeted engagement events focusing on hard to reach community members (high school students, Hispanic/Latino communities, community members living in the Town's ETJ, or other groups). The selection of these events and stakeholder activities will be identified in coordination with Town staff. Participants at targeted engagement events will conduct the same activities conducted at the public kickoff meeting, and will be encouraged to share the online survey with their local networks.



We will also prepare materials that can be used by Town staff at additional local events to publicize the engagement opportunity. This will include preparation of a “Meeting Toolkit” that plan ambassadors and Town staff can use to host meetings about the project and collect inputs during this first phase of public engagement.

I.10 Public Engagement Summary Report

Using the input provided from the public engagement activities occurring in Phase 1, a report will be prepared that synthesizes this input and highlights key trends and observations through community themes, and will include recommended refinements to the General Planning Principles based on community themes. This report will be reviewed by staff and presented to the Plan Advisory Committee and the public during Phase 2. The format of this report will be determined based upon the most appropriate method for conveying the key information (e.g., PowerPoint, short summary, full report, video). Based on the outcomes of these engagement activities, the Clarion Team will prepare a set of additional questions to be included in the report that can be asked at future engagement meetings in Phase 2.

I.11 Determine Analysis Priorities

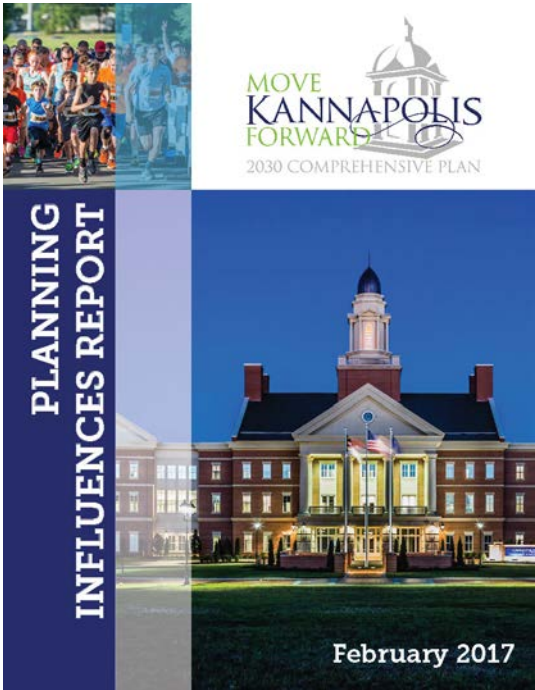
Based on the critical planning themes from Stakeholder interviews, the Clarion Team will develop recommendations for analysis priorities. This will include baseline planning analysis of sociodemographic trends, growth and land use, community infrastructure, and transportation. Analysis priorities will be confirmed with Town staff via a project management conference call.

I.12 Develop Community Snapshot Report

The Community Snapshot Report will include a variety of information presented in a concise format that will serve as the educational foundations throughout the planning process. Transportation messages from the ongoing Mobility Plan can be incorporated as deemed appropriate by Town Staff. Each of these sections can include a series of related policy direction questions that highlight the relevance of the information and tie it to policy choices that will be explored during this process.

Snapshot Report key information will include:

- Sociodemographic trends of Town in comparison to region
- Built environment conditions and development trends, including a development capacity analysis and plans for capital improvements



- Community health and recreation existing conditions and future plans
- Report on fiscal standing and identification of revenue generation sources relative to future growth
- Report on Town's current policy direction and implementation status of existing plans

The Team will work with Town planners to determine the status and potential relevance of existing plan policies and actions. This information will be used to determine plan components that have been completed, that may get carried forward, and that are no longer relevant. This includes the Town's current Comprehensive Land Use Plan and area plans. The Contractor will prepare an implementation audit worksheet and hold conference call(s) with Town staff to verify the status of plan implementation actions.

The Clarion Team will prepare analysis that shares information on critical planning influences and focuses on the analysis priorities set out in Task 2.4. This will likely include an assessment of population trends and projections, demographic trends, development conditions, status of housing and neighborhoods, projections for public services and facility needs, and public health trends.

The Team will prepare economic and fiscal analyses to include in the Community Snapshot report. This will include initial baseline analysis of existing regional and national economic and market conditions and trends that present opportunities and challenges for Davidson, general assessment of local fiscal trends, and relationship of future growth choices to fiscal health of the community.

PHASE 1 KEY DELIVERABLES:

- Project Management Plan
- Communications Plan
- Establishment of Publicity and Outreach Town Teams and Plan Advisory Committee
- Project Website
- Public Engagement Summary
- Community Snapshot Report

PHASE 2: TESTING POLICY DIRECTION

Phase 2 will build off the community interests identified in Phase 1 and will facilitate a community dialogue at two main touchpoints to further explore policy choices and refine the community’s direction for growth and change.

2.1 Community Stakeholder Interviews

During Phase 2, the Clarion Team will facilitate individual or small group structured interviews held over two days with elected and appointed officials, Town staff, citizen advisory board members, business representatives, community organizations, transportation partners, neighborhood representatives, and partners from adjacent jurisdictions. The purpose of the interviews is to provide an opportunity to engage in a candid conversation with community leaders and key stakeholders on the future of Davidson. This information will help identify the specific policy choices that will be tested with the larger community in Phase 2. A summary of interview themes will be prepared.

2.2 Plan Advisory Committee Meetings (2)

The Clarion Team will coordinate with Town staff to conduct two meetings of the Plan Advisory Committee. The first kickoff meeting will focus on introducing the planning process to the Plan Advisory Committee, share the findings of the public engagement activities and Community Snapshot Report during Phase 1 and recommended refinements to the General Principles for Planning, and brief the Plan Advisory Committee on the focus and activities of Engagement Part #2 – Conversations on Davidson’s Future (Task 2.2). The second meeting will focus on the outcomes of the Shaping Davidson’s Future multi-day workshop and how these findings should be translated specifically onto the Planning Areas map.

2.3 Engagement Part #2 - Conversations on Davidson's Future

The Clarion Team will prepare materials for and facilitate the *Conversations on Davidson's Future* event in Davidson. This event will achieve several objectives, including sharing information about the planning process, educating citizens about critical planning influences set out in the Community Snapshot Report, and reporting back on what was learned through Part #1 engagement activities. Building off of Task 1.10, a series of follow up questions will be asked of community residents to gain a finer grained understanding of key engagement themes.

This event can include a variety of engagement activities: idea walls, dot voting, mapping exercises, live polling, visual preference surveys, policy priority rankings, and other interactive activities. This might also include a "Choose Your Own Adventure" activity that allows participants to choose policy directions and explores where the policy choices lead them relative to the Town's General Planning Principles. An online version of engagement activities will be prepared and hosted on the project website.





2.4 Engagement Part #3 – Shaping Davidson’s Future Multi-Day Workshop

The Clarion Team, in coordination with Town staff, will conduct a multi-day workshop to test growth scenarios and design concepts for the study area. Prior to the workshop, the Clarion Team will have conversations with Town staff to discuss and prepare the initial scenario materials to share at the opening night workshop. On the first evening, residents of Davidson will be invited to attend an open house to learn about the different scenarios being evaluated and to provide feedback on the ideas. The next two days, the project team will prepare the scenario evaluations, focused on the key geographic areas of change. Development of scenarios will include interviews with key stakeholder focus groups, including landowners and representatives of adjacent neighborhoods and non-residential developments proximate to areas of change, to discuss the desired land use and design outcomes. Reconnaissance trips and additional data collection may be conducted as part of this task. On the third night, the draft scenarios will be shared with the general public and will include a scorecard for each scenario that provides rankings for how well each scenario achieves the Town’s refined General Planning Principles. The outcome will be a new character based land planning framework that can be used to guide updates to the Planning Areas map and associated character areas and plan policies being developed in Phase 3.

Scenario Planning

We don’t define here the tool for scenario planning as we believe the specific questions to be answered should guide the decision for a specific tool. We have experience using ArcGIS-based scenario planning tools CommunityViz and City Engine. We can also use mapping and SketchUp visualizations to prepare alternatives.

2.5: Public Engagement Report on Shaping Davidson's Future

This report will summarize the engagement activities conducted during Phase 2 and the salient findings from community responses to key policy choices and alternative growth scenarios. This report will document all inputs provided during these meetings and will provide guidance for the team's work during Phase 4: Plan Development.

2.6: Prepare Updated Content for Project Website and Social Media

We will work with the Town staff to roll out the specific publicity and outreach components, including content for social media "pushes" website updates, news releases, potential video content, and other related publicity activities.

PHASE 2 KEY DELIVERABLES:

- Staff Memorandum on Stakeholder Interview Themes
- Preparation of Materials and Conducting Two Plan Advisory Committee Meetings
- Preparation of Materials and Facilitating Conversations on Davidson's Future Workshop
- Preparation of Materials and Facilitating Shaping Davidson's Future Multi-Day Workshop
- Public Engagement Report on Shaping Davidson's Future
- Updates to Social Media and Project Website

PHASE 3: PLAN DEVELOPMENT

Phase 3 work will result in a draft Davidson Comprehensive Plan that will be shared with the Plan Advisory Committee in three separate modules, and to a joint meeting of the Town Planning Board and Board of Commissioners.

3.1: Develop Formal Outline for Comprehensive Plan

The Clarion Team will develop a draft outline and template for the Comprehensive Plan. Emphasis will be placed on creating a Plan that includes a comprehensive spectrum of policy topics in a streamlined format. The Town’s current Strategic Plan and preliminary planning themes will be used to guide this outline. The Plan, at a minimum, will include an executive summary, introduction, thematic policy chapters with goals and strategic actions, and the Planning Areas framework. A mobility chapter can also be incorporated and the Clarion Team can work with the Mobility Plan consultant to appropriately incorporate into the overall comprehensive plan if that is the direction the Town would like to proceed with.

3.2: Conduct Staff Work Session to Refine the Planning Areas Elements

Our team will prepare for and conduct a work session with Town staff to hone the specific approach for updating the Town’s Planning Areas map and associated classifications. This could include carrying forward the existing framework, and possibly making modifications to the existing classifications. The assessment will include an evaluation of the current pros/cons of the current system and how it works in practice with respect to rezoning case assessments. This will also include consideration of relevant Small Area Plans and how they will be carried forward within the new plan.

3.3: Prepare Policy Framework and Staff Review Draft of Comprehensive Plan

The Clarion Team will draft the plan's policy framework (e.g., goals and policies) for each plan chapter building off the public inputs provided in Phases 1-2 and relevant policy direction being carried forward from previous plans. Staff review drafts of each chapter will be provided to Town staff for review and comment prior to sharing with the Plan Advisory Committee. Particular emphasis will be placed on developing policy guidance for growth management, placemaking, design guidance for future private development and public facilities, and mobility. The goals and policies for these chapters will be coordinated to ensure that the future land use and community design vision is supported by the transportation policies, and vice versa. The Plan will also include a special focus for expanding coordination and information sharing with community partners and neighboring jurisdictions, particularly in areas for joint planning interest. We recommend that this staff review draft be shared with all Town Departments to ensure a comprehensive review of the plan at this stage.

3.4: Prepare First Public Review Draft of Comprehensive Plan

The Clarion Team will amend the draft Comprehensive Plan based on a consolidated set of staff comments and provide a first Public Review Draft in three modules to be reviewed by the Plan Advisory Committee.

3.5: Present Draft Plan Elements to Plan Advisory Committee

The Clarion Team will facilitate three Plan Advisory Committee meetings to present the draft plan in three modules. We recommend this approach based on years of experience presenting comprehensive plans to highly engaged communities. This will ensure that Plan Advisory Committee members feel they have had enough time to review the chapters and to provide educated responses and comments on the draft.

3.6: Prepare Second Public Review Draft of Comprehensive Plan

The Clarion Team will prepare a second Public Review Draft of the Comprehensive Plan that incorporates the requested edits requested by the Plan Advisory Committee and approved by Town Staff. This document will be presented to the Town’s Project Manager to distribute to the Planning Board members and Town Commissioners.

3.7: Conduct Joint PB/BOC Work Session to Present Draft Plan

The Clarion Team will prepare for and conduct a joint work session of the Town Board of Commissioners and the Planning Board to present the planning process, the second Public Review Draft of the Comprehensive Plan, and will focus on highlighting the fundamental components and new policy direction included in the plan. The purpose of this meeting is to familiarize the members with the plan and answer questions.

3.8: Prepare Updated Content for Project Website and Social Media

The Clarion Team will prepare content for social media “pushes”, website updates, and news releases to publicize the project progress and Public Review Draft of Plan.

PHASE 3 KEY DELIVERABLES:

- Comprehensive Plan Drafts:
 - Staff Review Draft
 - First Public Review Draft
 - Second Public Review Draft
- Presentations to Plan Advisory Team to Present Draft Plan in Modules (3)
- Presentation to Joint Planning Board/Board of Commissioners to Present Draft Plan

PHASE 4: PLAN ADOPTION

We understand that Town staff will be leading the formal planning adoption hearing process to present the plan to the Planning Board and the Board of Commissioners. This recommended scope of work includes an assumption that a minimum number of consultant team hours will be needed to make adjustments to the plan and to assist with any questions and making adjustments based on feedback that will occur during Phase 4. No formal trips are assumed as part of this phase of work.

4.1: Prepare Public Hearing Draft

The Clarion Team will prepare a Public Hearing Draft of the Comprehensive Plan that addresses any changes requested by Town Staff that are a result of comments and feedback shared at the joint Planning Board/Board of Commissioners meeting.

4.2: Assist Town Staff with Plan Adoption

The Clarion Team will assist Town Staff with addressing any requested edits and modifications to the Public Hearing Draft of the Comprehensive Plan as it moved through the adoption process.

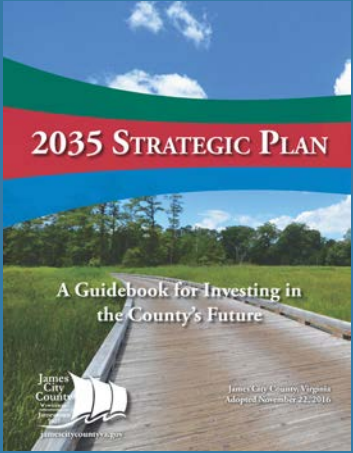
4.3: Prepare Updated Content for Project Website and Social Media

The Clarion Team will prepare content for social media “pushes” website updates, and news releases to publicize the project progress and the Public Hearing Draft.

PHASE 4 KEY DELIVERABLES:

- Public Hearing Draft of Comprehensive Plan
- Assistance Modifying the Plan based on feedback provided during adoption process

Strategic Plan



Clarion Associates was hired by James City County, Virginia (Historic Williamsburg) to assist in developing this first-of-its-kind effort to evaluate current policy direction, economic opportunities, and fiscal constraints, to create a single, integrated Strategic Plan that will guide county actions and investments for the next 20 years. This Strategic Plan creates a new linkage between the County's comprehensive plan and the annual budgeting and capital improvement planning processes to improve investment decisions to community goals. The planning process was unique and included a multi-tiered engagement process that included regular meetings with the Board of Supervisors, a Strategic Plan Advisory Group made up of community stakeholders, a Technical Advisory Group comprised of County department directors, three in-person engagement workshops, and an online survey. The County Administrator and County staff have reworked their annual budgeting and staff review process to be framed using the goals of the new 2035 Strategic Plan.

PHASE 5: COMPREHENSIVE PLAN IMPLEMENTATION GUIDEBOOK

This final phase of work will focus on developing the specific implementation action plan that will align directly with the Town's Strategic Plan to reinforce regular updates and monitor plan implementation progress. Our assistance will be provided through development of a Public Review Draft of the Guidebook as we understand that Town Staff will lead the effort to present the draft to the Planning Board and Board of Commissioners.

5.1: Conduct Town Staff Plan Implementation Work Session

The Clarion Team will prepare for and facilitate a work session that includes all Davidson Town Departments to discuss the specific action strategies included in the plan and their feedback on timing and cost to implement the strategies. This will include a survey document that targets strategies specifically to each department that will be distributed to Town Staff and results compiled prior to the work session. During this session, staff will be asked to use their community knowledge to rank like groupings of strategies in priority order to assist the planning team with developing priorities set out in the Implementation Guidebook.

5.2: Prepare Staff Review Draft of Comprehensive Plan Implementation Guidebook

Clarion will prepare a Staff Review Draft of the Implementation Guidebook that aligns the Town of Davidson Strategic Plan organization with the Comprehensive Plan goals and strategic actions and identifies the priorities (ordered in five year increments), lead staff, timeline, and necessary resources to implement each strategy. This can be used to update the Town's Strategic Plan on a regular basis as priority initiatives are achieved.

5.3: Prepare Public Review Draft of the Comprehensive Plan Implementation Guidebook

Clarion will work with Town Staff to refine the Implementation Guidebook and prepare it for review by the Planning Board and Town Board of Commissioners. This task assumes up to three rounds of edits of the Guidebook.

CLARION TEAM AND STAFF RESPONSIBILITIES

Over the course of the project, the consultant team and staff will work closely to coordinate meetings and to develop work products as defined in this scope of work. We recommend that general responsibilities for this work be shared as set out below:

Preparation of Meeting Reports and Summaries:

Staff will prepare all meeting summaries that require documentation of proceedings, such as Plan Advisory Committee meetings, Town Council meetings, or Planning Board meetings. The Clarion Team will prepare all reports and summary documents that require any level of analysis, synthesis, or providing recommendations, such as summaries of public engagement activities.

Coordination of Meeting Locations and Notifications:

Staff will be responsible for securing the locations of meetings, setting up the audio/visual equipment for meetings, and providing meeting notifications to meeting attendees (i.e., Town Council, Planning Board, Plan Advisory Committee, etc.)

Distribution of Materials:

As deemed necessary by staff, the Clarion Team will prepare handouts and meeting materials for distribution prior to scheduled project meetings. Staff will be responsible for printing and electronic distribution of meeting materials to Town Council, Planning Board members, Plan Advisory Committee and other meeting attendees.

Preparation of Presentation Materials and Meeting Handouts:

In coordination with staff, the Clarion Team will prepare all meeting materials for project meetings identified in this scope of work. Presentation materials, such as large format presentation boards will be prepared by the consultant team for public events and adoption hearings, and printed by Town staff. Meeting handouts and smaller documents that require printing for project meetings also will be printed by Town staff.

F. Project Budget

Budget

Based on our proposal for the Town of Davidson Comprehensive Plan Update with a total of five phases of work, we estimate that the following not-to-exceed budget will be necessary to complete the scope of work. This budget is inclusive of all project expenses and professional fees, except for local lodging expenses and project printing expenses, which we understand will be provided by the Town of Davidson. We welcome discussions with the Town to further explore the scope and budget to tailor it to the Town's needs.

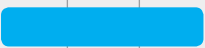




PHASE		BUDGET	
1	Education and Engagement	\$	54,750
2	Testing Policy Direction	\$	50,500
3	Plan Development	\$	37,800
4	Plan Adoption	\$	4,800
5	Comprehensive Plan Implementation Guidebook	\$	8,500
Contingency Funding for Additional Project Work		\$	13,650
TOTAL		\$	170,000

Team Billing Rates

TEAM MEMBER	RATE/HR	
CLARION ASSOCIATES		
Leigh Anne King, AICP, LEED AP Principal & Project Manager	\$	135
Roger Waldon, FAICP Senior Consultant	\$	160
Nate Baker, AICP, CNU-A Associate	\$	80
David Henning, Esq. Associate	\$	75
Christopher Peterson Marketing & Graphics Coordinator	\$	60
PLANNING NEXT		
Jamie Green, AIA, FAICP Principal	\$	195
Sarah Bongiorno, LEED AP, BD+C Senior Project Manager	\$	125
DPFG		
Lucy Gallo, CGMA Managing Principal, Southeast Region	\$	165

G. Schedule

We provide here a schedule that aligns with our project approach and is in keeping with the schedule set out in the RFP. We anticipate meeting monthly with the Town's project managers either in-person or via web-meeting to ensure coordination throughout the project. Based on our experience with past planning projects, we know that it can be necessary to be flexible on the amount of time needed to properly schedule and notify for public adoption hearings. We include that assumption in our schedule below.

PHASE	2018				2019										
	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	cont.
1 Education and Engagement															
2 Testing Policy Direction															
3 Plan Development															
4 Plan Adoption															
5 Comprehensive Plan Implementation Guidebook															
Project Management Meetings	★	★	★	★	★	★	★	★	★	★	★	★	★	★	
Community Outreach Engagement		IE	IE	PAC	PW	PAC		PW	SWS	PAC	PAC	PAC JWS			
	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	cont.

PAC Plan Advisory Committee
IE Public Intercept Events
PW Public Workshop

SWS Staff Work Session
JWS Joint Work Session (PB/BOC)
★ Project Management Meetings

H. Why Our Team is Well Positioned to Partner with Davidson

The Clarion Associates Team is uniquely situated as the best candidate to work with Davidson. Below we identify the key reasons why we are the best fit for the job.

We Have Experience Working in the Greater Charlotte Region - We have prepared nearly a dozen plans and codes in the Charlotte region and other high growth communities. We understand the impacts of growth and the unique ways communities plan for growth.

Our Comprehensive Planning Experience is Unmatched - Collectively, our firm has developed more than 100 plans across the United States and more than 200 ordinances to implement community plans through zoning, design standards, and other provisions. Our Chapel Hill office led development of eight award winning plans for clients located within the Carolinas.

We Understand How to “Plan for the Edges” - We have worked with many high quality communities to think through the strategies for managing growth and character for the remaining lands within their planning areas. The Town of Cary is a primary example of using a strategic approach to plan for development on the edges and how that fits within the larger planning approach for the entire community. We also worked with the City of Columbia and Richland County, South Carolina (see <http://weplantogether.org/> for more details) to develop a joint planning effort and later development code revisions that aligned the vision for planning in areas of common interest.

We Offer a Full Array of Services - From land use planning, market analysis, public engagement, developing design guidance, our team provides a complete array of services for this project.

We Focus on Land Use and Character - As you can see from the example projects included within this proposal, our team members are dedicated to evolving community land use plans to take into account the character and design of different parts of the community and to develop strategies for conserving or transforming these places using urban design concepts and visualizations.

We Have a Unique Focus on Sustainability- Clarion Associates has been involved nationally in the evolution of modern best practice plans to include sustainable development provisions. Firm principals have led zoning clinics with the American Planning Association (APA) on this topic, written articles on sustainable policies to include in plans in *Planning* magazine, assisted in the drafting of the first national model Sustainable Development Code, and have received awards from the Sustaining Places initiative of the APA for excellence in sustainable plan making.

We Create Implementable Plans- Our firm has a unique combination of planners and planner-attorneys that work on both plan development and writing the ordinances that implement the plans. We understand the linkage between plans and codes, and write our plans so that they are highly implementable. We also have worked with communities to develop greater linkages between plans and local budgeting / capital improvement planning processes. The James City County (VA) *2035 Strategic Plan* (see the [plan website](#) for more details) illustrates how we help communities link comprehensive planning policy to local investment decision-making.

I. Appendix

Provided as separate enclosures are example work products that our Clarion Team professionals have prepared for our clients. We offer these as examples of work that are similar in nature to work products requested in the RFP.

- Snapshot Report Example - Kannapolis Planning Influences Report
- Policy Engagement Report Example - Cary Policy Choices Engagement Report
- Design-Focused Planning Example - Independence Redevelopment Area Plans
- Implementation Plan Example - James City County 2035 Strategic Plan

LEIGH ANNE KING, AICP, LEED® AP

Principal

Leigh Anne King is a Principal with Clarion Associates. She is a planner who has experience working with local governments on planning initiatives including sustainable community land use plans, strategic growth plans, affordable housing programs, growth management strategies, development ordinances and design guidelines, school siting, and open space planning. She was the lead author of four award winning plans for Iredell County, North Carolina, Wilson, North Carolina, Camden County, North Carolina, and Eastern Orangeburg County, South Carolina. She has spoken at several national and state-level conferences on the topics of affordable workforce housing, local food systems, and rural development strategies.



Master of City and
Regional Planning
University of North Carolina, Chapel Hill

Bachelor of Arts
University of Tennessee, Knoxville

Related Project Experience

Comprehensive and Sustainable Community Plans

Camden County, NC	Manassas, VA
Cary, NC	Richland County, SC
Clemmons, NC	Rock Hill, SC
Eastern Orangeburg County, SC	Tupelo, MS
Fredericksburg, VA	Union County, NC
Greenville, NC	Waxhaw, NC
Hanover County, VA	Wilson, NC
Iredell County, NC	
Kannapolis, NC	

Growth Management Strategies and Multi-Jurisdictional Plans

Rock Hill, SC	Local Area Regional Transportation Plan for
Hillsborough, NC	Western Union County, NC
Orange County, NC	Davidson County – Nashville, TN Open
BRAC Regional Alliance Infrastructure	Space Plan
Integration Plan	Mississippi County, AR Smart Growth
	Toolkit

Neighborhood, Small Area, and Site Master Plans

Emerald Isle, NC	Lynchburg, VA
Chapel Hill, NC	Southern Orange County Government
Wake Forest, NC	Services Master Plan, NC

Affordable Housing Programs

Islamorada, FL	Palm Beach County, FL
Lee County, FL	Teton County, WY
Marathon, FL	

Zoning Ordinance Updates and Design Standards

Henrico County, VA	Powhatan County, VA
Orange County, NC	Biloxi, MS

Professional History

Clarion Associates, LLC
Senior Associate 2005- Present

Center for Urban and Regional Studies
Research Assistant, 2004-2005

The Conservation Fund
Land Use Programs Coordinator 2000- 2003

American Secure Care
Project Manager 1998 – 2000

Office of State Senator, Nashville, Tennessee
Alumni Legislative Intern, 1998

Professional Associations

American Institute of
Certified Planners
Member

American Planning Association
North Carolina Chapter

Leadership in Energy & Environmental Design
Accredited Professional

Publications

Eating Our Own: How Planners Can Foster the
Development of Local Food Systems
Carolina Planning, Summer 2013

Workforce Housing and the Courts
Planning and Environmental Law
October 2011

Green Infrastructure Plan Evaluation
Frameworks, Journal of Conservation
Planning, March 2005



Master of City & Regional Planning
University of North Carolina , Chapel Hill

Bachelor of Science
Urban Studies & Planning, MI

Professional History

Clarion Associates
2005 – present

Town of Chapel Hill
Planning Director
1984-2005

Triangle J Council of Governments
Director of Planning Programs
1972-1984

Professional Associations

American Institute of Certified Planners,
Fellow

American Planning Association
Charter Member

ROGER WALDON, FAICP
Senior Consultant

Roger Waldon is a Principal with Clarion Associates, based in the North Carolina office. Mr. Waldon served as Planning Director for the Town of Chapel Hill for 21 years, directing the Town’s comprehensive planning and growth management functions. His work has emphasized neighborhood conservation and growth management, including preparation of land use plans and special area plans, preparation and administration of design guidelines, transportation planning, annexation, capital improvements, housing and community development initiatives, and evaluation of development applications. Prior to his work for Chapel Hill, Mr. Waldon worked on regional initiatives as Director of Planning Programs for the Triangle J Council of Governments, a regional planning organization based in the Research Triangle Park, North Carolina. He has also served as an elected official on the Chapel Hill-Carrboro Board of Education.

Mr. Waldon is a frequent speaker at national planning conferences, and has lectured on planning topics at Universities in Massachusetts and North Carolina. His writing includes articles on planning processes and neighborhood conservation, and a book published by the American Planning Association, Planners and Politics. He is a contributor to the 2009 edition of ICMA’s “Green Book,” Local Planning: Contemporary Principles and Practice. He is a Fellow of the American Institute of Certified Planners, and recognized as one of the Top 25 Most Influential Planners in the 50 year history of planning in North Carolina

Major Projects

- Growth Management and Neighborhood Plans | Chapel Hill, NC: Including land use, community facilities, housing, transportation, environmental protection, neighborhood preservation, downtown revitalization, and growth management elements; Hillsborough, NC; Lynchburg, TN; Wake Forest, NC
- Comprehensive Plans | Fredericksburg, VA; Manassas, VA; Orange County, NC; Iredell County, NC; Waxhaw, NC; Johnston County, NC; Brentwood, TN; Tupelo, MS; Wilson, NC; Rock Hill, SC; Camden County, NC; Washington, NC; Orangeburg County, SC; Clemmons, NC; Union County, NC
- Facilities Plan for school construction | Orange County, NC
- Urban Design projects for downtown areas | Winston-Salem, NC; Thomasville, NC; Lancaster, Texas; Chapel Hill, NC; Montgomery, OH
- Six Neighborhood Conservation Districts
- Intergovernmental Agreements | Orange County, NC; Moore County, NC

NATHANIEL BAKER, AICP, CNU-A

Associate Planner

Nate Baker brings to Clarion skills in sustainable planning and code writing. He is currently the chair of the Young Planners Group for APA-NC. Nate began his career as a planner in El Paso, Texas, where he was a case manager for large subdivision and land study projects, contributed to transportation plans, and worked with the Planning Commission to implement the newly adopted comprehensive plan. Since then he has contributed to multiple comprehensive plans, conducted research on development regulations, and performed urban growth analyses. He was awarded a Fulbright Research Fellowship in 2016 to study and compare international planning systems. He is fluent in Spanish and Portuguese and has helped communities provide outreach to Hispanic populations. Nate has also spoken about scenario planning, career development, and metropolitan planning at conferences in North Carolina, Brazil, and South Africa. Through his work Nate seeks to help communities achieve vibrant, equitable, and sustainable growth.

Project Skills

- Comprehensive planning and implementation
- Zoning code development
- Regional population and economic analysis
- Mapping, graphics, and visualization
- Print and digital publication

Project Experience

Plans

- Cary, NC
- El Paso, TX
- Kannapolis, NC
- Graham, NC
- Greenville, NC
- Richland County, SC
- Wake County, NC

Codes and Assessments

- Cedar Hill, TX
- El Paso, TX
- Henrico County, VA
- Norfolk, VA
- Prince George's County, MD
- State College, PA
- Teton County, WY



Master of City and Regional Planning
University of North Carolina, Chapel Hill, NC

Fulbright Research Fellow
Center of Regional Planning and
Development
The Federal University of Minas Gerais
Belo Horizonte, Brazil

Bachelor of Science
Urban and Regional Studies
Cornell University, Ithaca, NY

Professional History

Clarion Associates, LLC
Associate 2014- Present

City of El Paso, TX
Planner, 2012-2013

Professional Associations

The American Institute of Certified Planners

American Planning Association
North Carolina Chapter

The Congress for New Urbanism

Publications & Presentations

Planning for a Sustainable Metropolitan Region in Brazil and North America: Challenges & Strategies
International Society for City and Regional Planners, 52nd Congress, Durban, South Africa 2016

Do I Still Need a Business Card? How Networking Works in 2015
North Carolina APA Conference, 2015

Promises and Pitfalls of Planning Support Systems: A North Carolina Case Study
Annual Conference
American Planning Association – NC Chapter
Fall 2014



Master in Urban Planning
Harvard University, Cambridge, MA

Juris Doctor (Cum Laude)
Environmental Certificate (Honors)
Florida State University, Tallahassee, FL

Bachelor of Science, Civil Engineering
Northwestern University, Evanston, IL

Professional History

Clarion Associates, LLC
Chapel Hill, NC
Associate 2016 – Present

cultureNOW
Boston, MA
Intern 2014

Florida State University College of Law
Tallahassee, FL
Research Assistant 2012

Oertel, Fernandez, Bryant & Atkinson, P.A.
Tallahassee, FL
Law Clerk 2012

Professional Associations

American Planning Association
North Carolina Chapter
Member

Florida Bar Association
Member

Professional Engineer-In-Training
IL Dept. of Financial & Professional
Regulation

Awards

American Planning Association – MA 2014 &
National 2015 Student Project Award (Team).
*Connect Chelsea: Three Visions for a
Gateway City; Harvard GSD Core Studio*

Department of Energy Better Buildings Case
Competition—Most Innovative 2014 (Team).
*Sustainability strategies for franchise
buildings*

Book Awards, FSU College of Law (2010-13)
*Growth Management, Water Law,
Planned Communities, and Comparative
Constitutional Law*

DAVID HENNING, ESQ.
Associate Planner

David Henning is a planner and lawyer serving as an Associate with Clarion’s Chapel Hill office. David’s work for Clarion has included comprehensive plan updates, strategic plans, land development code updates, and affordable housing studies. During his education he honed his planning and design skills while contributing to a vision plan for the nearby community of Chelsea, MA, and while developing a strategic framework for preservation and planning across the globe for the riverfront in Agra, India. Still other projects delved into urban design, zoning, area planning, resilience, and affordable housing. Prior to his planning work, David performed agency monitoring for an environmental law firm in his home state of Florida. His academic projects have been recognized by the American Planning Association and the U.S. Department of Energy. David strives to help communities realize their potential to improve the lives of their current and future residents.

Project Skills

- Planning and implementation
- Community engagement
- Mapping and data visualization
- Land use regulation
- Affordable housing studies

Project Experience

Plans and Studies

Cary, NC

Greenville, NC

James City County, VA

Monroe County, FL

Codes and Assessments

Apopka, FL

Henrico County, VA

Prince George’s County, MD

Richland County, SC

State College, PA

CHRISTOPHER PETERSON

Marketing and Special Projects Coordinator

Christopher Peterson serves as the Marketing and Special Projects Coordinator for Clarion's Chapel Hill team. Chris holds a diverse background in both Communication sciences, focusing on public relations, and Geospatial Science, focusing on GIS and remote sensing applications. Chris assists the team with various public engagement products including developing project websites, graphic design, 3D renderings, document design, GIS mapping, and drafting. Chris joined Clarion Associates in the early fall of 2015. Prior to joining clarion, he worked with a civil engineering firm. There Chris performed similar duties with marketing, graphic design, and GIS applications. Chris was also highly involved with planning and participating in public meetings on multiple civil engineering projects. During college, Chris worked his summers for the Norfolk U.S. Army Corps of Engineers, aboard an oceanographic surveying vessel, charting navigation waterways in and around the Chesapeake Bay.

Project Skills

- Graphic Design
- Web Design
- 3D Modeling
- ESRI ArcGIS
- Document Design and Formatting

Project Experience

- Cary, NC- Community Plan
- Greenville, NC- 2026 Horizons Plan
- Kannapolis, NC- Comprehensive Plan
- James City County, VA – Strategic Plan
- Loudoun County – Comprehensive Plan
- State College, PA – Zone State College | Zoning Ordinance Update
- City of Norfolk, VA – Zone Norfolk | Zoning Ordinance Update
- City of Apopka, FL – Land Development Code Update
- Prince George's County, MD – Zoning Ordinance and Subdivision Regulations Rewrite
- Borough of State College, PA – Zoning Ordinance Update
- Henrico County, VA – Zoning Ordinance and Subdivision Update
- Mooresville, NC – Zoning Code Rewrite



Bachelor of Science, Geospatial Science
Radford University, Radford, VA

Bachelor of Science, Communication
Radford University, Radford, VA

Professional History

Clarion Associates, LLC
Chapel Hill, NC
2015 – Present

Anderson & Associates
Blacksburg, VA
2013-2015

US Army Corps of Engineers
Oceanographic Surveying
Norfolk, VA
2012



Jamie A. Greene, AIA FAICP

PRINCIPAL / PLANNING NEXT

Jamie’s top priority is always to complete the mission and achieve outstanding results. Perhaps that comes from his time as an Army officer. It’s his passion for communities, however, that drives him and our work. As hands-on principal of our practice, Jamie spent the past 20 years being inspired by the voices and commitments of the communities we serve. Today he strives to help communities of all sizes and conditions answer their most fundamental question: “What’s next?”

Relevant project experience includes:

Education

- Masters of Urban and Environmental Planning, University of Virginia
- Bachelor of Science in Architecture, The Ohio State University

Certifications and Training

- Fellow of the American Institute of Certified Planners (FAICP)
- Registered Architect

Speaking

- 2018 APA National Conference [Place-based Branding: Essential for Economic Development]
- 2018 International Town Gown Association Conference [Partnerships with Purpose: Opportunity through Real Estate Collaboration]
- 2017 Society for University and Campus Planning Conference [Never Go Alone: Critical Collaboration for the Changing Urban Campus]

- **Envision Athens**, a vision and strategic plan for Athens-Clarke County, GA;
- **ValpoNEXT**, vision plan for the City of Valparaiso, IN;
- **Fairgrounds to Future**, a vision for the former Montgomery County Fairgrounds site, Dayton, OH;
- **Area Plans and Strategic Plan**, for the City of Independence, OH;
- **Master Plan and Area Plans**, for the City of Upper Arlington, OH;
- **River District Revitalization Plan**, for the City of Elkhart, IN;
- **Plan Together**, comprehensive plan processes for Richland County and the City of Columbia, SC;
- **Imagine Westerville**, community plan and area plans for the City of Westerville, OH;
- **Foward OP**, a vision and strategic plan for the City of Overland Park, KS;
- **Vibrant Communities**, an action agenda for Elkhart County, IN;
- **Creative District Plan**, for the City of Valparaiso, IN;
- **OneDecatur**, comprehensive plan for the City of Decatur, AL;
- **Build One Portsmouth**, comprehensive plan for the City of Portsmouth, VA; and
- **Map for Mobile**, comprehensive plan for the City of Mobile, AL.

Jamie has presented the work of Planning NEXT at many national, regional and local conferences, including: American Planning Association (APA), America Institute of Architects, Society of College and University Planners, and Railvolution. He has served as an adjunct faculty member of the Knowlton School of Architecture at The Ohio State University. Among other professional and civic activities, Jamie serves on the Collaborative Brand Marketing Committee for central Ohio, an extensive multi-year effort designed to advance the identity and prosperity of the region.

The Upper Arlington Comprehensive Plan and its many area planning components have taken a physical form in recent years since the plan. Jamie has worked through a number of projects, like Upper Arlington, that have involved a re-envisioning the physical environment through focused area planning, rezoning, and aggressive implementation.





Sarah Bongiorno, LEED AP BD+C

SENIOR PROJECT MANAGER / PLANNING NEXT

When it comes to creating momentum and movement, Sarah knows a thing or two. Our clients say she “keeps the train running on time.” We say she’s not only well organized but positively passionate for design and quality places. Which explains why Sarah is able to simultaneously make every client feel like our only client while leading a range of civic initiatives.

Recent examples of Sarah’s work includes:

- **ValpoNEXT**, vision plan for the City of Valparaiso, IN;
- **Fairgrounds to Future**, a vision for the former Montgomery County Fairgrounds site, Dayton, OH;
- **Imagine Westerville**, community plan and area plans for the City of Westerville, OH;
- **Forward OP**, a vision and strategic plan for the City of Overland Park, KS;
- **Creative District Plan**, for the City of Valparaiso, IN;
- **Imagine Cary**, community plan for the Town of Cary, NC;
- **Build One Portsmouth**, comprehensive plan for the City of Portsmouth, VA;
- **Anderson Tomorrow**, comprehensive plan update for Anderson Township, OH;
- **Go North Olmsted**, master plan for the City of North Olmsted, OH;
- **One City, One Vision**, a vision and strategic plan for the City of Anniston, AL; and
- **Build Mobile**, neighborhood planning toolkit, the City of Mobile, AL.

Education

- Masters of Urban Design, Columbia University
- Bachelors of Architecture, Ball State University

Certifications and Training

- NCI Charrette System, National Charrette Institute
- LEED Accredited Professional: Building Design and Construction, USGBC

Select Recent Speaking

- 2017 David J. Allor Planning and Zoning Workshop [Happy, Healthy and Strong: Planning an Age Friendly Community]
- 2017 APA Ohio Planning Conference [Embracing an Age-Friendly Ohio]
- 2016 MFR Connect Conference [Engaging with Impact - How to Use Community Engagement to Build Momentum for Planning and Action]
- 2015 Central Ohio Planning and Zoning Conference [Shaping the Future: How to Use Scenario Planning to Develop Place-based Land Use Policy]

Sarah is certified in the NCI Charrette System by the National Charrette Institute.

In addition to her work with Planning NEXT, Sarah has served as an adjunct faculty member of the Knowlton School of Architecture at The Ohio State University. She also recently served on several committees for the Center for Architecture and Design including Design Week[s] and coordinated the Center’s Camp Architecture youth program. Sarah holds a Masters of Science of Architecture and Urban Design from Columbia University and a Bachelors of Architecture from Ball State University.



Sarah is currently coordinating efforts in Overland Park, Kansas (www.ForwardOP.org) for Forward OP, the community vision and strategic planning process.





LUCY GALLO, CGMA
MANAGING PRINCIPAL
SOUTHEAST REGION
lucy.gallo@dpfg.com

FOCUS AREAS

Fiscal Impact Analysis
Economic Impact Analysis
Incorporation Feasibility Studies
Impact Fee Evaluation and Representation
Governmental Fiscal Affairs Liaison

AFFILIATIONS

Government Finance Officers Association
Florida Government Finance Officers Association
Urban Land Institute
Visiting Scholar – Winthrop University

PUBLICATIONS + TECHNICAL PAPERS

Impact Fee Handbook, NAHB, November 2016
An Overview of Special Purpose Taxing Districts, NAHB, September 2014
Municipal Finance Development Tools
After The Great Recession, NAHB, January 2012
Paying for Public Infrastructure in the Carolinas: Reconsidering Development Financing Options, co-author, NAHB, July 2010
Analyzing the Benefits and Costs of Economic Development Projects, collaborative review, UNC School of Government, May 2010
Proportionate Share Impact Fees, co-author, NAHB, November 2009

PRESENTATIONS

Wise Financing for Smarter Growth in Today's Cash Strapped World, New Partners for Smart Growth, 2011.
Impact Fee Methodologies: Protecting Your Community from Controversies, National Impact Fee Roundtable, 2009
Tools for Economic Development Finance, National Impact Fee Roundtable, 2009

PROFESSIONAL EXPERIENCE

2011 to Present

Development Planning & Financing Group, Inc. (DPFG)
Managing Principal

2009 – 2011

AECOM Economics (Formerly Economics Research Associates)
Associate Vice President

2003 – 2009

Miley, Gallo & Associates, LLC
President and Principal

1986 – 2003

TKTK - Executive Vice President and Principal

EDUCATION AND DESIGNATIONS

B.S., Accounting, University of South Carolina
Organizational Development Certificate Program, UNC
CGMA - Chartered Global Management Accountant

Lucy Gallo is the Managing Principal of the Southeast Region of DPFG and provides fiscal and economic impact analysis, real estate market analysis, benefit/cost modeling and public infrastructure finance (impact fees, tax increment financing, and special assessment districts) advisory services for urban development, redevelopment and comprehensive planning projects. With significant experience in community revitalization initiatives, Lucy has served as a lead fiscal consultant for numerous large-scale economic development and public/private partnership engagements.

Lucy understands that meaningful economic and fiscal impact analyses can successfully bridge the gap between traditional planning and economic reality to forge a cooperative, comprehensive community planning process. Over the years, she has assisted a diverse cross-section of communities, ranging from small towns and rural counties to large urban cities, with fiscal and economic analyses to evaluate important land-use planning initiatives. Regardless of the community's size, the goal of each engagement has been to address pertinent issues and concerns regarding long-term fiscal sustainability.

The ultimate goal of every modeling assignment is to help local governments, and their constituencies, in carrying out fiscal stewardship. Lucy's financial models are designed with utmost transparency; an approach that distinguishes her work in its field. Her studies have been subjected to the highest level of peer review, and those reviews consistently conclude that her approach to impact analysis is both thorough and comprehensive.

Lucy often collaborates with the UNC-Chapel Hill City and Regional Planning Department and the UNC School of Government on fiscal and economic impact related research, projects and publications.

SOUTHEAST REGION OFFICES

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RESEARCH TRIANGLE, NC

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