



PROJECT UNDERSTANDING

The City of Westwood is in a very unique position in regard to planning for the future. Although it is a first ring residential oriented suburb the past and future is framed by the use of key places and relationships with key entities. Places like 47th Street, the Woodside Racket Club and Entercom properties, and the Dennis Park / Westwood Christian Church and Westwood View Elementary School area. Entities such as KU, Westwood Hills and Mission Woods, and other adjacent government entities (city, county and state) and commercial / office areas.

Rarely does a place of Westwood's stature – small landlocked predominantly suburban residential community - have so many strategic elements to consider as part of a planning process. This planning process and product will need to meet the state statutes that apply to updating a comprehensive plan in the state of Kansas, but more importantly the process and the plan will need to be heavily strategic in determining a common vision, method(s) for pursuing that vision and laying out a strategic decision making path as community attitudes, physical qualities and marketplace variables may change in the future.

The city of Westwood is at a critical juncture. This community has traditionally been a single-family suburban community with several activity nodes that served a variety of purposes supporting the community and the surrounding area. Unlike several northeast Johnson County suburbs it has not seen single-family residential redevelopment occur at the level of several nearby communities. Instead it has witnessed first hand commercial repurposing and redevelopment, as well as conversion of property from one use to another. The repurposing / redevelopment that has been occurring shows that the market sees an inherent value to the place – not just as a single family suburb, but as a more urban place.

Such a context points to the importance of this planning effort and outcome. This plan will need to address the following important questions:

- What does Westwood want to be in the future? Based upon that vision, what goals and strategies should be set to reach the vision?
- How do these goals and priorities guide allocation of city resources through annual budget, capital outlays, and debt structure?
- How should the community make critical decisions about the future development of key locations?
 - » As 47th Street development gains popularity how does market desire meet community desire?
 - » How will the Entercom property develop, and how does that mesh with the Westwood View / Dennis Park / 5050 Rainbow property? This plan will have to consider the financial realities of redeveloping this site.
 - » How can the Westwood View / Dennis Park / 5050 Rainbow property play a role in keeping the elementary school open, vibrant and sustainable? This plan will need to build upon the Kansas City Urban Land Institute (ULI) Charrette and incorporate community input into this vision.
 - » What is the highest and best use of the property City Hall sits on today?
 - » How will the urban style development at Woodside (47th and Rainbow) impact the future repurposing / redevelopment of property in close proximity?
- What is the strategic process for considering and addressing non-traditional projects and solutions in Westwood?
- What should be done to enhance opportunities for travel by transit, bicycle? How can we make the community more walkable?
- What should be done to address regional and local transportation and parking needs? How should on-street parking, one-way streets and regional parking be considered?

This plan will need to address both a long-term desired future and the alternatives that may be on the horizon in the short term. These are just a few of the key planning issues and questions facing Westwood that our team's project approach is intended to address.





Shockey
Consulting
Services, LLC

Helping Communities Make Better Decisions Since 1998



WESTWOOD, KS
Master Plan
July 27, 2015



13000 W. 87th Street Parkway, Suite 103 | Lenexa, KS 66215 | (913) 248-9585
www.shockeyconsulting.com



July 27, 2015

Tony Atchity, Westwood Planning Commissioner
City of Westwood, Kansas
4700 Rainbow Blvd
Westwood, KS 66205

Re: Master Plan RFP

Dear Mr. Atchity,

Shockey Consulting is pleased to present qualifications for the Westwood Master Plan. We've assembled a local team of professionals that have successfully worked together in the past. I will serve as your project manager leading the Strategic Planning component and overseeing our excellent planning team for the Comprehensive Plan. I'm excited to work again in Westwood as I managed the community engagement and drafted the 1997 Westwood Comprehensive Plan. Fred Sherman gave us a tour of Westwood and it was great to see all of the progress since 1997!

Our team includes two planners from Shockey: Erin Ollig, AICP and Shelby Ferguson; Dave Knopick with dPlanit; Lisa Koch with Groundswell who will focus on transportation and parking strategies; and Kelly Van Elders from Landworks, an experienced parks planner. Our local team is uniquely qualified to assist you. Our experience matches your requirements as follows:

- ✓ Comprehensive Planning Experience – Our team has 70+ years of experience in urban planning for cities as consultants as well as former local government planners.
- ✓ Community Engagement Experts – We have demonstrated success in designing and implementing complex public engagement processes that generate broad-based community input and translate it into meaningful community priorities.
- ✓ Strategic Planning Experts -- As a former local government manager, I understand the complicated issues, politics and varied personalities. Shockey Consulting has worked for 18 different government agencies to set priorities and solve complex problems.

We are excited to work with you as you plan Westwood's future. If you have any questions about our approach or qualifications, please contact me, (913) 515-4365 (cell) or sheila@shockeyconsulting.com.

Sincerely,

Sheila Shockey
President, Shockey Consulting Services, LLC.

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PROJECT APPROACH

MASTER PLANNING OUTCOMES

The RFP provided was well crafted and provided us a good sense of what is needed. Fred Sherman also met with our team and gave us a tour of the community. Based upon our knowledge of the community, the following is our understanding of the desired master planning process outcomes:

- Establish a shared community vision for the future of Westwood;
- Create an overall blueprint including goals, strategies & implementation steps;
- Set short-term priorities with the Governing Body that drive decisions about budget, capital outlay, financial policies and operations;
- Develop a Comprehensive Plan that meets the requirements of state statute while defining a process for making future development decisions.

To successfully create these outcomes, and address the unique opportunities, issues, needs, challenges facing Westwood requires a variety of skilled experts, but also a team of genuinely personable individuals that are committed to working closely with City leaders, and to listening and building relationships with the public and the stakeholders they encounter throughout the project.

With the understanding above, our team is prepared to address the scope of services identified in the RFP within a nine month timeframe through the following proposed approach.

PHASE 1: PROJECT INITIATION

During this phase our team will work closely with the City of Westwood staff and leadership to establish key foundational elements of the project. Working together, we will establish the project management, logistical and communication framework for the project.

Additionally, a community engagement strategy will be developed in Master Plan Steering Committee Meeting #1 to identify the specific methods, activities, assignments and schedule that will be undertaken throughout the project. This strategy will be revisited throughout the project to ensure that engagement is effectively reaching all targeted groups and soliciting desired input.

Task 1.1

- Development of project management and community engagement strategy.
- Kick-off project team meeting
- Establishment of Master Plan Steering Committee – Team to facilitate meeting to craft Community Engagement Plan

Deliverables for Phase 1

- Agenda/materials for Master Plan Steering Committee Meeting #1 & summary meeting notes
- Community Engagement and Project Management summary memo resulting from Steering Committee Meeting #1

Schedule: Weeks 1 – 3

PROJECT APPROACH CONTINUED

PHASE 2: DISCOVERY, DATA SYNTHESIS & ANALYSIS

The purpose of task two is to establish a solid foundation of information related to all aspects of the Westwood community and surrounding area. Pertinent data will be targeted for review and analysis, and site visits will be made to observe and record conditions. Stakeholder interviews will be conducted to identify existing conditions and future issues. The information gathered will be prepared for use by the Governing Body, Planning Commission, Master Plan Steering Committee and for public dissemination.

Task 2.1

- Base Data: Review and analyze base data and information provided by the City of Westwood
- Conduct site visits to observe and record conditions

Task 2.2

- Base Maps: Prepare base maps of the graphically displaying the analysis from Task 2.1
- City staff will provide updated data and maps regarding residential building, density/land use, capital improvement projects, utilities, infrastructure and other similar data required for the plan. The project team will also use MySidewalk Insights, a local, big data mapping service Shockey Consulting has a license to utilize on this project.

Task 2.3

- Stakeholder Interviews: During the Community Engagement Plan development in Task 1, key groups or individuals will be identified for stakeholder interviews. We will discover and summarize through these discussions existing conditions, future issues to address and encourage participation in the planning process. Examples of groups for stakeholder interviews include: University of Kansas Hospital representatives, Shawnee Mission Schools Superintendent, Woodside Village representatives, Woodside Racquet Club representatives, surrounding community planners and others that might not attend a public meeting or where specific information from them is desired.

Deliverables for Phase 2

- Existing Condition/Future Issues Summary Memo
- Existing Conditions Maps / Presentation Materials

Schedule: Weeks 1 - 6

PHASE 3: VISIONING / STRATEGIC PLANNING

With the foundational information in hand, our team will begin the process of partnering with stakeholders to develop the vision and goals that inform the Strategic Plan and Comprehensive Plan. During this phase the focus of efforts will be on community engagement that establishes factual and perceptual issues; needs and desires as potential goals; and a guiding vision for Westwood.

PROJECT APPROACH CONTINUED

Activities associated with the development of community engagement tools and services in support of creating and communicating the plan vision throughout the project will be done concurrently with other tasks outlined in this approach.

Task 3.1

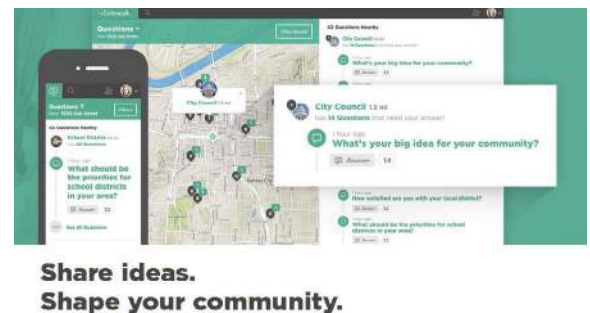
- Create project brand and basic communication/recruitment pieces: Prepare materials as basic communications and recruitment pieces to include website, handout, a PowerPoint presentation.

Task 3.2

- Community Values Survey: A community survey will be developed during a meeting with the Governing Body. The survey will provide community members (residents and business owners) a convenient way to participate in the planning process and will provide insight into the community vision, priorities and values. Residents and business owners will be encouraged to complete the survey online. It will be posted on the City's website. The survey can also be printed and distributed at public locations and mailed to those residents who prefer their materials in print. We will tabulate responses and provide a summary report.

Task 3.3

- Digital Engagement: We will employ MySidewalk which is a digital engagement service where we pose questions and people comment, vote, share ideas. This will be coordinated with other input methods so the questions and discussion topics change throughout the planning process.



Task 3.4

- Public Event #1: The focus of this event will be two-fold: 1) to inform and educate participants about the planning process and the findings to date; and 2) to verify issues identified through Phase 1 activities by listening to ideas regarding a vision and potential goals and community priorities. To reach a majority of the community and to energize stakeholders, the meeting location and format should be more community oriented, engaging and fun than a typical public meeting.

Task 3.5

- Draft Vision/Goals Meeting: A draft vision and set of long-term goals will be drafted based upon the community engagement in Tasks 3.1 – 3.4 working with the Master Plan Steering Committee in Meeting #2. This will be provided to the Westwood Governing Body for consideration and their use in their Strategic Planning sessions.

Task 3.6

- Governing Body Strategic Planning: A vision describes the future in idealistic terms. The community engagement during Task 3.1 – 3.5 will provide the Governing Body with an idea about what the

PROJECT APPROACH CONTINUED

community desires in terms of the future as well as the issues and priorities for them to address in the short-term. We will facilitate two days of strategic planning with Governing Body and staff resulting in a plan to guide the City's annual budget, capital outlays, staffing levels, debt structuring and other expenditures.

Deliverables for Phase 3

- Website materials
- Project Handout & PowerPoint
- Community Survey Tool & Summary Memo
- Digital Engagement Memo
- Master Plan Steering Committee Meeting #2 Agenda Materials & Summary
- Vision & Goal Community Engagement Summary
- Governing Body Strategic Planning Workshop Materials & Summary
- Draft Strategic Plan
- Draft Vision Statement & Goals

Schedule Weeks 1 - 16

PHASE 4: PLAN DEVELOPMENT

With a guiding vision in hand and having engaged community stakeholders, our team will begin the development of a specific Master Plan addressing the goals identified through the project to this point.

It should be noted that this plan will address applicable elements / principles of sustainability and the integration of land use, multi-modal transportation and infrastructure components of the plan to meet the requirements of state statutes for comprehensive plans. The draft will be tested through continued community engagement activities during this phase of the project.

Task 4.1

- Draft Comprehensive Plan Development: Based upon the draft Vision Statement & Goals, the project team will prepare materials for discussion during Master Plan Steering Committee #3 to refine various concepts and components. The resulting materials will be used for discussion by the community at the second public event.

Task 4.1

- Public Event #2: Using both in-person and digital means, the vision, goals and potential planning concepts and components will be brought before the community for input. This step is critical in that it allows an opportunity for the public to further understand the development of the plan concepts and components. The presentation of these materials will show that the public's input has been considered. More detailed feedback will be encouraged at this interactive meeting.

PROJECT APPROACH CONTINUED

Deliverables for Phase 4

- Meeting Agenda & Summary for Master Plan Steering Committee #3
- Materials for and Summary of Public Event #2

Schedule Weeks 17 - 21

PHASE 5: IMPLEMENTATION STRATEGY & FINAL PLAN

Phase 5 is focused on delivering the plan implementation strategy and final plan documentation and finally, the adoption of the plan.

Task 5.1

- Complete the draft plan per review from Phase 4
- Develop an Implementation Strategy during Master Plan Steering Committee #4 for the plan findings and recommendations, including issue identification, proposed actions, responsible implementation parties, projected timeframe, and projected costs.

Task 5.2

- Produce adoption draft plan document and support presentation materials.
- Attend and present the final deliverables to the Planning Commission, City Council and public.
- Develop and deliver final plan documents.

Deliverables for Phase 5

- Adoption of plan and implementation strategy.
- Final Master Plan per RFP requirements.

Schedule Weeks 22 - 28

PROJECT BUDGET & SCHEDULE

The timeline for phase completion and deliverables has been outlined for each phase in this project approach. This schedule is approximately 7 months (October - May). Our team will regularly consult with the City staff on the project schedule and make any necessary adjustments as required throughout the community engagement process. Details regarding the budget is described on pages 30 and 31 including a schedule of fees broken down by work task, hourly rates for project personnel and estimated travel and incidental costs. Because all of our team members are local, travel costs are minimal delivering more high value expertise for the same dollar.

PROJECT SCHEDULE

	WEEK 1	WEEK 2	WEEK 3	WEEK 4	WEEK 5	WEEK 6	WEEK 7	WEEK 8	WEEK 9	WEEK 10	WEEK 11	WEEK 12	WEEK 13	WEEK 14	WEEK 15	WEEK 16	WEEK 17	WEEK 18	WEEK 19	WEEK 20	WEEK 21	WEEK 22	WEEK 23	WEEK 24	WEEK 25	WEEK 26	WEEK 27	WEEK 28
PHASE 1: Project Initiation																												
PHASE 2: Discovery, Data Synthesis & Analysis																												
PHASE 3: Vision / Strategic Planning																												
PHASE 4: Plan Development																												
PHASE 5: Implementation Strategy & Final Plan																												



COMMUNITY ENGAGEMENT STRATEGIES

There is a vast range of community engagement tools and techniques that are available today. These tools and techniques range from traditional tried and true methods to new digital media methods. In evaluating and employing these tools and techniques there are a few key principles to finding the right combination that unlocks project success and sets the tone for continued implementation efforts.

- **An understanding of how to reach targeted stakeholders:** we do our homework, understand your stakeholders and learn how best to engage them.
- **A multi-prong approach:** always employ several tools, techniques and methods.
- **A strong foundation:** built upon lessons learned from past engagement efforts.
- **No gimmicks:** don't do something just because it is the hottest trend or technology.
- **Genuine engagement:** honestly listen and show how decision-makers considered the input.

Our project approach is based upon developing a Community Engagement Memo at the outset of the project (Task 1.1). This strategy will outline the specific tools and timing for community engagement efforts throughout the project. As events and activities occur and tools / methods are employed, the consultant and Client team will evaluate and adjust the strategy in a proactive manner to ensure that lessons learned are employed as the project unfolds.

Our team believes that citizen engagement is a transparent process in which information is transferred and shared among all parties. Community stakeholders, given the right information about issues in advance of discussions, can become the most effective planners. Our community engagement process includes informing, educating, identifying, prioritizing, building consensus and motivating everyone so that a shared vision is not only determined, but a commitment to implementation is developed.

Our past projects have provided our team with vast experience in the utilization of many community engagement and relations tools / methods. For this project the engagement process will include both traditional and electronic methods of engagement. Four primary methods for community engagement are identified below:

Direct communication tools – such as a project website linked to the city or chamber web site, the e-news tool, local newspaper, etc. may inform and educate the general citizenry regarding events, activities and progress associated with this project. Additionally, these tools will serve as places where people can access further information related to sustainability topics and resources.

Community workshops and open houses – The use of workshops or open houses are important for assessing long-term community desires, but also for addressing development and design interface issues, as well as communicating the shared vision for this project. Such workshops and open houses can incorporate electronic / digital means for gathering direct input for the project, as well as traditional low tech approaches. Sometimes the best way of reaching stakeholders is to go to where they are already gathering. A mobile meeting truck that offers food can entice stakeholders to participate. We staff the mobile meeting with display boards, videos and tablets to record input from stakeholders in a quick and convenient forum.

COMMUNITY ENGAGEMENT STRATEGIES

Stakeholder interviews – Given the existing development pattern that is in place, as well as the focus on redevelopment, it will be critical that existing business interests and property owners be engaged directly through one-on-one interviews and topical focus groups. These activities will not only broaden ownership in the outcome of the planning project, but also will allow for greater detailed discourse than the typical community meeting. Interviews and focus groups allow for a deeper conversations regarding issues and ideas that may arise from other engagement efforts such as workshops or open houses. A key element of these interviews is to forge partnerships and commitments toward implementation of the plan.

Digital media – Supplementing traditional engagement methods above, efforts during the project focus on engaging the community through the use of digital tools such as MySidewalk (which can be linked to Twitter, Facebook, YouTube, etc.) allowing citizens, stakeholders and other interested parties to access the project in real time 24/7 and on the go through mobile applications. This type of tool will support a managed discussion that citizens can access from home at their convenience. Thus, digital media will broaden citizen engagement to reach demographic groups that do not traditionally come to public meetings. Digital media tools will be used to generate ideas, prioritize concepts / projects, and develop / present solutions to problems that are identified in the planning area and more. Also, through links to the city or chamber web site, these tools can become a platform for possible continued discussion after the plan is complete (i.e. reporting on implementation progress and project development).

Our team is skilled at developing and implementing an effective community engagement utilizing not only the tools and methods outlined above, but also tools and methods related to community survey and polling techniques whether traditional or via digital means. We are prepared to conduct and be part of community events and meetings at a variety of locations and times. The possibilities for how to engage the public are vast, but our goal is to unlock project success by working with the community to employ the right combination of tools / methods that will work in Westwood for this project.

PROJECT TEAM



SHEILA SHOCKEY

Shockey Consulting Services, LLC
Project Manager

Education

Bachelor's in Public Administration, Washburn University
Master's in Public Administration, University of Missouri-Kansas City

Affiliations & Accolades

Project Manager for Missouri
APA Plan of the Year and
National APA Small Town Plan
of the Year

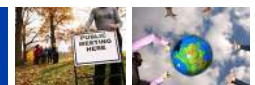
Member of the American
Planning Association

Sheila Shockey is the founder and president of Shockey Consulting Services, llc. She has worked with local governments as a staff member and consultant since 1989. She was the Assistant City Administrator for the City of Prairie Village, Kansas – a first-tier suburb with many of the same issues as Westwood. Sheila brings the perspective of having worked in a government agency, a deep understanding of planning issues and ability to translate these issues effectively to all stakeholders.

STRATEGIC PLANNING: Sheila's background in city management influences how she approaches goal setting and strategic planning. Understanding the issues and challenges means she can better relate to participants and help them define solutions. Sheila knows how to create an engaging process that results in productive conversations and is fun!

PLANNING & COMMUNITY ENGAGEMENT: Sheila is a skilled facilitator and public process designer. She has managed many complex stakeholder planning processes including one with over 8,000 stakeholders providing input into the final plan. Sheila has been the project manager for several projects winning state and national awards for excellence in planning.

1997 WESTWOOD COMPREHENSIVE PLAN: Sheila, with a previous employer, managed the public participation process, prepared community and business surveys, and drafted the final plan document. The issues facing Westwood included managing infill development, property maintenance, and recruitment of commercial development. A community and business survey was conducted. The results of the survey set the groundwork for a series of workshops with community participants. Sheila facilitated the workshops and authored the draft and final plan.



PROJECT TEAM CONTINUED



DAVE KNOPIK, AICP

dPlanit

Lead Planner

Education

Bachelor's in Parks and Recreation, University of Oklahoma

Master's in City and Regional Planning, University of Oklahoma

Affiliation

Member of the American Planning Association

American Institute of Certified Planners

Dave Knopick has been engaged in planning for over 25 years, working with people and communities on a wide array of regulatory, planning, design, building and development projects. This experience has taught Dave that success comes from effective collaboration, and meaningful partnerships. Citizens, developers, property and business owners, consultants, government staff and community leaders must work together to achieve a desired vision. By working together an essential foundation for successful plans, implementation tools and physical projects is established. Dave is currently working to bring people together by blending traditional and new planning approaches with technological tools in a manner that engages and energizes people.

As a planning consultant Dave has focused on providing service to public agencies and communities nationally, regionally and locally. Rarely has Dave engaged in providing services to private development companies. Public service is at the core of that focus. He served as Community Development Director in Lenexa, Kansas for three years.

DPLANIT PROJECT EXPERIENCE

Comprehensive Planning Project Experience

- Blue Springs, MO
- Raymore, MO
- Sedalia, MO
- Cheney, KS
- Nebraska City, NE

PROJECT EXPERIENCE (while with another firm):

Comprehensive / Growth / Strategic Planning Project Experience

- Fairhope, AL
- Magnolia Springs, AL
- Fort Smith, AR
- Cherry Hills Village, CO
- Red Oak, IA
- Sioux City, IA
- Story County, IA
- Waukegan, IA
- Atchison, KS
- Reno County, KS
- Salina, KS
- Miami County, KS
- Jackson, MS
- FOCUS KC, Kansas City, MO
- North Kansas City, MO
- Raytown, MO
- Sedalia, MO
- Sugar Creek, MO
- Lincoln / Lancaster County, NE
- Hastings, NE
- Boerne, TX



PROJECT TEAM CONTINUED



ERIN OLLIG, AICP
Shockey Consulting Services, LLC
Planner

Education

Bachelor's in Sociology, St. Cloud State University
Master's in Urban Planning, University of Kansas

Affiliations

Treasurer of the American
Planning Association – Kansas
Chapter

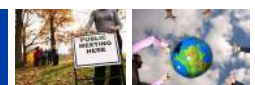
American Institute of
Certified Planners

Erin Ollig, AICP, is an urban planner who is an experienced planning and stakeholder engagement project manager. She has managed several comprehensive and community plans resulting in more sustainable communities. She excels at creating dynamic, exciting planning processes that are highly interactive with large-scale participation. She is skilled at facilitating in-person planning workshops and virtual interaction events. She has used web-based technology to gather input from stakeholders and hold highly interactive conversations about important community issues. She has technical background in land use, environmental, transportation, infrastructure and housing issues.

Fred Sherman mentored her as a planner in Gardner, Kansas and she looks forward to working with him again on this important community plan. She joined Shockey in 2005 after working for city and county government.

SIMILAR PROJECTS

- City of Emporia, Kansas
Imagine Emporia Together
Plan
- City of Greenwood,
Missouri Comprehensive
Plan
- City of Louisburg, Kansas
Downtown Revitalization
Plan
- City of Columbus, Kansas
Community Strategic Plan
- Vision Wamego, Kansas
Strategic Plan



PROJECT TEAM CONTINUED



LISA KOCH, AICP
Groundswell Consulting, LLC
Transportation Planner

Education

Bachelor's in Political Science, University of Kansas
Master's in Urban Planning, University of Kansas

Affiliations

President of the Kansas
Chapter of the American
Planning Association

Chapter President's Council
and Chair of the Grant's CPC
Committee – American
Planning Association

Board of Directors – Greater
Kansas City Chapter of the
Women's Transportation
Seminar

Lisa is a Transportation Planner who specializes in multimodal capital improvement planning at the corridor, area, community, regional and statewide level. Through her 13-year career, which included planning for the City of Mission, the State of Kansas and most recently as a consultant, she has worked on projects that have improved safety and circulation for roadway users, developed bus and rail transit routes in many U.S. cities and created bicycle and pedestrian plans that focus on user safety.

The cornerstone of Lisa's style is communication and engagement, a performance and data-driven decision-making process, cost effective solutions and focusing on implementation from the outset.

SIMILAR PROJECTS

- City of Newton, Kansas Bicycle Master Plan
- Creating Sustainable Places – Rock Island Corridor Study
- City of Grandview, Missouri I-49 Corridor Plan
- City of Grandview, Missouri Sustainable Development Guidelines for the M-150 Corridor
- Ashford University Master Plan



PROJECT TEAM CONTINUED



SHELBY FERGUSON

Shockley Consulting Services, LLC
Planner

Education

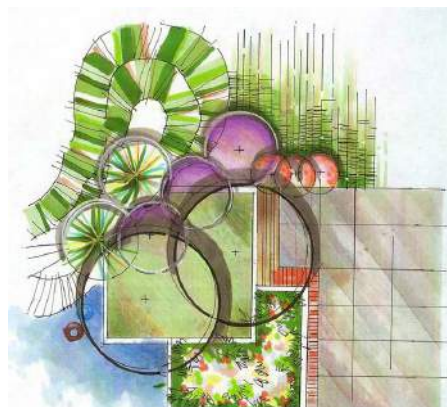
Bachelor's in Urban Planning and Design, University of Missouri - Kansas City
Bachelor's in Housing and Interior Design, Missouri State University

Affiliations

Member of the American
Planning Association

Member of the Women in
Transportation Group

Shelby Ferguson, an urban planner, has contributed to area communities since 2008 focusing on redevelopment, growth management, historic preservation and housing. She has managed comprehensive community plans resulting in long-range plans for redevelopment. She brings knowledge of urban planning and design to help communities create their visions. Shelby's a talented artist who uses visual facilitation techniques and sketches to bring community vision to life. Below are some of Shelby's creations. She has worked in both fields to understand the appreciation of design while also having the ability to evaluate and execute solutions within projects. She has experience working with underserved communities and uses technology and social media to effectively engage stakeholders.



PROJECT TEAM CONTINUED



KELLY VANELDERS

Landworks Studio
Landscape Architect

Education

Bachelor's in Landscape Architecture, Kansas State University

Registrations

PLA
LEED
ENV SP

Kelly is the Director of Landscape Architecture for the Landworks Studio team. With 25 years of industry experience primarily focused in the parks and recreation industry, working both in the public and private sector, Kelly is very adept at leading complex planning and design projects between multiple disciplines, consultants and clients. Kelly is a creative and artistic designer with beautiful yet practical results. Kelly's skills also include public engagement and charrette facilitation. His vast experience was gained by leading teams through numerous large and small scale projects while working for a variety of Kansas City's best consulting firms and the City of Overland Park.



SIMILAR PROJECTS

8TH & MAIN FARMER'S
MARKET
Grandview, Missouri

I-49 CORRIDOR STUDY
Grandview, Missouri

COLLEGE AVENUE
PEDESTRIAN CROSSING
Columbia, Missouri

39RAINBOW MIXED-USE
DEVELOPMENT
Kansas City, Kansas

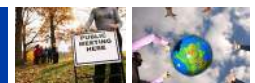
NORTHWOOD SHOPPING
CENTER
Kansas City, Kansas

EL DORADO PARKS &
RECREATION MASTER
PLAN
El Dorado, Kansas

KU WEST CAMPUS URBAN
STORMWATER
Lawrence, Kansas

GIVING GROVE AT HALE
COOK ELEMENTARY
Kansas City, Missouri

CLEAR CREEK PHASES 2 & 3
Shawnee, Kansas



QUALIFICATIONS

SHOCKEY CONSULTING SERVICES, LLC

Shockey Consulting Services, LLC, provides award-winning management, planning and public participation consulting services to federal, regional, state, and local governments and other public agencies.

WHAT WE DO

MANAGEMENT CONSULTING

Make plans, prioritize, reorganize, create programs, and improve services.



We are former government managers and planners who understand the issues our clients face. Shockey can help agencies set goals, reorganize, measure performance, create new programs, and develop sustainability, management and funding strategies.

PLANNING

Create a vision and strategic plans, develop a comprehensive plan, identify future land use, prepare plans for watersheds, downtowns, green infrastructure, sustainability, and communities.



Our creative planners have impressive credentials. No matter the scale -- regional, community, or neighborhood -- people support the plans and implement them because of the inclusive planning process. We provide visioning, comprehensive land use planning, strategic planning, and sustainability planning services.

PUBLIC PARTICIPATION

Engage, educate, communicate, and involve stakeholders/the public for better decision-making.



Some people call it public involvement; others call it public engagement, public relations, public outreach, public education, or communications. Whatever you call it, call us because we can help your community make a better decision by involving the public in the process!

OUR CORE COMPETENCIES

- Setting budget, capital, organizational, & community priorities, strategic planning
- Planning quality places & communities
- Educating & involving the public
- Enhancing revenues & community investment
- Improving existing programs
- Complying with regulations
- Measuring program performance
- Developing new programs



SHOCKEY CONSULTING SERVICES, LLC

STRATEGIC PLANNING EXPERIENCE

Shockey works with agencies to set goals, establish priorities and make plans for the future. As former local government managers, we understand the complicated issues, politics and varied personalities. We've successfully brought groups together to set priorities and solve complex problems.

STRATEGIC PLANNING CLIENT LIST

Shockey Consulting Services, llc. has provided council goal-setting/strategic planning services to the following clients:

- ◇ City of Blue Springs, Missouri
- ◇ City of Creve Coeur, Missouri
- ◇ City of Fairway, Kansas
- ◇ City of Independence, Missouri
- ◇ City of Kansas City, Missouri
- ◇ City of Lenexa, Kansas
- ◇ City of Maryland Heights, Missouri
- ◇ City of Mission, Kansas
- ◇ City of O'Fallon, Illinois
- ◇ City of Olathe, Kansas
- ◇ City of Raymore, Missouri
- ◇ City of Raytown, Missouri
- ◇ City of Shawnee, Kansas
- ◇ Johnson County, Kansas
- ◇ Little Blue Valley Sewer District, Independence, Missouri
- ◇ Mid-America Regional Council
- ◇ Unified Government of Wyandotte County, Kansas / Kansas City, Kansas



"The City of Kansas City has used Shockey Consulting Services over the years on numerous projects and I would give them a 5-star rating. They are simply the best and deliver what they promise. Ms. Shockey is frankly brilliant and demands the same from her team members."

John Franklin, Assistant City Manager
City of Kansas City, Missouri

REFERENCES

Adam Norris, Deputy City Administrator of Development Services | City of Blue Springs, Missouri
Phone: (816) 655-0498 | Email: anorris@bluespringsgov.com

Jim Giles, Dir. of Council & Community Relations | Office of Mayor Sly James | City of Kansas City, Missouri
Phone: (816) 513-3500 (Office) | (816) 513-6575 (Direct) | Email: jim.giles@kcmo.org

Mark Perkins | City Administrator | City of Creve Coeur, Missouri
Phone: (314) 872-2511 | Email: mperkins@ci.creve-coeur.mo.us

"We were pleased with the strategic planning process and your services. We plan to keep the plan up to date going forward. Thanks again for your excellent work."

Mark Perkins, City Administrator
City of Creve Coeur, Missouri



SHOCKEY CONSULTING SERVICES, LLC.

PLANNING QUALIFICATIONS

We all want to live the ideal place. Shockey can help you define what that means to your community. Our insightful planners create collaborative processes that result in plans that not only describe that vision, but include vivid graphics to bring that vision to life! We develop plans to reinvigorate downtowns, neighborhoods, and entire communities. We can focus on corridors, economic development, watersheds, green infrastructure, transportation, and parks/trails/greenways. **Over the past 17 years, Shockey has successfully completed 28 community planning projects.** We know how to create livable, sustainable, healthy places where people want to be. Let's get your diverse group of stakeholders' together to not only plan for your ideal place, but make it a reality!

PLANNING APPROACH

We all know that one size doesn't fit all, particularly when it comes to planning. Shockey has proven success in tailoring plans that are unique and reflective of each community. Using innovative techniques and a collaborative process, Shockey's urban planners can help your community define its future, develop a plan to achieve that vision and identify the actions needed to make it come to fruition.

We believe the members of your community make the best planners. Using our approach, community engagement is not a separate set of tasks but rather it is an integral part of plan development. Technical data and analysis is provided to the community stakeholders to educate & inform them about planning issues. This approach not only results in a better planning product but a more educated and engaged community.

SHOCKEY COMMUNITY PLANNING CLIENT LIST

- ◇ Columbus, Kansas
- ◇ Edgerton, Kansas
- ◇ Franklin County, Kansas
- ◇ Greenwood, Missouri
- ◇ Harvey County, Kansas
- ◇ Holton, Kansas
- ◇ Kansas City, Missouri
- ◇ Larned, Kansas
- ◇ Leawood, Kansas
- ◇ Louisburg, Kansas
- ◇ Maryland Heights, Missouri
- ◇ Merriam, Kansas
- ◇ Mid-America Regional Council
- ◇ Peculiar, Missouri
- ◇ Raymore, Missouri
- ◇ Rosehill, Kansas
- ◇ Sedgwick County, Kansas
- ◇ Sugar Creek, Missouri
- ◇ Unified Government of Wyandotte County
/ Kansas City, Kansas
- ◇ Wamego, Kansas
- ◇ Waverly, Kansas



"Best public session I've been involved with in the city for the last 16 years."

-- Regarding the Maryland Heights Comprehensive Plan Update with 214 participants.

J. Wayne Oldroyd, AICP,
Director of Community Development.
City of Maryland Heights , Missouri

QUALIFICATIONS

DPLANIT

dPlanit is based upon the foundation of providing public engagement and urban planning services through the effective collaboration of client, community and consultant colleagues. As a small business, dPlanit operates in concert with client and project team members at all times. As a result, in every project, dPlanit has found a shared commonality – the pursuit of a vision for a better community, a better neighborhood, a better development, a better environment, a better...

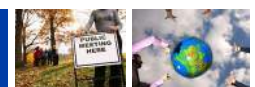


The goal at dPlanit is simple – *accomplish the “vision for a better ...”* by working together. Achieving this goal is essential for successful plans, implementation tools and physical projects. It is also essential to the building of relationships and partnerships that go beyond any individual project in order to positively impact communities in the future.

Over the past three years, dPlanit has been involved in a variety of planning projects and services for:

- ◇ Baldwin City, KS
- ◇ Blue Springs, MO – Master Plan
- ◇ Cheney, KS – Comprehensive Plan
- ◇ Cheyenne, WY
- ◇ Edwardsville, KS
- ◇ Gardner, KS
- ◇ Kansas Department of Transportation (KDOT)
- ◇ Leawood, KS
- ◇ Louisburg, KS
- ◇ Mid-America Regional Council (Kansas City, MO)
- ◇ Moundridge, KS – Comprehensive Plan
- ◇ Nebraska City, NE – Comprehensive Plan
- ◇ North Kansas City, MO – Master Plan
- ◇ Raymore, MO – Growth Management Plan
- ◇ Regional Economic Area Partnership (Wichita, KS)
- ◇ Sedalia, MO – Master Plan
- ◇ Warsaw, MO – Master Plan

No matter the client or community, dPlanit is committed to the pursuit of a vision for a better...



QUALIFICATIONS

GROUNDSWELL CONSULTING, LLC

Groundswell Consulting is a transportation Planning and Project Development consulting firm.

Owner Lisa Koch, AICP, brings 13 years of progressive expertise in:

- Transit development planning, operations, management, and the delivery of federal programs;
- Program Management of major transportation investments from project inception through construction and operations;
- Roadway and highway transportation and traffic analysis;
- NEPA management and specialty area studies at all levels of analysis
- Bicycle and pedestrian corridor and area studies;
- Strategic communications planning for elected officials, specialized markets, survey development, and the public specifically developed for highest impact;
- Municipal comprehensive plans and capital improvement plans focused on implementation steps, measurement and budget availability.
- Performance measurement programs for Federal, State, regional and local governments that measure and assess the true values of the agency.
- Transportation research, demography, population forecasting, and general research methodology development.

LANDWORKS STUDIO

Landworks Studio was established in the Fall of 2000 to offer a unique and flexible approach to mapping out creative and cost effective plans and designs. This strictly landscape architectural firm uses the art and science of analysis, planning, design, management and preservation of land to create exciting landscape environments.

Landworks Studio is committed to providing innovative, sustainable, enduring landscape architecture for our clients and the environment. We understand and enjoy that every project/client is unique. We pride ourselves in delivering a fresh approach each and every time. It is our desire to provide our clients with unparalleled professional service and more than satisfying results. We believe that being a dynamic, client-oriented firm with a team approach to each project is what sets us apart from other firms and is the basis for our success.

Landworks Studio is a certified Disadvantaged Business Enterprise with the Kansas Department of Transportation and a certified Women Owned Business in the states of Kansas and Missouri.

SCOPE OF SERVICES

- | | | |
|----------------------------------|--------------------------------------|-----------------------------------|
| • Park Master Planning & Design | • Sustainable/LEED Design Strategies | • Professional Rendering Services |
| • Recreation Planning & Design | • Site Master Planning | • Site Analysis/GIS Mapping |
| • Sports Facility & Field Design | • Wayfinding & Signage | • Cost Estimation |
| | • Trail Planning & Design | • Construction Administration |
| | • Public Facilitation | |

SIMILAR PROJECTS

SHOCKEY CONSULTING SERVICES, LLC

DOWNTOWN LOUISBURG REVITALIZATION PLAN

Client: City of Louisburg, Kansas
Firms: dPlanit and Shockey Consulting Services, llc.
Result: The plan was completed and approved by the City Council. The City of Louisburg is currently working to move forward with implementation.



dPlanit



The dPlanit / Shockey team prepared a downtown revitalization plan in this small suburban town in eastern Kansas. The plan aided the community in setting the foundation for future revitalization efforts in its downtown. Outreach activities included conducting business owner meetings, updating city council, administering a public opinion survey, contacting area stakeholders through door-to-door outreach, attending community events, and conducting public meetings.

Rita Cassida | Public Works Director | City of Louisburg, Kansas
Phone: (913) 837-5371 | Email: cassida@mokancomm.net

GROWTH MANAGEMENT PLAN

Client: City of Raymore, Missouri
Firms: Shockey Consulting Services, llc. and dPlanit
Result: Plan implemented



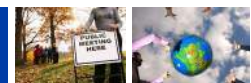
dPlanit

This project was an update to the Growth Management Plan (GMP) which serves as a guide for the future development of the City of Raymore. Shockey served as the project manager and worked with dPlanit on this project. The consultant team facilitated stakeholder interviews, community workshops and key planning area focus groups. During the series of community outreach, citizens discussed and drafted goal statements for consideration by the Planning Commission for inclusion in the plan. The goal areas for future development of Raymore included: Community Identity, Transition/Change, Physical Quality and Physical Growth.

Jim Cadoret | Community Development Director | City of Raymore, Missouri
Phone: (816) 892-3030 | Email: jcadoret@raymore.com

"Thank you for your efforts in regards to this very important issue. We are looking forward to implementing this project which is crucial to our continued growth. I always feel comfortable when Shockey is on the job."

Juan Alonzo, Former Mayor
City of Raymore, Missouri



SIMILAR PROJECTS

SHOCKEY CONSULTING SERVICES, LLC

MERRIAM, KANSAS COMPREHENSIVE PLAN

Client: City of Merriam, Kansas
Shockey Role: Project Manager
Result: Plan used for land use decisions

The City of Merriam, Kansas had some controversial land use applications over the years and found their Comprehensive Plan inadequate to properly address these land use decisions. Shockey was asked to prepare a Comprehensive Plan with extensive public engagement in the planning process. A series of community workshops resulted in a plan that recommends traditional neighborhood design concepts such as increased density, smaller street-widths, integration of mixed uses and pedestrian friendly corridors.



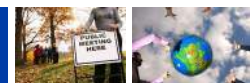
Quinn Bennion | City Administrator | City of Prairie Village, Kansas
Phone: (913) 385-4601 | Email: qbennion@pvkansas.com

MERRIAM, KANSAS COMPREHENSIVE PLAN ADDENDUM

Client: City of Merriam, Kansas
Shockey Role: Project Manager
Result: Plan implemented

The Shawnee Mission School District placed the West Antioch Elementary School and land at 7101 Switzer Road for sale in September of 2004. The site was designated as “City Hall and Schools” according to the official zoning map. This designation restricts the redevelopment of the site or re-adaptation of the building. The comprehensive plan was amended to be zoned appropriately in order to accommodate redevelopment of the site or facilitate the re-adaptation of the building. Facilitated public involvement to determine an appropriate long-range land use for the West Antioch Elementary School site. Prepared plan amendment document.

Quinn Bennion | City Administrator | City of Prairie Village, Kansas
Phone: (913) 385-4601 | Email: qbennion@pvkansas.com



SIMILAR PROJECTS

SHOCKEY CONSULTING SERVICES, LLC

GRANDVIEW AREA HOUSING ASSESSMENT

Client: City of Merriam, Kansas

Shockey Role: Project Manager

Result: Plan implemented – New Retail Built including IKEA

Shockey Consulting evaluated whether the Grandview area is eligible for a redevelopment district designation under state statutes. Grandview is generally bordered by Johnson Drive on the north, 62nd Street on the south, Slater on the east and Interstate 35 on the west. Shockey performed a windshield survey of the Grandview area to determine the general condition of the housing stock and, more specifically, determine whether the housing stock is deteriorated or deteriorating according to the Kansas statutes. An assessment tool was developed to conduct the windshield survey. Shockey conducted the windshield survey and documented structures and conditions with digital photos and developed a color-coded Geographic Information System (GIS) map to explain the findings. A final written report and a PowerPoint presentation was prepared regarding redevelopment districts.



Shockey conducted the windshield survey and documented structures and conditions with digital photos and developed a color-coded Geographic Information System (GIS) map to explain the findings. A final written report and a PowerPoint presentation was prepared regarding redevelopment districts.

Quinn Bennion | City Administrator | City of Prairie Village, Kansas

Phone: (913) 385-4601 | Email: qbennion@pvkansas.com

VISION WAMEGO – STRATEGIC VISION PLAN

Client: City of Wamego, Kansas

Shockey Role: Project Manager

Result: Plan implemented

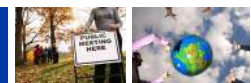
Vision Wamego is a strategic vision and action plan for the City of Wamego, a town of nearly 5,000 residents. Through significant public engagement, Wamego residents came together to develop goals and objectives for the next three to six years. The visioning endeavor was led by a city-appointed Steering Committee, whose purpose was to provide guidance and insight into the vision, goals, objectives, and strategies for Wamego. With a solid foundation of leadership, entrepreneurship and success, the Steering Committee together with the community brought the process to fruition. The plan was a factor in Caterpillar's decision to expand its current facility by 40,000 square feet and eventually hiring 120 new positions.

"We found our partners from Shockey Consulting Services to be highly professional, patient, enthusiastic, friendly, comfortable with ambiguity and complexity, and able to apply very advanced technical skills in all aspects and phases of their work with us."

Robert Cole, Former Director,
Pottawatomie County Economic
Development Corp. with Vision Wamego
(Kansas)

Julie Roller | Development Associate | Pottawatomie County Economic Development Council

Phone: (785) 456-9776 | Email: Julie@ecodevo.com



SIMILAR PROJECTS

SHOCKEY CONSULTING SERVICES, LLC

NOBTTOWN MARKET STUDY, KANSAS CITY, MISSOURI

Client: City of Kansas City, Missouri
Shockey Role: Retail Market Assessment
Result: Study complete

Provided an assessment of retail, office, industrial and residential real estate market sectors in the Nobttown area of Kansas City, Missouri. The study included an overview of retail trends and development across the metropolitan area; a comparison of retail trade potential and actual retail sales within the study area; local and regional vacancy and adsorption rates in office and industrial markets; and patterns of area home sales over a sixteen month period. The study offered specific strategies for development in each market sector and served as a guide for potential development scenarios within the community. In addition to the market analysis, Shockey provided public participation services to support this work.

Gerald Williams | Community Development | City of Kansas City, Missouri
Phone: (816) 513-2897 | Email: gerald.williams@kcmo.org

MARKET STUDY AND ECONOMIC ANALYSIS

Client: City of Peculiar, Missouri
Shockey Role: Project Manager
Results: Adopted by City Council and recommendations implemented.

The City of Peculiar, Missouri in partnership with the Missouri Department of Transportation (MoDOT) are designing the I-49 (formerly US 71) and 211th Street Interchange, with construction anticipated to begin spring of 2015. Shockey developed a market analysis for two specific areas in Peculiar; the 211th Street Interchange and Downtown Peculiar; along with an overall economic analysis for the community. The Market Analysis work included: review of existing market studies and plans, development of recommendations for updating the Comprehensive Plan zoning and land-use criteria, analysis of supply and demand issues and their impacts on both focus areas, retail and residential impacts due to economic analysis and recommendations for potential growth and development in the City of Peculiar. The Economic Analysis included: identification of existing programs designed for development and redevelopment, business expansion and attraction; understanding market data and future growth requirements as identified by Comprehensive Plan Update Process; crafting incentive program recommendations and targeted areas based on needs identified in planning process; and establish recommendations for future growth.

"Shockey Consulting is fantastic. They will always be #1 on my list. Thanks again!"

Gary L. Mallory,
Economic Development Director
City of Peculiar, Missouri

Gary Mallory | Economic Development Director | City of Peculiar, Missouri
Phone: (816) 820-8740 | Email: cassmallory@yahoo.com



SIMILAR PROJECTS

SHOCKEY CONSULTING SERVICES, LLC

U.S. 71 TRANSIT STUDY

Client: Mid-America Regional Council, Jackson County, Missouri, and Kansas City, Missouri
Firms: Shocke Consulting Services, LLC and Lisa Koch while with a previous employer
Result: The study was completed.

This corridor transit alternatives analysis identified transit options from downtown Kansas City, Missouri, through the city of Grandview, to a terminus at M-150 in south Kansas City. Alternatives studied included express bus, bus on shoulder/express BRT, streetcar, and commuter rail. The process included extensive public engagement to the diverse communities along the corridor, land use charrettes and the development of conceptual engineering and capital cost estimates. A locally preferred alternative of bus on shoulder/express BRT was identified for the corridor. The project followed the Federal Transit Administration's (FTA) perspective New Starts AA process to arrive at a consensus decision on a Locally Preferred Alternative (LPA) and to receive FTA approval to enter into Preliminary Engineering (PE).

www.kcsmartmoves.org

"I thought you did a really fantastic job putting together last night's JCCCAA/U.S. 71 Transit Study open house. Great atmosphere, prizes, food, interactive layout and impressive venue. I think attendees really enjoyed themselves...in addition to learning something and engaging with study team members."

Julie Wittman, Public Affairs Coordinator,
Mid-America Regional Council

Karen Clawson | Transportation Planner | Mid-America Regional Council
Phone: (816) 474-4240 | Email: kclawson@marc.org



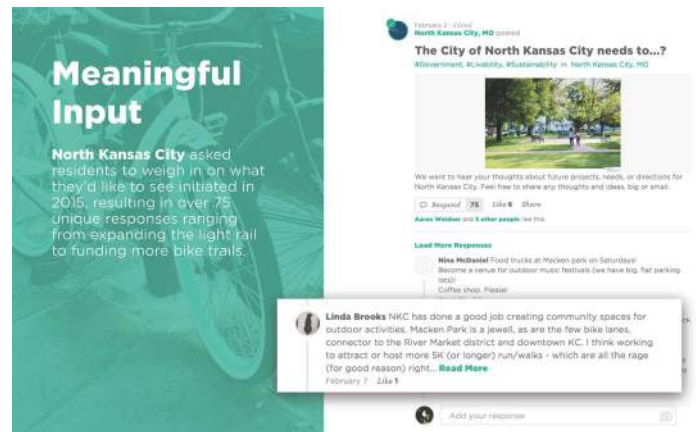
SIMILAR PROJECTS

DPLANIT

NORTH KANSAS CITY, MO – MASTER PLAN

dPlanit is currently part of the team selected to develop the master plan for the City of North Kansas City. The focus of this planning effort is to convey a vision that leverages the unique qualities and characteristics of North Kansas City as a place with residential living, employment and business choices and opportunities.

While industrial development has been a key component of the physical development pattern of the city, recent development trends have included the Northgate Village mixed residential development, and commercial repurposing of older structures. The framework of the plan is being created around identifying areas of change, transition and stability, as well as catalyst projects and focus areas. The primary role for dPlanit in this project is the development of key plan implementation strategies.



Sara Copeland | Community Development Director | City of North Kansas City, Missouri
Phone: (816) 412-7855 | Email: scopeland@nkc.org

WARSAW, MO – MASTER PLAN

As part of an EDA grant from the federal government dPlanit was part of the team selected to develop a master plan, zoning regulations and capital improvements strategy for the City of Warsaw. dPlanit was assigned the primary role of developing a long range plan for the community.

The plan, which was recently approved by the EDA, provides a vision for and strategic approach to future development through a framework of small districts focused on the assets that exist in each district. These districts range from established residential neighborhoods to downtown and highway commercial areas to new resort and residential opportunities that exist along the waterfront.

Randy Pogue | City Administrator | City of Warsaw, Missouri
Phone: (660) 438-5522 | Email: r.pogue@welcometowarsaw.com

SIMILAR PROJECTS

DPLANIT

CHEYENNE, WY – WEST EDGE BLUEPRINT

dPlanit was involved with the development and execution of the public engagement strategy for the West Edge Blueprint project, as well as the drafting of document content working with city staff and other consultants. Recently, dPlanit has been selected to serve as part of a team to develop the next phase of this project.

The Blueprint document provides a vision for the West Edge neighborhood, which is adjacent to downtown consisting of a mix of government, residential, industrial and commercial service uses. As part of the next phase of the project dPlanit will be working on the development of the more specific district land use plan and development strategy. This work will include the development of the methodology for plan implementation.



Matt Ashby | Planning Services Director | City of Cheyenne, Wyoming
Phone: (307) 637-6284 | Email: mashby@cheyennecity.org

EDWARDSVILLE, KS – ON-GOING PLANNING SERVICES

For the past 3 years dPlanit has served as a contract staff planner providing planning services in support of the City Manager, City Council and Planning Commission in Edwardsville. Much of the daily activity is associated with implementation of the city's comprehensive plan through established policies and regulations, as well as proactive activities and engagement with potential developers. Major tasks currently involve the rewriting of the zoning regulations, as well as development review services working directly representatives of development projects.

Michael Webb | City Manager | City of Edwardsville, Kansas
Phone: (913) 441-3707 | Email: mwebb@edwardsvilleks.org

FEE PROPOSAL

7/27/2015 City of Westwood, KS Master Plan	SHOCKEY CONSULTING SERVICES								Task Sub- Total (Fees + Expenses)
	Shockey	Knopick/Ollig	Ferguson/Koch	Van Elders	Administrative Support	Hours	Fee	Expenses	
Hourly Rate	\$150	\$125	\$100	\$145	\$60				
PHASE 1: PROJECT INITIATION									
Task 1.1	0.0	0.0	0.0	0.0	0.0	0.0			
Kick-off meeting	3.0	3.0	3.0	0.0	0.0	9.0		30	
Establish Steering Committee	0.5	0.0	2.0	0.0	2.0	4.5			
Facilitate Steering Committee Meeting #1	6.0	3.0	6.0	0.0	0.0	15.0		30	
Prepare Community Engagement Plan	1.0	1.0	4.0	0.0	0.0	6.0			
	0.0	0.0	0.0	0.0	0.0	0.0			
Hours	10.5	7.0	15.0	0.0	2.0	34.5			
Fee	\$1,575	\$875	\$1,500	\$0	\$120		\$4,070	\$60	\$4,130
PHASE 2: DISCOVERY, DATA SYNTHESIS & ANALYSIS									
Task 2.1 Base Data - collect & analyze data including site visit & Existing Conditions/Future Issues Summary Memo	3.0	3.0	9.0	3.0	0.0	18.0		50	
Task 2.2: Base Maps - Collect maps prepared by City & Pull MySidewalk Insights Maps & Prepare Existing Conditions Maps/Presentation Materials	1.0	3.0	6.0	0.0	0.0	10.0			
Task 2.3: Stakeholder Interviews (5 individuals or groups)	1.0	0.0	16.0	0.0	5.0	22.0		50	
Hours	5.0	6.0	31.0	3.0	5.0	50.0			
Fee	\$750	\$750	\$3,100	\$435	\$300		\$5,335	\$100	\$5,435
PHASE 3: VISIONING / STRATEGIC PLANNING									
Task 3.1: Create Project Brand & Communication Pieces	1.0	0.0	8.0	0.0	0.0	9.0			
Task 3.2: Community Values Survey (distributed electronically by the City)	4.0	0.0	4.0	0.0	0.0	8.0			
Task 3.3: Digital Engagement using MySidewalk	4.0	0.0	6.0	0.0	0.0	10.0			
Task 3.4: Public Event #1	6.0	12.0	24.0	3.0	12.0	57.0		500	
Task 3.5: Steering Committee Meeting #2	6.0	3.0	6.0	0.0	0.0	15.0		30	

FEE PROPOSAL

7/27/2015		SHOCKEY CONSULTING SERVICES								
City of Westwood, KS Master Plan		Shockey	Knopick/Ollig	Ferguson/Koch	Van Elders	Administrative Support	Hours	Fee	Expenses	Task Sub-Total (Fees + Expenses)
Task 3.6: Governing Body Strategic Planning		21.0	0.0	21.0	0.0	2.0	44.0		50	
Hours		42.0	15.0	69.0	3.0	14.0	143.0			
Fee		\$6,300	\$1,875	\$6,900	\$435	\$840		\$16,350	\$580	\$16,930
PHASE 4: PLAN DEVELOPMENT										
Task 4.1: Draft Comprehensive Plan Development - Steering Committee Meeting #3		6.0	18.0	24.0	0.0	2.0	50.0		30	
Task 4.2: Public Event #2		6.0	12.0	24.0	3.0	12.0	57.0		500	
Hours		12.0	30.0	48.0	3.0	14.0	107.0			
Fee		\$1,800	\$3,750	\$4,800	\$435	\$840		\$11,625	\$530	\$12,155
PHASE 5: IMPLEMENTATION STRATEGY & FINAL PLAN										
Task 5.1: Complete draft for Steering Committee Meeting #4		6.0	32.0	24.0	0.0	0.0	62.0		30	
Task 5.2: Produce adoption draft plan, present to Planning Commission & Council at meetings open to the public, develop and deliver final plan documents		8.0	8.0	8.0	0.0	0.0	24.0		300	
Hours		14.0	40.0	32.0	0.0	0.0	86.0			
Fee		\$2,100	\$5,000	\$3,200	\$0	\$0		\$10,300	\$330	\$10,630
SUB-TOTAL HOURS		83.5	98.0	195.0	9.0	35.0				\$49,280
TOTAL HOURS		420.5								
TOTAL FEES		\$47,680								
TOTAL EXPENSES		\$1,600								
GRAND TOTAL FEES + EXPENSES		\$49,280								

APPENDIX



Shockey Consulting's guide to developing a strategic management system®

Government agencies are operating in a new reality with ever-changing and unknown conditions. Declining revenues and increasing demands have caused leaders to make tough choices in the short-term with uncertainty about effects on the long-term health and stability of their communities. Successful agencies are taking the next step and implementing a strategic management system to guide them through these tough times and into a prosperous future.

This handout provides an overview of a recommended strategic management system and is used as part of Shockey's Strategic Management training program.



It's a new world. Set your strategy to succeed.

WHAT IS A STRATEGY?

A strategy is carefully investing your resources to achieve a desired outcome.

A strategy is a plan of action to achieve a particular goal or desired outcome. You develop your strategy in anticipation of future events or trends. A strategy considers where you are now, where you want to go, and trade-offs of various actions.

When writing a strategy statement, don't use a preposition like "by," "to," or "via," because you are making a strategic choice to do one thing not two. A strategy is a specific informed choice.

WHAT IS A STRATEGIC MANAGEMENT?

Strategy is deciding what to do with the limited resources available. Execution is getting done what you plan. Strategic Management is creating a strategy, getting it done, measuring results and learning from what was done. It is a circular process that results in many important benefits for agencies including:

- Aligning activities and resources to community priorities;
- Improving internal and external communication and teamwork;
- Monitoring organizational performance against strategic goals; and
- Encouraging learning and innovation.

DEVELOPING A STRATEGIC MANAGEMENT SYSTEM

MOVE BEYOND THE PLAN

Most agencies have goals and objectives or some sort of written priorities or plans. What they don't have is a planning process that aligns resources to priorities. The process graphic above describes the six steps of strategic management - adapted from the Six Disciplines for Excellence®.

The remainder of this document describes the steps necessary to prepare a strategic plan and implement a strategic management system.

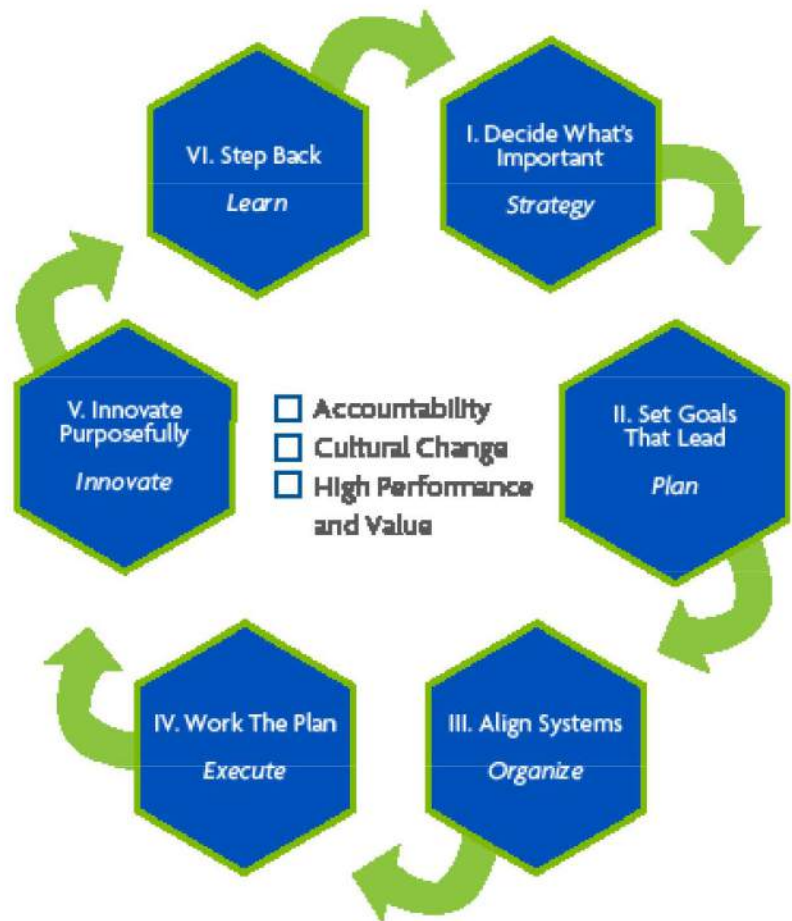
INVOLVE THE RIGHT PEOPLE

Involving the right people in the planning process is important. Deciding who will be involved in developing the plan and how to involve them is the first step.

Stakeholder interviews, surveys, and committees are effective in involving many people in developing strategies. People who are involved in the development of the plan are more likely to stay on track when implementing. Consider involving people external to the organization as well as internal.

ENVIRONMENTAL SCAN

An environmental scan helps decision makers look critically at internal and external environments that affect the organization. The focus is on both short- and long-term factors. Gather information about issues and future trends from a number of sources. A complete analysis of strengths, weaknesses, opportunities and threats is important when developing strategies.



Typical categories of information include:

- Increasing demands and declining revenues
- Changing demographics
- Regulations and enforcement
- Infrastructure management/asset management
- Service-delivery
- Citizen satisfaction
- Workforce



Planning is a learning process. Successful planning processes build shared understanding of the organization and its changing environment, develop capabilities in strategic thinking and enhance communication among key stakeholders.

DEFINE A VISION

A vision states what you want to do in idealistic terms. It is future-oriented and creates a vivid mental picture of where you are headed. It should be an inspirational statement that energizes the organization. It should be easy to remember and recite. An effective vision statement can take your organization out of the present and focus it on the future.

CAPTURE YOUR VALUES

Values are core beliefs or principles that guide the organization and its future. Ensure that they are developed to reflect the organization's shared principles.

REFINE YOUR MISSION OBJECTIVES

A mission is a purpose or reason for being. Whereas the vision will guide the future actions of the organization, the mission is the purpose for the organization's existence. All goals, objectives and tactics should help the organization carry out its mission.

The mission of _____

(organization/department/program/subprogram) is

to provide _____

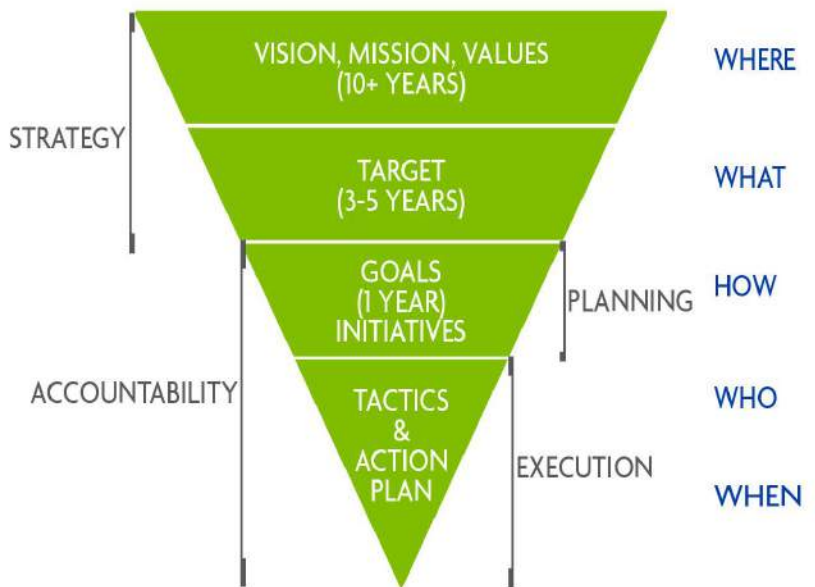
(service/product/what) to _____

(customer/for whom) so that _____

outcome/why).

DEFINE YOUR STRATEGY

Define your organization's strategy statements. These are general statements to describe how the organization will move toward achieving its vision. Strategy statements should describe what your organization will do and what will not do. Setting strategy statements takes your plan from a "to-do" list to a strategic plan where you make choices and define a specific path.



DEVELOP GOAL STATEMENTS

Goals are statements that emulate the policies of the organization. The goals are long-term, usually between three and five years.

DEVELOP OBJECTIVES

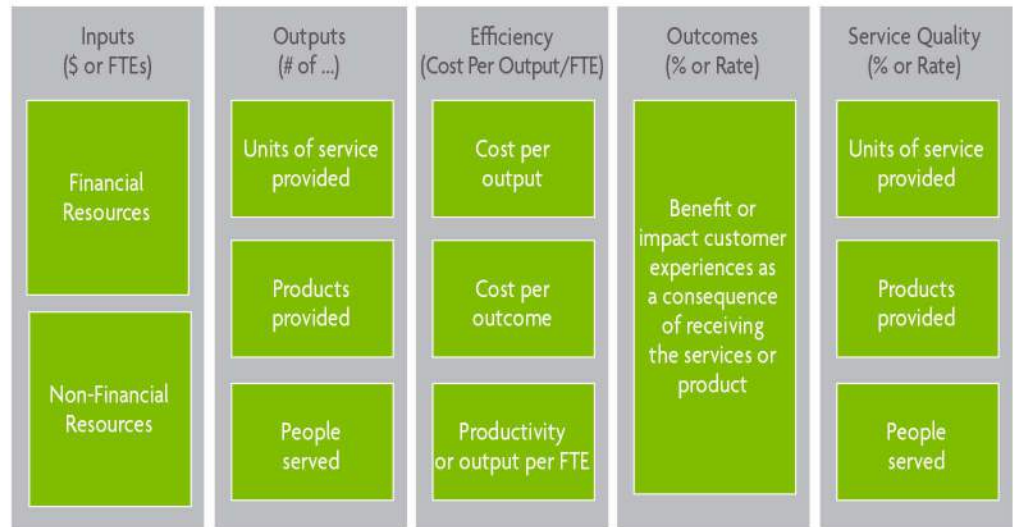
Objectives are similar to goals but have targeted outcomes. Objectives result in specific, short-term outcomes that should be attainable within a calendar year. In most instances, these objectives will be stepping stones to achieve the more long-range goals of the organization.



ACTION PLAN

Develop tactics, assign responsibility, set a schedule and monitor progress. Tactics, like strategies, are aimed at specific activities for the organization. However, they are short-term, describing steps to achieve the organization's objectives within a year. You can touch a tactic. It is a specific action. Again, they are measurable actions that can be used to gauge the success of the organization at reaching its objectives.

FAMILY OF PERFORMANCE MEASURES

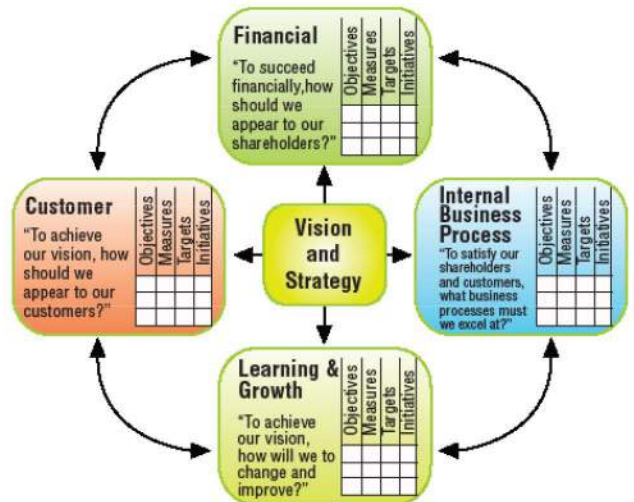


Performance measures show progress toward or accomplishment of desired outcomes. A good set of measures typically includes a family of performance measures to give a more accurate and comprehensive picture of organizational performance.

USE A BALANCED SCORECARD APPROACH

The Balanced Scorecard Approach is a strategic planning and management tool originated by Drs. Robert Kaplan (Harvard Business School) and David Norton. It is a performance measurement framework that has traditional financial and strategic non-financial performance metrics to give managers a more "balanced" view of organizational performance.

Goals, objectives, measures, targets and initiatives should be developed considering all four perspectives of the organization: Financial, Customer/Citizen, Processes, and People. We recommend communities also consider developing their plans around the **Fifth Perspective: Sustainability**.



ALIGN SYSTEMS, WORK THE PLAN, INNOVATE, AND LEARN

Once the plan is complete, align all organizational systems to the plan, work it and constantly learn from implementation and results. Strategic management is an ongoing process.



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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
7/2/2015

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

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		NAIC # 29424 30104 00914	

COVERAGES

CERTIFICATE NUMBER: CL157208240

REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADD'L SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY		37SBAAP9759	11/3/2014	11/3/2015	EACH OCCURRENCE \$ 1,000,000
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR	DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000				
		MED EXP (Any one person) \$ 10,000				
		PERSONAL & ADV INJURY \$ 1,000,000				
		GENERAL AGGREGATE \$ 2,000,000				
	GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:					PRODUCTS - COMP/OP AGG \$ 2,000,000
B	AUTOMOBILE LIABILITY		37UECAQ6245	11/3/2014	11/3/2015	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	<input checked="" type="checkbox"/> ANY AUTO					BODILY INJURY (Per person) \$
	<input type="checkbox"/> ALL OWNED AUTOS	<input type="checkbox"/> SCHEDULED AUTOS				BODILY INJURY (Per accident) \$
	<input type="checkbox"/> HIRED AUTOS	<input type="checkbox"/> NON-OWNED AUTOS				PROPERTY DAMAGE (Per accident) \$
						\$
	UMBRELLA LIAB	<input type="checkbox"/> OCCUR				EACH OCCURRENCE \$
	EXCESS LIAB	<input type="checkbox"/> CLAIMS-MADE				AGGREGATE \$
	DED	RETENTION \$				\$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY	<input type="checkbox"/> Y <input checked="" type="checkbox"/> N	37WECZF6548	7/7/2015	7/7/2016	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	N/A				E.L. EACH ACCIDENT \$ 1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below					E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
						E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D	PROFESSIONAL LIABILITY		PHSD983219	11/3/2014	11/3/2015	LIMIT: \$1,000,000

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

CERTIFICATE HOLDER

CANCELLATION

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

AUTHORIZED REPRESENTATIVE

L Insurance, Inc/KKN

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