CITY OF MONROE - GENERAL SERVICES COMMITTEE
CITY HALL CONFERENCE ROOM
300 W. CROWELL STREET, MONROE, NC 28112
Thursday, November 7, 2024 - 4:15 PM

AGENDA
www.monroenc.org

1. Minutes of General Services Committee Meeting of September 5, 2024

2. Budget Adjustment Code Enforcement Lien Write Off - Community Development

3. Helping Hands Program Modification

4. Project CR2202 Community Development - Covid Restriction Removal, East Village, Funding Reallocation

5. FAA - Status of Reimbursable Agreement for Siting Study

6. Lease Compliance - Union County Community Action, Inc.

7. Youth Apprenticeship Week Proclamation November 17 - 23 2024

8. Award of Contract for Planning and Design and Construction Documents for US 74/601 Interchange Enhancement and Skyway Drive Streetscape Design Project

9. Acceptance of Office of Community Oriented Policing Services FY24 COPS Hiring Program Grant, Addition of Two Police Officer Positions and Approval of a Budget Amendment for FY 2025

Other Items

CITY OF MONROE
GENERAL SERVICES COMMITTEE MEETING
City Hall Conference Room
300 W. Crowell Street
Monroe, NC 28112
September 5, 2024 - 4:15 PM

MINUTES

Present: Committee Member Julie Thompson (Chairwoman), Committee Member Gary Anderson, Committee Member Surluta Anthony

Absent: None

Staff: Mark Watson, City Manager; Lisa Hollowell, Assistant City Manager; Lisa Strickland, Director of Finance; Ryan Jones, Director of Property Management; Catherine Mullis, Permit Center Supervisor; Lisa Stiwinter, Director of Planning and Development; Angela Duncan, Senior Budget Analyst; Teresa Campo, Community Development Manager; Terry Sholar, Senior Staff Attorney; Richard Long Jr., City Attorney; Douglas Britt, Assistant Director of Planning and Development; Bryson Hester, Transportation Planner; Anna Shova, Accountant I.

Visitor(s): Linda Smith, Alliance for Children; Melanie Miller, Union County Community Arts Council

The General Services Committee met in the City Hall Conference Room at 4:15 p.m. on September 5, 2024. A quorum was present. Chairwoman Julie Thompson presided.

Item 1. General Services Committee Meeting Minutes from August 1, 2024.
The minutes from the August 1, 2024 General Services Committee meeting were presented for the Committee's approval.

Committee Member Anderson moved to approve the minutes of the General Services Committee Meeting of August 1, 2024.

Committee Member Anthony seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

Item 2. Resolution for Lease Agreement Extension with Arts Council.
Terry Sholar, Senior Staff Attorney, presented that staff is recommending to the General Services Committee to consider extending its lease with the Union County Community Arts Council until July 31, 2026.

The City of Monroe entered into a lease agreement with the Union County Arts Council to lease the property located at 327 Hayne Street for a period of eighteen (18) months beginning October 1, 2023. The current lease term expires on April 30, 2025. The Arts Council has requested the lease be extended for an additional fifteen (15) months. The draft lease extension provides for an additional fifteen (15) month extension to end on July 31, 2026 under the same terms and conditions as the original lease.

The General Services Committee is requested to provide a favorable recommendation to City Council to consider adopting the resolution approving extending the Lease Extension Agreement on the property located at 327 Hayne Street to the Union County Community Arts Council and authorize the City Manager to execute the Agreement and other necessary documents.

Committee Member Anthony made a motion to approve the recommendation to City Council to consider adopting the resolution and authorize the City Manager to execute the necessary documents.

Committee Member Anderson seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

Item 3. Budget Amendment for Unspent Appropriations.

Lisa Strickland, Finance Director, presented that a budget amendment is necessary to the fiscal year 2025 budget in order to re-appropriate incomplete items from fiscal year 2024.

It is necessary to re-appropriate items that have been approved, but are not complete at the end of the fiscal year. The nature of these items is projects that are only partially complete, grants that have not been spent in their entirety and unspent drug seizure money. Incomplete items from fiscal year 2024 are as follows:

General Fund:

$17,590	Water & Sewer Connection Fee Assistance – program approved by Council to assist low income families with utility connection fees
9,094	Down payment Assistance – program approved by Council to assist low income families with house purchase
2,728	Unspent donations received for Police Department youth programs
48,996	State Equitable Sharing – Money received from seizures – restricted to law enforcement expenditures.
12,394	Explorer Program - Police (Donations)
25,459	US DOJ Bureau of Justice Grant
153,052	CDBG Grant for Exhaust Fan – Fire
50,384	Assistance to Firefighters Grant for gear washer and dryer - Fire
75,000	Regional Economic Development Reserve Fund Grant for mobile classrooms - Fire
80,000	Regional Economic Development Reserve Fund Grant for water rescue supplies - Fire
95,000	Regional Economic Development Reserve Fund Grant for hazardous materials - Fire
9,504	ARPA funding for Senior Center
995	Tree Donation to be used in planting
$580,196	Total General Fund

Downtown Monroe Fund:

$25,778	Façade Grants
52,736	Downtown Incentive Program
$78,514	

Police Department Forfeiture Fund:

($20,485)	US Justice – Federal Equitable Sharing- Money received from seizures – restricted to law enforcement expenditures
110,670	U S Treasury - Federal Equitable Sharing- Money received from seizures- restricted to law enforcement expenditures

$90,185

Staff requests General Services Committee recommendation of approval of the proposed budget amendment for appropriation of unspent items from Fiscal Year 2024 to Fiscal Year 2025.

Committee Member Anthony made a motion to approve the proposed budget amendment.

Committee Member Anderson seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

Item 4. Approve resolution Designating Depositories and Resolution Designating Signatories.

Lisa Strickland, Finance Director, presented that staff is requesting to update the depositories designated as authorized for the Finance Officer to deposit funds of the City and the individuals designated as authorized signatories for the City's bank account.

In accordance with North Carolina General Statute 159-31, the City has elected to deposit funds into financial institutions under the pooling method of collateralization of public funds. A resolution is attached to update the names of financial institutions that are authorized depositories for the City and are included on the North Carolina Department of State Treasurer's Pooling Bank List as of August 5, 2024. General Statute 159-25(b) of the North Carolina Government Fiscal Control Act specifies that the Finance Officer or properly designated Deputy Finance Officer and another municipal official must sign all checks and drafts issued by a local government. A resolution is attached that removes former Mayor, Marion Holloway, and adds current Mayor, Robert A. Burns to the approved signatories on the City's bank accounts.

Staff recommends the General Services Committee recommend City Council approval of Resolution R-2024-58 Designating Depositories and Resolution R-2024-59 for Designating Signatories for the City of Monroe and forward to the City Council Consent Agenda.

Committee Member Anderson made a motion to approve the Resolution R-2024-58 Designating Depositories and Resolution R-2024-59 for Designating Signatories for the City of Monroe and forward to the City Council Consent Agenda.

Committee Member Anthony seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

Item 5. Certification of Tax Base and Charge to Collect 2024-2025 Taxes.

Lisa Strickland, Finance Director, presented that the General Services Committee is requested to forward an Order authorizing the Tax Collector to collect the taxes charged in the tax records.

N.C.G.S. 105-321(b) states the municipal governing body shall adopt and enter in its Minutes an Order authorizing the Tax Collector to collect the taxes charged in the tax records and receipts. The Order of Collection shall have the force and effect of a judgement and execution against the taxpayers' real and personal property.

City Staff recommends that the General Services Committee forward to City Council authorization for the Tax Collector to collect the 2024-2025 Tax Levy as listed below:

Type	Amount
Property Tax	$27,643,273.04
Special District Tax	$63,019.39
Total Late Listings	$46,247.96
Total Tax Levy	$27,752,540.39

Committee Member Anthony made a motion to forward to City Council authorization for the Tax Collector to collect the 2024-2025 Tax Levy.

Committee Member Anderson seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

Item 6. Authorize 2-Ton Dump Truck Purchase.

Ryan Jones, Property Management Director, presented that the General Services Committee is requested to consider providing a favorable recommendation to City Council to award the purchase of a 2-ton dump truck in the amount of $135,000.00 to Excel Truck Group.

Funds were allocated in the FY25 budget, approved by City Council on June 11,2024, in the amount $127,000.00 for the procurement of a 2-ton dump truck for the Grounds Maintenance division of the Property Management Department. The current truck has surpassed its life expectancy and no longer provides dependable service.

Excel Truck Group has provided a quote of $130,321.00 for this vehicle not including funds needed for tag, title and safety lighting provided after the purchase. Due to the purchase cost exceeding $90,000.00, a formal bid was required as part of the selection process for this equipment. While purchase price exceeded the funds allocated, staff was able to save money within this capital line to cover the excess.

The following bids were received for this purchase:
Excel Truck Group $130,321.00
Piedmont Truck Center $151,523.00

In accordance with Section 34.01-G of the City of Monroe Code of Ordinances, City Council is required to authorize all equipment purchases exceeding $90,000.00.

Staff recommends that the General Services Committee provide a favorable recommendation to City Council to approve the award of the 2-Ton Dump Truck to Excel Truck Group in the amount of $130,321.00 and authorize the City Manager to execute all necessary documents.

Committee Member Anderson made a motion to provide a favorable recommendation to City Council the approve the award of the 2-Ton Dump Truck to Excel Truck Group and authorize the City Manager to execute all necessary documents.

Committee Member Anthony seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

Item 7. Special Event Permit for Union County Christmas Parade.

Catherine Mullis, Permit Center Supervisor, presented that the General Services Committee is requested to consider a special event permit for an event to be held in Downtown Monroe on November 24, 2024.

The 71st annual Union County Christmas Parade is planned to be held on Sunday, November 24, 2024 in Downtown Monroe from 2:00 pm – 4:00 pm. The parade route will be closed from 1:00pm – 5:00 pm. The applicant is estimating over 2,000 people will attend the event with 2,000 people at peak periods. The event will include a stage, floats and trailers, school bands, sports groups, horses and dogs, cars, trucks, and miscellaneous street vendors with treats and toys. The businesses that will be open during the event have all signed in favor of the event.

The following departments have reviewed and approved the application with the following comments:

Fire Department:
Monroe Fire Department Approves Permit.

Police Department:
Approved. A meeting is scheduled with the parade committee to go over road closures and staffing.

Engineering Department:
Street closings from 1:00 pm to 5:00 pm per application. Report issues or concerns to the Street Division at 704-282-4533 during normal business hours and to the Street Division Standby at 704-226-5913 after hours and during the event.

Planning and Development Department:
Approved.

Union County Environmental Health:
No permit required from Union County Environmental Health.

If General Services Committee is in agreement with the aforementioned approvals, a recommendation will be presented to City Council for approval of the special event permit.

Committee Member Anderson made a motion to accept the staff request and bring it to City Council to approve the special event permit.

Committee Member Anthony seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

Item 8. Approval of Charlotte Regional Transportation Planning Organization Memorandum of Understanding.
Lisa Stiwinter, Planning and Development Director, presented that the General Service Committee is requested to provide a recommendation for the adoption of the Memorandum of Understanding (MOU) for the Cooperative, Comprehensive and Continuing Transportation Planning of Monroe, NC a municipality within the Charlotte Regional Transportation Planning Organization (CRTPO), and authorizes the Mayor to sign on behalf of the City.

In 1962, Congress enacted the Federal-Aid Highway Act and required that an urban area (as defined by the Department of Commerce, Bureau of the Census) that exceeds a population of 50,000 establish a "continuing, cooperative, and comprehensive" (3-C) transportation planning process in order to qualify for federal transportation funds. Later, the Metropolitan Planning Organizations (MPOs) were created in order to carry out the required planning process. Jurisdictions within defined urbanized areas are required to coordinate their transportation planning activities under the umbrella of an MPO.

In the Charlotte Urban Area, the Charlotte Regional Transportation Planning Organization (CRTPO) is the current organization charged with implementing the federally-mandated 3-C transportation planning process. The CRTPO planning area includes all of Mecklenburg, Iredell County and Union County. The City of Monroe became part of the Charlotte Urban Area as a result of the 2000 Census. CRTPO is comprised of a governing body titled Policy Board" and a technical body titled "TCC". The Policy Board is made up of elected officials that act as a forum for cooperative decision-making for the metropolitan area in cooperation with the State, thereby serving as the basis for cooperative planning process. The TCC consist of non-elected, technical representatives from each local, State and Federal governmental agency directly related to and concerned with the transportation planning process for the planning area.

The Memorandum of Understanding (MOU) is the governing document for CRTPO that outlines the policies, structure, membership and the roles and responsibilities and serves to guide the cooperative, comprehensive, continuing transportation planning process among the parties. CRTPO's MOU was adopted July 17, 2024.

The boundary of urbanized areas or currently referred to as urban areas, is refined after every U.S. Decennial Census. The Urban Area Data release from 2020 Decennial U.S. Census does not show the Charlotte Urban boundary expanding. The 2020 Census did show that several member jurisdiction's population increased therefore increased their number of weighted votes. All good standing member jurisdictions (paid current fiscal year dues) will receive at least one vote. Member jurisdictions with a population greater than 20,000 will receive two weighted votes, which Monroe receives 2 votes.

To remain a member of the Metropolitan Planning Organization (MPO), the City of Monroe, NC must adopt the attached MOU document and authorize the Mayor to sign on behalf of the City. The City's annual membership dues are approximately $15,429. As a reminder, under Federal and State law, the regional MPO must approve all projects and programs spending Federal funds in the area, so it's important that Monroe remain an active member of our MPO.

Staff recommends approval of the Memorandum of Understanding (MOU) for the Cooperative, Comprehensive, and Continuing Transportation Planning of Monroe, NC as a member of CRTPO, and authorize the Mayor to sign the agreement on behalf of the City

Committee Member Anthony made a motion to approve the Memorandum and authorize the Mayor to sign the agreement on behalf of the City.

Committee Member Anderson seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

Item 9. Amend the Policy Number GA-16 Outside Agency.

Teresa Campo, Community Development Manager, presented a revised Outside Agency Policy that has been drafted to offer City Council guidance while considering and recommending funding requests for outside agencies. The General Services Committee is being asked to review the draft policy and provide a favorable recommendation to City Council. In addition, Staff would like a recommendation from the General Services Committee to discuss the application eligibility process.

On January 11, 2022 City Council adopted the revisions to Policy Number GA-16 Outside Agency Funding. Staff is submitting a revised Outside Agency Policy document for City Council Consideration to additional eligibility criteria. In addition, our agencies continue to perform and generally exceed the required leveraging.

Recommendation Changes to Outside Agency Eligibility Criteria Section

- Eligible applicants must be a non-profit organization that provides a service for the Monroe community. In order to be considered, the applicants are required to submit an original, complete application with a Financial Report and proof of 501(c)(3), and tax exempt letter of determination from the IRS.

Recommendation of Changes to Outside Agency Eligibility Section

- All agencies that are eligible for funding must be registered and in good standing with the North Carolina Charitable Solicitation Licensing requirements. Agencies that are registered and comply with the exempt provisions or also eligible.

- All agencies that are eligible for funding and provide transitional, supportive, permanent, and/or emergency housing and/or shelter may not house persons that are subject to a lifetime registration requirement under a state sex offender registration program. No person subject to a lifetime requirement under the state offender registration program is eligible. Agencies must comply with all North Carolina State Sex Offender Requirement.

- All agencies eligible to receive funding from the City must ensure proper criminal background checks for any staff and/or volunteers. Prohibiting individuals convicted of violent crimes and/or subject to any state sex offender registration to have contact with children and any other vulnerable

populations.

Required Reporting and Programmatic Monitoring

- Relating to the agency's scope of services all outside agencies approved for funding shall be required to submit a programmatic report bi-annually no later than the end of February each year and year-end report no later than the end of July of each year to include all agency leveraging.

General Services Committee is requested to provide a determination regarding the Outside Agency funding application eligibility process and recommend approval of the revised Outside Agency Policy and forward to City Council for approval on the Consent Agenda at the September 10, 2024 meeting.

Committee Member Anthony recommended to change and include that no currently registered sex offenders would be eligible for funding instead of only who are subject to a lifetime registration requirement under the state offender registration program.

Committee Member Anderson made a motion to accept the changes to Outside Agency Eligibility Section and forward to City Council for approval.

Committee Member Anthony seconded the motion, which unanimously passed with the following votes:

AYES: Chairwoman Thompson, Committee Member Anderson, Committee Member Anthony

NAYS: None

Item 10. Special Needs and Disabilities Committee Community Survey.
Committee Member Thompson stated that this item will be discussed at the following meeting.

No action is required.

There being no further business the meeting adjourned at 4:42 p.m.

_____
Committee Chairwoman, Julie Thompson

City of Monroe
Where Heartland Meets High Tech

STAFF REPORT

TO: General Services Committee

VIA: Mark Watson, City Manager

DATE: November 7, 2024

FROM: Lisa Stiwinter, Planning and Development Director

PREPARED BY: Teresa Campo, Community Development Manager

SUBJECT: Budget Amendment for Write-off of Code Enforcement Lien

SUMMARY STATEMENT

The General Services Committee is requested to recommend to City Council a write-off of a code enforcement lien, totaling $38,295.00 on 840 Maurice St. The City has foreclosed on this property and a budget amendment is required in order to process this adjustment.

REVIEW

The Planning and Development Department's Community Development Division manages the City's Land Bank. The City acquired 840 Maurice St, parcel 09237004 in a foreclosure on March 27, 2024. Community Development plans to use this parcel to develop affordable veteran housing and/or fire/emergency/police workforce housing. City Council's approval is required to write off the existing code enforcement (2013/demolition) lien totaling $38,295.00. The City was unable to meet the timeliness deadline to collect the debt, and was at risk of losing their recorded lien. Collections referred the property to the Community Development Division for affordable housing project consideration. Community Development initiated the foreclosure on the property. A budget amendment is required to process this adjustment.

RECOMMENDATION

General Services Committee is requested to provide a favorable recommendation to City Council for approval to write off the code enforcement lien on 840 Maurice Street and approve the budget ordinance required to process this adjustment.

Attachment: BA-2024-31

CITY OF MONROE
BUDGET AMENDMENT
BA-2024-31

Amendment necessary to appropriate funding to process the write off of the code enforcement lien at 840 Maurice Street.

General Fund:

Revenues:	
Appropriation of Unassigned Fund Balance	$38,295
Expenses:	
General Government	$38,295

Adopted this 18th day of November, 2024.

_____
Robert A. Burns, Mayor

Attest:

_____
Bridgette H. Robinson, City Clerk

City of Monroe
Where Heartland Meets High Tech

STAFF REPORT

TO: General Services Committee

VIA: Mark Watson, City Manager

DATE: November 7, 2024

FROM: Lisa Strickland, Finance Director

PREPARED BY: Dawn Whitesides, Customer Service Supervisor

SUBJECT: Helping Hands Program Modification

SUMMARY STATEMENT

Provide information on Helping Hands Program and request program modifications to be able to offer more assistance to City of Monroe utility customers.

REVIEW

The City of Monroe has a program called the Helping Hands Program that is designed to help families in need pay their utility bill. The City partners with the Department of Social Services (DSS) to evaluate customers to determine customer eligibility.

Staff recommends that the guidelines for the program be modified in order to assist more customers.

Current guidelines:

1. Funds are used to assist customers in paying utility bills when they are in a crisis that is time limited and not client created.
2. Normal use of this program is to solve a non-reoccuring crisis.
3. Applicant income is verified by DSS to be in the range of 150% of Federal Poverty Income Guidelines.

4. Helpings Hands Program funds are considered after DSS looks to use any Federal, State and County funds that may be available to the Applicant.
5. This program is only available to City utility customers.
6. Funds cannot be used to pay deposits or bills from previous addresses.
7. Maximum assistance is $350 per household per emergency not to exceed $700 per fiscal year.

Suggested changes to the guidelines:

1. Funds are used to assist customers in paying utility bills when they are in a crisis that is time limited and not client created.
2. Normal use of this program is to solve a non-reoccuring crisis.
3. Applicant income is verified by DSS to be in the range of 200% of Federal Poverty Income Guidelines.
4. Helpings Hands Program funds are considered after DSS looks to use any Federal, State and County funds that may be available to the Applicant.
5. This program is only available to City utility customers.
6. Funds cannot be used to pay deposits or bills from previous addresses.
7. Maximum assistance is $400 per household per emergency not to exceed $800 per fiscal year.

Federal Poverty Income Guidelines 2024 (Monthly Amounts)

Family Size	1	2	3	4	5	6	7	8	9	10
200%	$2,510	$3,406	$4,303	$5,200	$6,096	$6,993	$7,890	$8,786	$9,683	$10,580
150%	$1,882	$2,555	$3,227	$3,900	$4,572	$5,245	$5,917	$6,590	$7,262	$7,934

RECOMMENDATION

Staff presents this for consideration and approval from the General Services Committee. If approved, it will go to City Council Consent Agenda for approval by full Council.

Union-Anson County Habitat for Humanity®

October 1, 2024

Teresa Campo MPA, CMA, CZO, CDA
Community Development Coordinator
City of Monroe

Teresa,

Union-Anson County Habitat for Humanity (UACHFH) is working in partnership with the City of Monroe and Monroe Union County CDC to complete Phase Two of East Village Subdivision at the present time. In early 2021 The City of Monroe approached Union-Anson County Habitat for Humanity and asked us to consider partnering with them and Monroe Union County CDC to complete Phase Two of East Village. In June, 2021 UACHFH became the managing partner, with a 51% interest in East Village, LLC. We built two new homes to finish Phase One in 2023 and we are in the design phase of Phase Two right now. The design phase is underway and we hope start infrastructure work in early 2025.

Phase Two of East Village will be 22 single family homes of workforce housing for first time homebuyers who are employed and/or living in the City of Monroe. We are looking to partner with the City of Monroe to provide workforce housing for people who serve critical roles in our local communities. To build these 22 new homes in East Village we must secure $1,400,000.00 in funding for the infrastructure work in Phase Two of East Village. A document showing the estimated infrastructure costs is attached to this letter and we are diligently working to secure funding from private and public sources to make Phase Two of East Village a reality.

We are, therefore, asking the City of Monroe to approve and set aside $500,000.00 in the current budget cycle for the East Village infrastructure program. This funding will be designated for the infrastructure costs for Phase Two of the East Village workforce housing project. UACHFH will provide matching funds for the City of Monroe contribution for this project through our private donors and partners. The Braswell Trust has committed to providing $150,000.00 in funding for this infrastructure project to date and we are working on securing additional funding for this project.

Sincerely,

Mike Reece

Mike Reece
Director of Development
Union-Anson County Habitat for Humanity
704-254-3013
Mreece@unionhabitat.org

STAFF REPORT

TO:	General Services Committee
VIA:	Mark Watson, City Manager
DATE:	November 7, 2024
FROM:	Lisa Stiwinter, Planning and Development Director
PREPARED BY:	Teresa Campo, Community Development Manager
SUBJECT:	East Village Phase II Infrastructure Match

SUMMARY STATEMENT

The General Services Committee is requested to recommend to Council 1) Removal of the COVID-19 restrictions from the Project Fund CR2202 (Housing and Public Private Partnerships); 2) Remove the COVID19 restrictions for the Union Anson County Habitat for Humanity (UCHFH) Urgent Repair Program and Reduce the Funding to $75,000; and 3) Remove the COVID-19 Restriction for the Monroe Union County Community Development Corporation (MUCCDC) Mortgage and Foreclosure Assistance Program and Reduce the Funding to $75,000. In addition, Community Development requests that a recommendation be made to City Council to award up to $500,000 of the CR2202 project funds to the East Village, LLC and/or its Managing Partner for the East Village Phase II $1.4m infrastructure project. Also, authorize Mark Watson, City Manager to execute all funding documents.

REVIEW

The City of Monroe received American Rescue Plan funds during the COVID 19 Pandemic. The City designated the Planning and Development's Community Development Division to administer the funds to assist in various community development and housing initiatives for our citizens. The Centers for Disease Control has lifted the COVID19 pandemic status. Community Development respectfully requests the recommendation to remove the COVID19 restrictions from the urgent repair and mortgage/foreclosure/tax assistance programs. In addition, we request that General Services recommend funding of up to $500,000 to the East Village LLC and/or its managing partner for the infrastructure at the East Village II subdivision. East Village II is in the design phase and will result in up to 22 single-family new constructed homes for low to moderate-income

households. This affordable workforce housing community will provide a priority to Monroe residents and our employees. The infrastructure estimate is $1,400,000.

RECOMMENDATION

General Services Committee is requested to provide a favorable recommendation to City Council for approval to remove the COVID-19 Restrictions from Project Fund CR2202 Housing and Public Private Partnerships AND recommend funding of up to $500,000 to the East Village, LLC and/or its managing partner for East Village Phase II infrastructure. The $500,000 is conditional to the commitment letter(s) for the additional $900,000 in match funds, approved plans, developer fee structure review, and other necessary compliance documentation. The funding agreement will contain the required language regarding Monroe residents and our employees. Authorize Mark Watson, City Manager to execute all funding agreements.

Attachment: Infrastructure Cost Estimate

STAFF REPORT

TO: General Services Committee

VIA: Mark Watson, City Manager

DATE: November 7, 2024

FROM: Lisa Hollowell, Assistant City Manager

PREPARED BY: ACM Hollowell

SUBJECT: Reimbursable Agreement – Air Traffic Control Tower Siting Study

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SUMMARY STATEMENT

The Charlotte Monroe Executive Airport was accepted into the Federal Contract Tower (FCT) program in November 2023, enabling the Federal Aviation Administration (FAA) to operate an air traffic control tower through contracted services once a tower is constructed and operational. As of October 31, 2024, the necessary agreement to begin this process, has not been executed despite multiple inquiries from City officials to the FAA. The City is seeking guidance from the General Services Committee on the next steps.

REVIEW

Background

The Charlotte Monroe Executive Airport has been accepted into the Federal Contract Tower (FCT) program, enabling the FAA to operate an air traffic control tower through contracted services. The application process began in 2022, and although EQY was initially not selected, an appeal led the FAA to choose EQY based on a benefit/cost (BC) ratio exceeding 1.0, which is a requirement for the program. The acceptance notice was sent to the City in November 2023. The BC analysis is valid for five years, after which a new analysis will be required for new candidates.

The FCT Program provides the operating funds for air traffic services and the Airport is responsible for funding capital expenses, including construction, equipment, and maintenance of the Tower. And in some instances, there may be Airport Improvement Grant funds available for construction costs and equipment, though this expense is expected to be borne by the Airport. The North Carolina General Assembly appropriated $6 million for the tower in the 2023

Appropriations Act (S.L. 2023-134), which will assist in paying for some of the associated capital costs.

Issue

To date, the Reimbursable Agreement has not been executed. Initial discussions with the FAA, NCDOT, and the City's contracted Engineer of Record indicated that the Engineer would oversee the siting study for the tower location. However, in mid-2024, the City was informed that the FAA must conduct this study, requiring the City to enter into a reimbursable agreement directly with FAA.

The Reimbursable Agreement is a contract requiring the City to reimburse the FAA for the costs associated with a siting analysis, projected to be $60,000. This detailed study will evaluate up to three potential tower sites, along with two alternatives, to determine the optimal location and functionality for the new tower at the Airport.

Once the City was informed that FAA must conduct the study, the City Manager's Office, the Airport Manager, and NCDOT sent multiple emails to the FAA inquiring about executing the Reimbursable Agreement, the status of the draft agreement, and the overall process. As of October 31, 2024, this agreement has not been received by the City or executed.

RECOMMENDATION

The City is prepared to move forward and seeks guidance from the General Services Committee on the next steps. One suggestion is to contact the State's U.S. Senators and Representatives for assistance. City Management would like the Committee to provide direction on this matter.

STAFF REPORT

TO:	General Services Committee
VIA:	Mark Watson, City Manager
DATE:	November 7, 2024
FROM:	Lisa Hollowell, Assistant City Manager
PREPARED BY:	Lisa Hollowell, Assistant City Manager
SUBJECT:	Information Only - Lease Compliance by the Union County Community Action, Inc.

SUMMARY STATEMENT

This staff report provides an executive summary of the lease requirements and compliance by the Union County Community Action, Inc. for lease of four buildings located at the Winchester community complex.

Executive Summary

Lease
A lease agreement was executed on January 1, 2020, between the City and Union County Community Action, Inc. (UCCA) for the lease of four buildings within the Winchester Neighborhood Community Center complex. This agreement covers three buildings in full and designated rooms within a fourth building (Building A), with a lease term of ten years, set to expire on December 31, 2029. This current lease is the second renewal of a previous ten-year lease that began in 2010, with original agreements tracing back to 1998.

Lease Amounts
The lease amount is nominal, set at $1 per building annually, totaling $4 for the entire lease. Since the commencement of the lease, the City has received timely lease payments each January from 2020 through 2024.

Independent Market Rent Appraisal
UCCA is obligated to provide the City with independent market rent appraisals when prepared, which are meant to establish the value of in-kind contributions associated with the complex. While no appraisals appear to have been submitted to the City, the Monroe Union Economic Development Commission has provided an estimate of the in-kind value at approximately $515,000. UCCA's own estimate of in-kind value for FY 2022-23 is approximately $776,002 (from UCCA's website) and City staff developed an estimate based upon a 2024 comparison at $673,847. Therefore, the overall range of estimates for in-kind contributions spans from $515,000 to $776,002, based on varying appraisal methodologies. And UCCA appears to be out-of-compliance with the requirement in the lease for not having submitted these reports.

Buildings Uses
The lease specifies that the buildings are to be utilized exclusively for operating Early Head Start/Head Start programs or similar child development and educational initiatives. Any alternative use requires written consent from the City. UCCA generally complies with these provisions, though Building A is noted for providing adult education classes, which arguably diverges from the stipulated use.

Maintenance Responsibilities
UCCA holds responsibility for the maintenance and upkeep of the leased buildings and grounds, including HVAC systems, plumbing, and janitorial services (except for Building A). The City is responsible for maintaining the building shell, roof, and landscaping. Any improvements to the leased premises necessitate prior approval from the City. The UCCA appears in compliance with these stipulations.

Termination Conditions
The lease includes provisions allowing either party to terminate the agreement with a 90-day written notice. Additionally, if UCCA defaults and fails to rectify the situation within 30 days of notice from the City, or if the property is used for non-Head Start purposes for 180 days, the City may terminate the lease. In cases of significant property damage, either party may terminate the lease with a 10-day notice.

RECOMMENDATION

No Action – Information Only

STAFF REPORT

TO: General Service Committee

VIA: Mark Watson, City Manager

DATE: November 7, 2024

FROM: Lisa Stiwinter, Planning and Development Director

PREPARED BY: Teresa V. Campo, Community Development Manager

SUBJECT: Youth Apprenticeship Week Proclamation November 17 – 23, 2024

SUMMARY STATEMENT

General Service Committee is requested to recommend to City Council the recognition of National Apprenticeship Week 2024.

REVIEW

South Piedmont Community College (SPCC) will be hosting a banquet on November 21, 2024 and requested a proclamation and attendance from our Mayor Robert Burns. This year marks the 10th annual National Apprenticeship Week (NAW), which is a nationwide celebration where employers, industry representatives, community-based organizations, educational institutions, and others host events. The purpose of the events is to showcase the successes and value of Union County's Registered Apprenticeship programs. Apprenticeship programs strengthen Monroe's economy by developing a highly skilled workforce to meet industry needs, creating pathways for career seekers to advance into good jobs. The theme for NAW 2024 is "National Apprenticeship Week 2024: Celebrating 10 Years of Engagement, Expansion, and Innovation."

RECOMMENDATION

Staff requests the General Services Committee recommend City Council issue the proclamation for National Apprenticeship Week 2024. This effort aligns with the Good Job Great City, Monroeworks initiative.

Attachment: Proclamation

PROCLAMATION OBSERVING
NOVEMBER 17 - 23, 2024
NATIONAL APPRENTICESHIP WEEK

WHEREAS, National Apprenticeship Week is celebrating its 10th anniversary of raising awareness of the vital role Registered Apprenticeships provide in creating opportunities by allowing apprentices to earn while they learn and preparing a pathway to good, quality jobs and well-paying careers in the City of Monroe, North Carolina and across the nation; and

WHEREAS, Registered Apprenticeship programs enable employers to develop and train their future workforce while offering career seekers affordable paths to secure high-paying jobs, and

WHEREAS, the City of Monroe, North Carolina recognizes the role of Registered Apprenticeship in expanding opportunities in our workforce that are inclusive of all individuals, thus providing a path for all qualified individuals, including men, women, youth, people of color, rural communities, justice-involved individuals and individuals with disabilities, to become apprentices and contribute to America's industries; and

WHEREAS, The City of Monroe, North Carolina recognizes that Registered Apprenticeship, a proven and industry-driven training model, is a key strategy to improving job quality, and creating access to good-paying, family-sustaining jobs for all, starting with youth and young adults, while addressing some of our nation's pressing workforce challenges such as rebuilding our country's infrastructure, addressing critical supply chain demands, supporting a clean energy workforce, modernizing our cybersecurity response, and responding to care economy issues; and

WHEREAS, The City of Monroe, North Carolina is recognized as a Good Jobs Great Cities destination by the National League of Municipalities and the United States Department of Labor and promotes jobs through our collaborative partners and MONROEWORKS.

NOW, THEREFORE, I, Robert Burns, Mayor, by the virtue of the authority vested in me as Mayor of the Monroe, do hereby proclaim November 17, 2024 through November 23 2024 as National Apprenticeship Week in the City of Monroe, North Carolina and encourage employers to create and expand apprenticeship opportunities, providing hands on learning experiences, mentorship, and career pathways. I also urge educational institutions to collaborate with industries and develop curriculum that aligns with the needs of apprenticeship programs. I further call upon government entities to provide resources, incentives, and policy support to foster the growth and accessibility of apprenticeship programs inclusive to all of our citizens.

IN WITNESS WHEREOF, I have hereunto set my hand and caused the Seal of the City of Monroe to be affixed this the 18th day of November 2024.

Robert Burns, Mayor

Attest:

_____

Bridgette H. Robinson, City Clerk

City of Monroe
Where Heartland Meets High Tech

STAFF REPORT

TO: General Service Committee

VIA: Mark Watson City Manager

DATE: November 7, 2024

PREPARED BY: Lisa Stiwinter, Director of Planning and Development

SUBJECT: Award of Contract for Planning and Design and Construction Documents for US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design project.

SUMMARY STATEMENT

The General Service Committee is requested to consider staff's recommendation to award Kimley-Horn the contract for Planning and Design and Construction Documents for the US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design project.

REVIEW

The North Carolina Department of Transportation (NCDOT) has an Interchange Improvement project located at US 74/601 (U-5723) that includes replacing the bridge, constructing roundabouts at both ends and including an 8-foot sidewalk on both sides. The project is currently in the right-of-way acquisition phase and is scheduled for construction in 2028.

In 2015, an area redevelopment plan titled “Concord Avenue Area Master Plan was adopted by City Council, which was the first step toward revitalization of an important gateway into Downtown Monroe. One of the special objectives for the Plan was to develop an action/implementation plan that provides recommendation strategies that will serve to implement the vision for the area.

Gateway and Intersection and Streetscape Enhancements were identified as action items in the Concord Avenue Area Master Plan that include landscaping, decorative/street lighting, gateway monumentation, pedestrian sidewalks/connections, movement of utilities underground and signal modifications. The NCDOT Interchange Improvement Project at US 74/601 has provided the City a great opportunity to bring forward the Gateway and Intersection and Streetscape Enhancement recommendations outlined in the Concord Avenue Area Master Plan.

In October 2023, the Planning and Development Department brought before City Council a request for funding in the amount of $1.7 million for the planning, design and construction plans and to begin implementation of an Interchange Enhancement at US 74/601 and Skyway Drive Streetscape Design project. Due to the significant benefits the Interchange Enhancement and Streetscape Design project in coordination with NCDOT bridge replacement and roundabouts, City Council voted to grant the funding for the project.

The Planning and Development Department advertised a Request for Qualifications (RFQ) on July 12, 2024 seeking qualifications from highly qualified and experienced firms or teams to

assist with the planning and design and construction plans for the design and implementation of interchange and streetscape improvements as identified in the Concord Avenue Area Master Plan. The department received four proposals from qualified consulting firms expressing interest in the project. Based on the proposals received, qualifications, experience and the selection team scoring, Kimley-Horn, national planning and engineering firm has been selected with a project cost of $489,450.

RECOMMENDATION

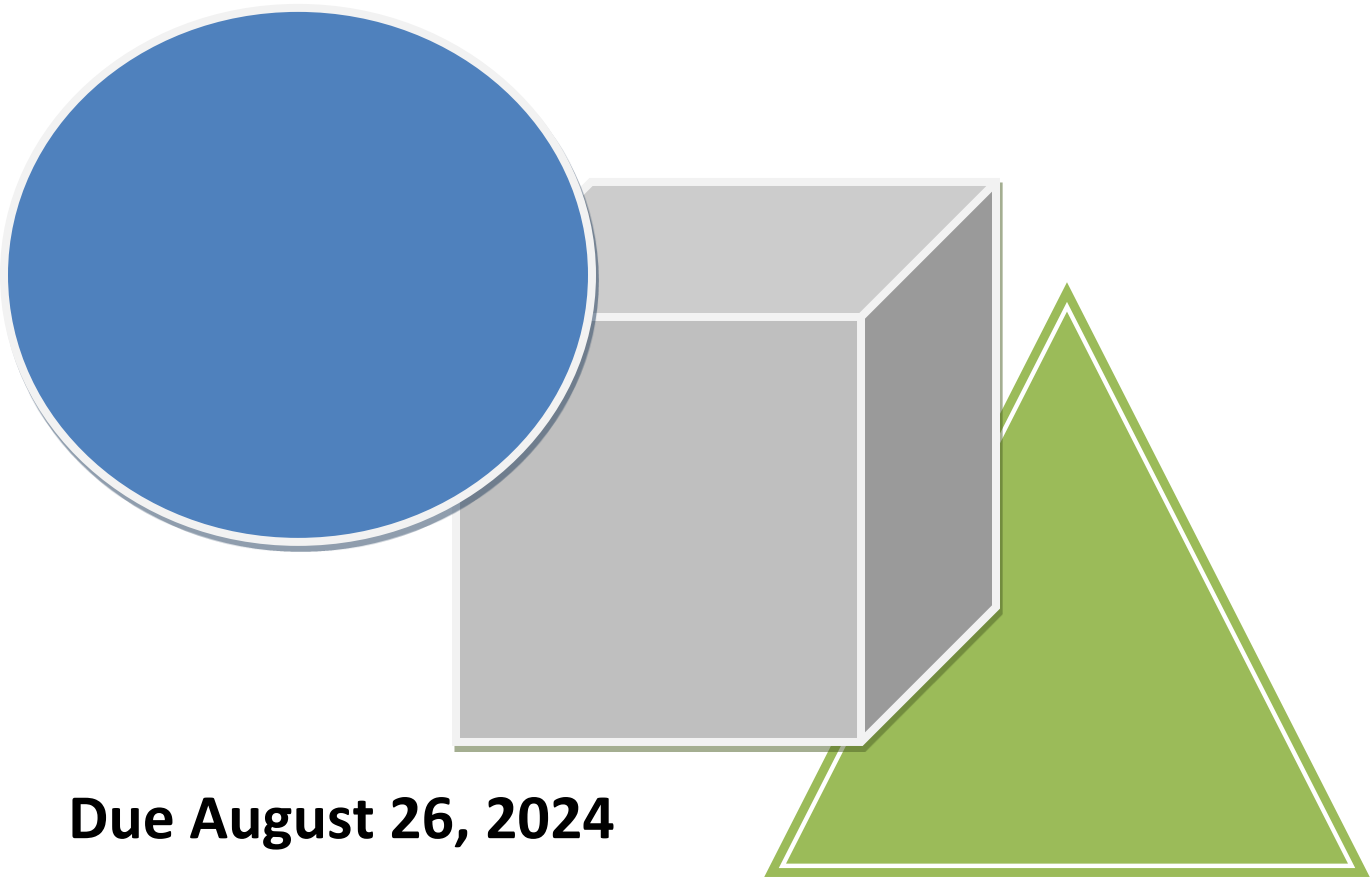
Staff is requesting the General Service Committee consider recommending the contract award to Kimley-Horn for the Planning and Design and Construction Documents for the US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design project.

Attachments:
Request for Qualifications (RFQ)
Kimley-Horn's Proposal
Scope of Services
Fee and Expenses

City of Monroe
Planning & Development

Request for Qualifications (RFQ)

US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design



Due August 26, 2024

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US 74/601 INTERCHANGE ENHANCEMENTS AND SKYWAY DRIVE STREETSCAPE DESIGN

Notice is hereby given that the City of Monroe located at 300 West Crowell Street in Monroe, North Carolina 28112 is seeking qualifications from highly qualified and experienced firms or teams to assist with the planning and design and construction plans for two (2) eight (8) feet multi-use paths and the design and implementation of interchange and streetscape improvements as identified in the Concord Avenue Area Master Plan. The selected firm or team will prepare a planning and design and construction documents for two (2) eight (8) feet multi-use paths along Skyway Drive and develop design and construction documents for the US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design project that include landscape enhancements, street lighting, wayfinding, street trees, enhanced pedestrian connections, movement of utilities underground, gateway monumentation and signal design modifications. The scope of the improvements will generally align with the project extents of the US 74 and US 601 Interchange Project, state project number U-5726 (shown below as Exhibit A for reference), and coordination with the North Carolina Department of Transportation (NCDOT) Division 10 will be required by the selected firm or team. The scope of work will also include recommendations for additional design beyond the extents along Skyway Drive to West Myers Street. Intersections along Skyway Drive to be evaluated include Pedro St., King St. Lydia St. and W. Myers St. The improvements will be primarily focused on Skyway Drive.

Qualifications should be submitted as a comprehensive document or package and demonstrate the ability and intent to complete the required Scope of Work. The firm or team's current and prior experience shall be relevant to community planning, environmental, engineering, landscape architecture, urban design streetscape and landscape, transportation planning and demonstrate effective public outreach and quality products.

A portion of this project may be reimbursed with Federal-aid funding through the North Carolina Department of Transportation (hereinafter referred to as the Department). The solicitation, selection and negotiation of a contract shall be conducted in accordance with all Department requirements and guidelines outlined in the NC Transportation Contract Provisions for Non-Federal Entity Contracts Under Federal Awards. The selected consultant will be required to comply with applicable laws, requirements, and regulations governing this funding.

The primary and/or subconsultant firm(s) shall be pre-qualified by the Department of Transportation (NCDOT) to perform any combination of the work codes listed below for the City of Monroe. Work Codes required are:

- 00026 Capacity Analysis (Intersections and Corridors)

- 00032 Categorical Exclusions
- 00063 Environmental Assessments/Findings of No Significant Impacts
- 00070 Erosion and Sedimentation Control Design
- 00097 Guide Sign Design-Conventional Roads?
- 00132 Landscape and Streetscape Design
- 00152 Pavement Design
- 00155 Pavement Marking Plans
- 00171 Public Involvement
- 00172 Public Participation & Planning
- 00195 Roadway Construction Engineering & Inspection
- 00200 Feasibility Studies
- 00207 Signal Design
- 00208 Signal Equipment Design/Application
- 00209 Signal System Design
- 00210 Signal System Timing Development & Implementation
- 00247 Traffic Management Plan
- 00269 Urban Roadway Design
- 00270 Utility Coordination
- 00314 Roadway Lighting
- 00337 Estimating
- 00362 Easement Surveying
- 00433 Tier I-Basic Hydrologic & Hydraulic Design

WORK CODES for each primary and/or subconsultant firm(s) SHALL be listed on the respective RS-2 FORMS (see section 'SUBMISSION REQUIREMENTS').

Introduction

The City of Monroe is the county seat of Union County, located approximately 25 miles east of Charlotte, North Carolina. Monroe is one of 14 municipalities in Union County, and is the County's only full service community. The City is home to nearly 35,894 individuals of diverse backgrounds, ethnic groups, races, and socio-economic status. In addition to the City's proximity to Charlotte, Monroe is served by a multi-layered transportation network highlighted by US 74 and US 601, the Monroe Expressway toll road, the Charlotte-Monroe Executive Airport, and the CSX railroad. Today, one of the most workhorse roadway in the City is US 74, which serves as a busy east-west route through the region, and remains one of the most common routes from Charlotte and points west to popular beach towns.

In 2015, the City adopted a small area revitalization plan titled “Concord Avenue Area Master Plan” in order to revitalize a blighted area that served as an important gateway into Downtown Monroe. The purpose and intent is to improve public safety, aesthetics, viability and appeal of the area through a comprehensive small area revitalization plan.

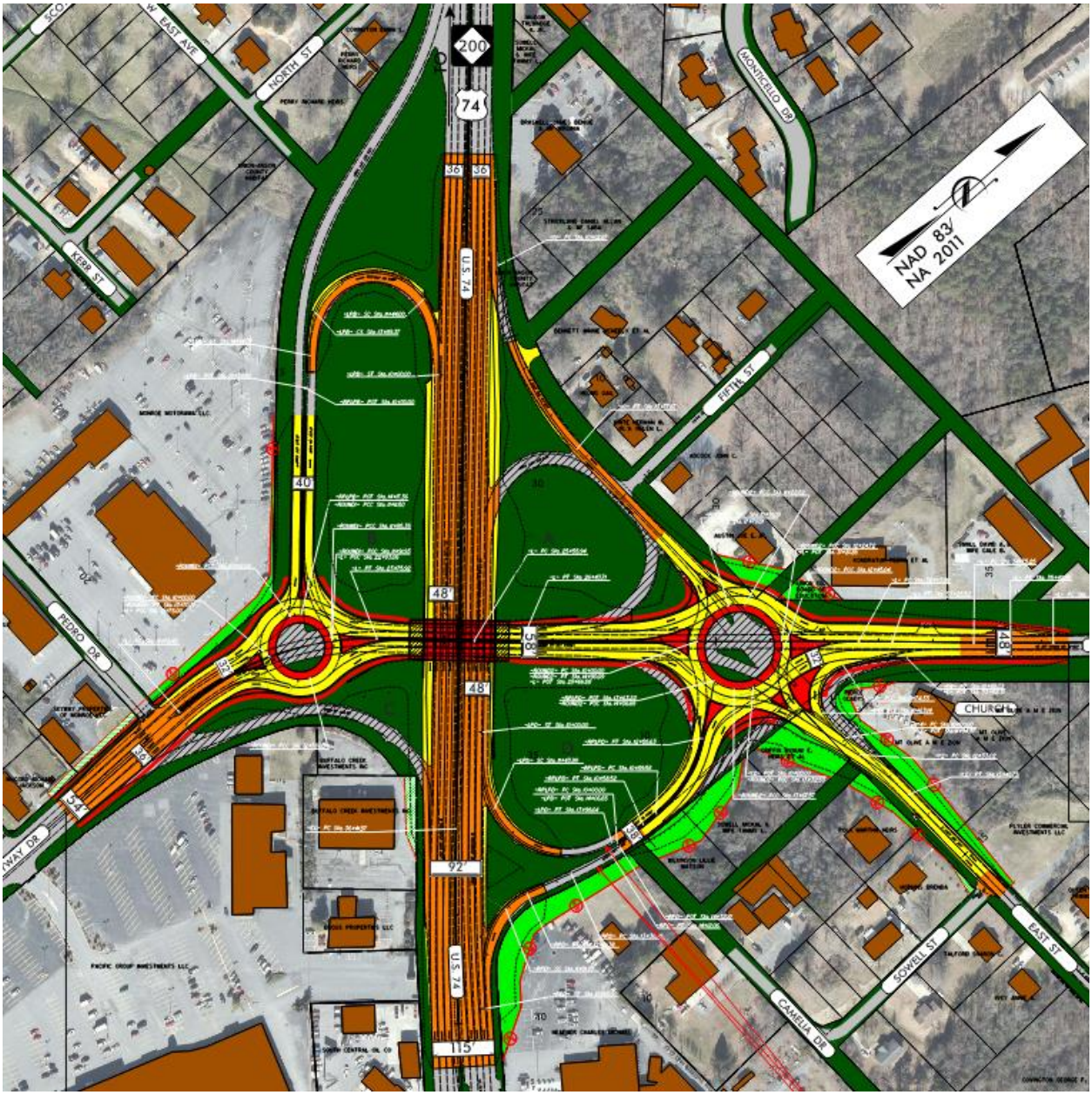
The Concord Avenue Area Master Plan addresses urban design, future land uses, aesthetics and transportation and reflects the vision of the community. The plan brings a sense of continuity between urban design and infrastructure design. Specifically, the Plan provides a development, form and massing, aesthetic enhancements, gateway treatments as well as streetscape improvements and road connectivity that will help develop a “sense of place”.

The Master Plan also included an action plan that provides a broad set of recommendations that includes additional detail in phasing, responsibilities, costs and potential funding sources. The action plan for the Concord Avenue Area Master Plan recommends a variety of capital projects mostly related to transportation (e.g. gateways, intersection improvements, new street connections and new roadway design for existing streets). The US/601 Interchange Enhancements and Skyway Drive Streetscape Design will serve to implement the gateway/landscape improvements and intersection improvements in the Concord Avenue Area Master Plan.

Project Goals and Objectives

The goal of this project is to provide the City of Monroe planning, design and construction phase services for landscape enhancements, street lighting, wayfinding, street trees, enhanced pedestrian connections, movement of utilities underground, gateway monumentation and signal design modifications at the interchange of US 74/601 Interchange and along Skyway Drive in Monroe, NC. The project scope of work shall be coordinated with NCDOT and align with the project extents of the US 74 and US 601 Interchange Project, state project number U-5723 (shown below in exhibit A for reference), but also shall include two (2) eight (8) feet multi-use paths on both sides of Skyway Drive and recommendations for additional design beyond the extents along Skyway Drive to West Myers Street. Intersections along Skyway to be evaluated include Pedro Street, King Street, Lydia Street, and West Myers Street. The improvements will be primarily focused on Skyway Drive. The selected firm or team shall incorporate into the scope of work the development of preliminary pricing for budgeting purposes.

EXHIBIT A:



Specific Objectives:

1. Interchanges located at US 74 and US 601 provide an opportunity for a grand entrance and gateway into the Concord Avenue Area as well as Downtown Monroe. Enhancements identified in the Concord Avenue Master Plan include gateway monumentation, decorative bridge treatments, landscaping treatments, as well as

improved pedestrian and vehicular lighting (shown below in Exhibit B and C for reference).

EXHIBIT B:

EXHIBIT C:

2. Intersection Improvements are identified located along Skyway Drive that emphasize aesthetic treatments including enhanced pedestrian connections, street lighting and trees that line the roadway at the intersections of Skyway Drive and Pedro Street, King Street and West Myers Street. Intersection improvements at Skyway Drive and Lydia Street emphasize signalized intersection improvements, enhanced pedestrian accommodations as well as mast arm traffic signals, pedestrian crossing signals and the movements of utilities underground (as shown in Exhibit D below).

3. Planning and design and construction plans for two (2) eight (8) feet multi-use paths along Skyway Drive.

EXHIBIT D:

Project Implementation

The project will be completed in three phases:

1. The first phase will be to provide planning and design and construction plans for two (2) eight (8) feet multi-use paths along Skyway Drive to include preliminary and final design plans, the development of preliminary and final design plans for the US74/601 Interchange and Skyway Drive Streetscape, preliminary construction cost estimates, phasing recommendations and 100% construction documents and taking into consideration public input and outreach.

2. Supplemental to the design plans and construction documents shall be the permitting and environmental permitting to include submitting, tracking and applying for plan approval for Construction Documents from various agencies.

3. The third phase will consist of bidding and construction phase services, which will include issuing a bid package and conducting a pre-bid meeting, pre-construction conference, site visits and construction observations, and construction meetings.

The Professional Services shall include but not limited to the following deliverables:

1. Develop Design and Construction Plans for multi-use paths along Skyway Drive
   a. Provides two (2) eight (8) feet wide multi-use paths on the east and west side of Skyway
   b. Includes concept plans and design
   c. Opinion of probable construction cost as well as additional "soft costs" likely to be incurred as part of the project, such as preliminary engineering and design, permitting, survey, subsurface utility engineering, utility relocation, right-of-way agent, and geotechnical fees.

2. Planning and Design Plans for streetscape and landscape enhancements at the interchange of US74/601 and Skyway Drive to include the following:
   a. Preliminary and final design plans and preliminary constructions cost and phasing recommendations.
      i. Landscape design and materials
      ii. Hardscape design and materials
      iii. Intersection and Crossing Enhancements
      iv. Lighting Layout
      v. Wayfinding Signage Layout
      vi. Monumentation Layout

3. Survey and base mapping.

4. Traffic Signal Design/Intersection Enhancements to include the following:
   a. Intersection and Crossing Enhancement Enlargements for four (4) intersections inclusive of one signal redesign at Lydia Street.
   b. Signal design plans
   c. Electrical details plan
   d. Metal pole and mast arm plans

5. Construction Documents-100% Design

6. Permitting to include Construction Documents plan approval

7. Environmental Permitting to include the following:
    a. Natural Resource Technical Memorandum (NRTM)
    b. Protected Species Surveys and USFWS Coordination

8. Bidding and Construction Documents to include a bid package in compliance with the required Davis Bacon Wage Determinations and other federal and/or state language.

9. Construction Administration Services

10. Public Engagement Plan

11. Implementation plan broken down by short, intermediate and long-term strategies and objectives

Small Professional Service Firm (SPSF) Participation

Federal funds through Charlotte Regional Transportation Planning Organization (CRTPO), North Carolina Department of Transportation (NCDOT), and Federal Highway Administration (FWHA) may be used for a portion of this project. The use of Small Professional Services Firms (SPSF) is encouraged. Small businesses determined to be eligible for participation in the SPSF program are those meeting size standards defined by Small Business Administration (SBA) regulations, 13 CFR Part 121 under the North American Industrial Classification System (NAICS). The NCDOT's policy is to ensure non-discrimination based on race, religion, color, creed, national origin, sex, handicapping condition or age in the aware and performance of its contracts to create an equitable environment in which small businesses can compete fairly for contracts financed with federal and state funds. SPSF participation is not contingent upon the funding source.

The Firm, at the time the RFQ is submitted, shall submit a listing of all known SPSF firms that will participate in the performance of the identified work. The participation shall be submitted on the North Carolina Department of Transportation (NCDOT) Subconsultant's Form RS-2. RS-2 forms may be accessed on the NCDOT's website at NCDOT Connect Guidelines & Forms.

The SPSF must be qualified with the NCDOT to perform the work for which they are listed.

Real-time information about firms doing business with NCDOT and firms that are SPSFE certified through the Contractual Services Unit is available in the Directory of Transportation Firms. The Directory can be accessed on NCDOT's website at Directory Firms-Compete listing of certified and prequalified firms.

The listing of an individual firm on NCDOT's directory shall not be construed as an endorsement of the firm.

Prequalifications

The Department (NCDOT) maintains on file the qualifications and key personnel for each approved discipline, as well as any required samples work. Each year on the anniversary date of the company, the firm shall renew their prequalified disciplines. If your firm has not renewed its application as required by your anniversary date or if your firm is not currently prequalified, please submit an application to the Department (NCDOT) prior to submittal of your letter of interest. An application may be accessed at on NCDOT's website at Prequalifying Private Consulting Firms-Learn how to become Prequalified as a Private Consulting Firm with NCDOT. Having this data on file with the Department (NCDOT) eliminates the need to resubmit this data with each letter of interest.

Even though specific DBE/MBE/WBE goals are not required for this project, the Department of Transportation is committed to providing opportunity for small and disadvantaged businesses to perform on its contracts through established Department (NCDOT) goals. The Firm, sub-consultant and sub-firm shall not discriminate based on race, religion, color, national origin, age, disability or sex in the performance of this contract.

General Terms

Conflict of Interest: No person who is an employee, agent, consultant, officer, or elected official or appointed official of recipient or sub-recipient who exercises any functions or responsibilities with respect to project activities or, is in a position to participate in the decision making process or, gains inside information with regard to such activities may obtain a financial interest or benefit from a funding activity, have a financial interest in any contract with respect to a CDBG activity or its proceeds for themselves of those they have business or immediate family ties.

Excluded Parties ("Debarred and Suspension): Title 24 Code of Federal Regulations Part 24 requires that City of Monroe not enter into contract with any agency, corporation, partnership, or other legal entity that has been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded by the Federal Government from Participating in transactions involving Federal funds. All firms are required to certify that neither you nor your principals are presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation in programs funded by a Federal agency. Further, all firms must

certify that you will not use, directly or indirectly, any of these funds to employ, award contracts to, engage the services of, or fund any contractor that is debarred, suspended, or ineligible under 24 Code of Federal Regulations Part 24.

Minority and Women Owned(MBE/WBE) or Disadvantaged Businesses (DBE): Minority Businesses (MBEs), Women Businesses (WBEs), Disadvantaged Business Enterprises (DBEs) and other small businesses shall have the opportunity to compete fairly in contracts financed in whole or in part with federal grant funds. The City of Monroe will not allow any person or business to be excluded from participation in, denied the benefits of, or otherwise is discriminated against in connection with the award and performance of any contract because of sex, ethnicity, race, color, age, handicap or disability, religion, or national origin.

Equal Employment Opportunity: All Firms will be required to follow Federal Equal Employment Opportunity (EEO) policies. The City of Monroe will affirmatively assure that on any project constructed pursuant to this advertisement, equal employment opportunity will be offered to all persons without regard to race, color, creed, religion, national origin, sex, familial status, disability or handicap, ethnicity, age.

Hold Harmless: The Firm shall indemnify the City of Monroe against any and all loss or damage to the extent arising out of the Firm's negligence in the performance of services under this Request and for infringement of any copyright or patent occurring in connection with or in any way incidental to or arising out of the occupancy, use, service, operations or performance of work under this Request.

Iran Divestment Act: Pursuant to G.S. 147-86.59, any person identified as engaging in investment activities in Iran, determined by appearing on the Final Divestment List created by the State Treasurer pursuant to G.S. 147-86.58, is ineligible to contract with the State of North Carolina or any political subdivision of the State. The Iran Divestment Act of 2015, G.S. 147-86.55 *et seq.** requires that each vendor, prior to contracting with the State certify:

1. That the vendor is not identified on the Final Divestment List of entities that the State Treasures has determined engages in investment activities in Iran;

2. That the vendor shall not utilize on any contract with the State agency any subcontractor that is identified on the Final Divestment List; and

3. An authorized representative of the responding firm must certify by signing the attached Iran Divestment Act Certification required by N.C.G.S. 143C-6A-5(a).

Drug-Free Workplace: During the performance of this Request, the Firm agrees to provide a drug-free workplace for his employees; post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the workplace and specify the actions that will be taken against employees for

violations of such prohibition; and state in all solicitations or advertisements for employees placed by or on behalf of the firm that the Firm maintains a drug-free workplace.

For the purposes of this section, "drug-free workplace" means a site for the performance of work done in connection with a specific contract awarded to a contractor/firm in accordance with this chapter, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the Request.

E-Verify Requirement: The Firm shall comply with the requirements of Article 2 of Chapter 64 of the General Statutes. Further, if the Firm utilizes a subcontractor, the Firm shall require the subcontractor to comply with the requirements of Article 2 of Chapter 64 of the General Statutes.

Other: Any firm wishing to be considered must be properly registered with the Office of the Secretary of State and with the North Carolina Board of Registration for Professional Engineers and Land Surveyors. Any firm proposing to use corporate subsidiaries or subcontractors must include a statement that these companies are properly registered with the NC Board of Registration for Professional Engineers and Land Surveyors. The Engineers performing the work and in responsible charge of the work must be registered Professional Engineers in the State of North Carolina and must have a good ethical and professional standing. It will be the responsibility of the selected private firm to verify the registration of any corporate subsidiary or subcontractor prior to submitting a Statement of Qualifications. The firm must have the financial ability to undertake the work and assume the liability. The selected firm will be required to furnish proof of insurance coverage in the minimum amounts listed below:

Coverage	**Minimum Limits**
Workers' Compensation	*Statutory Limits*
Employers' Liability	*$500,000*
General Liability	*$1,000,000 per occurrence/$2,000,000 aggregate*
Automobile Liability	*$1,000,000*
Professional Liability (E&O)	*$1,000,000 per occurrence/$2,000,000 aggregate*

Evaluation Criteria and Procedures

Submission Requirements:

RFQ responses should be submitted as a comprehensive document or package and demonstrate the ability and intent to complete the required Scope of Work. The firm's current and prior experience shall be relevant to community planning, environmental, engineering, landscape architecture, urban design, streetscape and landscape, transportation planning and demonstrate effective public outreach and quality products.

Please submit your RFQ responses no later than 5:00 p.m. Monday, August 26, 2024, to:

City of Monroe
Planning and Development Department
Attn: Lisa Stiwinter
P.O. Box 69
Monroe, NC 28111

All questions regarding the qualifications specifications shall be directed to Lisa Stiwinter in writing at lstiwinter@monroenc.org no later than Monday, July 29, 2024. Late submittals will not be accepted. Further information is contained in this RFQ document. The City of Monroe reserves the right to reject any or all responses and to waive any irregularities.

Each firm's submittal shall only be considered if submitted as a complete document by the stated deadline. Responses to this RFQ should contain the following:

1. A Qualification Package (not more than 15 pages) consisting of:
    a. A cover letter expressing interest in working with the City of Monroe that includes a point of contact for the firm;
    b. Year the firm was established;
    c. Consultant specialties; List of sub-consultants and their specialization of their use;
    d. Relevant experience of the firm and resumes of the project team;
    e. List of current and prior projects of similar scope with municipalities (List up to 5, starting with most recent, Provide year project was completed, location, contact name, phone number and email address, and scope of work performed for each). Additional relevant experience may be included;
    f. A description of the approach to be taken toward completing the Project Scope, including the process and any deliverables resulting from each task;
    g. Any proposed changes to the Project Scope;
    h. A proposed schedule for the entire process, including meetings, milestones, presentations, and final completion;
    i. A statement indicating that the firm is independent, properly licensed to practice in the state of North Carolina, and has no conflict of interest with regard to any other work performed by the firm for the City;
    j. A summary of estimated labor hours by task that clearly identifies the project team members and the number of hours performed by each team member by task.

2. References: Provide three (3) references (names, addresses, phone numbers, email addresses) for comparable work for your firm and for the team members. Provide a brief description of the scope of services provided for each reference.

All applicants shall be required to submit at least four (4) hard copies of the complete package responding to each item above and one (1) digital copy. The submittal shall be printed on 8 ½" by 11" white paper, minimum 12 point font, double-sided, and bound with a maximum total of 30 pages (15 sheets) (RS-2 forms are not included in the page count). The cover letter will not be included in the page count. Unless absolutely necessary, all responses and copies should minimize or eliminate the use of non-recyclable material or non-reusable materials such as plastic report covers, plastic dividers, vinyl sleeves, and GBC binding. Paper clips and staples are acceptable.

Consultant Certification Forms RS-2

Completed Form RS-2 forms **SHALL** be submitted with the firm's response.

This section is limited to the number of pages required to provide the requested information.

Submit Form RS-2 forms for the following:

- Prime Consultant firm (Prime Consultant Form RS-2 Rev 1/14/08), and;
- ANY/ALL sub-consultant firms (Sub-consultant Forms RS-2 Rev 1/15/08) to be or anticipated to be utilized by your firm.

Complete and ***sign*** each Form RS-2 (instructions are listed on the form)

In the event the firm has no sub-consultant, it is required that this be indicated on the Sub-consultant Form RS-2 by entering the work "NONE" or the number "ZERO" and *signing* the form.

Distribution and Outreach

This RFQ is being advertised on the City's website, NC Planning List serve, and the NCAPA Website.

Selection Team

The City of Monroe will assign a selection team made up of members of staff that have professional experience with the subject topics.

Selection Criteria

The Selection Team will evaluate each firm based on information provided in the Technical Report submittal, detailing the firm's history, project team, present workload, office location, relevant experience, past performance, and quality assurance policies.

- Technical Report submittal.....**25%**

In addition, the Consultant's response to meet the Scope of Work requirements shall be of great consideration. Heavily weighted, specific evaluation criteria, among other factors, will include:

- Creative and innovative approach to engaging the public to receive public participation and input and coordination with landowners, governing bodies, utility agencies, NCDOT, CRTPO and other affected entities.....**25%**
- Overall Project Management and Approach …… **10%**
- Implementation broken down by short, intermediate and long-term strategies and objectives.....**15%**
- A Final Planning and Design and Construction Documents that serve to implement the goals and objectives of the Concord Avenue Area Master Plan and recognize the inherent relationship with the US 74 and US 601 Interchange Project, state project number U-5726. .....**25%**

North Carolina firms qualified to do the required work will be given priority consideration. A North Carolina firm is a firm that maintains an office in North Carolina staffed with an adequate number of employees judged by the City of Monroe to be capable of performing a majority of the work required.

After reviewing qualifications, if firms are equal on the evaluation review, then those qualified firms with proposed SPSF participation will be given priority consideration.

Selection Procedure

The City will conduct a fair and impartial process for the selection of the consulting firm. The City of Monroe reserves the right to reject all responses received and cancel the solicitation in the best overall interest of the City. The City reserves the right to award in whole or part and to waive any formalities as may be permitted by law. The City reserves the right to offer qualifications and supporting documentation to other entities that may have an interest.

TASK	TENTATIVE DEADLINE
City of Monroe advertise/publish Request for Qualifications	July 12, 2024

Questions regarding the RFQ due	July 29, 2024
Responses to RFQ due	August 26, 2024
Staff review and Interviews	August 27, 2024 – September 13, 2024
Selection based on qualifications/Firm Notified	September 16, 2024
General Service Committee Recommendation	October 3, 2024
Monroe City Council selection of project	October 8, 2024

All consulting firms should be prepared to present to the selection committee. The selected firm should be prepared to present to City Council.

Addenda and Interpretations: Any and all questions regarding this document must be addressed to Lisa Stiwinter, the City of Monroe Director of Planning and Development, at 704-282-4569 or lstiwinter@monroenc.org. Any and all revisions to this document shall be made only by written addendum from the City of Monroe. Therefore, no oral statements by any person shall modify or otherwise affect the terms, conditions or specifications stated in this request for qualifications. All are cautioned that the requirements of this RFQ can be altered only by written addendum and that verbal communications from whatever source are of no effect. **ALL QUESTIONS SHALL BE SUBMITTED NO LATER THAN MONDAY, July 29, 2024.**

Review of Public Information: All formal responses received become public information at the time of the submittal. Formal responses will be made available for public review after the City completes their review of the items presented. Requests to view responses can be made to the Director of Planning and Development. Copies of qualifications may be made at that time at a cost required by the City of Monroe.

Minor Deviations/Exceptions to Request for Qualifications: Minor deviations from the provisions of this Request for Qualifications may be considered; however, all proposed minor deviations must be explained in detail and submitted with the response.

Exceptions to Request for Qualifications: Written approval for any proposed substitution or changes in specifications must be obtained by the Consultant prior to the due date. Requests for approved equals, clarifications or changes in specifications, and/or protests of specifications must be received by the City of Monroe Director of Planning and Development by Monday, July 29, 2024.

It is up to the sole discretion of the City of Monroe to allow or reject any alternatives or appeals to modify the RFQ.

Changes to specifications will be made by written addendum. Prospective Consultants may make appointments to discuss these specifications. This, however, does not relieve prospective Consultants from the requirement for a written request for clarification or change to the specifications. Consultants' failure to request exceptions to specifications or approved equals as stated above will be interpreted as the Consultants' intent to comply fully with the requirements as written. Conditional or qualified responses shall be subject to rejection in whole or in part. The City of Monroe reserves the right to postpone the selection for its own convenience.

Performance: In case of default of the contractor, the City may procure the articles and services from other sources and hold the consultant responsible for any excess cost occasioned thereby.

Expenses Incurred in Preparing Qualifications: The City of Monroe accepts no responsibility for any expense incurred by the consultant in the preparation and presentation of a response to this RFQ. Such expenses shall be borne exclusively by the consultant.

Reservation of Right to Amend Request for RFQ: The City reserves the right to amend the RFQ at any time during the process, if it believes that doing so is in the best interest of the City.

Conditions of Request and Requirements

The following conditions apply to this RFQ:

1. The City of Monroe (City) reserves the right to withdraw this solicitation of qualifications at any time without prior notice. Further, the City makes no representation that any agreement will be awarded to any firm submitting a response.
2. The City reserves the right to reject any and all qualifications submitted in response to this request and to reject any sub-consultant or individual working on a consultant team.
3. Any changes to the qualification requirements will be made by addendum.
4. In any event, the City shall not be liable for any pre-contractual expenses incurred by any response or Consultant. This shall include pre-contractual expenses such as preparing the Response, submitting the Qualifications to the City, negotiating with the City on any matter related to the Response or other expenses incurred prior to the date of award for any agreement related to the services herein described.
5. No prior, current, or post award verbal agreement(s) with any officer, agent, or employees of the City shall affect or modify any terms or modifications of this RFQ or any contract or option resulting from this process.

6. The City reserves the right to waive any minor irregularities, informalities or oversights at its sole discretion. The term “minor” as used herein means any proposer or City irregularities or oversights that does not materially affect or alter the intent and purpose of this RFQ, and is not in violation of any State of North Carolina or Federal Government rules, laws, and regulations that may apply to this procurement.

PROJECT SCOPE

The City of Monroe is soliciting proposals for the services of a firm/team for the following scope of work:

1. Develop design and construction documents for two (2) eight (8) feet multi-use paths along Skyway Drive and develop design and construction documents for the US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design project that include landscape enhancements, street lighting, wayfinding, street trees, enhanced pedestrian connections, movement of utilities underground, gateway monumentation and signal design modifications.

2. Project Meetings/Due Diligence-includes on-site kickoff meeting and monthly virtual meetings throughout the project and the establishment of the steering committee and stakeholder meetings. Consultant will review existing corridor conditions, obtain GIS base mapping and environmental information.

3. Survey and Base Mapping-Site surveying including topography, boundaries, centerline staking and preparation of plats for easement acquisition. Surveying will be performed in accordance with the requirement of the North Carolina Department of Transportation (NCDOT) Location and Surveys Unit for Route Surveys.

4. Utility Coordination: The consultant will coordinate the design of all utility relocations to construct the project. Coordination with landowners, governing bodies, and other affected entities. All tasks shall be completed in accordance with the North Carolina Department of Transportation (NCDOT) utility relocation process.

5. Subsurface Utility Exploration

6. Project Coordination and Management

7. Preliminary Concept Design for landscape and materials, hardscape and materials, intersection and crossing enhancements, lighting layout, wayfinding signage, and monumentation.

8. Traffic Signal Design/Intersection Enhancements

9. Construction Documents-100% Design

10. Permitting

11. Environmental Permitting

12. Bidding and Construction Phase Services

13. Public Engagement-includes public open house, steering and stakeholder committee meetings during the design process.

14. Cost Estimating

15. Coordination with representatives of the City of Monroe, NCDOT, CRTPO and any other applicable agencies throughout the planning and design.

16. Possible presentations to City Council during the planning and design process.

KNOWN PROJECT SPECIFIC ISSUES

1. ADA Standards-Design and any amenities must adhere to ADA guidelines
2. Easement Acquisition-Surveys will need to be prepared for easement acquisition. Design and any necessary temporary construction easements should be sensitive to adjacent properties

STATEMENT OF QUALIFICATIONS

US 74/601 Interchange Enhancements *and* Skyway Drive Streetscape Design

AUGUST 2024

PREPARED FOR: City of Monroe

PREPARED BY: Kimley»Horn

Cover Letter

August 26, 2024

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

Year Established

1967

Office Location:
Kimley-Horn
200 South Tryon Street
Suite 200
Charlotte, NC 28202
TEL 704 333 5131

RE: Request for Qualifications (RFQ) for US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design

Dear Ms. Stiwinter and Members of the Selection Committee:

Kimley-Horn is proud to support the City in its efforts to enhance the US 74/601 Interchange project and improve the streetscape design along Skyway Drive in accordance with the Concord Avenue Area Master Plan. We have a proven track record in this type of design work and have been a trusted partner to the City for many years. Our team has a deep understanding of the City's expectations, extensive knowledge of NCDOT processes, and a multi-disciplinary approach to gateway enhancements and streetscape design.

As you review our proposal, please consider the following additional benefits our team offers you:

Local Knowledge and Experience. Throughout the Concord Avenue Area Master Plan, we identified opportunities for new development and infrastructure. We provided recommendations regarding safer and more walkable streets, public realm activation, gateway enhancements, and aesthetic treatments that would activate and compliment the area, promoting a more vibrant and accessible urban core. We bring years of experience working with the City. We are positioned right down the road to lead an effective and efficient design process alongside City staff to get the most complete design on time and under budget that will not only meet but exceed your expectations.

Proven Multi-Disciplinary Approach. A project like this requires the expertise of a number of professionals from a multitude of design disciplines. Kimley-Horn has the advantage of having all of those in-house. Outside of our strategic partnership with several of our partner SPSF firms, we provide a seamless design process across all disciplines ensuring that our shared vision with the City can be built while navigating all requirements of North Carolina Department of Transportation (NCDOT). We have a proven track record of successfully implementing state and federally-funded projects all over the country.

National Award Winning Experience. While we have a local presence, we also represent a firm of over 8,000 design professionals from multiple disciplines giving us the ability to leverage experts from all parts of the country as needed. Kimley-Horn has been consistently ranked as a top national design firm and has won a number of local and national design honors. However, our highest honor comes from helping communities just like yours all over the country realize their potential and leveraging those improvements to allow for the reinvestment of billions of dollars back into their urban cores.

Thank you for your consideration of our letter of interest and if you have any additional questions, please feel free to reach out at the contact information provided below.

Sincerely,

Kimley-Horn

Kyle Baugh, PLA, Project Manager, Primary Contact Person | 704 319 7685 | kyle.baugh@kimley-horn.com

Consultant Specialties

Kimley-Horn | Charlotte, NC

Established in 1967 in Raleigh, NC, Kimley-Horn is a comprehensive engineering, planning, and environmental consulting firm with over 8,000 employees across 130+ offices nationwide. Our services encompass civil engineering, urban planning, landscape architecture, roadway design, construction engineering inspection (CEI), water resources, stormwater design, utilities, environmental sciences, and geographic information systems (GIS).

Our team of talented professionals, including civil, water, natural system, and mechanical engineers, planners, landscape architects, and environmental scientists, possess extensive knowledge and production capacity. As a firm owned and operated by practicing professionals, we take great pride in our technical proficiency and client service. With our multidisciplinary resources and experienced staff, we excel in coordinating projects, facilitating meetings, increasing productivity, and successfully tackling projects of any scale or nature.

Kimley-Horn Office Locations

130+
OFFICES
NATIONWIDE

8,000+
EMPLOYEES
NATIONWIDE

700+
EMPLOYEES
IN THE CAROLINAS

8
OFFICES
IN THE CAROLINAS

Falcon Engineering (Falcon) | Cary, NC

For more than 20 years, Falcon has provided geotechnical engineering, materials testing, and special inspections. Using innovative approaches and pioneering technologies, the diversity and experience of their leadership team has enabled Falcon to compile an extensive project portfolio encompassing very large complex projects in the commercial, industrial, private/public sector, and transportation markets. The firm is Small Professional Services Firm (SPSF) registered with the NCDOT and HUB certified with the North Carolina Department of Administration (NCDOA).

Wetherill Engineering, Inc (WEI) | Charlotte, NC

WEI was established in 1993 with a focus on providing structural and roadway engineering services. WEI is a multi-disciplinary engineering firm, known for their technical excellence, integrity, and commitment to client satisfaction. They create innovative solutions that address complex engineering challenges while minimizing environmental impact. Over the years, the company has grown into a multi-disciplinary engineering firm capable of handling projects from the planning phases through construction administration and close-out. WEI prides itself on delivering big-firm results with a small-firm feel.

Relevant Experience and Project Team

RELEVANT NCDOT EXPERIENCE

The table below firmly establishes the Kimley-Horn team's significant experience with similar projects in type, size, and complexity, and our ability to complete designs and obtain permits. The projects below were worked on by the same Kimley-Horn team proposed for this contract. **We believe our team's experience is unmatched with our overall knowledge of the planning, design, and bidding assistance of similar state-funded projects in North Carolina municipalities.**

Project Name	Urban Roadway/ Multiuse Trail Design	Public Involvement	Federal Funding/ Municipal Agreement	Environmental Document	Structural Design	Hydrologic/ Hydraulic Design	Erosion and Sediment Control Design	Utility Coordination	Traffic Management Plan (Level 3 and 4)	Threatened and Endangered Species Survey and Studies
C-5613H, Lakeview/Reames Intersection Improvements, Charlotte, NC	✓	✓	✓	✓		✓	✓	✓	✓	✓
EB-5781, Stewart Creek, Tributary 2 Greenway, Charlotte, NC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
EB-5831, Coxe Avenue Complete Streets Design, Asheville, NC	✓	✓	✓	✓		✓	✓	✓	✓	✓
U-5805, Idlewild/Rama/ Monroe Intersection, Charlotte, NC	✓	✓	✓	✓		✓	✓	✓	✓	✓
EB-5777, Smithville to JV Washam Greenway, Cornelius, NC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
EB-5938, Book Walk South, Hickory, NC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
EB-5753, Baldwin Avenue Sidewalk Design, Marion, NC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

PROJECT ORGANIZATION

Our team organization is shown below, including key individuals and their responsibilities. Experience summaries of key individuals are provided on **pages 4-8.**

CITY OF MONROE

PROJECT MANAGER

Kyle Baugh, PLA

QC/QA

Tony Spacek, PE

Landscape Architecture (132)	Roadway and Bicycle/Pedestrian Facility Design (26, 70, 97, 155, 269, 195)	Community Engagement Liaison (171)	Roadway Lighting (171)
Laura Handleton, PLA	Alex McIntyre, PE	Jonathan Whitehurst, AICP	Jeremy Gruzd, PE

Structural	Utility Design (270)	Environmental/NEPA (63, 200)
Matt Sumter, PE	Matthew Shoesmith, PE	Taylor Kiker, PWS Tad Hardy, PE

Traffic/Signal Design (207,208,209,210,247)	Transportation and Mobility	NCDOT Coordination
Stacie Phillips, PE	Nat Heyward, AICP	Ben Taylor, PE

Hydrologic and Hydraulic (433)	Wayfinding/Gateway Design	Geotechnical Engineering (152)	Survey (337,362)
Jake Maschoff, PE	Paul Freeland, PLA	Jeremy Hamm, PE [1]	Andy DeGroat, PLS, CPUL [2]

Subconsultants 1. Falcon Engineering, Inc. (SPSF) 2. Wetherill Engineering, Inc (SPSF)

RESUMES

EDUCATION/CREDENTIALS

BS, Landscape Architecture, Purdue University

Professional Landscape Architect in NC and SC

Kyle Baugh, PLA

Project Manager

Kyle has spent his career focusing on urban design, master planning, parks and trails, transit-oriented design, and regional/area planning. He has worked on public and private sector projects ranging from award-winning park projects, hardscape designs, strategic corridor studies, transit station area planning and design as well as large-area land use plans to private mixed-use developments and high school, university, healthcare, and corporate campuses. Kyle's extensive experience includes sports and entertainment master planning and design, including professional sports stadiums and facilities as well as pedestrian and bicycle infrastructure planning and design. From creating a vision and seeing it through to a built reality, his passion for design is emphasized by his ability to create "places" that are inspiring and sustainable.

Relevant Experience

- Forward Monroe Land Use and Transportation Plan, Monroe, NC
- Concord Avenue Area Master Plan, Monroe, NC
- Greer Downtown Revitalization, SC
- Coxe Avenue Complete Streets, Asheville, NC
- David Lyle Streetscape, Rock Hill, SC
- York County Thoroughfare Plan, SC
- Downtown Master Plan, Stallings, NC
- Downtown Cornelius Master Plan, NC
- Pearl District, Charlotte, NC

EDUCATION/CREDENTIALS

B.S., Civil Engineering, University of Toledo

Professional Engineer in NC, OH, and SC

Tony Spacek, PE

QC/QA

Tony is a transportation engineer with 22 years of extensive experience in roadway and signal design, allowing him to bring knowledge of project issues, challenges, and opportunities from his experience delivering infrastructure projects following federal, state, and local standards, laws, and regulations. Tony's roadway and signal design experience helps enable him to understand the distinctive challenges of accommodating vehicles and pedestrians along roadway facilities and at intersections. With 10 years of QC/QA management and 15 years of project management experience, he knows what it takes to help ensure a project runs smoothly.

Relevant Experience

- C-5613H, Comprehensive Neighborhood Improvement Program (CNIP), Lakeview/Reames Intersection Improvements, Charlotte, NC
- Harris Square Improvements, Harrisburg, NC
- NC 49 and Cedar Drive Intersection, Harrisburg, NC
- Hickory Ridge Road Feasibility Study, Harrisburg, NC
- Stallings Road Sidewalk Project, Harrisburg, NC
- Caldwell Road Sidewalk Project, Harrisburg, NC
- Celanese Road Roadway Improvements, Rock Hill, SC
- R-2566B, NC 105 RCI Corridor, Boone, NC

EDUCATION/ CREDENTIALS

BS, Landscape Architecture, Ohio State University

Professional Landscape Architect in NC and SC

Laura Handleton, PLA

Landscape Architecture

Laura has 7 years of experience in landscape architecture. She has worked on a variety of projects, including master plans, urban streetscapes, parks, open spaces, and residential amenity areas. She has contributed to projects across North and South Carolina, and collaborates with local communities to create meaningful moments and specialized designs for the people using the space. Whether working on a countywide master plan or a mini-park, Laura brings passion and expertise to projects of any scale.

Relevant Experience

- Greer Downtown Revitalization, SC
- Parks and Recreation Master Plan (Meck Playbook), Mecklenburg County, NC
- Parks and Recreation Master Plan, Lewisville, NC
- Parks and Recreation Master Plan, Matthews, NC
- Mason Wallace Park Master Plan and Park Improvements, Charlotte, NC

EDUCATION/ CREDENTIALS

MS, Civil Engineering, University of Massachusetts

BS, Environmental Engineering, Clemson University

Professional Engineer in NC

Alex McIntyre, PE

Roadway and Bicycle/ Pedestrian Facility Design

Alex is a civil engineer with experience on various greenway, trail, stormwater, and stream restoration projects statewide for the City of Charlotte, NCDOT, private developers, and other surrounding municipalities. She has been instrumental in completing preliminary multiuse trail layout and planning, final trail design, hydraulic design, and working through complicated stormwater and environmental permits for numerous trail projects.

Relevant Experience

- EB-5783, Sam Newell Road Multiuse Path, Matthews, NC
- Book Walk and Book Walk South, Hickory, NC
- Uptown Cycle Link, Charlotte, NC
- Stewart Creek Tributary 2 Greenway and Stream Restoration, Charlotte, NC
- Willow Pond Stream Rehabilitation, Cornelius, NC

EDUCATION/ CREDENTIALS

MUEP, University of Virginia

BA, Journalism and Mass Communication, University of North Carolina at Chapel Hill

American Institute of Certified Planners

Jonathan Whitehurst, AICP

Community Engagement Liaison

Jonathan is a professional planner and project manager with applied knowledge in coordinating land use and transportation for area plans and corridor studies. During the past 18 years, he has led or contributed to comprehensive plans, community master plans, small area plans, regional visioning exercises, corridor studies, and mobility plans. He regularly partners with communities throughout the Southeast and beyond to reinforce livability and mobility through thoughtful decisions based on local context. Jonathan routinely plans and facilitates innovative community engagement efforts that yield actionable data and inform the planning process.

Relevant Experience

- Forward Monroe Land Use and Transportation Plan, Monroe, NC
- Concord Avenue Area Master Plan, Monroe, NC
- Greer Downtown Revitalization, SC

EDUCATION/ CREDENTIALS

MS and BS, Civil Engineering, North Carolina State University

Professional Engineer in NC and SC

Stacie Phillips, PE

Traffic/Signal Design

Stacie is a transportation engineer with 20 years of experience specializing in transportation design, operations, and safety. Having designed 1,500+ traffic signals in North Carolina and coordinated 2,000+ traffic signals on the East Coast, she is familiar with balancing the operational and safety objectives of all modes of transportation. Stacie serves on the Transportation Research Board Bicycle Transportation Committee and the City Transportation Issues Coordinating Council.

Relevant Experience

- NC 105 RCI Corridor, Boone, NC
- Book Walk and Book Walk South, Hickory, NC
- Big Mill Farm Road and Hopkins Road Improvement Project, Kernersville, NC
- US 601 Improvements from Forrest Road to US 52, Mount Airy, NC
- Bryson City Intersection Improvements, Swain County, NC

EDUCATION/ CREDENTIALS

MUD, University of North Carolina, Charlotte

BS, Urban and Regional Planning, East Carolina University

American Institute of Certified Planners

Nat Heyward, AICP

Transportation and Mobility

Nat specializes in mobility planning, land use planning, urban design, and economic development. He has experience leading and supporting mobility and transportation planning efforts and leverages his extensive design and planning skills to clearly communicate mobility solutions to clients. Nat brings energy and a personal passion for multimodal connectivity to all his projects. He also has extensive experience organizing and leading engagement efforts that focus on providing a comprehensive and inclusive approach to gaining meaningful community feedback.

Relevant Experience

- Forward Monroe Land Use and Transportation Plan, Monroe, NC
- Columbus LinkUS Corridor Planning Initiative, OH
- Greenville-Pickens Area Transportation Study (GPATS) Horizon 2040 Long-Range Transportation Plan (LRTP), Greenville, SC

EDUCATION/ CREDENTIALS

MBA, State University of New York, Albany

BS, Civil Engineering Technology, State University of New York, Utica

Professional Engineer in NC

Ben Taylor, PE

NCDOT Coordination

Ben has nearly 25 years of experience in designing and reviewing transportation projects. His experience includes new roadway alignments, widenings, and realignments; major intersection improvements; and greenways. Ben has provided transportation design services for public and private sector clients and has permitted dozens of projects through local NCDOT District offices. He also has worked with the NCDOT Division of Highways office on Transportation Improvement Program (TIP) projects and has worked on public sector projects ranging from sidewalks to transit.

Relevant Experience

- Uptown Cycle Link, Charlotte, NC
- EB-5783, Sam Newell Road Multiuse Path, Matthews, NC
- U-5873/U-5907, NC 115 (Main Street)/Potts Street Intersection, Cornelius, NC
- Jordan/Davidson Intersection Project, Cornelius, NC

Matt Sumter, PE

Structural

Matt has 16 years of structural engineering experience, which includes structural design, structural evaluation and rehabilitation design, construction administration, and project management. He is accomplished in designing and repairing structural and waterproofing systems to prolong the life of parking structures. Matt also has experience performing strategic planning and parking management, including functional layout of parking, functional layout of signage, and parking studies.

Matthew Shoesmith, PE

Utility Design

Matthew has 28 years of experience in the water and wastewater industry. He has successfully managed multiple utility projects by understanding the particular challenges of each project, identifying potential solutions, and working to implement these solutions to deliver the best possible product to each client. Matthew's utility experience includes booster pump stations, sanitary sewer pump stations, large diameter water and sanitary sewer lines, elevated storage tanks, distribution system modeling, and equalization basins.

Taylor Kiker, PWS

Environmental/NEPA

Taylor has 5 years of experience in wetland and stream delineations; Clean Water Act 401/402 permitting; rare, threatened, and endangered species habitat assessment and surveys; aquatic resources restoration; and mitigation monitoring. She has worked on numerous projects for various local municipalities and private developers in North Carolina and South Carolina. Taylor is proficient in ArcGIS for general spatial analysis and GPS for field data collection.

Tad Hardy, PE

Environmental/NEPA

Tad is a transportation engineer specializing NEPA documentation preparation and feasibility studies. He has been prepared multiple levels of environmental documentation for various pedestrian projects ranging from sidewalk improvements to greenways and multi-use paths. Tad is familiar with the applicable local and federal rules and regulations required for environmental compliance as well as assists with conducting community studies and coordinating public outreach efforts and has participated in numerous public involvement meetings.

Jake Maschoff, PE

Hydrologic and Hydraulic

Jake offers 11 years of experience in managing and producing a range of stormwater and stream restoration projects. He is thoroughly familiar with the steps required to assess and design stormwater systems while being cost-effective. Many projects Jake has completed require complex decision making and creativity, and through his experience, he has developed an understanding of the necessary steps to help clients meet their stormwater and natural channel design needs.

Jeremy Gruzd, PE

Roadway Lighting

Jeremy has 18 years of experience in the design of infrastructure technology systems for local, state, and national government agencies as well as private utility providers. Relevant experience includes the design of various copper, fiber, and wireless networking applications. Jeremy is responsible for the development of plans, specifications, and details. He also has the field experience that provides our team with an ability to design with an understanding of field installation and maintenance requirements.

Paul Freeland, PLA

Wayfinding/Gateway Design

Paul is a Senior Landscape Architect for Kimley-Horn. He has 16 years of experience at the local, national, and international levels, ranging from prominent sports, campus and corporate projects to hospitality, retail, mixed-use, and urban living. His projects span a variety of scales, and his passion for building collaborative client relationships leads to successful, thoughtful approaches to project challenges and variety of innovative solutions for his clients.

Jeremy Hamm, PE

Geotechnical Services

Jeremy has 15 years of experience providing geotechnical investigations and engineering recommendations and designs. He has built an extensive portfolio of working for municipalities and government agencies throughout North Carolina, including NCDOT. Jeremy also has served as a field engineer, staff professional, project engineer, and project manager on numerous NCDOT projects and is thoroughly familiar with NCDOT, American Association of State Highway and Transportation Officials (AASHTO), and load and resistance factor design (LRFD) guidelines and procedures.

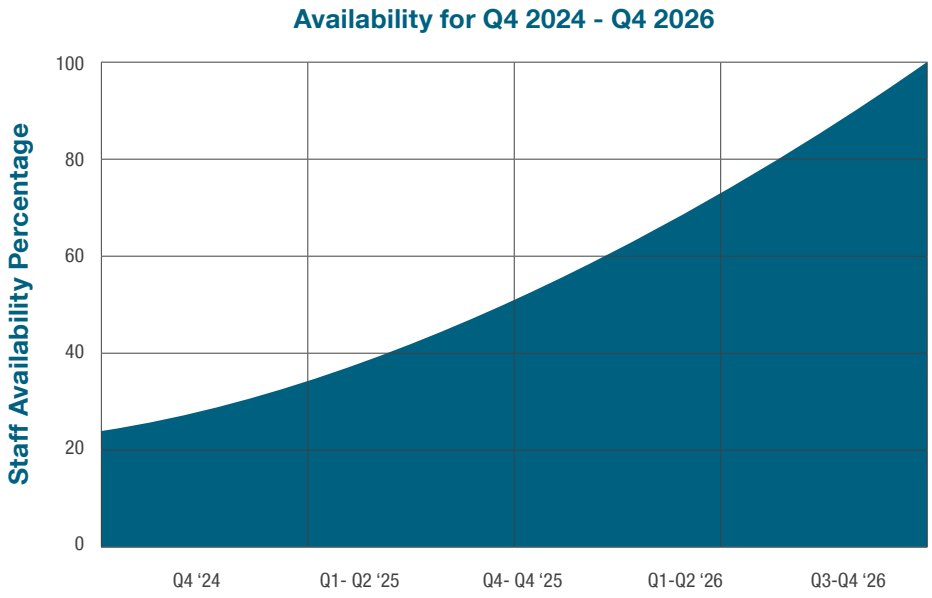
Andy DeGroat, PLS, CPUL

Survey

Andy is a licensed professional land surveyor in North Carolina and Tennessee with over 38 years of experience. He is fully proficient in all aspects of surveying, including location, topographic, GPS, high definition laser scanning, and utility surveys. He has managed multiple annual service contracts and projects for DOTs in NC, SC, GA, and FL. These contracts have included survey, subsurface utility engineering (SUE), and utility coordination services. He was a contract manager for the NCDOT open- ended services contract with other firms for over 28 years.

CAPACITY CHART/AVAILABLE WORKFORCE

Our team has analyzed the current workload and determined that the proposed staff can be readily available for the City of Monroe US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design. Kimley-Horn is committed to providing adequate personnel resources for this project. To monitor our staff workload, Kimley-Horn employs a thorough forecasting technique known as our Castahead process. This effort involves assessing our project milestones and staff loading on a weekly, monthly, and six-month basis, drilling down to the project team level. Individual staff member loading is assessed to the person level in the one-week and one-month timeframes and the operating unit level in the six-month timeframe. A database is used to track all project commitments/milestones and staff commitments firmwide. Using this intensive, we can identify overloads and shortfalls many months in advance and develop strategies to overcome them. By having a clear picture of staff workload at all times, Kimley-Horn will be optimally positioned to meet the City's expectations on this project. The Kimley-Horn staff members selected for this team are available immediately to serve the City of Monroe and are in an excellent position to handle the workload required to complete the scope of work developed for this project.



Past Performance

McKinney Wayfinding Implementation | *McKinney, TX*

Year Completed: Ongoing

Contact: Gary Graham | ggraham@mckinneytexas.org | 972 547 7383

Scope of Work: Wayfinding Master Plan, Design Concepts for Wayfinding, and Gateway Signage

McKinney has a historic downtown that is a major destination, as well as numerous parks and other developments. In an effort to better connect people to community resources, entice visitors to discover new destinations, and enhance the look of the community, the City of McKinney decided it needed a city-wide wayfinding program. McKinney engaged the Kimley-Horn team to develop wayfinding and gateway signage for a city-wide plan. Working with Corbin Design, Kimley-Horn performed a wayfinding master plan, which included design concepts for wayfinding and gateway signage. We worked closely with city staff on design concepts and presented options to the public. Many of the signs will be on Texas Department of Transportation (TxDOT) roadways and the team coordinated with TxDOT on the plans. The wayfinding plans include an array of sign sizes and types, including pedestrian kiosks. The master plan, sign design intent drawings, messaging, and approximate sign locations are complete and were adopted by City Council. The implementation plan is currently underway, with bidding expected within the year.

CNIP—Lakeview/Reames Intersection Improvements | *Charlotte, NC*

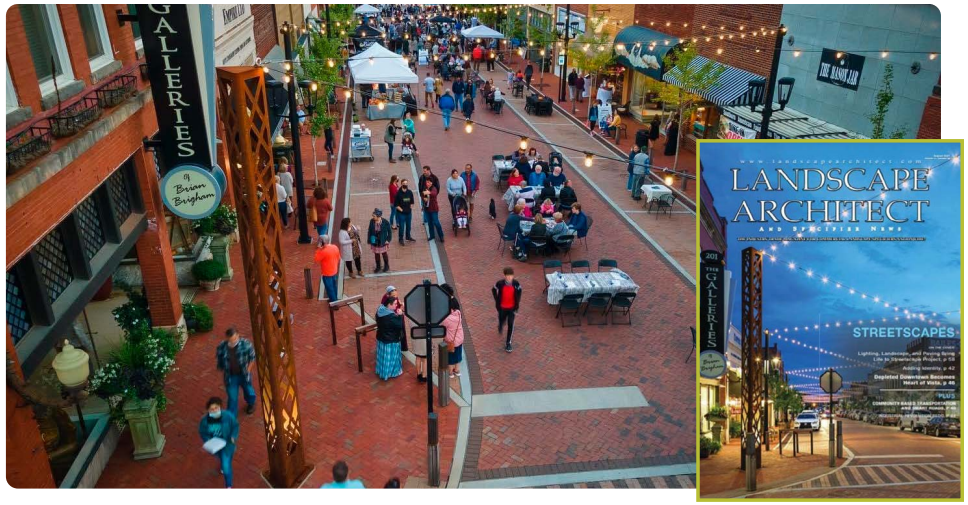
Year Completed: 2023

Contact: Jonathan Hamrick | 980 219 1785 | jonathan.hamrick@charlottenc.gov

Scope of Work: Urban Street Design Guidelines (USDG), Traffic Analysis, Public Involvement, Alternatives Analysis, Natural Resources, Design Plans, Traffic Control, Geotechnical Investigations, Landscape Architecture, Drainage Design, Erosion Control Plans, Signing and Marking Plans, and Quantity Takeoffs

As part of the Sunset Beatties Ford CNIP area pre-planning phase, the community identified improvements at the intersection of Lakeview and Reames Road as a high priority for the community. There also was a need for safe pedestrian and bicycle accommodations along Lakeview Road to connect the neighborhoods to Hornets Nest Park and Hornets Nest Elementary School.

During the planning phase, the initial round of public outreach presented two feasible alternatives—a roundabout and a signalized intersection with turn lane improvements and minor realignments of the approaches. Ultimately, the public preferred a roundabout due to its documented safety performance versus a signal.



Greer Station Revitalization | *Greer, SC*

Year Completed: 2021

Contact: Rick Danner | 864 801 2027 | rdanner@cityofgreer.org

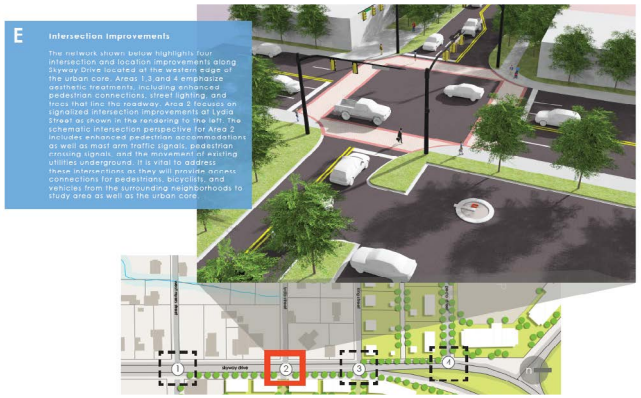
Scope of Work: Landscape Architecture, Urban Design, Civil Engineering, Electrical Engineering, Structural Engineering, Signal Design, and Wayfinding Design

After Kimley-Horn completed the award-winning Community Master Plan for the City of Greer and the broader region, the City continued their relationship with Kimley-Horn to further advance the design of the historic downtown Greer focus area—Greer Station. Kimley-Horn led a visioning process with the City and Greer Station merchants to address concerns and identify opportunities. In total, the Greer Station improvements included nine streets—one of these being Trade Street, Greer Station's "Main Street." A key principle of the visioning process was to enhance the pedestrian experience. The commercial downtown district was established in 1873 as a flag station along the Atlanta Charlotte Airline Railroad and a thriving mill community in the early 20th century, which had fallen into disrepair in recent years. The heartbeat of the urban core needed new life. The need to focus on the pedestrian vision for Trade Street became clear early on. A pedestrian-first and active environment would create synergy to the downtown core and act as a catalyst for the City's future growth.

With consideration for the backdrop of a historic downtown, Kimley-Horn modernized the streets and brought immediate activation and vibrancy back to the commercial core of Greer Station—even in the midst of the COVID-19 pandemic. The Trade Street "woonerf," designed as a multimodal living street, gives the City the ability to close the street for events throughout the year. The flush/shared street accommodates an all-inclusive environment without the need for ramps, while the narrow lanes, on-street parking, and other decorative streetscape enhancements keep traffic calm and speeds low, creating a pedestrian-first atmosphere under a brilliant, string-lit canopy.

2022 North Carolina American Council of Engineering Companies Award

2022 South Carolina American Society of Landscape Architects (ASLA) Award



Concord Avenue Revitalization Initiative | *Monroe, NC*

Year Completed: 2015

Contact: Lisa Stiwinter | 704 282 4569 | lstiwinter@monroenc.org

Scope of Work: Land Use Assessment, Market Forecast, Multimodal Transportation Planning, Urban Design, Streetscape, Policy Framework, and Community Engagement

Kimley-Horn partnered with the City of Monroe on the development of a small area redevelopment plan along Concord Avenue, an important gateway into historic downtown. The subject area is made up of approximately 100 different parcels and a total of 42 acres consisting of residential and non-residential uses. The intent of this project is to revitalize properties to create an attractive entrance to Monroe and establish a catalyst area for improvement of a community node. The plan included an assessment of a larger study area to determine interconnectivity of people, businesses, and development to adjoining areas of the community. In addition, the redevelopment plan provided recommendations for leveraging funding opportunities within the private and public sector for long-term economic development opportunities. Future development concepts were based on a detailed market analysis, focusing on residential, retail, office, and hospitality uses.

Diverging Diamond Interchange (DDI) Enhancement Project | *Cornelius, NC*

Year Completed: 2012

Contact: Andrew Grant | 704 892 6031 ext 172 | agrant@cornelius.org

Scope of Work: Planning, Landscape Architecture, Agency Coordination, and Structural Design Services

The Town of Cornelius, in collaboration with the NCDOT recognized the opportunity to enhance the aesthetics of the I-77/Catawba Avenue interchange during the installation of the DDI. The town aimed to create a visually appealing and welcoming environment for residents, tourists, and interstate travelers passing through the area. By reflecting the unique characteristics of the Town of Cornelius, these aesthetic improvements were intended to add value and contribute to community pride for many years to come.

The West Catawba Avenue served as the primary east-west thoroughfare for Cornelius and acted as a gateway to the downtown area. It also was the only interchange with I-77 within the Town's limits. Recognizing the significance of this location as a gateway for Cornelius, our team of industry-leading professionals was assembled to aesthetically enhance the planned interchange upgrade by NCDOT.

Drawing inspiration from the town's location along the shores of Lake Norman, the ultimate design theme incorporated a nautical aesthetic. Two high masts, resembling sails, were placed along the center median, creating a visually striking feature. Stainless steel cabling was added to enhance the maritime ambiance. Additionally, enhanced signage and landscaping were designed for the bridge, further enhancing its visual appeal.

Project Management, Understanding, and Approach

PROJECT MANAGEMENT

Our approach to project management and the deliberate way we communicate with staff, City Council, stakeholders, and the public will help ensure consistent and effective execution of the planning process. Key aspects include:

Project Leadership. Our recognition of this is evident by how we structured our team. **Kyle Baugh, PLA** will be our project manager. He will be supported by a deep bench of local subject matter experts.

Community Engagement Strategy. Upon selection, we will work with staff to refine the engagement strategy presented in our statement of qualifications to define goals and determine how best to allocate available resources.

Project Work Plan and Data Assembly. Our first deliverable will be a Project Work Plan that includes an overview of the planning process, engagement strategy, and milestone schedule. We also will provide a data needs request.

Kickoff Meeting and Tour. Starting with a kick-off meeting and tour will help the City and Kimley-Horn step confidently into the planning and design process together.

Client Coordination and Progress Reporting. We will schedule biweekly coordination calls with the City's project team, and our monthly invoices will include a status report that shows progress and deliverables by task.

PROJECT UNDERSTANDING

The US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design project presents a unique opportunity to stimulate economic development in Monroe while enhancing the multi-modal accessibility to create a welcoming environment that attracts people and businesses and fosters community pride. No consulting firm has a better understanding of the needs of this project than Kimley-Horn. Our lead efforts on the Concord Avenue Area Master Planrea Master Plan as well as Forward Monroe (The Future Land Use and Transportation Plan) enabled us to outline and identify the specific requirements of this project. We have been actively supporting the City's endeavors to reach this point. As part of this current RFQ, we have developed a comprehensive strategy to support the implementation of these recommendations and are fully prepared to commence immediately. Our extensive knowledge of the project and the study area gives us a significant advantage over others, ensuring a seamless transition for the City to move into engagement and conceptual design.

The proposed improvements will primarily align with the US 74 and US 601 Interchange Project. The plan includes recommendations for further design enhancements along Skyway Drive up to West Myers Street. We will assess the intersections along Skyway Drive, including Pedro Street, King Street, Lydia Street, and West Myers Street. The main focus of the improvements will be on Skyway Drive, encompassing elements such as lighting, multi-use paths, landscaping, street trees, wayfinding, signal design modifications, and gateway monumentation.

PROJECT APPROACH

Our approach to this project is designed to create efficiencies and minimize surprises along the way.

Task 1 | Project Kick-Off and Goal Setting

1

Right from the start, we will meet with City staff to better understand roles and responsibilities, communication methods, and goals and objectives of the project. We have a thorough understanding of downtown Monroe but will be careful not to bring preconceived notions of the final design and how US 74/601 Interchange Enhancements and Skyway Drive relates to other priorities for the City. Through this initial level setting, we will develop specific goals for the project, establish design criteria, a project vision, and work together on an actionable schedule and work plan. Following this in-person meeting, we will join staff in a walking tour of the corridor and other downtown places that will influence the design. Our team will bring to the table a number of considerations based on our experience with NCDOT projects as well as gateway and aesthetic considerations.

Task 2 | Community Engagement

2

Our work engaging the community about this important area began over a decade ago when on October 9, 2013, we kicked off the Concord Avenue Revitalization Initiative with a meeting and tour. In the years that followed, we had dozens of conversations with staff, stakeholders, and the public as part of the Revitalization Initiative, Forward Monroe, and the update to the City's Unified Development Ordinance (UDO). Our approach to this new exciting phase of engagement will start with a diagnostic of the many conversations that have touched on this area.

We also recognize that effective engagement during a design process must allow different viewpoints to identified, expressed, and considered in a thoughtful and effective way. Our philosophy on engagement includes:

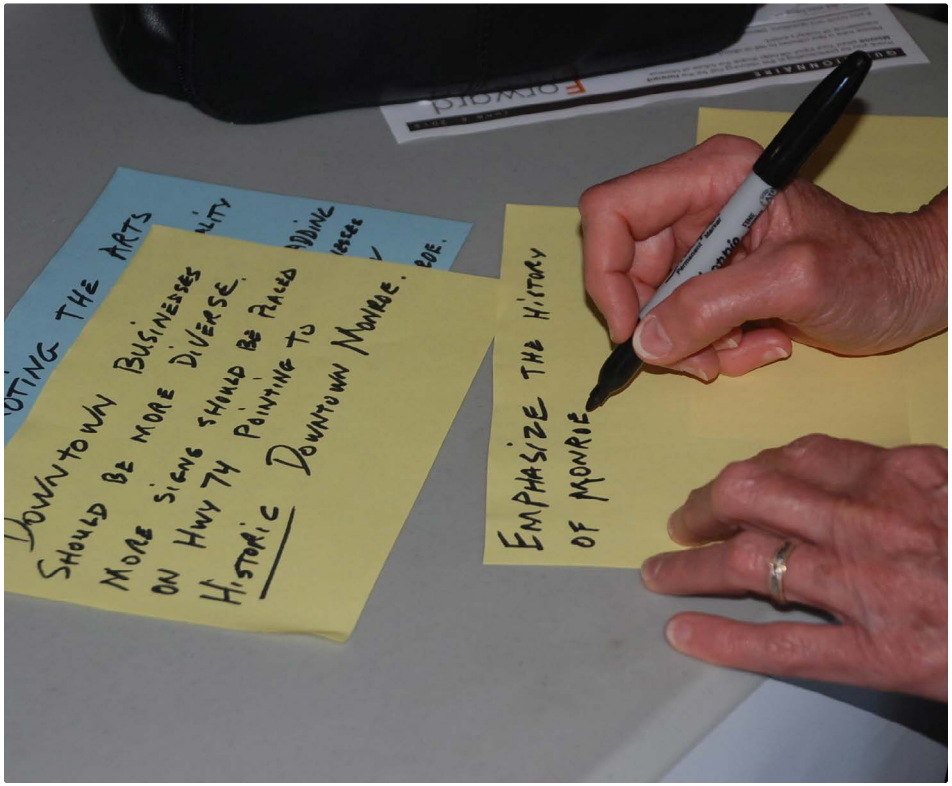
- **Building Awareness and Excitement.** Awareness must precede engagement. Together, we will tell the story of the timeline and history of the project and what led us to this point. As it often happens there is a gap between planning processes to the design and implementation of a project conceived through the process so it's importatnt to re-establish the excitement gained through the previous engagement activities related to the opporutnity.
- **Cultivating Understanding.** The streetscape design for Skyway Drive must inspire while remaining functional and in alignment with street design requirements. We convey complex details throughout the process with simplicity.
- **Being an Extension of Staff.** We take our role as professional advisors seriously, communicating constraints, needs, and trade-offs to groups with different goals and expectations. We have enjoyed more than a decade of being part of the Monroe team.
- **Inviting Genuine Participation.** Getting broad representation and meaningfully using the ideas generated can be a challenge. We understand firsthand the sensitivities the Monroe community faces in the area of the study corridor. Launching a robust outreach and communications campaign will make involvement in the process a choice to be excited about.

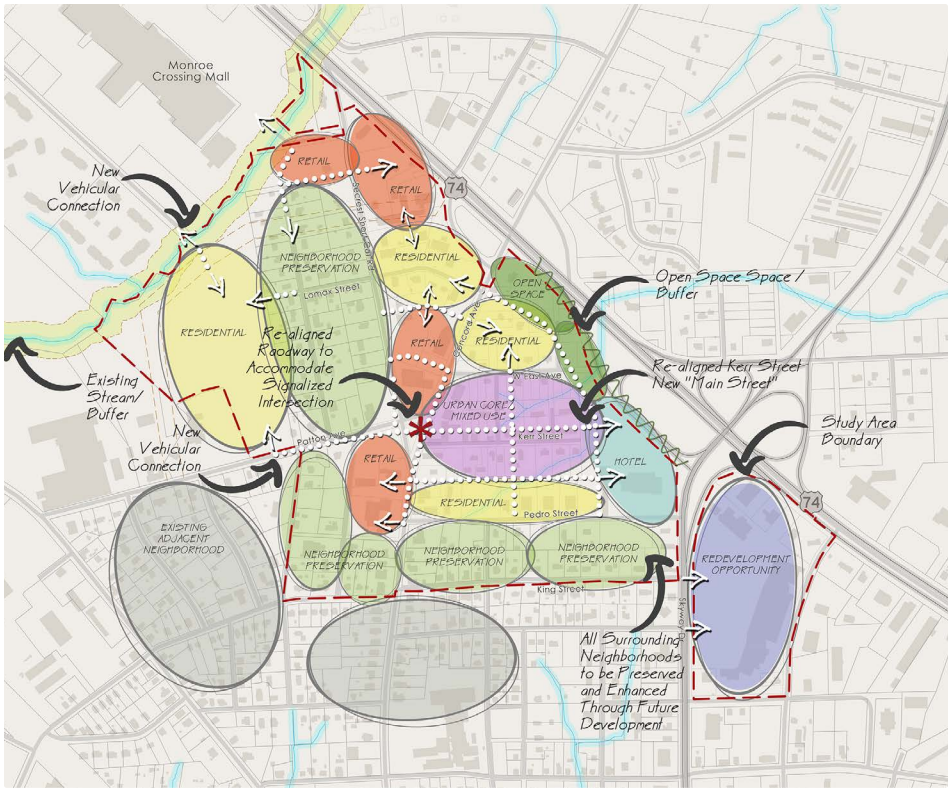
We emphasize an approach—not just techniques—to outreach, focusing on engaging people in ways they find comfortable. We will begin by creating a Community Engagement Plan that will include a customized set of involvement and outreach techniques, including:

- **Design Committee.** We will work with you to create the right mix of internal and external stakeholders to serve on a design committee that provides oversight, general guidance, and community engagement leadership.
- **Project Website/Digital Engagement Hub.** We anticipate having a digital presence throughout the planning process and launching an online survey at key points. Recently, we have used Social Pinpoint to serve as a one-stop digital engagement platform that seamlessly provides a project website with an overview of the planning process, documents and resources, current project status, and engagement activities. We will use the website to launch interactive maps, visual preference surveys, and other digital engagement tools.

- **Stakeholder Engagement.** We will engage stakeholders through focus groups, forums, and/or one-on-one interviews. These sessions will be designed to engage stakeholders identified in consultation with the design committee.
- **Workshops, Mini-Charrettes, and Pop-up Events.** Given the competition for time, it's important to give people the opportunity to provide input in a way that's comfortable and convenient to them. Our workshops and mini-charrettes will be interactive, fun, and visual sessions focused on key milestones. Where possible, we will connect with the community by attending one of the many established events in the area to make it simple, convenient, and fun for them to be informed and provide input.

After each phase of engagement, a summary will be prepared so that the design committee can consider the input as key decisions are made throughout the process.





Task 3 | Data Gathering

3

Data gathering will begin shortly after initial conversations with City staff. Coordinating and processing thorough surveys and SUE data takes time, so it is important to start as soon as possible. During the data gathering phase, our subconsultant, **Falcon**, will collect all necessary survey information for the corridor. This will involve coordinating with the City and NCDOT to obtain survey and design information related to the US 74/ US 601 Interchange project. They will then develop a coordinated base file to work from. Additionally, they will collaborate with the City of Monroe's Public Works, Public Utilities, Stormwater, and Development and Design Services Departments to analyze existing utility drawings. This analysis will assess the remaining useful life of utilities and conduct an initial review of potential impacts to large utilities. Initial conversations also will be initiated with private utility companies.

Task 4 | Design/Permitting

4

Conceptual Design. After obtaining clear direction from the City, a thorough survey and comprehensive base file, and valuable feedback from the community, we will begin conceptualizing the outlined design features associated with the project. The identified improvements though separate in nature must all speak in a cohesive vocabulary so that the design aesthetic is consitent throughout the corridor. From the multiuse paths, intersection designs, bridge enhancements, and gateway monumentation to the landscaping, lighting, and material selection of the hardscape design, these improvements together will represent a grand new entrance to the Concord Avenue area and into downtown. As such, the conceptual design at the beginning of the process will be done collaboratively with all required discpilines providing feedback. This will give us the ability to make sure we are developing a design for these amenities that will not only be inspiring and functional but designed, permitted, and implemented on time and under budget.

Design Engagement. Throughout the process we will be meeting with City staff and sharing ideas as well as working side by side in a collaborative workshop environment to make sure we are designing collectively as a team. Upon completion of the intial conceptual design we will also want to engage again with the community to present our ideas and request feedback. We will use a mutitude of design softwares and programs to graphically illustrate the design direction to remove as much guess work by the community as possible. Graphics will be clearly and vibrantly illustrated and presented as a complete design aesthetic package for the corridor. 3-Dimensional modeling will be done to help illustrate specific elements designed within the corridor and their relationship to the interchange and streetscape design. Most important for conveying the monumentation and intersection designs and conveying their spatial relationships and scale. We will begin with a bold vision and challenge the status quo, but we will constantly test that against the functional, programmatic, and permittable challenges. As a leading design firm we will make sure that the solutions we develop in collaboration with the City are forward thnking and sustainable. Based on the feedback and the direction from the City and community and tested also against the vision and goals we set out at the beginning of the project we will move into final design and begin to sharpen our pencils further.

Final Design. Kimley-Horn will prepare design drawings at 30%, 75%, 90%, and 100% stages. Each of these deliverables will include an opinion of probable construction cost (OPCC). We will develop final plans and special provisions in sufficient form and detail for the City to let construction contracts. All final designs for the project will conform to the appropriate AASHTO specifications, the current practices of NCDOT, and the City's requirements. Kimley-Horn offers significant knowledge and experience with The Americans with Disabilities Act (ADA) and Public Right-of-Way Accessibility Guidelines (PROWAG) guidelines as well as National Association of City Transportation Officials (NACTO) recommendations and will incorporate current requirements to keep the project compliant.

1. **30% Preliminary Plans.** This stage includes preliminary plans with title sheet/ legend/sheet index, background planimetrics of existing elements, layout sheet, grading plans, storm drainage concepts, planting plan, hardscape plan, and typical sections.
2. **75% Plans.** This stage includes project notes, stormwater management plans, drainage layout and calculations, cross-sections, pavement marking plans, right-of-way (ROW) easements, utilities by others (UBO) plans, utility construction plans, property lines, typical sections, traffic control plans, signing plans, signal design plans, erosion control plans, and special details.
3. **90% Plans.** This stage includes final plan and profile sheets, including construction traffic control plans, pavement marking plans, erosion control plans and details, signal designs, signing plans, and material quantities. It also will identify existing (ROW), proposed (ROW), permanent utility, and construction easements sufficient to encompass all improvements.
4. **100% Final Plans for Construction Authorization.** This stage includes final updates as requested by the City and will include the project manual.

The plans will be permitted through multiple agencies. Coordination with these agencies will begin at 30% and the permitting process will typically begin after the completion of 75% design plans.

Task 5 | Bidding Assistance and Construction Administration

5

Kimley-Horn will develop contract documents including technical specifications conforming with standard NCDOT format, itemized bid proposal, and engineer's OPCC. Kimley-Horn will assist the City with the bid advertisement, attend the prebid meeting, and help City staff with responses to contractors' questions related to the project. We also will assist with preparing any addenda before bid opening and preparing the final bid tabulation. After the bid opening, Kimley-Horn will attend the preconstruction meeting to assist City staff with any technical questions related to construction drawings and/or contracts.

After the selection of a general contractor (GC), we will meet with the City and GC at a preconstruction conference to answer any final design questions, gather information and feedback related to implementation and phasing provided by the GC, and also provide feedback on the expectations of quality for the finished product. We will support the City throughout the duration of the construction process all the way to the punch-walk and ribbon cutting answering RFIs and providing direction and approval on project submittals.

Other Considerations

Throughout the design process, we recognize the importance of NCDOT coordination, quality control, and adherence to schedule.

PROPOSED CHANGES TO THE PROJECT SCOPE

Kimley-Horn confirms that there are no modifications to the proposed scope for this project.

Register Status

Kimley-Horn is properly registered with the Office of the Secretary of State and with the NC Board of Examiners for Engineers and Surveyors (Certificate No. F-0102). Our subcontractors, **WEI** and **Falcon** are properly registered with the NC Board of Examiners for Engineers and Surveyors.

Private Engineering Firm Qualification

Kimley-Horn's most recent private engineering firm qualification was approved by North Carolina Department of Transportation (NCDOT) on June 30, 2024 and is valid until June 30, 2025.

Conflict of Interest

To the best of our knowledge and belief, we have no conflict of interest regarding this project or its location.

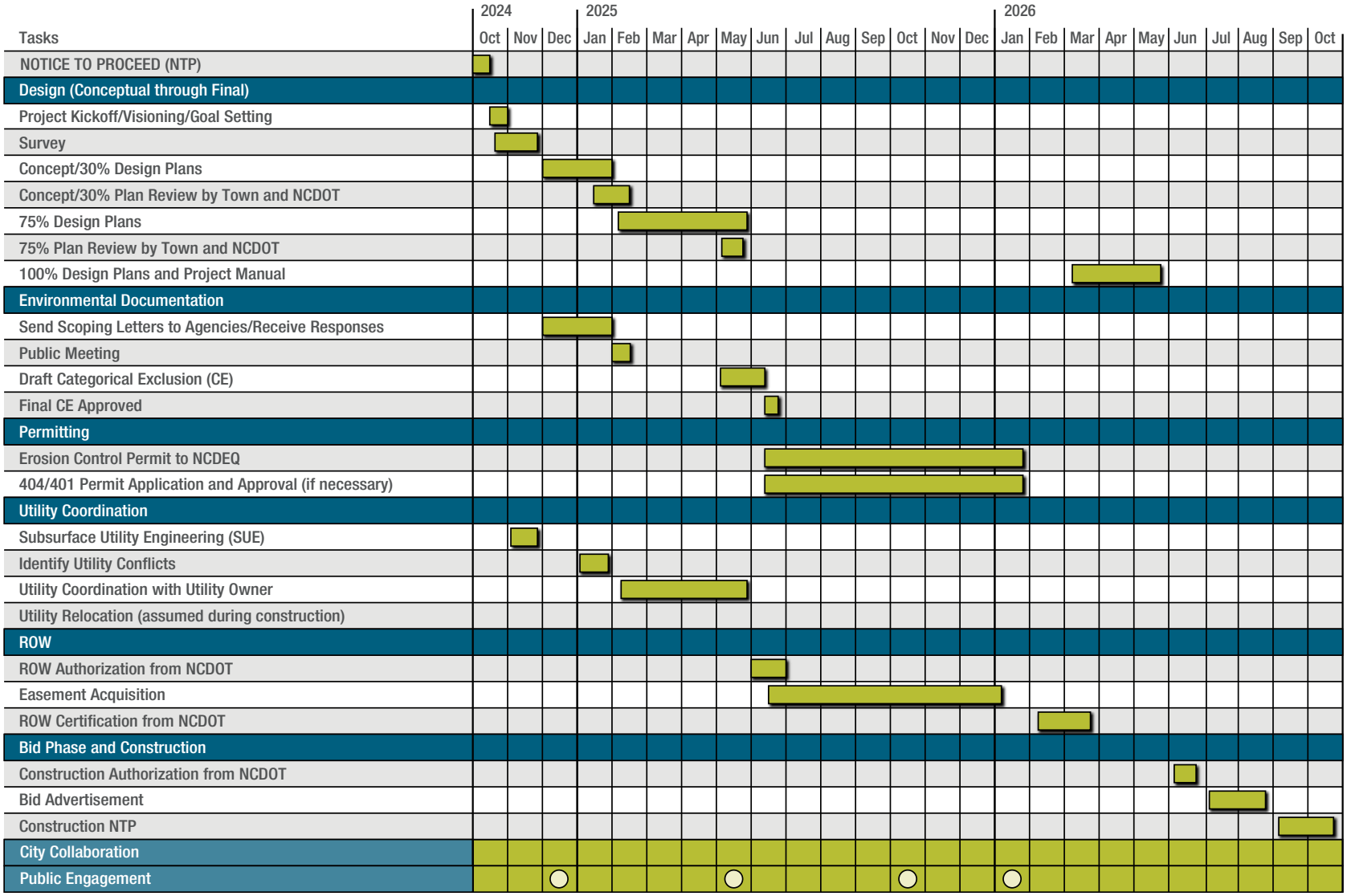
Labor Hours by Task

Estimates for the labor hours mentioned below will be refined through further coordination with the City to finalize the scope, schedule, and budget.

Task	Labor Hours
Project Meetings and Due Diligence	140
Survey and Base Mapping (Weitherill)	350
Utility Coordination	130
SUE (Falcon Engineering)	200
Environmental (NEPA) Documentation	100
Preliminary Concept Design	135
Monumentation/Wayfinding Design	85
Interchange Landscape Design	100
Interchange/Bridge Enhancements Cocneptual Design	160
Traffic Signal Design/Intersection Enhancements	270
Final Design/Construction Documents	410
Permitting/Environmental Permitting	150
Bidding/Construction Phase Services	190
Public Engagement	115

SCHEDULE

Kimley-Horn consistently delivers projects on time and within budget by effectively managing resources. We use bimonthly effort reports to provide our project managers with up-to-date staffing and expense information, allowing them to closely monitor project cost, cost control effectiveness, and schedule. We also hold regular bimonthly telephone progress meetings with our clients to communicate progress and next steps. If federal or state funding is not secured and NCDOT's Right-of-Way authorization, certification, and Construction Authorization are not required, we can expedite the timeline.



Potential Public Meeting

REFERENCES

At Kimley-Horn, our clients consistently express their satisfaction with our services. They commend us for delivering exceptional results and for being great to work with. We thrive on this feedback and it drives us to continuously excel. We encourage you to reach out to our clients to inquire about our work history and the quality of service we provide. For more detailed information about four specific projects, please refer to the similar project experience section on **pages 9-13**.

1

Rick Danner | Mayor

Downtown Greer Station

City of Greer

864 801 2027

rdanner@cityofgreer.org | 301 East Poinsett Street, Greer, SC 29651

2

Jonathan Hamrick | Engineering Project Manager

CNIP—Lakeview/Reames Intersection Improvements

City of Charlotte

980 219 1785

jonathan.hamrick@charlottenc.gov | 600 East Fourth Street, Charlotte, NC 28202

3

Gary Graham | Transportation Engineering Manager

McKinney Wayfinding Implementation

City of McKinney

972 547 7383

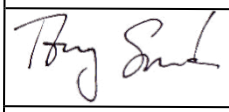
ggraham@mckinneytexas.org | 222 North Tennessee Street, McKinney, Texas 75069

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
PRIME CONSULTANT
TO BE USED WITH PROFESSIONAL SERVICES CONTRACT ONLY
RACE AND GENDER NEUTRAL

US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design
TIP No. and/or Type of Work (Limited Services)

Kimley-Horn
*(Consultant/Firm Name **ONLY** -- Include NO PII (Personally Identifiable Information))*

SERVICE / ITEM DESCRIPTION	***Anticipated Utilization***
00026 Capacity Analysis (Intersections and Corridors); 00032 Categorical Exclusions; 00063 Environmental Assessments/Findings of No Significant Impacts; 00070 Erosion and Sedimentation Control Design; 00097 Guide Sign Design-Conventional Roads; 00132 Landscape and Streetscape Design; 00155 Pavement Marking Plans; 00171 Public Involvement; 00195 Roadway Construction Engineering & Inspection; 00200 Feasibility Studies; 00207 Signal Design; 00208 Signal Equipment Design/Application; 00209 Signal System Design; 00210 Signal System Timing Development & Implementation; 00247 Traffic Management Plan; 00269 Urban Roadway Design; 00270 Utility Coordination; 00314 Roadway Lighting; 00433 Tier I-Basic Hydrologic & Hydraulic Design	TBD
TOTAL UTILIZATION:	TBD

RECOMMENDED BY: CONSULTANT: Kimley-Horn	
	
*BY: Tony Spacek, PE	
TITLE: Vice President	
SPSF Status:	Yes ☐ No ☒

"PRIME CONSULTANT" (FORM RS-2)
RACE AND GENDER NEUTRAL

Instructions for completing the Form RS-2:

1. Complete a Prime Consultant Form RS-2 for the prime consultant firm.
2. Insert TIP Number and /or Type of Work (Limited Services)
3. Complete the Consultant/Firm name for the primary firm information.
4. Enter Service/Item Description – describe work to be performed by the Prime Firm
5. Enter Anticipated Utilization – Insert dollar value or percent of work to the Prime Firm
6. *Signature of the Prime Consultant **is required** on each RS-2 Form to be submitted with the Letter of Interest (LOI) to be considered for selection
7. Complete "SPSF Status" section - Check the appropriate box regarding SPSF Status, check Yes if SPSF

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
SUBCONSULTANT
TO BE USED WITH PROFESSIONAL SERVICES CONTRACT ONLY
RACE AND GENDER NEUTRAL

US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design
TIP No. and/or Type of Work (Limited Services)

Kimley-Horn
*(Consultant/Firm Name **ONLY** -- Include NO PII (Personally Identifiable Information))*

Wetherill Engineering, Inc.
*(Subconsultant/Firm Name **ONLY** -- Include NO PII (Personally Identifiable Information))*

SERVICE / ITEM DESCRIPTION	***Anticipated Utilization***
00337 Estimating; 00362 Easement Surveying	10-15%
TOTAL UTILIZATION:	10-15%

SUBMITTED BY:	**RECOMMENDED BY:**
SUBCONSULTANT:	CONSULTANT:
Wetherill Engineering, Inc.	Kimley-Horn
Debora B. Wetherill	Tony Spacek
*BY: Debora B. Wetherill	*BY: Tony Spacek, PE
TITLE: President	TITLE: Vice President
SPSF Status: Yes ☒ No ☐	

"SUBCONCONSULTANT" (FORM RS-2)
RACE AND GENDER NEUTRAL

Instructions for completing the Form RS-2:

1. Complete a Subconsultant Form RS-2 for each Subconsultant firm to be utilized by your firm.
2. Insert TIP Number and /or Type of Work (Limited Services)
3. Complete the Consultant/Firm name for the primary firm information.
4. Complete the Subconsultant/Sub Firm name for the sub firm information.
5. Enter Service/Item Description – describe work to be performed by the Sub Firm
6. Enter Anticipated Utilization – Insert dollar value or percent of work to the Subconsultant/Sub Firm
7. *Signatures of both Subconsultant and Prime Consultant **are required** on each RS-2 Form to be submitted with the Letter of Interest (LOI) to be considered for selection
8. Complete "SPSF Status" section - Subconsultant shall check the appropriate box regarding SPSF Status, check Yes if SPSF or No if not SPSF

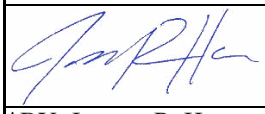
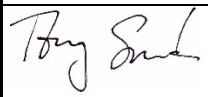
In the event the firm has **no** subconsultant, **it is required that this be indicated on the Subconsultant Form RS-2 form by entering the word "None" or the number "ZERO" and signing the form.**

NORTH CAROLINA DEPARTMENT OF TRANSPORTATION
SUBCONSULTANT
TO BE USED WITH PROFESSIONAL SERVICES CONTRACT ONLY
RACE AND GENDER NEUTRAL

US 74/601 Interchange Enhancements and Skyway Drive Streetscape Design
TIP No. and/or Type of Work (Limited Services)

Kimley-Horn
*(Consultant/Firm Name **ONLY** -- Include NO PII (Personally Identifiable Information))*

Falcon Engineering
*(Subconsultant/Firm Name **ONLY** -- Include NO PII (Personally Identifiable Information))*

SERVICE / ITEM DESCRIPTION		***Anticipated Utilization***
00152 Pavement Design		5-10%
	TOTAL UTILIZATION:	5-10%
SUBMITTED BY: SUBCONSULTANT: Falcon Engineering	**RECOMMENDED BY:** CONSULTANT: Kimley-Horn	
		
*BY: Jeremy R. Hamm, PE	*BY: Tony Spacek, PE	
TITLE: Principal, Director of Engineering	TITLE: Vice President	
SPSF Status: Yes ☒ No ☐		

"SUBCONCONSULTANT" (FORM RS-2)
RACE AND GENDER NEUTRAL

Instructions for completing the Form RS-2:

1. Complete a Subconsultant Form RS-2 for each Subconsultant firm to be utilized by your firm.
2. Insert TIP Number and /or Type of Work (Limited Services)
3. Complete the Consultant/Firm name for the primary firm information.
4. Complete the Subconsultant/Sub Firm name for the sub firm information.
5. Enter Service/Item Description – describe work to be performed by the Sub Firm
6. Enter Anticipated Utilization – Insert dollar value or percent of work to the Subconsultant/Sub Firm
7. *Signatures of both Subconsultant and Prime Consultant **are required** on each RS-2 Form to be submitted with the Letter of Interest (LOI) to be considered for selection
8. Complete "SPSF Status" section - Subconsultant shall check the appropriate box regarding SPSF Status, check Yes if SPSF or No if not SPSF

In the event the firm has **no** subconsultant, **it is required that this be indicated on the Subconsultant Form RS-2 form by entering the word "None" or the number "ZERO" and signing the form.**

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Scope of Services

Kimley-Horn will provide the services specifically set forth below.

Task 1 – Project Meetings and Limited Due Diligence

Kimley-Horn will attend up to twenty-two (22) total meetings as part of this task as outlined below:

- Up to one (1) meeting will be held onsite to review the existing corridor conditions. During this site visit Kimley-Horn will observe and complete limited photo-documentation of the existing corridor and conditions. This meeting is assumed to be up to four (4) hours in length and attended by up to three (3) Kimley-Horn staff.
- Up to eighteen (18) monthly virtual meetings will be held with City staff throughout the course of the design to discuss progress of the design. These meetings are assumed to be up to one (1) hour in length and attended by up to two (2) Kimley-Horn staff.
- Up to three (3) in-person meetings will be held with City staff to review preliminary and final design plans and preliminary construction cost numbers and phasing recommendations. These meetings are assumed to be up to one (1) hour in length and attended by up to two (2) Kimley-Horn staff.

Kimley-Horn assumes a project schedule of 18 months from notice to proceed. Additionally, to determine preliminary design/permitting constraints, Kimley-Horn will perform limited due diligence and records research based on readily available information from the City and County websites and information provided to us by others. This limited due diligence and records research will only be as accurate and complete as the information provided to us. Kimley-Horn will compile the information collected for use in the development of the preliminary plans and an Engineer's OPCC in **Task 2**.

Kimley-Horn will perform the following tasks associated with this limited due diligence and records research:

- Review available environmental information
- Observe on-site existing conditions
- Obtain available GIS data from the City and County.
- Obtain available survey data from the City.
- Review information gathered during project meetings.
- Recent and readily available site aerial imagery.
- Develop a list of applicable permits required prior to construction

A summary email of the findings will be provided to the Client at their request.

Task 2 – Survey & Base Mapping (Wetherill Engineering)

Planimetric Location and Mapping

WEI will provide field surveys to locate and map planimetric information for 5 acres within the project limits of Area A above

The planimetric location and mapping will include the following items, if present and visible:

- Roads, curbs, walks, parking, and paved areas;
- Driveways and alley locations and types (concrete, gravel, asphalt);
- Walls on the project site;

- Cemeteries and burial grounds on the project site, if marked;
- Building locations;
- Limits of wooded areas and limits of vegetation;
- Signs including road signs, business signs, and billboards;
- Fences location and type;
- Outbound limits of ponds, lakes, springs, or rivers;
- Plazas, planter beds, benches, and pools and;
- Above-ground utility appurtenances serving the project site.

Digital Terrain Mapping

WEI will provide topographic mapping for 5 acres within the project limits, as shown in Attachment A. WEI will collect three-dimensional survey data points that will be used to create a triangular irregular network (TIN) to define the existing topography and grades.

As part of this task, WEI will also perform a grid survey at intervals no larger than fifty feet by fifty feet (50' x 50'), where the site's existing grades are uniformly sloped. WEI will also obtain spot elevations at the tops/toes of the slope, intermediate points in washes/streams/creeks, and tops/toes of the slope coming back out of washes/streams/creeks to define cross-sections and break lines.

WEI will complete the field survey to map the topography at a proper scale with 1-foot vertical contours extending to the project limits unless requested by the client.

It is also assumed as a part of this task that this will be supplemental data in addition to the survey data collected and provided by the City as a part of the U-5723 DOT project, which is being designed separately.

Task 3 – Utility Coordination

Kimley-Horn shall not be or become responsible for design or construction by utility companies as a result of performing the work of this section. Kimley-Horn shall provide coordination with privately owned utilities which may be affected by the design of the Project and whose respective owners are responsible for the design and adjustments to these utilities (if any). Coordination of utilities and utility plans shall include the following tasks:

- Utility Analysis
    - Identify Utility Agencies and/or Owners - Kimley-Horn will utilize all available resources, including but not necessarily limited to the NC One Call, previous projects and on-site visits to identify utility facilities within the project limits.
    - Develop Utility Contact List - Kimley-Horn will make contact with utilities and/or agencies to establish appropriate contact personnel. Information collected includes: type of utility company name personnel name, shipping address, phone numbers (office, mobile, fax), and e-mail address.

- Distribute Plans - Engineer will distribute plans in formats provided by designer to utilities (hardcopy, PDF, Microstation).

- Utility Owner Concurrence:
  - Preliminary Utility Meeting - Engineer will conduct preliminary utility meetings with the utilities and Client to review project plans and schedules. Utilities will be requested to verify existing facilities, provide as-built information and propose resolutions to conflicts with roadway construction. Engineer will secure venue, send meeting notices, conduct meeting and record meeting minutes.
  - Individual/Field Meetings - Engineer will conduct individual/field meetings with the utilities to review their facilities in relation to the proposed project. Engineer will secure venue, send meeting notices, conduct meeting and record meeting minutes.

  - Collect and Review Utility Plans and Data - Engineer will collect as-built plans as well as marked plans from utilities and prepare a utility conflict analysis. Engineer will call out conflicts with respect to roadway plans, constructability as well as conflicts among utilities.

  - Identify Utilities with Compensable Rights - Engineer will investigate prior right claims made by utilities submitting such claim. Engineer will request appropriate documentation from utilities to validate prior rights (recorded easement / right-of-way or adverse possession) and assist utility with the completion of appropriate Relocation Agreement.

  - Utility Design Meetings - Engineer will conduct utility design meetings to review conflict resolution and constructability of utility relocation plans, schedules for installation cutover and removal of old facilities. Engineer will secure venue, send meeting notices, conduct meeting and record meeting minutes.

- Utility-by-Others (UbO) Plans - Engineer will prepare UbO plans for required private utility relocations within the project limits using the software specified by the Client. UbO plans will be submitted for review at periodic stages established by the Client. Engineer will conduct individual meetings with the utilities to review the UbO plans, estimates, and work schedules for accuracy and constructability.

Task 4 – Subsurface Utility Exploration (Wetherill Engineering)

Locate and Map Storm Sewer

WEI will attempt to identify 40 readily observable storm utility structures with above-ground appurtenances and/or features within the project limits shown in Attachment A. WEI will then map the location, size, type, and elevation of observable inverts and tops. Please note that we are not proposing to perform utility locating work such as Ground Penetrating Radar (GPR), electromagnetic (EM) surveys, or pipe camera services to aid in this task's recovery and tracing effort. WEI can provide these services at an additional fee if requested

Locate and Map Sanitary Sewer

WEI will attempt to identify 20 readily observable sanitary sewer utility structures with above-ground

appurtenances and/or features within the project limits, shown in Attachment A. WEI will then map the location, size, type, and elevation of observable inverts and tops. Please note that we are not proposing to perform utility locating work such as Ground Penetrating Radar (GPR), electromagnetic (EM) surveys, or pipe camera services to aid in this task's recovery and tracing effort. WEI can provide these services at an additional fee if requested.

Subsurface Utility Engineering (SUE) Quality Level "B" Utility Mapping

WEI will provide Quality Level "B" utility mapping per the ASCE/UESI/CI 38-22 "Standard Guideline for Investigating and Documenting Existing Utilities."

Utility Designation and Sketching

WEI will attempt to designate up to 15,000 linear feet (LF) of underground utilities within the proposed work area as delineated in Attachment A. This estimate for utility footage is based on a preliminary site visit and/or available record. If WEI finds that there are more utilities than estimated or the complexity of the utility location requires additional out-of-scope procedures to locate, WEI will notify the client and may request an additional fee commensurate to the additional utilities or additional time required.

Surveying and Mapping Utility Marks

WEI will horizontally locate the subsurface marks in the previous task using conventional surveying techniques. WEI will utilize the records collected in the last task and the survey locations to prepare the mapping of the underground utilities.

Subsurface Utility Engineering (SUE) Quality Level "A" Test Holes

WEI will provide Quality Level "A" test holes per the ASCE/UESI/CI 38-22 "Standard Guideline for Investigating and Documenting Existing Utilities." This scope of service includes the following subtasks:

Excavate Test Hole(s) and Prepare Field Report(s)

WEI's utility technicians will attempt to uncover the target(s) by excavating five test hole(s) at specific locations as requested by the client and as shown in Attachment A. Excavations by WEI will be performed with the use of pneumatic vacuum excavation equipment, to reduce the potential for damage to utilities.

Survey and Map Test Hole(s)

WEI will locate the five excavated items using conventional surveying techniques. These techniques may include Global Positioning System (GPS) or Total Station systems. WEI will then map the test holes' location to allow for mapping integration into the existing planimetric data.

Task 5 – Environmental (NEPA) Documentation

Environmental documentation services for the project will be provided as follows:

- KHA will prepare a Scoping/Start of Study Letter for distribution to regulatory agencies for collecting input on anticipated environmental permitting issues. The Start of Study Letter will serve to solicit comments and collect pertinent project information early in the project development process. The Start of Study Letter will include the project description, the TIP number, anticipated project schedule, and type of documentation proposed for the project. KHA

will also prepare the accompanying figures, which will include a Project Vicinity Map and Environmental Features Map. KHA will submit the letter and figures to the City for their review. KHA will revise the document once per City comments. Once approved, KHA will send the letter to the agencies on City letterhead via the North Carolina State Clearinghouse.

- Per NCDOT guidelines, KHA will also prepare tribal coordination letters for distribution to relevant tribes. The letters will be prepared on NCDOT letterhead and sent by NCDOT to each tribe.

- KHA will prepare a Direct and Indirect Screening Tool form to document the lack of potential for community direct and indirect impacts.

- KHA will obtain and review an Environmental Data Resources (EDR) report for documented environmental incidents within the project area. KHA will also review selected reasonable ascertainable regulatory lists such as permitted hazardous waste sites, leaking underground storage tanks, registered underground storage tanks and Resource Conservation and Recovery Act (RCRA) generators.

- KHA will prepare environmental documentation consistent with the National Environmental Policy Act of 1969, as amended (NEPA), as the project is expected to receive federal funds. This task is based on our understanding that this project will be considered a Categorical Exclusion (CE), an action which defined in 23 CFR 771.117: does not induce significant impacts to planned growth or land use of an area; does not require the relocation of significant numbers of people; does not have a significant impact on the natural, cultural, recreational, historic, or other resources; does not involve significant air, noise, or water quality impacts; does not have significant impacts on travel patterns; and does not otherwise, either individually or cumulatively, have any significant impacts.

- Since the proposed project consists of Type I (ground disturbing) actions, it is anticipated that the Type I and II Ground Disturbing Categorical Exclusion Action Classification Form (CE Checklist) will need to be completed for this project. KHA will prepare a CE Checklist in accordance with current NCDOT and FHWA procedures. If further NEPA documentation is required, it would be considered additional services.

- KHA will submit an electronic copy of the completed CE Checklist to the City for review and comment. KHA will revise the document once per City comments. If needed, KHA will submit the revised document to FHWA for review and comment. If comments from FHWA are received, KHA will revise the document and submit a final copy for signatures.

This scope of services does not include any investigation or reporting of historic resources. Should the design or other conditions change that would require further research or analysis of historic resources, it would be considered additional services.

Task 6 – Preliminary Concept Design

Kimley-Horn will develop up to two (2) Preliminary Concept Designs of the full project area, including the U-5723 DOT project, illustrating landscape and hardscape design enhancements and materials. The concepts will be provided to the Client for input and feedback.

The Preliminary Concept Designs will consist of the following plan view exhibits, developed using AutoCAD and Adobe Suite software and based on survey data provided by the City.

- Preliminary Landscape Design and Materials
- Preliminary Hardscape Design and Materials
- Preliminary Intersection and Crossing Enhancements
- Preliminary Overall Lighting Layout
- Preliminary Overall Wayfinding Signage Layout
- Preliminary Monumentation Layout

After receiving approval from the City on the above listed plan view graphics, Kimley-Horn will provide the following three-dimensional rendered graphics to illustrate design elements.

- Up to two Conceptual Gateway monumentation renderings
- Up to two bridge renderings depicting proposed improvements
- Up to three streetscape renderings, inclusive of intersections

As part of this task, Kimley-Horn will develop conceptual wayfinding standards, developed with input from the City. The standards will depict general aesthetics, materials, and dimensions for wayfinding signage. The standards may include designs for the following elements:

- Large monument sign
- Post-mounted sign
- Light pole banner signage

All deliverables listed as part of this task will be presented digitally to the Client. Kimley-Horn assumes up to one (1) round of revisions to each design alternative based on Client feedback. Up to one (1) Opinion of Probable Construction Costs (OPCC) will be developed for each of the concepts, up to two (2) total. Each OPCC developed should be used only to establish an order of magnitude for the construction cost and should not be relied upon for budgetary decision-making purposes. Because we do not control the cost of labor, materials, equipment or services furnished by others, methods of determining prices, or competitive bidding or market conditions, any opinions rendered as to costs, including but not limited to opinions as to the costs of construction and materials, shall be made on the basis of its experience and represent its judgment as an experienced and qualified professional, familiar with the industry. Kimley-Horn cannot and does not guarantee that proposals, bids or actual costs will not vary from its opinions of cost.

For review, the Client will receive PDF copies of the two (2) Preliminary Concept Designs, and the preliminary OPCC as the deliverables for this task. Up to one (1) round of revisions to the deliverables will be provided under this task.

Task 7 – Traffic Signal Design

The improvements at the intersection of Skyway Drive at Lydia Street will necessitate upgrading the existing traffic signal at the intersection to accommodate new multi-use paths, curb ramps, crosswalks, pedestrian signals, and metal mast arm poles. Due to the nature of the proposed improvements, Kimley-Horn expects impacts to the existing wood signal poles. Therefore, Kimley-Horn will prepare one temporary signal design to maintain traffic operations during construction and one final design incorporating the final improvements.

This traffic signal is owned and maintained by NCDOT, so a Traffic Signal Agreement between the City of

Monroe and NCDOT will be needed. The Agreement outlines the work to be done on the traffic signal and provides a pool of money to be provided by the City directly to NCDOT to compensate NCDOT for the review of design plans and inspection of the signal during construction. The fee for the Agreement is not included in Kimley-Horn's design fees. Kimley-Horn will coordinate with NCDOT to have this Agreement written and will coordinate with the City to have the Agreement executed. Once the Agreement is executed and the City has provided funds to NCDOT in the amount they request, Kimley-Horn can submit design plans for review.

Kimley-Horn will coordinate with NCDOT to gather the existing information needed for the signal design at the subject intersection and will visit the site to confirm the existing conditions. Kimley-Horn will prepare and submit to NCDOT the 90% temporary and final signal designs and electrical details. Upon receipt of 90% review comments, Kimley-Horn will revise the plans if needed and submit 100% signal plans and electrical details.

Task 8 – Design Development and Construction Documents

Based on the approval of the preferred concept developed in Task 2, Kimley-Horn will prepare construction documents for the proposed streetscape improvements on Skyway Drive from Pedro Street to Meyers Street. For this scope of work, the Construction Documents will not include the U-5723 DOT project and will be the responsibility of the City to coordinate the construction of the documents developed. It is assumed as a part of this task that survey will be collected and provided by the City for the U-5723 DOT project, and the supplemental survey and base mapping data for the Skyway Drive corridor will be provided by the consultant as identified in Task 2.

The Construction Documents for proposed streetscape improvements along Skyway Drive will incorporate the following submittals:

60% Design Plans

Kimley-Horn will prepare 60% Preliminary Plans which will consist of:

- Title Sheet
- Typical Sections
- Plan Sheets (1-inch = 20-feet horizontal)
    - Horizontal curve data
    - Superelevation
    - Preliminary slope stake lines
- Profile Sheets (1-inch = 10-feet vertical)
    - Vertical profile will match existing roadway
- Drainage Design
    - Conduct field reconnaissance of existing and proposed drainage features and patterns associated with proposed pipe crossings and existing ditches. Supplemental hydraulic surveys will be performed in addition to the provided survey, to be used to set proposed culvert inverts.
    - Size all cross pipes along sidewalk alignment and determine critical path profile minimums to allow for the proposed cross pipes. Incorporate these critical profile control points to establishing the vertical alignment.
    - Existing curb & gutter is assumed to be maintained along Skyway Drive
    - Spread calculations will be completed for both roadways.
    - Proposed drainage inlets and pipes will be designed to NCDOT standard.

  - Design proposed ditches necessary to appropriately drain low areas adjacent to proposed Sidewalk, overland flow, and to replace existing ditches impacted by the proposed Sidewalk.
  - Evaluate and design necessary revisions to existing hydraulic structures (drop inlets, cross pipes, headwalls) that may be impacted by the proposed sidewalk
  - Finalize hydraulic designs for ditches, storm drainage systems, drop inlet locations, outfall analyses, and final cross pipe designs.
  - Draft the proposed drainage features (ditches, cross pipes, inlets, etc.) and all associated labeling.
- Erosion and Sediment Control Design
- Work Zone Traffic Control Design
- Cross Sections (1-inch = 10-feet)
  - Cross Sections every 50' along sidewalk
  - Station labels, cross slope labels and existing ground labels for each cross section
- Opinion of Probable Construction Costs (OPCC)

Kimley-Horn will submit the 60% Plans in electronic (PDF) format to the City. The City will submit the 60% Plans in electronic (PDF) format to the NCDOT for review. Kimley-Horn will provide a Quality Control/Quality Assurance review of the 60% Plans prior to submittal. After submitting the 60% Plans, Kimley-Horn will conduct a virtual meeting with the City and NCDOT to discuss their comments with two Kimley-Horn employees.

90% Design Plans

Kimley-Horn will prepare final construction documents for submittal as Draft Final and Final Construction plans for bidding. Drawings shall comply with applicable requirements of the Americans with Disabilities Act and Accessibility Guidelines (A.D.A.A.G.) and current applicable State and local codes.

Construction Documents will include, site drainage, grading, erosion control, layout, sidewalk design, details, and a specification manual for a formal bid procedure. Drawings and details will be prepared using NCDOT 2024 Roadway Standard Drawings as the primary standard. Specifications will be prepared using NCDOT's 2024 Standard Specifications and be based on unit price bid. Bid documents shall be prepared for Single Prime contract. Kimley-Horn will prepare a bid proposal manual using NCDOT standards for bidding. Kimley-Horn will submit the project proposal manual to the City of Monroe for review and will anticipate any additional information specific to the City's procurement procedures to be included in the bid proposal. Kimley-Horn will complete the upfront contract document including standard provisions, supplemental conditions, notice to bidder, DBE requirement, change order forms, etc. that should be included in the Contract Manual. Kimley-Horn will only be responsible for preparing in project specific provisions and bid tab.

Kimley-Horn shall provide marked up plans showing all staff review comments with a written response for each, indicating how each comment was addressed. One (1) round of comment responses are anticipated in this task.

Kimley-Horn will prepare Draft final plans, technical specifications and bid documents including construction-ready drawings, special conditions, and unit price proposal page. This task assumes the City

will provide and City specific forms, narratives for use in the front-end specs for the bid book and the Consultant will assemble the bid book. Three (3) copies of the Draft Final Plans, Technical Specifications, and final Opinion of Probable Construction Cost will be submitted to the City and NCDOT, for review and approval. Engineer will provide a Quality Control/Quality Assurance review of the Draft final construction plans prior to submittal.

Final Sealed Plans

Upon receipt of comments or approval of the Draft final plans, Kimley-Horn will furnish one reproducible set of final sealed construction plans and documents for use by the City in the bidding and construction phases. Reproducible drawings will be 24" by 36". Two (2) copies of final sealed plans and signed NCDOT Encroachment Agreement/NPDES forms will be submitted to NCDOT for approval. Kimley- Horn will provide the City one (1) sealed hard copy as well as a DocuSign PDF of the final plans. Kimley- Horn will provide a CD with one (1) electronic set (in PDF format) of the sealed plans and specifications and applicable CADD files.

Task 9 – Permitting

For the purposes of this project, KHA shall be required to submit, track and apply for plan approval for Construction Documents from the agencies listed below. Drawings, details, specifications, and studies necessary to obtain these approvals shall be the responsibility of KHA. Permit submittals may include the following:

- City of Monroe
- Duke Energy Encroachment
- North Carolina Land Quality Section of NCDEQ
- Sedimentation and Erosion Control Permit - KHA will prepare and submit a sediment and erosion control permit to the regional Office of NCDEQ. The permit application package will include: NCDEQ S&EC checklist, Financial Responsibility Form (Signed by the County), calculation package, Construction Plans, application fee.
- North Carolina Department of Transportation (NCDOT)
- KHA will submit a non-utility encroachment agreement (as additional services if required)
- KHA assumes there will be three (3) review at the Division level. Any additional local reviews will be an additional service.
- KHA assumes any review elevated to State Level for permitting will be an additional service.

Normal and reasonable meetings (one per agency) are included in this task with each of the above agencies during the course of preparing appropriate permit applications. Two (2) rounds of drawing revisions due to reasonable regulatory review are included in this task.

Kimley-Horn has no control over the actions of jurisdictional agencies or other parties. Accordingly, professional opinions as to the status of permits and professional opinions as to the probability and timeframe for approvals are made solely on the basis of professional experience and available data.

Task 10 – Environmental Permitting

Natural Resources Technical Memorandum (NRTM) – KHA will summarize the findings of the stream and wetland delineation as well as the preliminary biological assessment in a technical memorandum. The NRTM will consist of a summary of the information gathered as part of this task. These findings will be used

in part to supplement the Categorical Exclusion and the environmental permit application documentation for the project.

- Protected Species Surveys and USFWS Coordination - The Endangered Species Act of 1973 mandates that federal agencies ensure that any actions authorized, funded, or carried out by that agency do not jeopardize the "continued existence" of listed species or result in the destruction or adverse modification of critical habitat. Documentation must be an Incidental Take Permit, Incidental Take Statement, "not likely to adversely affect" determination from the USFWS, or concurrence from USFWS that the project has "No Effect" on the listed species or critical habitat. From a NEPA perspective, Question Number 2 on the Categorical Exclusion Action Classification Form asks, "Does the project involve habitat where federally listed endangered or threatened species may occur?" To address this issue from the NEPA perspective, KHA will conduct a thorough review for threatened and endangered species, including the U.S. Fish and Wildlife Service (USFWS) list of endangered species, threatened species, federal species of concern, candidate species for Union County, and the North Carolina Natural Heritage Program (NCNHP) database. In addition, KHA will perform a habitat assessment concurrently with the delineation effort, identifying and documenting areas of potentially suitable habitat. If potentially suitable habitat is identified, KHA will coordinate with the USFWS to determine if species surveys are required and endeavor to obtain a "not likely to adversely affect" determination, or concurrence from USFWS that the project has "No Effect" on the listed species or critical habitat.

Task 11 – Bid Phase Services

The following will be provided as a part of this task:

- Based on Bid Document Preparation and Contractor Notification. Consultant will issue a bid package and conduct a pre-bid meeting with potential bidders. Consultant may answer questions received during the bid phase and provide clarifications and addendums if applicable.

Task 12 – Public Engagement

Public Open House Meeting 1 (30% Design)

- KHA shall be responsible for attending and preparing up to five (5) exhibits and a Power Point presentation for one (1) 3-hour initial open-house (drop-in style) public meeting. Two attendees from KHA are assumed.
- The meeting may consist of the following:
    - Presentation of preferred preliminary design
    - Preliminary wayfinding monumentation imagery
    - Additional support images and graphics
- KHA will attend the meeting and present the project, answer questions that may arise, and gather input shared by residents/businesses/the public attending the meetings.
- KHA shall develop a meeting summary to capture all information exchanged in the public meeting.
- It is assumed the City of Monroe will arrange the location of the meeting and notify the public of the meeting. This meeting is intended to be in person.

Stakeholder Meeting/Workshop 1 (30% Design)

- KHA shall be responsible for attending and preparing up to five (5) exhibits and a Power Point presentation for one (1) two-hour initial stakeholder workshop. Two attendees from KHA are assumed.
- KHA will attend the meeting and present the project, answer questions that may arise, and gather input and concerns gathered from the stakeholders.
- KHA shall develop a meeting summary to capture all information exchanged in the public meeting.
- It is assumed the City of Monroe will arrange the location of the meeting and notify the necessary stakeholders throughout the corridor.

Stakeholder Meeting/Workshop 2 (30% Design)

- KHA shall be responsible for attending and preparing up to five (5) exhibits and a Power Point presentation for one (1) two-hour initial stakeholder workshop. This workshop is reserved for a second group of stakeholder as identified by the City. Two attendees from KHA are assumed.
- The discussion will focus on the stormwater design, the preliminary 30% plans and options for streetscape design.
- KHA will attend the meeting and present the project, answer questions that may arise, and gather input and concerns gathered from the stakeholders.
- KHA shall develop a meeting summary to capture all information exchanged in the public meeting.
- It is assumed the City of Monroe will arrange the location of the meeting and notify the necessary stakeholders throughout the corridor.

Public Open House Meeting 2 (Final Design)

- KHA shall be responsible for attending and preparing up to five (5) exhibits and a Power Point presentation for one (1) 3-hour initial open-house (drop-in style) public meeting. Two attendees from KHA are assumed.
- This meeting/open house will be used to present the final design direction for the corridor.
- KHA will attend the meeting and present the project, answer questions that may arise, and gather input shared by residents attending the meetings.
- KHA shall develop a meeting summary to capture all information exchanged in the public meeting. It is assumed the City of Monroe will arrange the location of the meeting and notify the public of the meeting. This meeting is intended to be in person.

Online Preferences Survey

- KHA shall create one (1) online survey to be launched prior to final design to gather community preferences on design details such as bridge enhancements/gateway monuments.
- KHA shall use Social Pinpoint, MetroQuest, or a separate platform.
- KHA shall build a fully functioning draft survey for review by the City of Monroe. The City of Monroe will provide one (1) set of consolidated comments, and KHA will provide a demo of the final draft survey prior to finalizing the survey. The survey shall be provided in English and Spanish, with translation services provided by KHA.
- KHA will provide a brief summary of the survey in electronic PDF format.

This task assumes that the City will be responsible for the coordination, documentation, and digital uploading of all online content based on materials already provided to the City by the Consultant. No additional content or deliverables will be developed by the Consultant for the purposes of online content, i.e website updates, social media content, etc.

Additional Services

Any services not specifically provided for in the above scope will be billed as additional services and performed at our then current hourly rates. Additional services we can provide include, but are not limited to, the following:

- Record Drawings
- Monumentation Design
- Real Estate Coordination
- Geotechnical Assessments/Engineering
- Roadway Design
- Traffic Impact Analysis
- Structural Design
- Value Engineering Services
- Full Site Due Diligence
- Environmental Site Investigations
- Construction Phase Services
- Other Client-directed services excluded from tasks listed above.

Information Provided By Client

We shall be entitled to rely on the completeness and accuracy of all information provided by the Client. The Client shall provide all information requested by Kimley-Horn during the project, including but not limited to the following:

- Topographic and ALTA Survey associated with U-5723 project, if available.
- U-5723 project design plans and CAD drawings.
- Available GIS information for the property.
- Available adjacent development design plans.
- Existing available traffic and safety information to date.

Schedule

We will provide our services as expeditiously as practicable to meet a mutually agreed upon schedule. The scope and fee contained herein is based on a project duration of eighteen (18) months from the time of authorization. Delays to the project schedule that extend the duration could result in additional fees.

Fee and Expenses

Kimley-Horn will perform the services in Tasks 1 – 12 for the total lump sum fees below. Individual task amounts are informational only. All permitting, application, and similar project fees will be paid directly by the Client.

Task 1	Project Meetings and Limited Due Diligence	$35,800
Task 2	Survey & Base Mapping	$49,400
Task 3	Utility Coordination	$34,800
Task 4	Subsurface Utility Exploration	$39,700
Task 5	Environmental (NEPA) Documentation	$18,200
Task 6	Preliminary Concept Design	$95,400
Task 7	Traffic Signal Design	$22,200
Task 8	Design Development and Construction Documents	$95,300
Task 9	Permitting	$26,200
Task 10	Environmental Permitting	$16,000
Task 11	Bid Phase Services	$11,200
Task 12	Public Engagement	$35,250
EXP	Reimbursable Expenses	NTE $10,000
	Total	$489,450

Lump sum fees will be invoiced monthly based upon the overall percentage of services performed. Payment will be due within 25 days of your receipt of the invoice and should include the invoice number and Kimley-Horn project number.

Closure

In addition to the matters set forth herein, our Agreement shall include and be subject to, and only to, the attached Standard Provisions, which are incorporated by reference. As used in the Standard Provisions, "Consultant" shall refer to Kimley-Horn and Associates, Inc., and "Client" shall refer to Cabarrus County Infrastructure and Asset Management.

Kimley-Horn, in an effort to expedite invoices and reduce paper waste, submits invoices via email in an Adobe PDF format. We can also provide a paper copy via regular mail if requested. Please include the invoice number and Kimley-Horn project number with all payments. Please provide the following information:

_____Please email all invoices to _____

_____Please copy _____

If you concur in all the foregoing and wish to direct us to proceed with the services, please have authorized persons execute both copies of this Agreement in the spaces provided below, retain one copy, and return the other to us. Fees and times stated in this Agreement are valid for sixty (60) days after the date of this letter.

To ensure proper set up of your projects so that we can get started, please complete and return with the signed copy of this Agreement the attached Request for Information. Failure to supply this information could result in delay in starting work on your project.

We appreciate the opportunity to provide these services to you. Please contact me if you have any questions.

Kimley»Horn

Kimley-Horn and Associates, Inc.

Hourly Labor Rate Schedule

Classification	*Rate*
Analyst I	$135 - $165
Analyst II	$175 - $205
Professional	$200 - $235
Senior Professional I	$250 - $325
Senior Professional II	$345 - $420
Senior Technical Support	$120 - $300
Technical Support	$105 - $170
Support Staff	$90 - $150

Effective through June 30, 2025

Subject to annual adjustment thereafter

Internal Reimbursable Expenses will be charged at 5% of Labor Billings

External Reimbursable Expenses will be charged at 15% mark-up, or per the Contract

Sub-Consultants will be billed per the Contract

City of Monroe
Where Heartland Meets High Tech

STAFF REPORT

TO: General Service Committee

VIA: Mark Watson, City Manager

DATE: November 7, 2024

FROM: J. Bryan Gilliard, Chief of Police

PREPARED BY: Angie Rangolan, Administrative Services Supervisor

SUBJECT: Acceptance of Office of Community Oriented Policing Services FY24 COPS Hiring Program Grant, Addition of Two Police Officer Positions and Approval of a Budget Amendment for FY 2025

SUMMARY STATEMENT

The Police Department seeks to add two grant funded positions, accept the FY24 COPS Hiring Program Grant, approve a budget amendment and authorize the manager to execute any necessary documents.

REVIEW

The Police Department has applied for the Office of Community Oriented Policing Services FY24 COPS Hiring Program Grant. This grant is from the federal government in the amount $250,000. Staff recommends that grant funds be used to fund the Monroe Police Departments hiring or re-hiring of two additional career law enforcement officers in an effort to increase our community policing capacity and crime prevention efforts. There is a match requirement for this grant in the amount of $279,306. Council will need to take action to accept the grant, add two full time Police Officer positions to the City's authorized position total and designate and appropriate funds for the remainder of fiscal year 2025. The amount needed for the remainder of Fiscal Year is a total of $99,530. The City is responsible for 52.77% of this amount or $52,522 and the grant will reimburse 47.23% or $47,008.

RECOMMENDATION

Staff requests approval from the General Service Committee to accept this request to accept this grant, add two full-time Police Officer positions and appropriate and designate the funds for FY 2025 and forward to full Council for approval.

Attachment(s): Budget Amendment BA-2024-30

CITY OF MONROE
BUDGET AMENDMENT
BA-2024-30

1. Amendment necessary to designate and appropriate funds received from the of Office of Community Oriented Policing Services FY24 COPS Hiring Program Grant and City match of 52.77% for fiscal year 2025.

General Fund:

Revenues:	
Restricted Revenue	$47,008
Appropriation from Unassigned Fund Balance	$52,522
Expenditures:	
Public Safety	$99,530

Adopted this the 18th day of November 2024.

_____
Robert A. Burns, Mayor

Attest:

_____
Bridgette H. Robinson, City Clerk