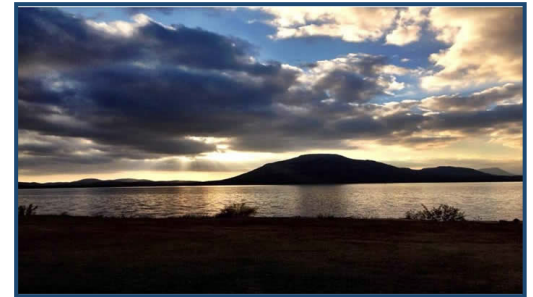


Joint Land Use Study for Lawton-Fort Sill and the Association of South Central Oklahoma Governments



White & Smith, LLC
Kansas City • Charleston

Benchmark CMR, Inc.

Marstel-Day, LLC



**WHITE &
SMITH, LLC**
PLANNING AND
LAW GROUP

October 17, 2016

CHARLESTON, SC OFFICE:

E. TYSON SMITH, ESQ., AICP

Admitted in South Carolina and Florida

South Carolina Certified

Family & Civil Court Mediator

KANSAS CITY OFFICE:

S. MARK WHITE, ESQ., AICP

Admitted in Missouri and North Carolina

Mr. Steve Kelly, CED Planner
Association of South Central Oklahoma Governments
P.O. Box 1647
Duncan, Oklahoma 73534-1647

Re: Joint Land Use Study for Lawton-Fort Sill
Association of South Central Oklahoma Governments

Dear Mr. Kelly:

On behalf of White & Smith, Benchmark, and Marstel-Day, I am pleased to submit this response and to confirm our desire to perform the required services to prepare a Joint Land Use Study for Fort Sill and the surrounding communities.

Our proposal outlines the unique experience and expertise we bring to this Project, including Joint Land Use Studies at nearby **Fort Hood, Fort Leonard Wood, Camp Crowder, and Camp Clark**. Our team has extensive **military-related experience in Oklahoma**, including the “Airport Environs Overlay Zoning” for the **City of Enid** and **Vance Air Force Base**. In addition, our JLUS Army experience also includes work at **Fort Bragg, Joint Base Lewis McChord, Fort Lee, and Fort Jackson**.

Please note, in particular, the “**Fort Sill Stakeholder Awareness and Participation Meeting**” described on page 8 of our proposal. We believe that this additional stakeholder project component will encourage meaningful military-civilian engagement during the JLUS and successful JLUS implementation down the road.

Most important, **I encourage you to contact our current and past clients**. White & Smith has demonstrated consistently our ability to work with staffs, development communities, Army personnel, citizen groups, and governing bodies to develop meaningful JLUS strategies.

Thank you for the opportunity to respond to the Request for Proposals and I am available to answer technical, price, and/or other contract questions.

Sincerely,



E. Tyson Smith, AICP
for White & Smith, LLC

255 KING STREET

CHARLESTON, SC 29401

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Our Team brings unique military-related experience in Oklahoma and the Region, including:

- the Airfield Environs Overlay for the City of Enid
- ICEMAPs for Vance, Tinker, Altus, & Shepard AFBs
- Community Partnership Programming for Altus, Shepard, and Vance AFBs

Summary of Response and Benefits to ASCOG

Army Joint Land Use Study and JLUS Implementation Experience.

Our Team brings extensive experience with nearby and key Army installations – including **Fort Hood, Joint Base Lewis McChord, Fort Bragg, Fort Leonard Wood, Fort Lee, and Fort Jackson**. We also have prepared the JLUS’s for two nearby Army National Guard installations in western Missouri: **Camp Clark and Camp Crowder**.

Local Government and Military Planning Experience in the Region.

We have worked with local governments and military installations in Oklahoma and north Texas, including **Vance AFB, Altus AFB, Sheppard AFB, Tinker AFB, and the City of Enid**.

Personalized Approach.

Our Principal Officers – Tyson, Phil, Jason, and Vagn – bring a **personalized approach** to our interactions with the JLUS Project Manager, Policy and Technical Committee members, Fort Sill officials, local planners and – perhaps most important – **members of the public who may be affected by the recommendations in the final JLUS report**.

Project Management and Quality Control Measures.

We take deliberate steps to ensure that **adequate time has been allocated** for the Fort Sill Joint Land Use Study and to put **quality control measures** in place that ensure the JLUS report is accurate and current, based on Army and local planning projections, and that all documentation is professional and properly proofed prior to dissemination.

Emphasis on Installation Awareness.

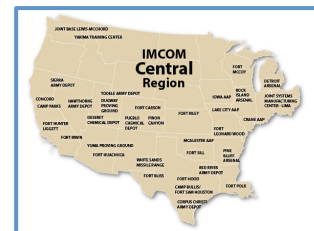
Finally, we have proposed holding a **“Fort Sill Stakeholder Awareness and Participation Meeting”** (see p. 8) to ensure that current Army personnel and officials are knowledgeable of the relationship between military and civilian land uses, and how the JLUS process is the first step to maintaining compatibility between the two.

General Information Statement

Pursuant to the requirements on page 22 of the RFP, we have provided the following “general information statement.”

The White & Smith Team is comprised of longtime JLUS partners Benchmark Planning and Marstel-Day, LLC. Our Principal Officers and Key Support Staff are introduced in detail behind the “Resumes” tab.

White & Smith has offices in Kansas City and Charleston and employs two attorney/ planners and a planning associate with extensive local government planning experience. Benchmark has offices in St. Louis and Charlotte and currently has twenty employees and planners. Marstel-Day has offices throughout the country, including in San Antonio, Virginia, and California. Marstel-Day currently has over fifty personnel on staff.



In addition to our military-related land use planning clients, our typical work involves all aspects of comprehensive planning and zoning, including our work in 2003-04 for the **City of Enid**. Clients include cities, counties, regional agencies, and state-level planning divisions. Depending on client need, we **bring experience with traditional and advanced planning and zoning techniques, with extensive experience with rural area planning** in the Midwest and Western regions of the United States.

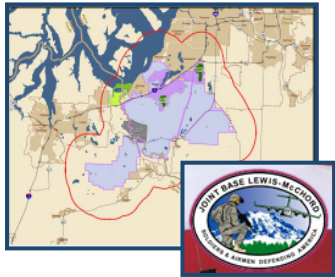
Our firms have completed or are working on three Joint Land Use Studies and JLUS Implementation projects in the Central Region of the Installation Management Command alone, including: **Fort Hood, Fort Leonard Wood, and Joint Base Lewis McChord**. Our Team members have worked together on at least 25 JLUS and JLUS Implementation projects around the country.

Key Personnel at each firm have been working on Joint Land Use Studies and other military-related planning activities for nearly seven years and have developed a personalized approach to JLUS planning and implementation efforts that **“go beyond the standard format.”**

Firm Background, Principal Officers, and Prior Experience

The following sections are responsive to the specific Selection Criteria set out at pages 21 and 22 of the Request for Proposal.

Firm Background



White & Smith was recently hired to develop implementation strategies for the 2015 JLUS performed at Joint Base Lewis McChord

White & Smith Planning and Law Group, located in Kansas City and Charleston, is teamed with long-term colleagues from past Joint Land Use Studies to complete the JLUS for Fort Sill and the surrounding areas. We bring planning, military, communications, GIS analytical, and legal expertise to this project. Our principal officers and assigned staff are described in the next section of this Proposal.

In addition to our military-planning experience around the country, our Team brings extensive experience in the State of Oklahoma and within the **Central Region of the Installation Management Command**, including Joint Land Use Studies or JLUS Implementation efforts at **Fort Hood, Joint Base Lewis McChord, Vance AFB-Enid, Altus AFB-Altus, Tinker AFB, and the City of Enid**. Our team has recently completed a JLUS at **Fort Lee**, has recently been hired again to update the JLUS at **Fort Bragg**, and to implement JLUS recommendations at **Fort Jackson**. We also have prepared and now are implementing JLUSs at **Camp Crowder** and **Camp Clark** in western Missouri.

Our work with other **U.S. Army Training and Doctrine Command (TRADOC)** units includes Fort Lee, Fort Jackson, and nearby **Fort Leonard Wood**.

Our experience preparing and implementing Joint Land Use Studies and our **past military experience in Oklahoma** makes us uniquely qualified to undertake and complete his wide-ranging Project over the course of the next year.

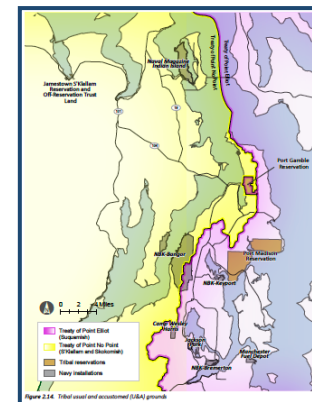
“Going beyond the standard format...”



Our Team Members prepared the 2003 Joint Land Use Study for Fort Bragg, as well as the 2009 Update. Our Team was recently hired to complete a 2017 JLUS Update for Fort Bragg

This is what past clients say about us. Our work product is always tailored to the unique needs of each client and community. For this Project our Team and our Project Approach are distinguishable in several ways:

- 1) **Army-Specific JLUS:** Our Team recently completed Joint Land Use Studies at **Fort Hood, Fort Leonard Wood, Fort Lee** and currently is working at other Army Installations, including **Fort Jackson, Fort Bragg, Camp Clark, and Camp Crowder**. We are familiar with the state of military planning in the Central Region of the Installation Management Command and in Oklahoma, in particular.
- 2) **Personalized Public Outreach:** The White & Smith Team is uniquely prepared to handle the localized **public outreach**, based on our prior experience in the state of Oklahoma, including the City of Enid and also in nearby Wichita Falls. In addition, Tyson Smith, our Team Lead, has **worked with Native American communities** around the country including directly for the Salt River Pima Maricopa Indian Community and during the JLUS for Naval Base Kitsap in 2015.



White & Smith’s work on the NBK/NAVMAG Joint Land Use Study in 2015, included the participation of five federally-recognized Native American Tribes including Port Gamble S’Klallam Tribe, Jamestown S’Klallam Tribe, Lower Elwha Klallam, Skokomish, and Suquamish

- 3) **Quality Control:** Our JLUS processes and studies are tailored to the **unique needs and characteristics of each particular community**. In particular, Army communities, differences in operations, culture, and land use patterns necessitate an individualized look and set of recommendations. In addition, we have built into our workflow a process for assuring that draft and final **documents are presented in a professional manner** and have been **thoroughly proofed and edited for publication**.

From a Past Client

“Mr. Smith provided excellent services for the Salt River Pima-Maricopa Indian Community. He rewrote the Community’s development impact fee program ordinance, implementation forms and procedures to create clear requirements and to close loopholes. He met with the Tribal Council on numerous occasions to explain how development impact fees work to create funding for public infrastructure. Through Mr. Smith’s respectful presentations, he was able to gain the trust of tribal officials and administrative staff.”

-Suzanne Colver, Planner
Salt River Pima-Maricopa Indian Community



Fort Sill Stakeholder Awareness and Participation Meeting

Military installations like local governments evolve in terms of visions, missions and planning to satisfy current and future. The JLUS analysis and recommendations will be informed through understanding existing conditions as well as desired future end states and plans at Fort Sill.

However, installations sometimes are less familiar with the relationship of community planning to military planning. We have found that **focused interactions with military staffs early in the JLUS process** facilitate meaningful engagement throughout the JLUS Process.

Therefore, during our stakeholder interviews in Task 2, we will hold a more formal, extended session with personnel from Fort Sill in order to:

- a. Validate JLUS requirements for Army information to support the JLUS planning process and identify **other potential issues not yet addressed or identified.**
- b. Address **JLUS information collection needs** to identify encroachment impacts to the community and to the mission.

The Fort Sill Awareness & Participation **Meeting Agenda** may include the following:

- a. Welcome and introductions
- b. Army encroachment issues overview per Army Regulation 350-19 and the *2015 Report to Congress on Sustainable Ranges*
- c. Installation plans, processes and studies overview that address encroachment issues
- d. Communications via community decision making and planning processes
- e. Table Top Exercise - Identification of current and future encroachment impacts based on the installation's current plans, e.g. Range Complex Management Plan, Installation Master Plan, the Army Compatibility Use Buffer program, etc.
- f. Overview of the Army Community Partnering program

Recommended **Army participants** may include:

- a. Commander, Deputy Commander or Chief of Staff
- b. Range Planner
- c. Installation master planner
- d. Environmental, Natural and Cultural Resources
- e. Public Affairs
- f. Airfield Operations
- g. Air Traffic Control
- h. Frequency Management
- i. SJA
- j. ITAM Program Manager

Proposal Technical Representations

Pursuant to the requirements on page 22 of the RFP, the White & Smith Team hereby represents that:

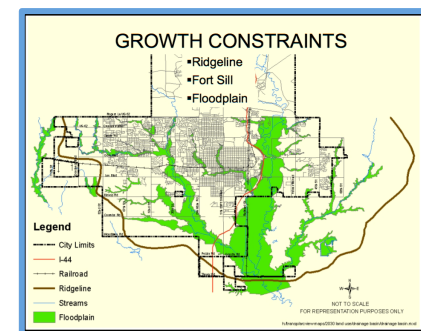
- We will in all respects conform to and comply with Equal Opportunity Employment requirements;
- White & Smith, LLC and its team are in good standing with the State of Oklahoma;
- No team member on the White & Smith Team is on the federal debarment and suspension list; and
- Any agreement resulting from award of the JLUS will *not* result in a conflict of interest, Rule 4, Title 74E of the Oklahoma Statutes.

In addition, our Team complies with the following minimum requirements set out on pp. 3 and 4 of the RFP:

- Adequate financial resources;
- Ability to deliver specified services, products, and deliverables;
- Ability to comply with proposed delivery schedule;
- Satisfactory record of integrity and ethics; and
- Otherwise qualified and eligible receive award of the proposed Joint Land Use Study contract.

Finally, pursuant to p. 24-26 of the RFP, note the following:

- White & Smith operates as a Limited Liability Corporation (LLC, Missouri); we also have offices in Charleston and are licensed to practice in South Carolina; Project Manager, Tyson Smith, is located in Charleston.
- Resumes for the entire White & Smith Team are provided behind the “Resumes” tab of the Proposal.
- Financial statements have been provided for each firm by sealed envelope.
- A sample JLUS ‘management report’ has been provided as Attachment E to the proposal.
- A signed copy of the “Contract to Provide Professional Consulting Services” has been provided as Attachment F.

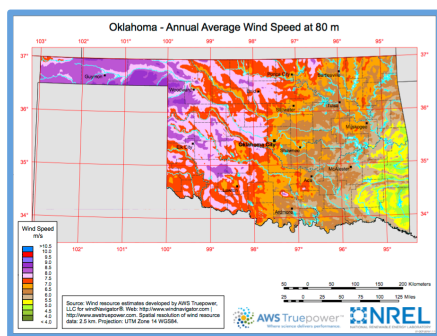
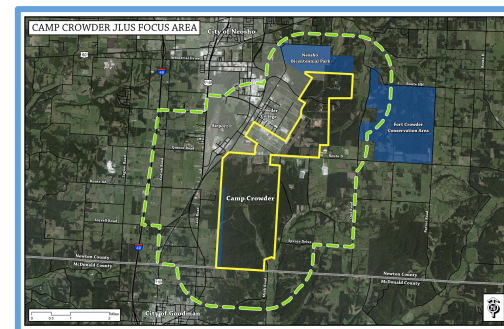


The presence of Fort Sill is noted among the potential constraints to future growth for the City of Lawton

Project Approach and Understanding

Though Fort Sill occupies twenty-eight (28) square miles within the City of Lawton, the Joint Land Use Study for Fort Sill is important to the entire region impacted by its operations – including its nearly \$2 billion annual economic impact.

We will evaluate all existing and anticipated future impacts from and on Fort Sill, including within the communities listed in the RFP and the proposed Study Area. We will work with the Policy Committee to define a “JLUS Focus Area” within which our detailed GIS analyses will be directed so as to encompass documented off-post operational impacts in the immediate vicinity of Fort Sill.



We note on page 7 of the RFP that, at this time, there are no known encroachment issues. Nonetheless, our analysis and work with the community will be rigorous to ensure that, if this is the case, that there are protections in place to maintain the status quo and to prepare for potential future civilian or military land use changes that could facilitate incompatibilities.

It is noted, of course, that renewable energy development is increasingly of concern for military installations around the country. We have worked in Oklahoma, Texas, New Mexico and nationwide with installations to plan for, prohibit, and coordinate with private energy providers with respect to proposed renewable energy projects that could impact military operations.

For the Fort Hood JLUS just this year, we recommended a **preemptory coordination process** between Fort Hood, energy developers and the Electric Reliability Council of Texas that would allow the DoD to know early in the process whether new wind energy project were being proposed anywhere in the state that could impact Fort Hood flight training.

Principal Officers

The principal officers who will lead the Fort Sill JLUS are introduced immediately below. Following that are introductions to our full Team support staff members who have been specifically assigned to the Fort Sill JLUS, based on identified needs in the RFP and based on our familiarity with the issues in the community and at Fort Sill. Areas of expertise we will bring to the Fort Sill JLUS include:

- Urban Planning
- GIS Land Use Analysts
- Cultural Resource Specialists
- Military Operational Specialists
- Environmental Resource Specialists
- Land Use Law Expertise
- Graphic Design

Recent Team Experience in Oklahoma

- City of Enid
- Military Land Use Compatibility Zoning
- Altus Air Force Base – Altus
- Community Partnerships & Encroachment Planning
- Tinker Air Force Base
- Encroachment Planning
- Vance Air Force Base
- Community Partnerships & Encroachment Planning



Tyson Smith, Esq., AICP (Project Manager) White & Smith, LLC (Charleston)



Education

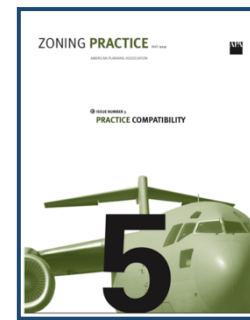
Master of Urban and Regional
Planning (University of Florida
1995)

Juris Doctor (University of Florida
2000)

Bachelor of Arts in Economics
(University of North Carolina at
Chapel Hill, 1991)

Tyson Smith has over twenty-four years of experience as a city and county planner, planning consultant, and attorney, focused entirely on governmental relations and community planning. Mr. Smith also is a certified mediator and expert at public facilitation and mutual problem solving. His military-civilian experience is extensive, starting in 1992 as a county planner in the Florida Keys, home to Naval Air Station Key West. He brings experience from around the country preparing Joint Land Use Studies, Military Overlay Zones, and JLUS other implementation tools. Each year, Mr. Smith instructs planners, attorneys, and law students on land use law, including preparation for the legal component of the American Institute of Certified Planners exam, the bi-annual Case Law update for the state APA chapter, and as a guest lecturer at the Charleston School of Law.

Before beginning his consulting career, Mr. Smith was a planner with the Monroe County Division of Growth Management in the Florida Keys. He later served as the Assistant City Planner for the City of Key West, Florida. In these positions, Mr. Smith gained experience in matters of military coordination, affordable housing, growth management, residential/commercial land use compatibility, transportation, and concurrency.



Recent Military
Planning publication
co-authored by
Project Manager,
Tyson Smith

Relevant Publications for Tyson Smith

Land Use Compatibility Near Military Bases, Zoning Practice (American Planning Association); May 2011 (with Appel).
Compatible Land Use Near Military Installations, Planning and Environmental Law (American Planning Association); April 2011 (with Appel).

What Koontz v. St. Johns River Water Management District means for Planners...for Now, Zoning Practice (American Planning Association); October 2013.

Legal Aspects of Conservation Easements: A Primer for Transportation Agencies, Legal Research Digest: 60 (Transportation Research Board); October 2013.

Recent Related Experience

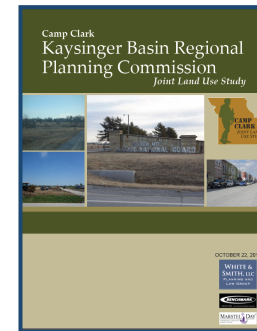
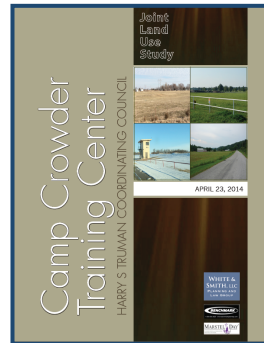
Fort Hood Joint Land Use Study
Fort Bragg Joint Land Use Study Update
Joint Base Lewis McChord JLUS Implementation
Fort Jackson and McEntire JNGB – JLUS Implementation
Fort Lee Joint Land Use Study
Fort Leonard Wood Joint Land Use Study
Marine Corps Air Station Beaufort Joint Land Use Study
Marine Corps Recruit Depot Parris Island Joint Land Use Study
Naval Base Kitsap and Naval Magazine Indian Island Joint Land Use Study
Accomack Wallops Flight Facility Joint Land Use Study Project Manager
Camp Crowder National Guard Training Site Joint Land Use Study
Camp Clark National Guard Training Site Joint Land Use Study



In 2016, Tyson presented on military planning issues at the Florida APA annual Conference, in Tampa, and the Association of Defense Communities Forum in Charleston, SC

Cannon Air Force Base JLUS Implementation and Renewable Energy Compatibility
Naval Air Station Key West; Plan Amendments and State Negotiations for Monroe County
Monroe County, Florida – Review and Comments for Atlantic Fleet Environmental Impact Statement
Homestead Air Reserve Base – JLUS Implementation and Military Overlay Zoning
Joint Base Andrews – Development of Military Overlay and Taking Analysis of JLUS Recommendations

The White & Smith Team recently completed Joint Land Use Studies at two Army National Guard Facilities in western Missouri and White & Smith was re-hired in 2016 to undertake JLUS Implementation of those Studies.



Mark White, Esq., AICP *Regional Project Support (Kansas City)*

S. Mark White is a planner and attorney recognized as an expert in zoning and subdivision law, form-based zoning and New Urbanism, land use and takings litigation, housing, development of comprehensive growth management plans, and implementation systems. He has over 25 years of experience representing clients at every level from city, state and local governments, including the City of Enid, Oklahoma.

Mr. White is a former partner of Freilich, Leitner & Carlisle. He received his Bachelor of Arts degree, magna cum laude, in History and Political Science from Bethany College in Lindsborg, Kansas, and holds a Juris Doctor and Master of Regional Planning from the University of North Carolina at Chapel Hill. While in law school, Mr. White was a Research Editor for the North Carolina Journal of International Law and Commercial Regulation, and worked at the Department of City and Regional Planning as a Research Assistant in the Center of Urban and Regional Studies. He is a former President of the board of directors of the nonprofit community development group Westside Housing Organization, and is a member of the North Carolina and Missouri Bars. In 2010, Mr. White was a member of the leadership team for the City of Lee’s Summit’s Livable Streets Committee. The Committee won passage of a Livable Streets Resolution by the City Council – the first in the Kansas City region.

In addition, Mr. White’s articles have appeared in a variety of notable publications, including “Using Adequate Public Facilities Ordinances for Traffic Management” (American Planning Association); “State and Federal Planning Legislation and Manufactured Housing: New Opportunities for Affordable, Single-Family Shelter” (THE URBAN LAWYER); “The Interaction of Land Use Planning and Transportation Management: Lessons from the American



Education

Juris Doctor/Master of Regional Planning (University of North Carolina at Chapel Hill)

Bachelor of Arts, magna cum laude, History/Political Science (Bethany College, Lindsborg, Kansas)

Experience” (with Freilich) (Transport Policy); and “Affordable Housing: Proactive and Reactive Planning Strategies” (American Planning Association, Planning Advisory Service Report No. 441).

Mr. White is also a frequent speaker at the national meetings of the American Planning Association, the American Center for National and International Law, the Congress of New Urbanism, the University of Wisconsin, and various other professional organizations.

Publications for Mark White

A 21st Century Land Development Code (American Planning Association, 2008).

Contributor, *A Legal Guide to Urban and Sustainable Development for Planners, Developers and Architects* (Wiley, 2008).

"Writing Defensible Codes," *The Commissioner* (Winter 2006).

"Unified Land Management Codes," *Municipal Lawyer* (Aug. 2006).

"Development Codes for Built Out Communities," *Zoning Practice* (Aug. 2006).



Mark prepared the “*Airport Environs Overlay District*” for the City of Enid, which encompasses the lands impacted by Vance Air Force Base

Phil Huber, MS Military Operations and Communications

Mr. Huber has more than 47 years of military, federal government civil service, and private sector consulting experience. He has worked for Marstel-Day since 2002 and is responsible for the firm's Encroachment and Sustainment Program portfolio. His portfolio encompasses a broad range of local, regional, and national issues and associated conflicts. The issues include but are not limited to urban sprawl pressures; operational noise impacts; competition for air, land, water space and frequency spectrum; air and water management and control issues; natural and cultural resource impacts; trespassing; socio-economic impacts; and other issues that occur primarily between the U.S. military and their multiple neighbors and stakeholders. Mr. Huber's approach to addressing these issues is holistic, deliberate, and collaborative. He approaches problem resolution through the use of programmatic approaches that identifies multiple courses of actions. In doing so, Mr. Huber evaluates and considers all aspects of the military and stakeholder's strategies, policies, programs, plans, resource allocations, education and training requirements, reporting and information management activities, and their efforts at conducting outreach and engagement activities.

Particularly noteworthy is his oversight of many projects that focus on encroachment issues, problem resolution, and mission sustainment on a landscape scale concurrent with protecting the economic lively hood of communities and working landowners. The goal is to establish partnerships through improved communications, establishment of mutual planning and compatible land use objectives, the purchase of easements, revisions to land use regulations, and improved inter-service and interagency interactions.



Education

Master of Science
National Defense University

Master of Business Administration,
Jacksonville State University

Bachelor of Science, Forest Science,
Penn State University

Mr. Huber has served and managed many client needs while working at Marstel-Day. He has provided oversight of a number of Joint Land Use Studies prepared in partnership with White & Smith, offering expertise on stakeholder involvement, civilian-military partnerships, and land use compatibility challenges. He has managed numerous projects and developed comprehensive programs for all of the DoD Services as well as the Office of the Secretary of Defense. He is credited with helping to establish the Marine Corps, Navy and Air Force encroachment programs as well as developing needed analytical frameworks and tools for conducting encroachment, real estate and legislative and regulatory assessments and reviews. Mr. Huber has produced for the clients strategies, policies, decision support tools, training modules, and comprehensive analyzes and plans; and he has conducted and facilitated many partnering and management workshops throughout the United States.

Mr. Huber, prior to joining Marstel-Day, completed 28 years of federal civil service in a wide variety of environmental positions, culminating as the Assistant for Environmental Quality, Office of the Deputy Assistant Secretary of the Army (DASA) for Environment, Safety, and Occupational Health (ESOH). Mr. Huber's earlier assignments as an Army employee included managing two Army installation environmental programs – Fort McClellan, AL and Fort Benning, Ga.; working on the environmental staffs of two Army major commands – U.S. Army, Europe, and the Training and Doctrine Command, Va, and managing worldwide general support programs as a staff member for the U.S. Army Environmental Center. Concurrent with his federal civil service career, Mr. Huber had a military career that spanned 30 years in both active and reserve status. His major deployments were to Viet Nam as a helicopter pilot, Saudi-Arabia/Kuwait, and Bosnia conducting civil affairs missions in support of the military, the State Department and USAID. He retired as a Colonel.

Recent Marstel-Day Joint Land Use Studies

- Fort Hood
- Fort Bragg
- Fort Lee
- Camp Clark National Guard Training Site
- Camp Crowder National Guard Training Site
- Shaw Air Force Base
- Marine Corps Air Station Beaufort
- Marine Corps Recruit Depot Parris Island

Marstel-Day has prepared Community Partnership Programs for 3 Oklahoma military installations, as well as for Sheppard AFB in Wichita Falls.



Jason M. Epley, AICP, CPM
Project Planner and Land Use Compatibility Analyst

Mr. Epley brings over 20 years of experience in the planning profession to the consulting team. His past positions have included working with municipal, county, regional and state government planning programs throughout North Carolina. He specializes in comprehensive planning, land use compatibility studies, development regulation, urban design, public involvement and meeting facilitation. Mr. Epley brings additional expertise and experience with downtown development and design where he serves as the Executive Director of the North Carolina Downtown Development Association. He has a wealth of experience helping communities develop meaningful plans and sound implementation strategies in over 100 communities across the country. A Certified Public Manager, Mr. Epley has managed a number of complex planning projects, including multi-jurisdictional projects and multi-disciplinary master planning teams.

Professional Affiliations

- American Planning Association (Since 1994)
- American Institute of Certified Planners (Since 1999)
- Nationally Certified Public Manager (Since 2006)
- North Carolina Downtown Development Association, President 2007-2009



Education

Master of City and Regional Planning, *Clemson University, Clemson, SC*

Bachelor of Arts, Geography, University of North Carolina at Greensboro, Greensboro, NC

Relevant Experience

Fort Hood Joint Land Use Study

Fort Bragg / Pope AFB, NC – Joint Land Use Study (*NCAPA Award*)

- Prepared for 7 counties, 11 municipalities, and 2 military bases

Fort Leonard Wood, MO – Joint Land Use Study – 4 counties, 2 municipalities

Fort Jackson, McCrady Training Center and McEntire JNGB, SC - JLUS Implementation Plan

Dubuque County, IA – 26 Mile Heritage Trail Community Assistance Team

Wilson County, NC - Comprehensive Plan and UDO

Colleton County, SC - Comprehensive Plan and Ordinance Rewrites

Bladen County, NC – Land Use Plan and County-wide Zoning Ordinance

Oconee County, SC – Initial County-wide Zoning Ordinance and Implementation

Henderson County, NC – Small Area Plan Assistance, 3D Modeling, and Community Character

Town of Butner, NC - Comprehensive Land Use Plan and Land Development Ordinance

Town of Marshall, NC – Comprehensive Land Use Plan and Development Ordinance

Town of Midway, NC – US 52 Corridor Plan, Sewer Policy, Zoning Overlay District

Town of Bermuda Run, NC – Comprehensive Plan

City of Walterboro, SC – Unified Development Ordinance and Zoning Map Preparation

City of Raeford, NC – Land Use Plan, Land Development Ordinance, Downtown Plan

City of Wilson, NC – Photo Illustrations demonstrating concepts in Comprehensive Plan

Town of Angier, NC – Illustrated Guide for Downtown Building Façade Grant Program

Sustainable Sandhills – Five-Year Strategic Development Plan Facilitation

Village of Whispering Pines, NC – Land Development Ordinance

Town of Wrightsville Beach, NC - Urban Design Master Plan (*NCAPA Award*)

Vagn K. Hansen II, AICP Land Use Compatibility Analyst

Mr. Hansen brings extensive national planning and military experience in the planning profession to the consulting team. He has worked with large and small municipalities, as a consultant at the state level and now in the private sector. Mr. Hansen specializes in land use planning, geographic information systems, development ordinances and zoning administration. His military related planning experience includes serving on the Board of Directors of the Fort Bragg Regional Land Use Advisory Commission, numerous special projects in the Fort Bragg region and as lead GIS analyst on the Fort Jackson/McCrary and McEntire JNGB Joint Land Use Study implementation plan for the Richland County and Columbia, South Carolina region and the multi-county Joint Land Use Study surrounding Fort Leonard Wood, Missouri.

Vagn has been a key Team member in our JLUS work at Fort Hood, Fort Bragg, and Fort Leonard Wood, as well as Camp Crowder and Camp Clark in western Missouri.



Education

Master of Arts, Applied Geography,
The University of North Carolina at
Greensboro, Greensboro, NC

Bachelor of Arts, Geography, The
University of North Carolina at
Wilmington, Wilmington, NC

Professional Affiliations

American Institute of Certified Planners
American Planning Association

Relevant Experience

Fort Hood Joint Land Use Study
Fort Lee Joint Land Use Study
Fort Jackson, McCrady Training Center and McEntire JNGB, SC - JLUS Implementation Plan
Fort Leonard Wood, MO – Joint Land Use Study – 4 counties, 2 municipalities
Fort Bragg Joint Land Use Study
Shaw Air Force Base Joint Land Use Study
Marine Corps Air Station Beaufort Joint Land Use Study
Marine Corps Recruit Depot Parris Island Joint Land Use Study
Naval Base Kitsap and Naval Magazine Indian Island Joint Land Use Study
Camp Crowder National Guard Training Site Joint Land Use Study
Camp Clark National Guard Training Site Joint Land Use Study
Town of Bermuda Run, NC – Comprehensive Plan and Annexation Study
City of Clinton, NC – Comprehensive Pedestrian Transportation Plan
Henderson County, NC – Small Area Plan Assistance, 3D Modeling
Wilson County, NC - Unified Development Ordinance
New Hanover County, NC - Castle Hayne Commercial Corridor Urban Design
City of Walterboro, SC – Unified Development Ordinance and Zoning Map
Town of Midway, NC – Comprehensive Land Use Plan and Development Ordinance
Town of Midway, NC - US 52 Corridor Plan, Sewer Policy, Zoning Overlay District

Town of Butner, NC - Land Use Plan and Land Development Ordinance
Village of Whispering Pines, NC - Land Development Ordinance
Town of St. James, NC - Unified Development Ordinance
Town of Kenansville, NC - Land Use Plan and Development Ordinance
City of Raeford, NC - Unified Development Ordinance
Village of Lake Park, NC – Unified Development Ordinance
Town of Cary, NC - Annexation Services Plan
City of Albemarle, NC - Annexation Feasibility and Services Plan
Town of Aberdeen, NC - Annexation Feasibility Study and Services Plan
Town of Sunset Beach, NC - Annexation Study and Services Plan
Town of Calabash, NC - Annexation Study and Services Plan

Additional Key Staff Support

Kelly Cousino, AICP Planning Associate

Kelly brings over twelve years of local government experience to White & Smith’s planning projects. She is skilled at the local government process and, in particular, interfacing with the public and appointed and elected officials.

Kelly brings experience assisting citizens, business owners, developers, engineers, architects, and real estate professionals with interpretation and application of Zoning Code and Land Development Regulation requirements.

In addition, Kelly has experience leading the development of local government Comprehensive Plans and, notably, the development of implementing ordinances and code amendments, including the comprehensive overhaul of local government zoning codes.

Finally, Kelly has experience running growth management programming in high growth areas and applying for and administering grants at the local government level.



Education

Master of Public Administration
Appalachian State University (2000)

Bachelor of Arts, Environmental
Studies
University of North Carolina –
Wilmington (2001)

Jason H. See, Ph.D.
Environmental Resources Analyst

Dr. See is a proven scientist with over 18 years of experience serving public and private sector clients. Currently, Dr. See serves as a program manager and natural resources lead. He provides senior technical expertise and quality reviews for the company’s federal and private sector clients in terrestrial, coastal and marine resources, project and program management, and ecosystems services. Dr. See works to ensure that company work products and deliverables are sufficiently and accurately characterized while verifying that Marstel-Day’s corporate sustainability effort is conveyed.

Dr. See has experience solving terrestrial, riverine, coastal, estuarine, and marine encroachment challenges for clients, including federal and state agencies, local communities, and the academic, nonprofit, and private sectors. His experience includes the development of natural resource assessments, policy review and development, analysis of proposed actions, and technology implementation to mitigate potential environmental impacts on mission or community; preparation and analysis of National Environmental Policy Act documents, biological assessments, and compliance documents; and conducting fatal flaw analyses for regional commercial development.

Specifically, for this project, Dr. See has prepared Joint Land Use Study documents. In addition, Dr. See has experience working with local, regional, state, and federal stakeholders to identify and mitigate potential encroachments that may impact the military mission, regional development potential, and local ecosystems/habitats.



Education

Ph.D., Marine Science, College of William and Mary, Williamsburg, Virginia

Bachelor of Science, Zoology, Texas A&M University, College Station, Texas

Professional Certifications and Memberships

Trained Facilitator, National Charrette Institute

Relevant Experience

Fort Hood Joint Land Use Study

NAVFAC Atlantic, VACAPES OPAREA TAP Environmental Impact Statement

Marine Corps Installations East, Sentinel Seascapes Initiative

NAVFAC Atlantic, Marine Mammal Protection Act Compliance for Marine Corps Air Station, Cherry Point BT-9 and BT-11 Targets

Integrated Natural Resources Management Plans – SUBASE New London, Groton, CT; Naval Support Activity Saratoga Springs, Saratoga Springs, NY; Naval Station Newport, Newport, RI; Presidio of Monterey, Monterey, CA

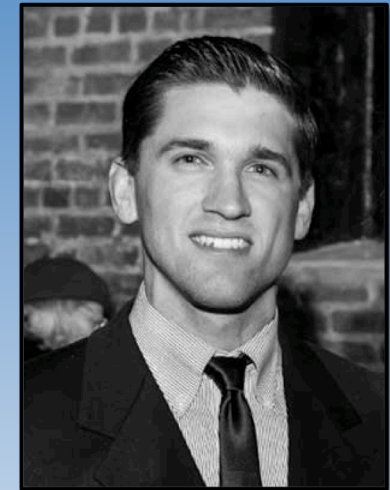
NAVFAC Atlantic, Marine Resources Assessment Program, U.S. Atlantic Coast and Eastern Atlantic

Doug Allen, AICP Planning Associate

Mr. Allen has over five years of experience in the planning field, including over three years of experience as a project manager. Throughout his career, Mr. Allen has served multiple roles on numerous projects, and has worked with stakeholders from large and small municipalities, as well as stakeholders from U.S. Air Force and U.S. Army installations. Mr. Allen specializes in land use planning, communications and engagement, and project management. His military-related planning experience includes working as the project manager for the Vance AFB, Oklahoma, Installation Complex Encroachment Management Action Plan (ICEMAP) in 2014, as a project co-lead of the Vance AFB-Altus AFB-Sheppard AFB regional ICEMAP, as the Communication and Engagement Lead for the ongoing Shaw AFB Joint Land Use Study, and as the Marstel-Day project lead and encroachment subject matter expert for the ongoing Fort Hood Joint Land Use Study. Mr. Allen has also worked as a facilitator for Air Force Community Partnership (AFCP) workshops in communities throughout the country, including Vance AFB, Altus AFB, and Sheppard AFB. He was accepted into the American Institute of Certified Planners in July 2016.

Professional Affiliations

American Institute of Certified Planners
American Planning Association, National and Virginia Chapters
Project Management Institute, National and Central Virginia Chapters



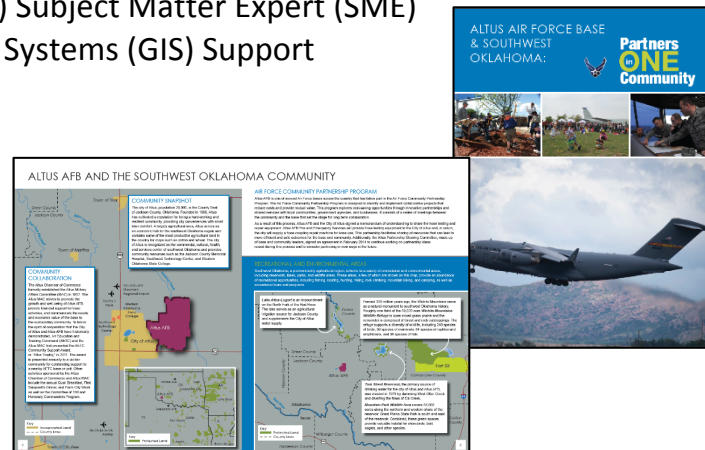
Education

Bachelor of Science
Urban and Regional Planning,
Virginia Commonwealth University,
Richmond, Virginia

Relevant Experience

- Fort Hood – Joint Land Use Study, Encroachment SME
- Vance AFB – ICEMAP, Project Manager
- Vance AFB and Enid, Oklahoma – AFCP, Support Facilitator
- Altus AFB, Sheppard AFB, and Vance AFB – Air Education and Training Command (AETC) Regional Encroachment Management Action Plan (REMAP), Project Co-lead
- Altus AFB and Altus, Oklahoma – AFCP, Support Facilitator
- Sheppard AFB and Wichita Falls, Texas – AFCP, Support Facilitator
- Shaw AFB and Poinsett Electronic Combat Range (ECR) – Joint Land Use Study, Communications and Engagement Lead
- Laughlin AFB – ICEMAP, Project Manager
- Laughlin AFB and Del Rio, Texas – AFCP, Support Facilitator
- Joint Base Langley-Eustis – Community Planning Liaison (CPL) Subject Matter Expert (SME)
- Joint Base Langley-Eustis – ICEMAP, Geographic Information Systems (GIS) Support

Doug recently worked on Community Partnership Programs throughout Oklahoma, including at Altus AFB in Southwest Oklahoma.



Leandra, Jacobson
Cultural Resource and Planning Analyst

Ms. Jacobson offers more than eight years of relevant experience as a researcher and analyst in all areas of cultural resources and communications management. She has supported Department of Defense clients by researching complex environmental challenges, including cultural resources, and conducts stakeholder research and analysis, including the development of engagement management plans. She brings a unique mix of education and experience not only in researching cultural resources, but implementing the results in actionable strategies. Ms. Jacobson has completed the National Association of Environmental Professionals training for the National Historic Preservation Act of 1966 Council on Environmental Quality, which provided guidance on integrating the National Environmental Policy Act with Section 106.

Relevant Experience

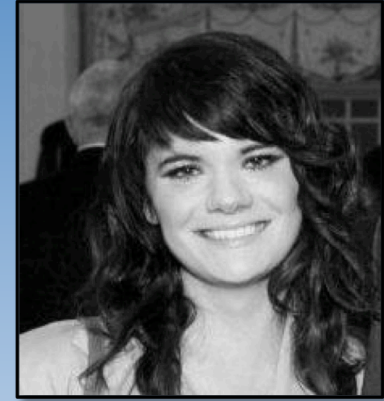
Washington, DC Navy Yard Historic District – National Register of Historic Places
Determination of Eligibility (DOE), Analyst

Naval Air Station Patuxent River, Maryland – Phase I Archeology Field Survey, Archaeological
Field Technician

Webster Field, Maryland – Phase I Archeology Field Survey, Archaeological Field Technician
Naval Support Facility Dahlgren, Virginia– Phase I Archeology Field Survey, Archaeological
Field Technician

Headquarters Marine Corps Cultural Resources, Environmental Conservation Awareness Support – Cultural Resources Lead
Investigator

Warren Grove Gunnery Range, ICEMAP – Cultural Resources SME and Engagement Lead



Education

Master of Arts, Humanities
Old Dominion University
Norfolk, Virginia

Bachelor of Arts Communication
Christopher Newport University
Newport News, Virginia

MacDill AFB, ICEMAP – Cultural Resources SME and Engagement Lead
Whiteman AFB, ICEMAP – Cultural Resources SME and Engagement Lead
Kirtland AFB, ICEMAP – Cultural Resources SME and Engagement Lead
Historic Jamestown Virginia – Preservation Virginia, Field Archaeologist

Prior Experience on Similiar Projects

Descriptions of our past performance on Joint Land Use Studies and other comparable projects are provided on the following pages. The box to the left summarizes our JLUS and JLUS Implementation work nationwide and the box to the right summaries our military-related work in Oklahoma and northern Texas.

JLUS & JLUS Related Projects

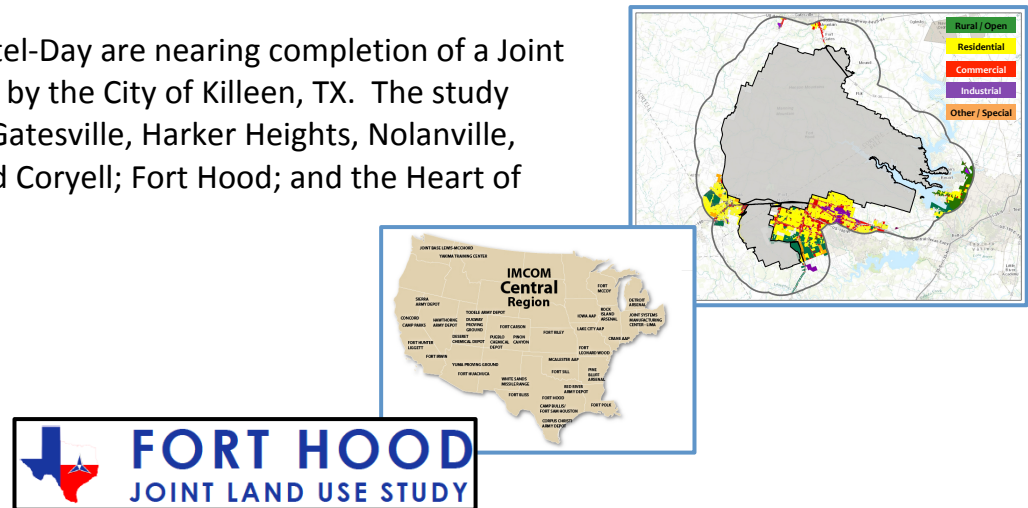
- Fort Hood
- Fort Bragg
- Joint Base Lewis McChord
- Fort Leonard Wood
- Fort Jackson/McEntire JNGB
- Fort Lee
- Camp Crowder
- Camp Clark
- Cannon Air Force Base
- Marine Corps Air Station, Beaufort
- Marine Corps Recruit Depot, Parris Island
- Homestead Air Reserve Base
- Shaw AFB/Poinsett ECR
- Joint Base Andrews/Prince George's County
- Naval Air Station JRB New Orleans
- Naval Base Kitsap
- Florida Keys/NAS Key West
- Marine Corps Base Camp Lejeune/Air

Relevant Team Experience in Oklahoma and Northern Texas

- City of Enid**
Military Land Use Compatibility Zoning
- Altus Air Force Base – Altus**
Community Partnerships & Encroachment Planning
- Sheppard Air Force Base – Wichita Falls**
Community Partnerships & Encroachment Planning
- Tinker Air Force Base**
Encroachment Planning
- Vance Air Force Base**
Community Partnerships & Encroachment Planning

Fort Hood *Joint Land Use Study*

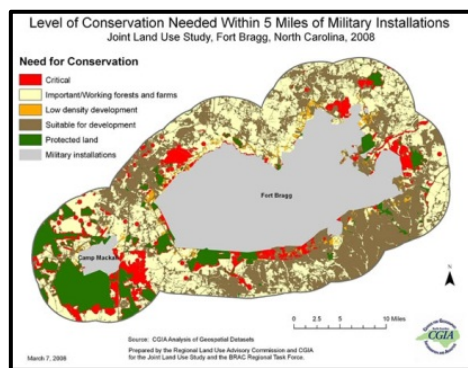
Benchmark and its partners White & Smith, and Marstel-Day are nearing completion of a Joint Land Use Study for Fort Hood, that is being sponsored by the City of Killeen, TX. The study partners include the cities of Killeen, Copperas Cove, Gatesville, Harker Heights, Nolanville, Lampasas, Temple and Belton; the counties of Bell and Coryell; Fort Hood; and the Heart of Texas Defense Alliance.



The primary focus of the study is an evaluation of the compatibility of land use and development activity in civilian communities with air and ground operations, training, testing and power projection missions conducted at Fort Hood. The goal of the study is to identify ways that Fort Hood and the neighboring civilian communities can work together cooperatively to encourage compatible growth and help to ensure the long-term viability and sustainability of Fort Hood's mission.

Fort Bragg Region, NC

Joint Land Use Study and JLUS Updates 2003, 2009, 2016



Jason Epley co-authored this award winning Regional Joint Land Use Study that covered the seven county region surrounding Fort Bragg and Pope Air Force Base. During this study process, Mr. Dougherty and Mr. Epley, along with the Center for Geographic Information and Analysis pioneered the development of the first regional GIS database of its kind in North Carolina for a seven county area that has expanded to eleven counties in support of countywide and regional planning efforts (Visit: www.sandhillsgis.com). The database was utilized to identify farmland, wildlife habitat, open space, forestland and environmentally sensitive lands in need of protection. They developed a methodology for identifying the existing level of protection needed for rural lands across the seven counties. The regional study, emphasizing sustainability, was u by the Office of Economic Adjustment (OEA) as the first JLUS to go beyond the standard

format – analyzing environmental impacts, agricultural conservation, natural resource protection, military training activities and developing areas concurrently. This study process has led to many implementation efforts that are noted below and is highlighted in several publications by the OEA.

In 2016, our team was hired to update the Joint Land Use Study for the seven-county region of Fort Bragg.

Joint Base Lewis McChord *Joint Land Use Study Implementation*

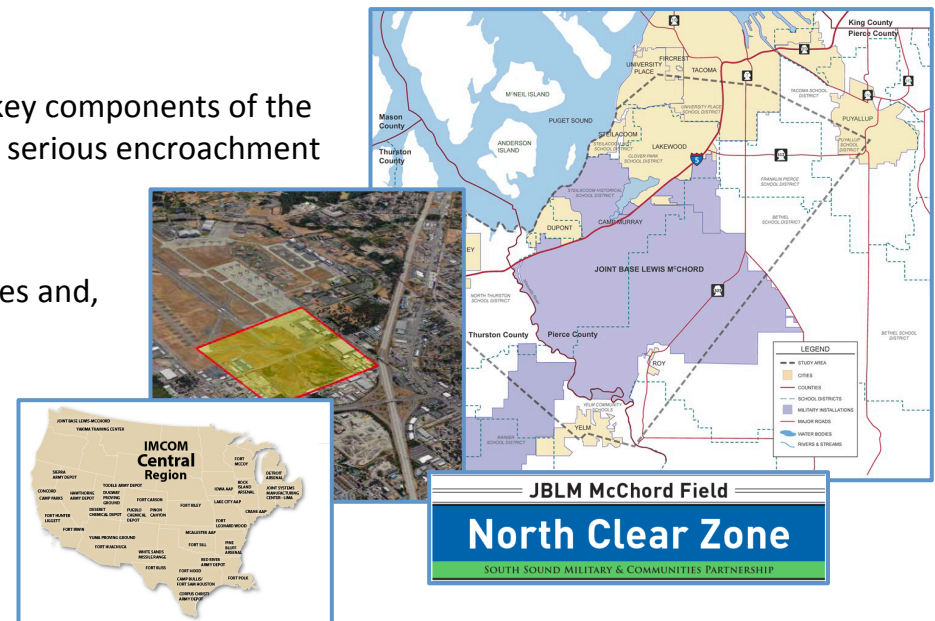
White & Smith has been hired as part of a team to implement key components of the Joint Base Lewis McChord 2015 Joint Land Use Study related to serious encroachment concerns in the North Clear Zone within the City of Lakewood, Washington.

JBLM is the largest Army installation in the western United States and, like Fort Sill, is located in the Central Region of Installation Management Command.

This project was begun in the Fall of 2016.

Among the encroachment tools being evaluated are:

- Zoning
- Comprehensive Plan Policies
- Transferable Development Rights
- Land and Easement Purchases
- Risk Allocation Tools
- Cooperative Relocation Agreements



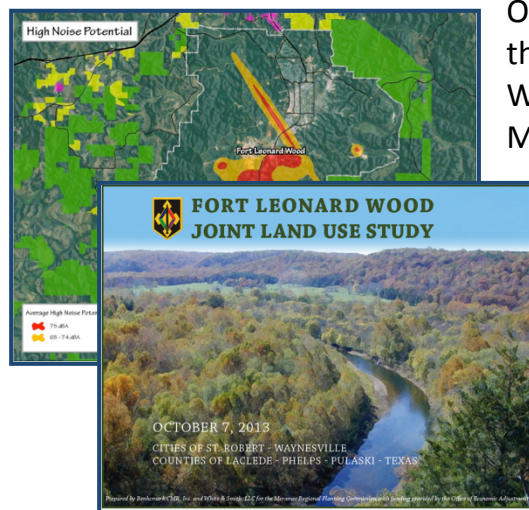
City of Enid

Comprehensive Plan, Zoning Code updates, & “Airport Environs Overlay District”

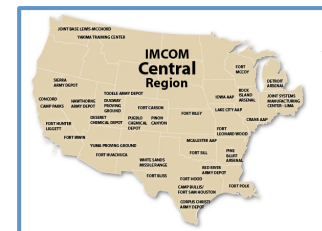
While at his former firm, Mark White wrote the new Comprehensive Plan and associated zoning amendments for this community north of Oklahoma City. The zoning amendments addressed development near a military base and included preparation of the **“Airport Environs Overlay District”** regulations. The amendments established building height and design standards to protect base operations and the quality of life of civilian populations and businesses.



Fort Leonard Wood & Meramec Regional Planning Commission Joint Land Use Study



Our key Team members completed the first Joint Land Use Study for the Fort Leonard Wood, Missouri region in 2013. Fort Leonard Wood is a 62,911-acre military base located in Pulaski County, Missouri, two miles south of Interstate 44.



The fort is home to the U.S. Army Maneuver Support Center (MANSCEN), where soldiers, Marines, airmen, sailors and international students from allied nations receive training. The Mission of MANSCEN is to provide the nation with value-based individuals, leaders, and teams trained in basic combat skills including chemical, engineer, military police and transportation disciplines. The purpose of the Fort Leonard Wood Joint Land Use Study (JLUS) was to identify locations in which land use conflicts between the civilian population and the military installation are occurring, or may potentially occur in the future. Once identified, the JLUS will make recommendations for mitigating or preventing these conflicts. The outcome ensures that Fort Leonard Wood can successfully conduct its mission, while simultaneously protecting civilian interests. The study included Pulaski, Phelps, Texas, and Laclede counties and the cities of Waynesville and St. Robert.

Contact:

Lyle D. Thomas, Planning Manager, Meramec Regional Planning Commission
Phone: 573-265-2993
lthomas@meramecregion.org

Fort Jackson/McEntire Joint National Guard Base

JLUS Implementation & Military Activity Overlay Zones

The Central Midlands Council of Governments, in cooperation with Richland County, the City of Columbia, Fort Jackson/McCraday Training Center, and McEntire Joint National Guard Base, engaged White & Smith and Benchmark to assist the region with two JLUS Implementation Plans for areas around the bases that are particularly vulnerable to future encroachment and land use compatibility issues. The project was completed earlier in 2013 and is under consideration for adoption by the local governments.

Contact:

Ben Mauldin
Phone: (803) 744-5390
bmauldin@centralmidlands.org



Fort Lee Crater Planning District Commission *Joint Land Use Study*

White & Smith, Benchmark, and Marstel-Day completed the Joint Land Use Study for the Fort Lee, Virginia region in 2013.

With the increases in population at Fort Lee, the surrounding communities are also experiencing increased development pressures, as well as increased traffic congestion and other environmental impacts. This JLUS included recommendations to ensure the future compatibility between land uses necessary to support the military mission at Fort Lee and the civilian population and development occurring near the installation.

Contact:

Dennis Morris, Chief, Executive Director
Crater Planning District Commission
(804) 861-1666
dmorris@craterpdc.org

Study Findings

Through research and analysis, the Joint Land Use Study examined, among other issues, military operational impacts and hazards as well as community impacts upon Fort Lee's mission and a compatibility analysis that identified the location of all-use impacts and hazards in relation to surrounding communities. Some of the key findings include:

- Most of Fort Lee's operational impacts and hazards are contained within its existing boundary.
- Fort Lee is primarily surrounded by natural and man-made boundary features.
- Fort Lee and the region have a compatible growth pattern.

Areas within the blue outline in this map were included in the Fort Lee Joint Land Use Study. In addition to the military installation, portions of Chesterfield and Prince George counties as well as the cities of Colonial Heights, Hopewell and Petersburg were included in the study. The line shown here shows the approximate boundaries of land where property owners and Fort Lee may impact one another.

Recommendations

Benchmark CMR, Inc. identified the following five implementation strategies to help ensure the continued pattern of compatible growth, further strengthening communication and coordination while ensuring Fort Lee's ability to sustain its military training mission into the future:

- Develop a formalized regional approach to enhance communication and land use coordination between Fort Lee and the surrounding communities.
- Create a Geographic Information System (GIS) database for monitoring land use changes in the region around Fort Lee.
- Conduct periodic environmental, safety and other impacts related to Fort Lee's training and operational mission.
- Support comprehensive Plan amendments in support of the Joint Land Use Study findings and recommendations.
- Conduct periodic operational impact assessments to enhance the sustainability of the training mission.

FORT LEE JOINT LAND USE STUDY

**SECOND DRAFT
OCTOBER 11, 2013**

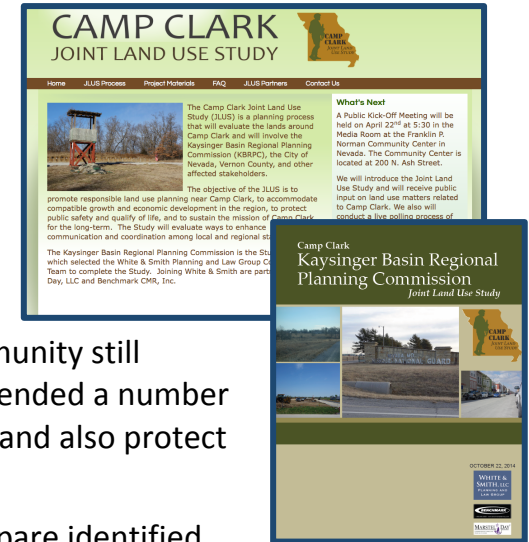
CITIES OF COLONIAL HEIGHTS - HOPEWELL - PETERSBURG
COUNTIES OF CHESTERFIELD - DINWIDDIE - PRINCE GEORGE

Camp Clark & Kaysinger Basin Regional Planning Commission *Joint Land Use Study & JLUS Implementation*

In 2014, the White & Smith team completed a Joint Land Use Study for the Kaysinger Basin Regional Planning Commission in west central Missouri, related to the Camp Clark Training Center.

Camp Clark is located immediately adjacent to the City of Nevada, Missouri in rural Vernon County. Growth from Nevada is manageable, but is occurring in the direction of Camp Clark. However, Camp Clark is surrounded by the unincorporated lands of Vernon County, which has no zoning or building codes and has not prepared a comprehensive plan. Since the community still wishes, nonetheless, to protect the mission at Camp Clark, our Joint Land Use Study recommended a number of “non-regulatory” approaches to doing so that would preserve the rural nature of the area and also protect private property rights.

In 2016, White & Smith was re-hired to conduct the JLUS Implementation process and to prepare identified zoning code, comprehensive plan amendments, and coordination agreements for the local governments and stakeholders originally involved in the Joint Land Use Study for Camp Clark.

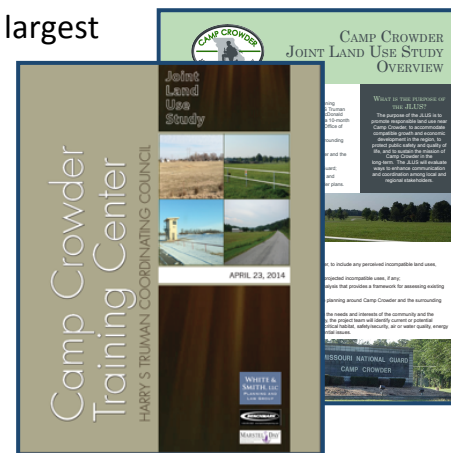


Camp Crowder and Harry S Truman Coordinating Council *Joint Land Use Study and JLUS Implementation*

In 2014, White & Smith, Benchmark, and Marstel-Day completed a Joint Land Use Study for the largest National Guard facility in the state of Missouri, a state that has taken proactive steps to maintain Department of Defense presence there.

Lack of restrictions on the extension of “growth-inducing” facilities, including roads, water and sewer, have created the need to undertake a Joint Land Use Study for the lands surround Camp Crowder in southwest Missouri. Public outreach for the Camp Crowder JLUS included:

- Stakeholder Interviews
- Two informational Brochures (right)
- A Project Website
- Real Time Outreach Polling & Distributed Public Surveys
- Receipt of public comment and written input



In 2016, White & Smith was hired once again to implement key components of the Camp Crowder Joint Land Use Study. Team Leader, Tyson Smith, is working on behalf of the regional planning agency to undertake outreach to landowners adjacent to Camp Crowder, as well as to prepare zoning, planning, and cooperative agreement documentation to accomplish JLUS implementation.

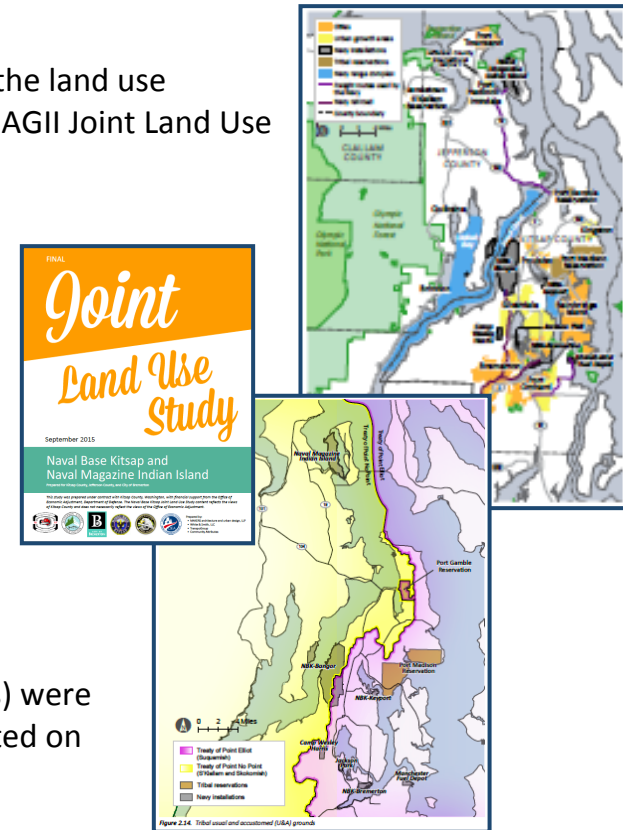
Naval Base Kitsap and NAVMAG Indian Island *Joint Land Use Study*

White & Smith, in partnership with MAKERS Architecture and Urban Design, led the land use planning implementation/recommendations component of the 2015 NBK-NAVMAGII Joint Land Use Study, the first ever conducted at these installations.

Among the areas addressed in the recommendations were:

- Lease and purchase of development rights
- Land conservation strategies
- Memorandum of Understanding
- Planning with regard to “growth-inducing” infrastructure
- Shared services programming
- Building height and security measures
- State coordination efforts (Washington Military Alliance)
- Rail and road safety, security issues
- Zoning coordination and overlay efforts

Notably, five federally-recognized Native American Tribes (i.e., sovereign nations) were included in the NBK/NAVMAG JLUS Study Area and tribal representatives participated on the JLUS Policy Committee and Technical Advisory Committee throughout.



Cannon Air Force Base, Portales (NM) *Community-Base Coordination Framework & Renewable Energy Compatibility*

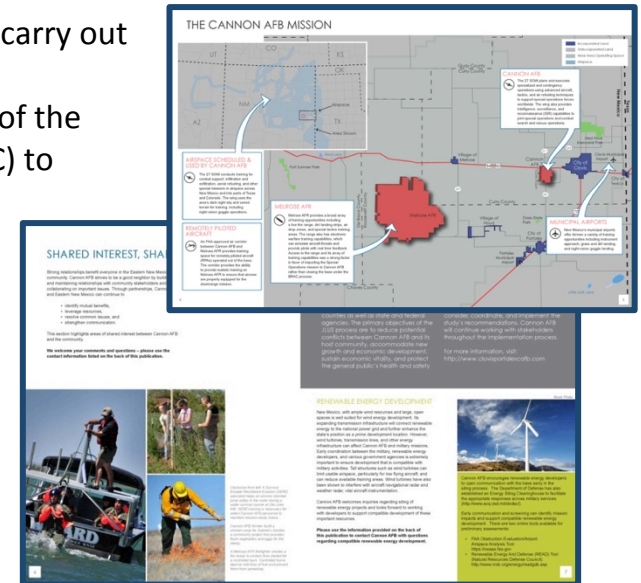
The City of Portales selected the Benchmark, White & Smith, and Marstel-Day team to carry out recommendations found in the adopted Joint Land Use Study and Regional Growth Management Plan, focusing on action plans to address the changes occurring because of the Cannon Air Force Base (AFB) transition from the Air Force's Air Combat Command (ACC) to Special Operations Command (AFSOC).

The team is working under the direction of the Local Growth Management Committee (LGMC) that consists of Curry County, City of Portales, City of Clovis, and Roosevelt County, New Mexico.

The team is also working with key representatives from each community, Cannon AFB, and the JLUS Partnership.

Contact:

Gayla Brumfield, Chair, JLUS Partnership Committee
(575) 769-1951
gayla@crehomes.org



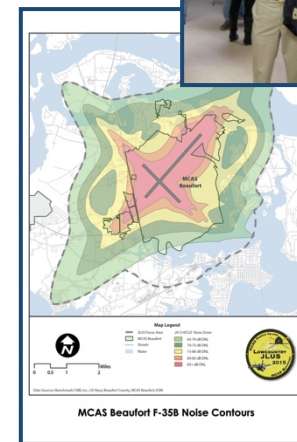
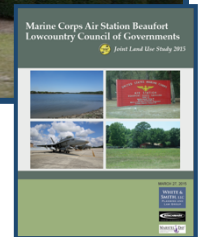
Marine Corps Air Station Beaufort *Joint Land Use Study and JLUS Implementation*

The White & Smith team recently completed the 2015 Joint Land Use Study for Marine Corps Air Station Beaufort. The Air Station is transitioning from the F-18 aircraft to the F-35B, which has a different footprint than the community currently is experienced with.

We have worked with the local governments, residents, JLUS Policy and Technical Committees to develop a series of JLUS recommendations that recognize the importance, not only of the military mission in the South Carolina Lowcountry, but also the special “quality of life” aspects that also must be protected.

Contact:

Ginnie Kozak, JLUS Project Manager
Lowcountry Council of Governments
(843) 726-5536
gkozak@lowcountrycog.org



Marine Corps Recruit Depot Parris Island *Joint Land Use Study and JLUS Implementation*

The White & Smith team recently completed the 2015 Joint Land Use Study for Marine Corps Recruit Depot Parris Island. This was the first JLUS for the MCRD Parris Island.

Parris Island presents a unique environment for “joint land use” planning, as it is surrounded, of course, by wide tidal creeks and rivers from the adjacent civilian community. However, transportation, environmental, and intergovernmental coordination issues were matters that required special expertise and proved to be areas within which our Team was able to offer unique solutions.

Contact:

Ginnie Kozak, JLUS Project Manager
Lowcountry Council of Governments
(843) 726-5536
gkozak@lowcountrycog.org



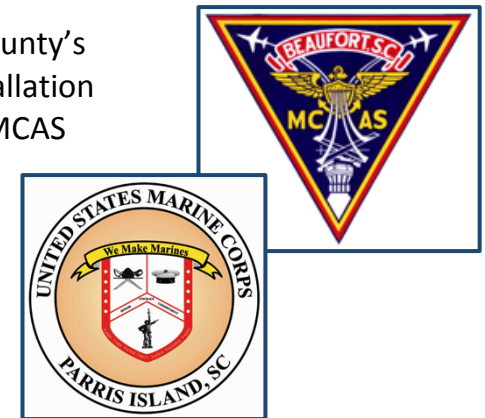
Marine Corps Air Station; Marine Corps Recruit Depot *Encroachment Control Plans*

Marstel-Day, LLC prepared Encroachment Control Plans (ECPs) for Marine Corps Air Station (MCAS) Beaufort, SC and Marine Corps Recruit Depot (MCRD) Parris Island, SC in 2009. The ECPs are designed to provide the Commanders and their staffs with courses of action that: 1) effectively respond to current and potential encroachment threats to mission capabilities, and 2) provide for the mutual exchange of information between the installations and the community, in ways that encourage them to work together to control encroachment through compatible land use planning and other actions.

Several of the management actions recommended were intended to capitalize on Beaufort County's newly authorized Transfer of Development Rights (TDR) program by further buffering the installation from incompatible development. Marstel-Day also currently provides on-site support to the MCAS Beaufort Community Plans and Liaison Office.

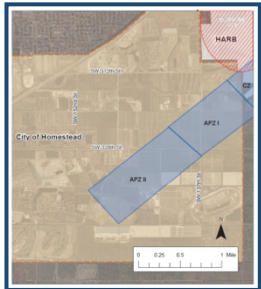
Contact:

Bruce Jackson
571-256-2790
bruce.jackson1@usmc.mil



Homestead Air Reserve Base

Joint Land Use Implementation: Military Overlay Zoning (adopted)



Partnering with Martel-Day, in 2009, White & Smith developed extensive military overlay provisions for the AICUZ lands surrounding Homestead Air Reserve Base. *That was the easy part.*

The notable experience here was our year-long negotiations with the elected officials of City of Homestead to craft a solution that would protect HARB's mission, as well as, the City's economic opportunities near and within the AICUZ areas.

We met on at least 12 occasions with elected officials, the public, and one-on-one with key landowners to tailor an overlay that the community could support.

Part of that solution included an authorization of the transfer of development rights from APZ 1 properties to properties outside of the APZs. This protected the value of any existing development rights, while ensuring, as well, that they would be used in areas away from the AICUZ zones.

Contact:

Larry Ventura, Chief, Environmental Flight
(786) 415-7163
Lawrence.Ventura@homestead.af.mil

Joint Base Andrews and Prince George's County, Maryland *Military Installation Overlay Zone and Takings Legal Analysis & Recommendations*



Joint Base Andrews Naval Air Facility Washington completed its most recent AICUZ Study in 2007 and its JLUS in early 2010. White & Smith was hired by Prince George's County to address the various implementation recommendations set forth in the JLUS.

Among other things, the JLUS recommended a Military Installation Overlay Zone, which the firm drafted and is under consideration by the County.

In addition, we assessed the legal implications of various actions proposed in the JLUS, including, a building moratorium and amortization program for the northern Clear Zone.

Naval Air Station JRB New Orleans *Joint Land Use Study Implementation*

White & Smith worked on the JLUS Implementation efforts at NASJRB New Orleans in 2013 and 2014. Among his roles in the project, Tyson Smith was the primary drafter of the Memorandum of Understanding to implement the Naval Air Station's 2011 Joint Land Use Study. We also worked on other JLUS implementation tools, including: zoning overlays, sample easements (servitudes), acquisition prioritization, real estate disclosure forms, and TDR/clustering provisions for consideration by the Steering Committees for recommendation to the elected officials in Plaquemines Parish and Jefferson Parish, each of which is impacted by the missions at NAS JRB.



Monroe County, Florida
Naval Air Station Installation Area of Influence
AICUZ Implementation & Comprehensive Plan Amendments (2005, 2012)

White & Smith has provided Monroe County with ongoing legal services for many years. In 2004, the an Air Installation Compatible Use Zone (AICUZ) Study was completed for the local Naval Air Station and White & Smith advised the County Attorney’s office on its obligations and opportunities related to the Naval Air Station and the AICUZ study.

Motivated in large measure by concern for public safety as well as the base’s major economic impact on the County, the County was interested in implementing an AICUZ-based airport zoning overlay for the base. However, widespread residential and some commercial development near the Station created significant base-community conflicts that have made full implementation a unique challenge.

In 2012, we helped Monroe County negotiate a state-approved amendment to its comprehensive Plan, which adopted a Military Installation Area of Influence. The Area reflected trends in military activity off the base and the plan included coordination procedures and agreements related to development intensities.



Contact:

Bob Shillinger, Esq.
County Attorney
Monroe County
Phone: 305-292-3470
shillinger-bob@MonroeCounty-FL.Gov

Marine Corps Base Camp Lejeune/Marine Corps Air Station New River, NC *Encroachment Control Plan*



Marstel-Day was hired by Headquarters, Marine Corps to develop the Encroachment Control Plan (ECP) for Marine Corps Base (MCB) Camp Lejeune and Marine Corps Air Station (MCAS) New River. The purpose of the ECP was to summarize the framework through which the installations coexist with the immediate region and to support the establishment of partnerships with the local, regional, and state planning and regulatory communities.

Initial research for the ECP made it clear that rapid urbanization and incompatible development was a significant encroachment threat and had the potential to fracture existing relationships between the base and the community. As a result, MCB Camp Lejeune called upon Marstel-Day to stand up and facilitate the formation of the Community-Military Cooperative Planning Group (CPG) to engage the communities immediately surrounding the base in consistent, coordinated, and sustained communication in an attempt to find mutually-beneficial solutions to common planning-related challenges.

The CPG is a joint, standing forum through which the eastern North Carolina region can address long-range issues associated with compatible and sustainable growth both on- and off-base. It encourages cooperative land use planning between the military installations and the surrounding communities to ensure long-term compatible development.

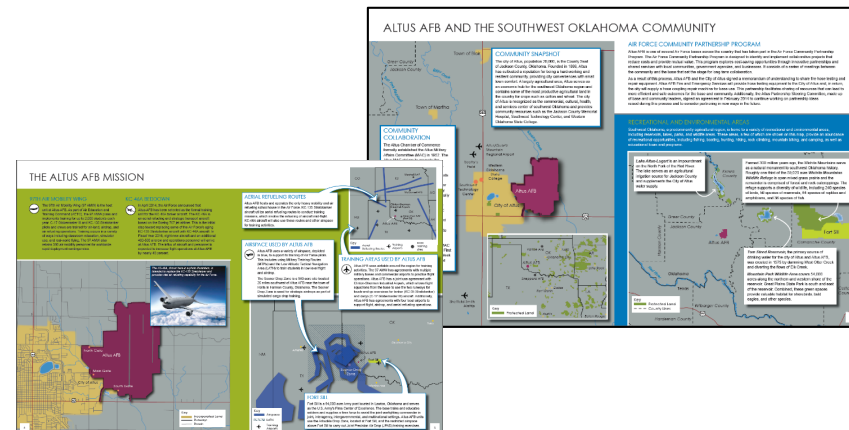
Contact:

Joe Ramirez, Community Plans and Liaison Officer, MCB Camp Lejeune
Phone: (910) 451-7645
joe.m.ramirez@usmc.mil

Oklahoma and Northern Texas *Encroachment Management Action Plans*

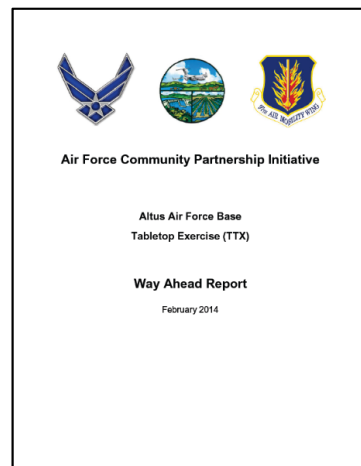
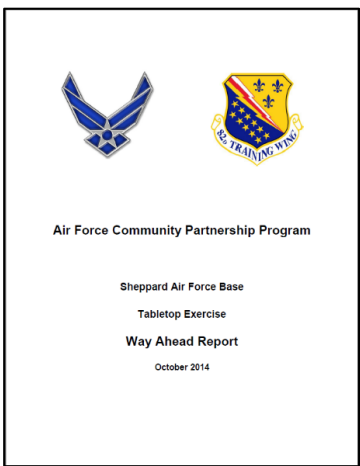
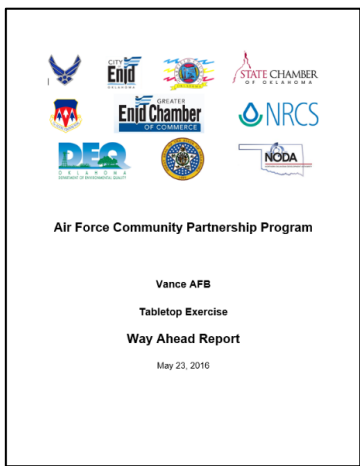
Marstel-Day, LLC prepared Installation Complex Encroachment Management Action Plans (ICEMAPs) for all Air Force Bases (AFBs) in the state of Oklahoma, as well as Sheppard AFB in Wichita Falls, Texas, between 2012 and 2014. The ICEMAPs for Tinker AFB, Altus AFB, Vance AFB, and Sheppard AFB identified and analyzed encroachment challenges that included but were not limited to incompatible urban growth, noise impacts in the community, water quantity and quality, interference by tall structures such as wind turbines, and spectrum interference caused by wind turbines.

In addition to the individual ICEMAPs, Marstel-Day developed a Regional Encroachment Management Action Plan (REMAP) for Altus AFB, Vance, AFB, and Sheppard AFB designed to address larger, regional encroachment challenges that affect all of the installations. The REMAP provides management actions designed to be executed by higher-level Air Force officials in coordination with state-and-national level stakeholders.



Oklahoma and Northern Texas *Community Partnership Programs*

Marstel-Day, LLC has facilitated Air Force Community Partnership (AFCP) meetings in numerous Air Force communities throughout the United States including Sheppard AFB-Wichita Falls, Texas, Vance AFB-Enid, Oklahoma, and Altus AFB-Altus, Oklahoma. The AFCP program includes a number of facilitated meetings between AFB personnel and members of the local community, held throughout the course of a year. The purpose of the meetings was to identify and implement partnerships between the bases and the local communities that result in lower operating costs, shared resources, and/or improved quality of life among the stakeholders. Partnerships developed during the Sheppard, Vance, and Altus AFCP programs included sharing small arms ranges, the development of a mechanic training center of excellence with local colleges, and opening up on-base facilities for use by the community. In addition to identifying useful partnerships between the installations and the surrounding communities, the AFCP meetings, in many cases, helped foster new relationships between the base and the surrounding communities.



Proposed Work Plan and Project Timeline

In accordance with pages 11-18 of the Request for Proposals, the White & Smith Team will complete the project in 9 Tasks, based on the assumed 14-month project schedule from date of contract. We will work with Project Manager Kelly during contract negotiation to solidify the timeline and needs for local data request and response.

Task	Task Description	Month													
		1	2	3	4	5	6	7	8	9	10	11	12	13	14
TASK I: PROJECT INITIATION															
1A	"Kick-Off" Meeting	■													
1B	Installation Tour	■													
TASK II: PUBLIC INVOLVEMENT															
2A	Interview Local and Military Officials		■												
2B	Prepare a Public Involvement Plan	■													
2C	Prepare Project Website	■	■												
2D	Plan for and Hold Public Workshops (3)		■								■			■	
TASK III: EXISTING AND HISTORICAL CONDITIONS ANALYSIS AND MAPPING															
3A	Existing Data Collection	■	■	■											
3B	GIS Mapping		■	■	■										
TASK IV: IDENTIFICATION AND ANALYSIS OF LAND USE AND FACILITIES CONFLICTS															
4A	Identify Existing Land Uses Located in Current Impact Areas		■	■	■	■									
4B	Evaluate Master Plans Impacting Fort Sill		■	■	■	■									
TASK V: FUTURE COMMUNITY DEVELOPMENT POTENTIAL AND ASSESSMENT OF FUTURE LAND USE CONFLICTS															
5A	Future Development Potential Analysis			■	■	■	■	■							
5B	Future Land Use Assessment			■	■	■	■	■							

Proposed Work Plan and Project Timeline continued on next page.

Proposed Work Plan and Project Timeline continued from previous page.

Task	Task Description	Month													
		1	2	3	4	5	6	7	8	9	10	11	12	13	14
TASK VI: LAND USE POLICY AND REGULATION RECOMMENDATIONS															
6A	Existing Regulations/Policies														
6B	New Regulations/Policies														
TASK VII: DRAFT AND FINAL JLUS REPORT															
7A	Draft Report presented to JLUS Sponsor														
7B	Recommendations to JLUS Policy Committee														
7C	Final Draft Report Distributed														
7D	Revisions to Final Draft Report														
7E	Presentation of Final Report to Policy Committee														
7F	Final Report Released to Public														
7G	Adoption of Final Report														
7H	Final Report Made Available														
TASK VIII: IMPLEMENTATION PLAN AND ACTION STEPS															
TASK IX: PRESENTATION OF REPORT & IMPLEMENTATION PLAN TO PARTICIPATING JURISDICTIONS, BY JOINT MEETING															

Projected Project Costs

The White & Smith Team will complete the project in 9 Tasks, based on the Proposed Work Plan and Project Timeline set forth above. We will perform these tasks for a **budget not-to-exceed \$265,727**.

This estimate includes all printing, reproduction, consultant fees, and travel costs. It is also assumed that the Consultant Team will perform all key tasks and that the local Project Sponsor will simply need to help coordinate meetings, facilitate data collection, and provide team feedback and guidance. We will work with Project Manager Steve Kelly during contract negotiation to revise these assumptions and the budget, as needed.

By Task, we estimate the Consultant level-of-effort and budget to be allocated generally as follows:

		Not-to-Exceed	
		Apx. Hours	Fees
1.	Project Initiation	80-120	\$13,036
2.	Public Involvement	80-120	\$13,036
3.	Existing and Historical Conditions Analysis and Mapping	150-220	\$26,073
4.	Identification and Analysis of Land Use and Facilities Conflicts	150-220	\$26,073
5.	Development Potential and Future Land Use Conflicts	150-220	\$26,073
6.	Land Use Policy and Regulation Recommendations	250-320	\$39,109
7.	Draft and Final JLUS Report	550-700	\$91,255
8.	Implementation and Action Steps	80-100	\$13,036
9.	Presentation of Report and Plan to Jurisdiction	80-100	\$13,036
		Consulting Fees Sub-Total	<u>\$260,727</u>
		Printing, Advertising Costs	\$5,000
		TOTAL PROJECT	<u>\$265,727</u>

References

Per the RFP, we are highlighting only three of our past client references for our Team's JLUS work over the last five years.

However, we encourage you to contact any prior clients, including those identified in the "Prior Experience on Similar Projects" section of the Proposal.

Lowcountry Council of Governments

**Joint Land Use Studies for Marine Corps Air Station, Beaufort and
Marine Corps Recruit Depot, Parris Island (2014-2015)
and
JLUS Implementation (2016)**

Ginnie Kozak, JLUS Project Manager

634 Campground Road
Yemassee, South Carolina 29945

843-726-5536

gkozak@lowcountrycog.org

Additional references follow on next page.

Missouri Military Preparedness and Enhancement Commission

Joint Land Use Study for Fort Leonard Wood (2012-2013)

Joe Driskill, Missouri Military Advocate

P.O. Box 1157
Jefferson City, Missouri 65102
573-526-0186
joe.driskill@ded.mo.gov

Harry S Truman Coordinating Council

**Joint Land Use Study for Camp Crowder (2013-2014)
and JLUS Implementation (2016)**

Ines Nizeye, JLUS Implementation Project Manager (now with Pasco County, Florida)

8731 Citizens Drive
New Port Richey, Florida 34654
727-847-8410
inizeye@pascocountyfl.net

Concluding Remarks

First, we reiterate the following distinguishing aspects of the White & Smith Team, set forth in our “Summary of Response and Benefits to ASCOG,” on page 3:

Army Joint Land Use Study and JLUS Implementation Experience
Local Government and Military Planning Experience in the Region
Personalized Approach
Project Management and Quality Control Measures
Emphasis on Installation Awareness

In conclusion, we would like to emphasize three key points:

Who you see, is Who you Get. Our Principal Officers for the Fort Sill Joint Land Use Study – Tyson, Phil, Jason, and Vagn – have worked together individually on every JLUS and JLUS Implementation project that we have teamed on. We know each other well and we have honed an approach that is efficient, responsive, and cost-effective. **We will not pass this project to “the back office.”**

Best Value for the Stakeholders. Having performed numerous JLUSs around the country – from Beaufort, South Carolina to Bremerton, Washington – we know what resources are needed and what are not in order to deliver a **meaningful JLUS process and an implementable JLUS study.**

Tailored Workproduct. Given our familiarity with the region, not only are we ready to “hit the ground running,” but we also are prepared to deliver a Joint Land Use Study that is **tailored to the unique aspects of this community,** Fort Sill, surrounding local governments, and the Oklahoma land use and statutory context.

ATTACHMENT A

QUALIFICATIONS QUESTIONNAIRE

The Association of South Central Oklahoma Governments is interested in entering into a relationship with a consultant who is able to assist with the Lawton Fort Sill Joint Land Use Study. This will require a consultant who is experienced with the cities and/or other public entities within a 25-mile radius of Fort Sill and who is available and accessible to the staff and employees.

To assist in the evaluation of qualifications, please answer the following questions:

1. Please explain what separates your company from its competitors and what specifically qualifies you to be a consultant for the City.

First, experience in the region. Among the ILUS and ILUS Implementation projects we have completed nationwide, four involve **Army Installations in the region**: Fort Hood, Fort Leonard Wood, Camp Clark, and Camp Crowder, as well as Cannon Air Force Base. In addition, our firm has done zoning work in Oklahoma and prepared the **Airfield Environs Overlay for the City of Enid and Vance AFB**.

Second, we bring **personalized expertise and attention** to our work. Less a "company," *per se*, we are a team of 5 planners who will be "on the ground" with you throughout, even as we rely on and call upon the expertise of our full firms and staffs. Tyson, Phil, Jason, Doug, Kelly, and Vagn will be attending ILUS Policy Committee and Technical Working Group meetings, working with staff, and conducting public outreach during this project. Each of us involves ourselves personally with our clients and we **protect our availability** throughout to ensure **personal attention to detail and quality of workproduct**.

2. Please describe your philosophy for encouraging public participation.

The credibility of the ILUS process and the final ILUS recommendations depends on a Public Involvement Plan that is **all-inclusive, responsive to need, and transparent**.

Therefore, there is **no such thing as one-size-fits-all**. Our past clients will tell you this.

We will assess during Task 1 what our **Public Awareness Campaign** should include: mailers, social media, radio announcements, community bulletin boards, traditional media, or emails. In addition, our Public Involvement Plan will include workshops in which we **engage with (not just present to)** our attendees. This will include **Interactive, real-time surveys**, boards and maps that allow the public to **locate their property relative to Fort Sill**, and open house formats to **allow landowners one-on-one, face-to-face communication** with our team and Army representatives.

TO THE BEST OF MY KNOWLEDGE, THE ABOVE INFORMATION IS TRUE AND CORRECT.

Name and Signature of Principal

Tyson Smith
(Name)

[Signature]
(Signature)

Title of Principal:

Shareholder

Company Name:

White & Smith

Date

10-10-16

ATTACHMENT B

RESPONDANT'S CERTIFICATION

NOTE: THIS PAGE MUST BE INCLUDED WITH YOUR RESPONSE

I, the undersigned, by signing the following statement agree that I have read and understand all of the instructions, specifications, and terms and conditions contained on each page of this Request for Proposals. I also understand that if this response is accepted by the Association of South Central Oklahoma Governments that all of the instructions, specifications, and terms and conditions submitted in my response and any additions, changes, or deletions made during negotiations will be made a part of this response under a binding Contract between my company and ASCOG. I also certify that this response is made without previous understanding, agreement, or connection with any person, firm, or corporation making a response for the same materials, and is in all fair and without collusion or fraud:

Our company is a (Check One):

- Corporation (The response MUST be signed by an Officer of the company)
Partnership _____ (The response MUST be signed by a General Partner)
Joint Venture _____ (The response MUST be signed by an Officer of the company)
Sole Proprietor _____ (The response MUST be signed by the Owner)

Compensation requirements:

Any compensation paid to the Respondent concerning the products and services should be outlined in detail in the response on a page immediately following the Respondent's Certification. The undersigned agrees not to accept remuneration or commission from any other source for any services related in the response.

AUTHORIZED COMPANY REPRESENTATIVE PLEASE SIGN BELOW:

NAME (TYPED/PRINTED): Tyson Smith

SIGNATURE: *TS* DATE: 10-10-16

[Your signature attests to your offer to provide the goods and/or services in this response according to the published provisions of this Request for Proposals. Contract is not valid until response/Contract is approved by ASCOG. When an award letter is issued, it becomes a part of this contract.]

[Appropriate Acknowledgment must be completed]

ATTACHMENT C

RFP for
FORT SILL JOINT LAND USE STUDY

NOTE: THIS PAGE MUST BE INCLUDED WITH YOUR

RESPONSE EXCEPTIONS/DEVIATIONS TO SPECIFICATIONS

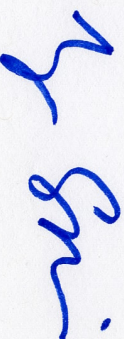
Please Initial:

we have not made exceptions or deviations to specifications

we have made exceptions or deviations to specifications. Please list exceptions/deviations in the space below:

FIRM NAME: White & Smith, LLC

SIGNATURE OF PERSON AUTHORIZED TO SIGN ON BEHALF OF FIRM:



Tyson Smith, Shareholder
SIGNER'S NAME AND TITLE

DATE

10-10-16

CORPORATE ACKNOWLEDGMENT: RFP FOR THE LAWTON-FORT SILL JOINT LAND USE STUDY

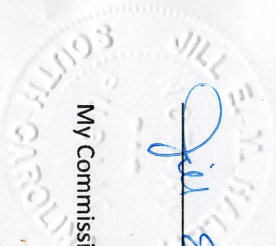
THE STATE OF _____ \$
COUNTY OF _____ \$

BEFORE ME, the undersigned authority, a Notary Public in and for said County and State, on this day personally appeared:

Tyson Smith _____ Shareholder
(Print Name) (Print Title)

of the corporation known as White & Smith, LLC, known to me to be the person and officer whose name is subscribed to the foregoing instrument and acknowledged to me that the same was the act of said corporation, that he or she was duly authorized to perform the same by appropriate resolution of the board of directors of such corporation and that she or he executed the same as the act of such corporation for the purposes and consideration therein expressed, and in the capacity therein stated.

GIVEN UNDER MY HAND AND SEAL OF OFFICE this the 14th day of October 2016.



Jill E. M. Allen Notary Public In and For Charleston County, South Carolina
My Commission expires: 1-11-2020

SOLE PROPRIETORSHIP ACKNOWLEDGMENT FORM: RFP FOR LAWTON-FORT SILL JOINT LAND USE STUDY

THE STATE OF _____ \$
§

COUNTY OF _____ \$

BEFORE ME, the undersigned authority, a Notary Public in and for said County and State, on this day personally appeared _____ known to me to be the person whose name is subscribed to the foregoing instrument, and acknowledged to me that he/she executed the same for the purposes and consideration therein expressed.

Attachment D

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
White & Smith, LLC

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification; check only **one** of the following seven boxes:

Individual/sole proprietor or single-member LLC
 C Corporation
 S Corporation
 Partnership
 Trust/estate
 Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ **S**

Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.

4 Exemptions (codes apply only to certain entities; not individuals; see instructions on page 3):
Exempt payee code (if any) _____
Exemption from FATCA reporting code (if any) _____
(Applies to accounts maintained outside the U.S.)

Print or type

See **Specific Instructions** on page 2.

5 Address (number, street, and apt. or suite no.)
200 NE Missouri Road ; Suite 200

6 City, state, and ZIP code
Lee's Summit, MO 64086

7 List account number(s) here (optional)

Requester's name and address (optional)
Association of South Central Oklahoma Governments (ASCOG)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number								
			-					
or								
Employer identification number								
7	2	-	1	5	9	1	9	3
								5

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

Sign Here S Signature of U.S. person ▶ Smith Date ▶ October 10, 2016

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.
Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/w9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.

By signing the filed-out form, you:
1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).

2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

Attachment E

QUARTERLY REPORT #2

FOR THE

LOWCOUNTRY 2015 JOINT LAND USE STUDIES

MAY 2014-JULY 2014

- 1. Public Kick-Off Meeting:** The Consultants prepared for and held two public meetings to introduce the public to the Joint Land Use Study process for both Marine Corps Air Station and Marine Corps Recruit Depot. These were held on May 22 at Battery Creek High School, southwest of the Air Station. Between 25-45 people attended each meeting. The Consultants prepared handouts and set up boards with easels indicating key mapped areas for each installation, including the JLUS study area and known impact zones and arcs.
Public input and questions were received and answered by the Consultants and a live-polling process was used to kick-off the Public Survey.
- 2. Informational Brochure:** The Consultants prepared and distributed the first of two informational brochures and made same available by download on the Project Website.
- 3. Public Survey:** The Public Survey was begun via a live-polling exercise on May 22nd at the Public Kick-Off Meeting. The Survey was made available for completion online and in hardcopy. At the recommendation of the JLUS Policy Committee, the LCOG JLUS Project Manager distributed the surveys at designated places around the County, including community groups and County libraries. The Consultants contacted civic organizations, identified by the Policy Committee, directly to make sure they were aware of the study and the survey opportunity, including the Rotary, Chambers, and the local chapter of the Association of University Women.
The Consultants updated the Policy Committee on Public Survey participation at its July 25th meeting in Beaufort. The Survey was closed on July 31st.
- 4. Strengths, Weaknesses, Opportunities, and Threats Analyses:** The Consultants prepared the SWOT Analyses for both installations, based on stakeholder, public, and committee input. The draft SWOT was presented for feedback by the Policy and Technical Committees on July 25th. The Consultants reported that the SWOTs would be used to develop implementation recommendations and would be summarized in the JLUS Reports.
- 5. Land Use Compatibility Assessments and Base Maps:** The Consultants prepared the Land Use Compatibility Assessments for both MCAS and MCRD, including all base and compatibility maps. These were presented for review and input by the Technical Committee on July 25th. Input was received and will be incorporated by the Consultants for presentation to the Policy Committee.



Attachment E

6. **TDR Implementation Materials:** The Consultants have prepared initial drafts of the TDR implementation forms and applications discussed with the Technical Committee at its April meeting with the Consultants. It is anticipated that these forms will be finalized in August and presented for committee review in September. The forms will include:

- TDR Certificate Application Form
- TDR Redemption Application
- Lost TDR Certificate Form & Release
- TDR Transfer Application Form
- Frequently Asked Questions
- TDR Registry
- Program Activity Overview

7. **Steering Committees:** The Consultants met with the Policy Committee during its standing bi-monthly meetings as the Northern Beaufort County Plan Implementation Committee in May and July. The Committees gave feedback on the initial public outreach efforts and initial deliverables, including the Land Use Compatibility Assessments, SWOT Analyses, and Public Survey processes. The Policy recommended presenting the Land Use Compatibility Assessments and SWOT Analyses at a public outreach meeting, later in the study, when there are additional materials and recommendations to be presented.



Attachment F

FORT SILL-JOINT LAND USE STUDY CONTRACT

THIS CONTRACT ("Contract") is entered into this _____ day of _____, 2016 effective immediately by and between _____ ("CONSULTANT") and the Association of South Central Oklahoma Governments (ASCOG), a Public Trust within the State of Oklahoma. For convenience, the CONSULTANT and ASCOG may sometimes be referred herein collectively as "parties" and individually as a "party".

WITNESSETH

WHEREAS, ASCOG desires to engage the CONSULTANT to provide consulting services to ASCOG for the Lawton-Fort Sill Joint Land Use Study and other work and services all as described in ASCOG's RFP which is attached hereto as Exhibit "A".

WHEREAS, CONSULTANT agrees to provide such work and services for ASCOG in accordance with the terms of this Contract;

NOW, THEREFORE, for the mutual promises set forth herein, and for other valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the parties hereto mutually agree as follows:

1. **Employment of Consultant:**

- A. ASCOG agrees to engage the CONSULTANT and the CONSULTANT hereby agrees to perform the services described in ASCOG's RFP dated September 15, 2016, which is hereby incorporated into this Contract as Exhibit "A" and as described in the CONSULTANT's response dated _____, 2016, which is hereby incorporated into this Contract as Exhibit "B".
- B. Notwithstanding anything to the contrary contained in this Contract, ASCOG and CONSULTANT agree and acknowledge that ASCOG is entering into this Contract in reliance on CONSULTANT's special and unique abilities with respect to the Lawton-Fort Sill Joint Land Use Study. CONSULTANT accepts the relationship of trust and confidence established between it and ASCOG by this Contract. CONSULTANT covenants with ASCOG to use its best efforts, skill, judgment, and abilities to perform the work in the Project and to further the interests of ASCOG in accordance with ASCOG's requirements, in accordance with the highest standards of CONSULTANT's profession or business and in compliance with all applicable national, federal, state, municipal, laws, regulations, codes, ordinances, orders and with those of any other body having jurisdiction. The CONSULTANT warrants, represents, covenants, and agrees that all of the work to be performed by the CONSULTANT under or

pursuant to this Contract shall be of the standard and quality which prevail among similar businesses and organizations of superior knowledge and skill engaged in providing similar services in major United States urban areas under the same or similar circumstances. CONSULTANT warrants, represents, covenants, and agrees that the work it performs will be accurate and free from any material errors.

2. Term:

The term of this Contract shall be no more than fifteen (15) months, commencing on (Date), 2016 and ending no later than (Date), 2017. The Contract may be extended six (6) months upon mutual agreement of both parties should unavoidable and unforeseen events demand it. However, no additional compensation will be provided for extensions.

3. Compensation:

ASCOG agrees to pay the CONSULTANT a fee of \$ 265,727 as described in the CONSULTANT's Response (attached hereto as Exhibit "B"). CONSULTANT agrees to provide all services required under this Contract for said sum.

4. Method of Payment:

The CONSULTANT shall bill monthly for services completed to date. Total payments shall not exceed the amount shown in (3), above. ASCOG shall pay invoices within 30 days of receipt; provided, however, that in the event ASCOG requests any supporting documentation for charges, payment shall be made within 30 days of receipt of the supporting documentation.

5. Changes:

ASCOG may, from time to time, require changes in the scope of services of the Consultant to be performed hereunder. Such changes, which are mutually agreed upon by and between ASCOG and the CONSULTANT, shall be incorporated in written amendment to this Contract.

6. Services and Materials to be Furnished by ASCOG:

ASCOG shall furnish the CONSULTANT with all available information, data, and material CONSULTANT requests pertinent to the execution of this Contract. ASCOG shall cooperate with the CONSULTANT in carrying out the work herein and shall provide adequate staff for liaison with the CONSULTANT.

7. Termination:

a. If, for any cause, the CONSULTANT shall fail to fulfill in timely and proper manner its obligation under this Contract, ASCOG shall thereupon have the

right to terminate this Contract by giving written notice to the CONSULTANT of such termination and specifying the effective date thereof, at least five (5) days before the effective date of such termination.

- b. Either Party has the right to terminate this Contract for any reason, with or without cause, upon ten (10) business days' notice to the other Party. Upon termination pursuant to this paragraph, the CONSULTANT shall be entitled to payment of such amount as shall compensate CONSULTANT for the services satisfactorily performed from the time of the last payment date to the termination date in accordance with this Contract, provided the CONSULTANT shall have delivered to ASCOG such statements, accounts, reports and other materials as required herein, and provided that CONSULTANT shall have delivered to ASCOG all reports, documents and other materials prepared by CONSULTANT prior to termination. ASCOG shall not be required to reimburse CONSULTANT for any services performed or expenses incurred preformed or expenses incurred after the date of the termination notice.

- c. **Non-appropriation.** Most of the funding for this project comes from the Department of Defense, Office of Economic Adjustment (OEA). ASCOG has been awarded a contract from OEA which is expected to be sufficient to fund the Lawton-Fort Sill JLUUS contractor requirements. If funding for the contract is cut due to budget reductions or other unforeseen events beyond ASCOG's control, CONSULTANT has no right to compel to make any payments required hereunder, or to expend funds beyond those specifically identified for this project. If the contract between ASCOG and OEA for the JLUUS project is reduced for any reason, ASCOG will not be liable for any differences. If such should occur, ASCOG and the CONSULTANT will attempt to renegotiate an amended contract for a reduced amount. If such negotiation is unsuccessful, either party may terminate the contract within thirty (30) days.

ASCOG agrees to use its best efforts to obtain authorization and appropriation of such funds and if such funds are appropriated, the governing body of ASCOG shall, for each ensuing Fiscal Year in which payments are due to be made, make all such payments subject to the terms of this Contract.

8. Information of Reports:

The CONSULTANT shall, at such time and in form as ASCOG may require, furnish such periodic reports concerning the status of the services provided hereunder, and copies of proposed and executed plans and other information relative to the Project as may be requested by ASCOG. The CONSULTANT shall furnish ASCOG, upon request, with copies of all documents and other material prepared or developed in relation with or as part of the services provided hereunder.

The CONSULTANT shall furnish ASCOG with an electronic copy of all materials prepared or developed in relation with or as part of the services provided hereunder.

9. Records and Inspections:

CONSULTANT shall maintain full and accurate records with respect to all matters covered under this Contract for a period of two years after the termination of the Contract, or if litigation relating to any aspect of this Contract is commenced within the two-year period, until there is a final, non-appealable judgment or a settlement agreement has been executed between all the parties. ASCOG shall have free access at all proper times to such records, and the right to examine and audit the same and to make transcripts there from, and to inspect all program data, documents, proceedings, and activities.

10. Completeness of Contract:

This Contract and the documents incorporated herein by specific reference contain all the terms and conditions agreed upon by the parties hereto, and no other agreements, oral or otherwise, regarding the subject matter of this contract or any part thereof shall have any validity or bind any of the parties hereto. If there is any conflict between the terms of this Contract and the documents attached hereto, the terms of this Contract shall control. This Contract may not be subsequently modified except in writing signed by both parties.

11. ASCOG Not Obligated to Third Parties: ASCOG shall not be obligated or liable hereunder to any party other than the CONSULTANT.

12. When Rights and Remedies Not Waived:

In no event shall the making by ASCOG of any payment to the CONSULTANT constitute or be construed as a waiver by ASCOG of any breach of covenant, or any default which may exist on the part of the CONSULTANT and the making of any such payment by ASCOG while any such breach or default shall exist in no way impairs or prejudices any right or remedy available to ASCOG in respect to such breach or default.

13. Indemnification:

The CONSULTANT agrees to indemnify and hold harmless ASCOG and all of its officers, employees, council members and agents from any and all claims by third parties, including, but not limited to, claims for damages, judgments, attorney's fees, expenses, injunctive or equitable relief, interest, personal injury, and death, that may arise from the CONSULTANT's performance under this Contract, provided that CONSULTANT shall not be required to indemnify or hold ASCOG harmless for

the intentional or negligent acts or omissions of ASCOG to the extent that such acts cause the injuries or damages complained of.

14. Insurance:

Consultant agrees to maintain insurance for comprehensive general liability, automobile liability insurance, workers' compensation and professional liability during the term of this Contract in the amounts not less than those required of other professional consultants retained by ASCOG. CONSULTANT shall provide ASCOG with evidence of such coverage in a form which is acceptable to ASCOG. Such policies shall name ASCOG, its officers, and employees as an additional insured and shall provide for a waiver of subrogation against ASCOG.

15. Personnel:

The CONSULTANT has all personnel required in performing the services under this Contract. All of the services required hereunder will be performed by the CONSULTANT or under CONSULTANT's supervision, and all personnel engaged in the work shall be qualified to perform such services.

16. Assignability:

The parties hereby agree that Consultant may not assign, convey or transfer its interest, rights and duties in this Contract without the prior written consent of ASCOG.

17. Notices:

Any notices or reports required by this Contract shall be sufficient if sent by the parties via personal delivery, facsimile, or via United States certified mail, postage paid, to the addresses noted below:

To ASCOG: ASCOG
CEDD Division
P.O. Box 1647
Duncan, OK 73534-1647

To Contractor: White & Smith, LLC
255 King Street, Charlotte, SC 29401

18. Governing Law Venue:

This Contract shall be governed by and construed in accordance with the laws of the State of Oklahoma. Venue for any action brought to interpret or enforce the terms of this contract shall lie in Stephens County, Oklahoma.

19. Attorney's Fees/Costs:

If any legal proceeding is brought to interpret or enforce the terms of this Contract, the prevailing party in such action shall be entitled to recover from the non-prevailing party, in addition to the prevailing party's actual damages, reasonable attorney's fees and court costs.

20. Authority to Sign:

The parties hereby warrant and represent that the undersigned persons have full authority and are duly authorized to sign on behalf of their respective principals and that such principals have duly authorized the transaction contemplated by this Contract.

21. IN WITNESS WHEREOF, ASCOG and the CONSULTANT have executed this

Contract as of the date first written above.

ASCOG:

By (Signed): _____

Print Name: _____

Title: _____

CONSULTANT:

By (Signed): 

Print Name: Tyson Smith

Title: Shareholder

White & Smith, LLC