2016 SUBDIVISION STAGING POLICY

Presentation on Alternative Constructs for Transportation Adequacy Testing
January 14, 2016

Intro

Steps needed to develop a new transportation test:

- Develop a framework for incorporating the new test
- Establish applicable thresholds(s) for adequacy
- Determine necessary monitoring requirements
- Incorporate funding/mitigation options
- Define relationship to Master Plans

Objective of today's roundtable discussion:

Evaluate 3 alternative frameworks for determining transportation adequacy - focusing mainly on an alternative policy area test

Background

Concerns with current transportation test:

TPAR –

- generally technically sound
- dependent on Department's regional travel forecasting model
- may be better suited comparing potential network investments
- considered by some to be somewhat of a "black box"

LATR-

- use of auto-centric Level of Service measure (CLV)
- CLV-based thresholds unfairly penalizes project approved last

In General

Objectives:

CLARITY –

- methodology or approach should be as clear and simple to understand as possible

RELEVANCE –

- tests should reflect the County's goals and policies as they vary among different place types

TRANSPARENCY –

- assumptions and data sources should be well documented providing results that intuitively "makes sense"

In General

Three Alternative Approaches

Common to all three alternatives:

- New Policy Area Typology
  - TOD areas (established and emerging TODs)
  - Beyond TOD areas
- An option to replace TPAR as the policy area test
- Retain CLV and HCM for local area test in the Beyond TOD areas

Common Elements

Policy Area Typology – TOD Areas

	TOD - Established	TOD - Emerging
Bethesda CBD	X	
Friendship Heights CBD	X	
Silver Spring CBD	X	
White Flint MSPA	X	
Wheaton CBD	X	
Glenmont MSPA		X
Grosvenor MSPA		X
Rockville TC MSPA		X
Shady Grove MSPA		X
Twinbrook MSPA		X
Chevy Chase Lake		X
Long Branch		X
Takoma Langley		X
Life Science Center		X

Common Elements

Policy Area Typology – Beyond TOD Areas

	Beyond TOD - Mature Suburban	Beyond TOD - Residential Suburban	Rural	Master Plan Special Pro-Rata
Derwood	X			
Rockville City	X			
North Bethesda	X			
Bethesda – Chevy Chase	X			
Germantown TC	X			
Kensington – Wheaton	X			
Silver Spring – Takoma Park	X			
Aspen Hill		X		
Clarksburg		X		
Fairland		X		
Gaithersburg City		X		
Germantown East		X		
Germantown West		X		
Montgomery Village / Airpark		X		
Cloverly		X		
North Potomac		X		
Olney		X		
Potomac		X		
R&D Village		X		
Rural East			X	
Rural West			X	
Damascus			X	
White Oak Policy Area				X
White Flint Sector Plan Area				X

Framework

Job Access via Transit & VMT/Household

Policy Area	Sub-Area	Area Test	Local Test	Area Payment	Local Payment	Annual Additional Tax for Cap. & Ops.	Impact Tax	Pay & Go
TOD	Established TOD	None	None	N/A	N/A	Yes	Yes or Pro-Rata as Applicable	Yes
	Emerging TOD Center	Job Access via Transit	1700 CLV& HCM	25% of Impact Tax	50% of Impact Tax or Mitigate or Pro-Rata as Applicable	No	Yes or Pro Rata as Applicable	Yes
Beyond TOD	Mature Suburban	Policy Area VMT/Household vs. County Average	1600 CLV & HCM	25% of Impact Tax	Mitigate	No	Yes	No
	Residential Suburban	Policy Area VMT/Household vs. County Average	1500 CLV & HCM	25% of Impact Tax	Mitigate	No	Yes	No

Framework

How well does Job Access via Transit & VMT/Household meet the objectives of clarity, relevance, and transparency?

Component/Issue	Clarity	Relevance	Transparency
Definition of Place Types	Good – uses existing boundaries for the most part	Good – similar places are grouped together	Good – changes are made in master plan context or Subdivision Staging Policy review
Area Test	Fair – uses model or other relatively detailed analysis	Good – tests measure goal related metrics on a per capita basis	Good – despite model complexity results should be mostly intuitive & can be forecasted
Local Test	Good – fewer CLV levels with more focus on place appropriate metrics.	Good – using CLV or LOS in mature TOD's with Metrorail is counter-productive. Balance of County pivots from 1600 CLV metric generally accepted as capacity.	Good – traffic studies using established guidelines and current conditions still required in 3 of 4 sub-areas
Funding / Mitigation	Fair – structure of annual additional tax TBD.	Fair – impact tax payments or pro-rata share may or may not lead to programmed improvements for specific locations.	Fair – per trip calculation for Pro Rata has numerous necessary assumptions, same for impact tax calculation
Monitoring	Good – Methodology in place for all but job access via transit (which is under development)	Fair - Metrics in area test will likely not vary much except for job access via transit when major high quality facilities introduced	Good – metrics are examined by Planning Board every two years with changes noted

Framework

Job Access via Transit & Jobs/Housing Balance Approach

Policy Area	Sub-Area	Area Test	Local Test	Area Payment	Local Payment	Annual Additional Tax for Cap. & Ops.	Impact Tax	Pay & Go
TOD	Established TOD	None	None	N/A	N/A	Yes	Yes or Pro-Rata as Applicable	Yes
	Emerging TOD Center	Job Access via Transit	1700 CLV& HCM	25% of Impact Tax	50% of Impact Tax or Mitigate or Pro-Rata as Applicable	No	Yes or Pro Rata as Applicable	Yes
Beyond TOD	Mature Suburban	Policy Area Jobs/Housing Balance vs. County Goal	1600 CLV & HCM	25% of Impact Tax	Mitigate	No	Yes	No
	Residential Suburban	Policy Area Jobs/Housing Balance vs. County Goal	1500 CLV & HCM	25% of Impact Tax	Mitigate	No	Yes	No

Framework

How well does Job Access via Transit & Jobs/Housing Balance meet the objectives of clarity, relevance, and transparency?

Component/Issue	Clarity	Relevance	Transparency
Definition of Place Types	Good – uses existing boundaries for the most part	Good – similar places are grouped together	Good – changes are made in master plan context or Subdivision Staging Policy review
Area Test	Fair for TOD – dependent on relatively detailed model Good for Beyond TOD – uses Cooperative Land Use Forecast for Jobs/Housing Balance	Fair – measures goal related metrics but jobs/housing balance is largely determined by market forces.	Good – despite model complexity for TOD test, results should be mostly intuitive & can be forecasted. Good for Beyond TOD as goal would be set by Council.
Local Test	Good – fewer CLV levels with more focus on place appropriate metrics.	Good – using CLV or LOS in mature TOD's with Metrorail is counter-productive. Balance of County pivots from 1600 CLV metric generally accepted as capacity.	Good – traffic studies using established guidelines and current conditions still required in 3 of 4 sub-areas
Funding / Mitigation	Fair – structure of annual additional tax TBD.	Fair – impact tax payments or pro-rata share may or may not lead to programmed improvements for specific locations.	Fair – per trip calculation for Pro Rata has numerous necessary assumptions, same for impact tax calculation
Monitoring	Good – Methodology in place for all but job access via transit (which is under development)	Fair - Metrics in area test will likely not vary much except for job access via transit when major high quality facilities introduced	Good – metrics are examined by Planning Board every two years with changes noted

Framework

NADMS & Jobs/Housing Balance Approach

Policy Area	Sub-Area	NADMS Goal	Local Test	Area Payment	Local Payment	Annual Additional Tax for Operations & Maintenance	Initial Impact Tax	Pay & Go
TOD	Established TOD	50% (or Per Master Plan)	None	See Initial Impact Tax Column	N/A	Annual Fee Based on Assessed Value & Graduated Attainment of Policy Area NADMS Goal	Based on Cost of Development & Policy Area NADMS Goal @ Time of Development Application	Yes
	Emerging TOD Center	35% (or Per Master Plan)	None	See Initial Impact Tax Column	N/A	Annual Fee Based on Assessed Value & Graduated Attainment of Policy Area NADMS Goal	Based on Cost of Development & Policy Area NADMS Goal @ Time of Development Application	Yes
Beyond TOD	Mature Suburban	Policy Area Jobs/Housing Balance vs. County Goal	1600 CLV & HCM	25% of Impact Tax	Mitigate	No	Yes	No
	Residential Suburban	Policy Area Jobs/Housing Balance vs. County Goal	1500 CLV & HCM	25% of Impact Tax	Mitigate	No	Yes	No

Framework

How well does NADMS & Jobs/Housing Balance meet the objectives of clarity, relevance, and transparency?

Component/Issue	Clarity	Relevance	Transparency
Definition of Place Types	Good – uses existing policy area boundaries – or master plan boundaries for the most part.	Fair – approach focused on NADMS attainment for individual developments.	Good – changes are made in master plan context or Subdivision Staging Policy review
Area Test (NADMS Goal)	Good - benchmark is likely set by model output and can be readily compared to existing NADMS - Good for "Beyond TOD" as Cooperative Land Use Forecast used for Jobs/Housing Balance	Fair for TOD – NADMS may not have been addressed in master plan in all areas. Fair for "Beyond TOD" – measures goal related metrics but jobs/housing balance is largely determined by market forces.	Good – despite model complexity for NADMS benchmark, results should be mostly intuitive & can be forecasted. Good for "Beyond TOD"- goal would be set by Council.
Local Test	Not Applicable for TOD – Good for Beyond TOD – fewer CLV levels with more focus on place appropriate metrics.	Poor if absence of Local Test applies to corridors with no programmed high quality transit. Good for "Beyond TOD" as balance of County pivots from 1600 CLV metric generally accepted as capacity.	Fair – traffic studies using established guidelines and current conditions still required in 2 of 4 sub-areas
Funding / Mitigation	Fair – NADMS incentive clear but process may get complicated if applied to different land uses and project phases	Fair – funding based on assessed value and NADMS attainment and not necessarily related to cost of improvements.	Fair – would require considerable amount of monitoring to establish funding level.
Monitoring	Poor – monitoring of NADMS at project level a challenge.	Good – NADMS monitoring in some manner likely to be part of any approach because of relevancy and is established as a metric in multiple existing Master Plans.	Good – NADMS examined by Planning Board in SSP review and Master Plan development and adoption.