Montgomery County

# Colocation of Public Facilities

April 2018

M-NCPPC

MONTGOMERY COUNTY MARYLAND

BOLAN SMART ASSOCIATES

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# COLOCATION OF PUBLIC FACILITIES FOR MONTGOMERY COUNTY

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# I.    EXECUTIVE SUMMARY

**Study Purpose**

This study establishes a framework for Montgomery County to pursue colocation opportunities for county agencies and departments. Colocation, the sharing of real estate (land and buildings) and services (infrastructure, technology, etc.) by two or more organizations, offers many benefits, including resource conservation and operational cost-effectiveness.

A colocation Directors Oversight Committee (DOC) was created at the direction of the Montgomery County Council and County Executive under the joint leadership of the County Executive's Office and the Maryland-National Capital Park and Planning Commission (M-NCPPC). This current initiative follows the 2015 completion of the Montgomery County Colocation White Paper (Phase 1, http://www.montgomeryplanning.org/research/documents/MNCPPCColocationFinal1-14-15.pdf), which addressed possible opportunities and challenges for colocation in Montgomery County, and included looking at policies and practices in other jurisdictions.

The purpose of this colocation study (Phase 2) is to examine historical, current and future colocation initiatives in Montgomery County and to document the DOC's findings, recommendations and next steps. Although the DOC's focus is physical colocation opportunities (facilities), there may be many options for agencies / departments to collaborate on business operations and administration that could improve future service delivery. Specific DOC evaluation concentrates on:

   a)  Enhancing the delivery of Montgomery County services.
   b)  Addressing resource constraints (real estate and financial).
   c)  Encouraging agency and department engagement.
   d)  Advancing the colocation conversation.

DOC objectives include:

   a)  Compiling and reviewing agency planning procedures and metrics.
   b)  Establishing multi-organizational colocation principles and approaches to planning.
   c)  Dissecting constraints to colocation options.
   d)  Exploring colocation prospects for inter-jurisdictional liaison and cooperation.
   e)  Promoting a holistic approach toward community interests and engagement.

**Colocation Study Organizational Structure and Stakeholder Engagement**

The colocation study is the product of the DOC, consisting of senior level leadership representing:

   a)  Montgomery County Executive Office
   b)  Montgomery County Department of General Services (DGS)
   c)  M-NCPPC - Montgomery County Planning Department (M-NCPPC Planning)
   d)  M-NCPPC – Montgomery County Department of Parks (M-NCPPC Parks)
   e)  Montgomery County Public Schools (MCPS)
   f)  Montgomery County Council

g) Office of Management and Budget (OMB)

h) Montgomery County Department of Transportation (DOT)

i) Housing Opportunities Commission (HOC)

j) Montgomery College

k) Washington Suburban Sanitary Commission (WSSC)

Additional input was obtained through strategic stakeholder interviews, comprising more than 16 agencies and departments, and totaling close to 100 county representatives.

## Colocation Types / Definition

The study respects that no single definition of colocation can be applied; there are many possible interpretations and applications of the concept. Rather, colocation should be embraced as a standard planning practice of physically locating organizations in facilities together to save resources and increase potential collaboration. For purposes of this study, the DOC agreed to use six definitions of colocation as follows:

1. Public Uses in the Same Building
2. Adjacent Public Uses
3. Adjacent Private Uses
4. Joint Use of Space
5. Public Private Partnerships (PPP)
6. Shared / Other Public Benefits or Interest

## Existing Montgomery County Projects, Policies and Practices

Approximately 165 examples of colocation projects were identified in Montgomery County as part of the colocation study. Historically, colocation was most prevalent in bilateral partnerships between MCPS and M-NCPPC Parks or the Montgomery County Department of Health and Human Services (i.e. child care programs and health centers). Of these 165 projects, six were selected for detail profiling, primarily because they are recently delivered projects comprising a broad cross-section of facility types and agencies. Projects are categorized into two colocation realms: colocated administrative functions and colocated service delivery.

## Pilot Projects

The DOC identified three pilot projects to highlight possible models for Montgomery County that could help expand colocation awareness. One pilot is for countywide internal operational services (fueling management), one is an under-utilized geographically-based site (Rockville / Carver Educational Service Center Site) and the third pilot represents possible future service delivery concepts (High School Community Service Colocation).

**Study Findings and Recommendations**

*Primary Principles*

A consensus for colocation action is premised on the following primary principles:

a)  Colocation is not a goal but a tool to achieving a desired outcome.
b)  Colocation is about effective service delivery, a possible answer to resource constraints and realizing cost-saving opportunities.
c)  Clustering of services and a one-stop-shop mentality can be an objective, but its application must be grounded in mission-driven priorities, including geography, to best meet the needs of local populations.
d)  Creating and supporting a framework that integrates colocation into multiple phases of the planning process will help promote a colocation mindset.
e)  Policy guidelines at the executive level across agencies are important to reinforcing colocation.

*Administrative Action*

Executive Branch / Council Level Policy Advancement

a)  Possible county policies and/or County Council resolutions (i.e. Council Resolution No 12-1758 for the Interagency Technology Policy and Coordination Committee (ITPCC).
b)  County Executive's communications role.
c)  Executive leadership to continue to provide DOC oversight, identify DOC obligations, prescribe actions, implementation recommendations, etc.
d)  Employ incentives to offset agency / department reservations and elevate interest.
e)  Facilitate interagency procurement tools and resource sharing.

Agency / Department Level

a)  Appoint and sustain agency-level designated staff for interagency communications to advance on-going collaboration.
b)  Leverage and expand on existing interagency relationships.
c)  Adapt annual reports to include colocation agency self-evaluation of colocation history, progress and future goals.
d)  Agencies may incorporate colocation considerations when assessing business service delivery and facility metrics (i.e. consolidation of duplicative services between agencies / departments).
e)  Reliance on agency / departmental accountability and self-monitoring (fundamental to the success of colocation).

<u>Budget Advancement</u>

a) Funding incentives to encourage collaborative efforts.

b) Consider funding a non-departmental account dedicated to on-going planning of colocation initiatives.

c) Assess the merit of using revolving funding sources, such as Advance Land Acquisition Revolving Funds (ALAR Funds) for colocation projects.

*Ongoing Colocation DOC Initiative*

a) Purpose is to advance colocation principles, process and practices.

b) County Administrative Officer and M-NCPPC Planning Director to co-chair, provide administrative support and DOC oversight.

c) Develop annual agendas for goals and outreach (including coordinating with the ITPCC regarding colocation project advances).

d) Report annually to the executive leadership.

e) Market colocation history, progress and future goals (host Montgomery County interactive website, etc.).

*Planning Process Implementation*

<u>Agency / Departmental Practices</u>

a) Establish early project specific agency facility / project planning (i.e. concept phase prior to mandatory referral).

b) Synchronize agency facility master planning horizons.

c) Shift planning paradigm from today to longer-term.

d) Add to Capital Improvement Program (CIP) agency self-evaluation of colocation activities related planning steps taken.

e) Incorporate OMB in the early stages of planning.

<u>Additional Planning Factors</u>

a) Create a generic project planning colocation checklist (possible requirement for mandatory referral regulatory review submission).

b) Evaluate merit of aligning service delivery geographies.

c) Promote private sector developer contributions supporting colocation opportunities.

d) Consider a requirement for a project concept plan to be submitted earlier in the planning process than the initiation of mandatory referral review for purposes of exploring possible colocation opportunities.

e) Establish colocation agency-level and project-based performance measures.

## II.    PROJECT BACKGROUND

Montgomery County has a rich history of cross-agency colocation initiatives and examples. A chronological synopsis of colocation initiatives includes:

   a)  1984 Interagency Technology Coordination Committee (and later iterations to current).
   b)  2003 Inventory of Montgomery County Strategic and Long Range Facility Plans (OLO).
   c)  2010 Cross-Agency Resource Sharing initiative (CARS).
   d)  2011 M-NCPPC / MCPS Joint Working Group (site selection).

**Colocation Study Phase 1** (2015 Colocation White Paper)

At the direction of the County Council and County Executive, M-NCPPC engaged Bolan Smart Associates (Bolan Smart) to complete Phase 1 of the colocation study, entitled <u>Montgomery County Colocation White Paper</u>. The white paper addresses possible opportunities and challenges for colocation in Montgomery County, including looking at policies and practices in other jurisdictions.

**Colocation Study Phase 2**

Phase 2 of the colocation study began in 2016 under the joint leadership of the County Executive's Office and M-NCPPC. A Directors Oversight Committee was convened to develop a framework for colocation practices in Montgomery County. Bolan Smart has continued as project consultant for Phase 2.

The purpose of Phase 2 is to focus on approaches to:

   a)  Enhancing service delivery.
   b)  Addressing resource constraints / seeking cost savings.
   c)  Promoting agency and department engagement.
   d)  Setting a framework for next steps.
   e)  Advancing the colocation conversation.

Specific DOC objectives include:

   a)  Establishing multi-organizational colocation principles and planning functions.
   b)  Dissecting constraints to colocation options.
   c)  Compiling and reviewing agency planning procedures and metrics.
   d)  Exploring colocation prospects for inter-jurisdictional liaison and cooperation.
   e)  Promoting a holistic approach to the engagement of community interests.

**Colocation Study Organizational Structure and Stakeholder Participation**

A two-tier organizational structure of a Colocation Executive Committee and Colocation Directors Oversight Committee was established. The <u>Executive Committee</u> is composed of the following members to provide overall guidance and appoint a representative from their respective agencies to serve on the Directors Oversight Committee:

a) Chief Administrative Officer – Timothy L. Firestone
b) Chair, Montgomery County Planning Board – Casey Anderson
c) Superintendent, Montgomery County Public Schools (MCPS) – Dr. Jack R. Smith
d) Executive Director, Office of the County Council – Marlene Michaelson
e) Executive Director, Housing Opportunities Commission – Stacy L. Spann
f) President, Montgomery College – Dr. DeRionne P. Pollard
g) GM / CEO, Washington Suburban Sanitary Commission (WSSC) – Carla A. Reid

The Colocation Directors Oversight Committee, which combines both facilities and operational leaders, is chaired jointly by the County Executive's office and M-NCPPC's Montgomery County Planning Department. Participants include county-wide senior level leadership (executive and legislative branches, agencies and departments):

a) Assistant CAO, County Executive's Office and DOC Co-Chair– Ramona Bell-Pearson
b) Director, M-NCPPC Planning and DOC Co-Chair – Gwen Wright
c) Deputy Director, Montgomery County Department of General Services (DGS) – Greg Ossont
d) Chief, Office of Planning and Development, DGS – Ronnie Warner
e) Deputy Director, M-NCPPC Planning – Rose Krasnow (through December 2017); Carol Rubin (as of January 2018)
f) Director, M-NCPPC Parks – Mike Riley
g) Deputy Director, M-NCPPC Parks – Mitra Pedoeem
h) Director, Department of Facilities Management, MCPS – James Song
i) Team Leader, Real Estate Management, MCPS – Peter Geiling
j) Representative from County Council – to be determined (currently Marlene Michaelson)
k) Capital Budget Manager, Office of Management and Budget, Mary Beck
l) Director, Legislative and Public Affairs, Housing Opportunities Commission (HOC) – Shauna Sorrels
m) Senior Vice President, Administrative and Fiscal Services, Montgomery College – Janet Wormack
n) Associate Senior Vice Present, Administrative and Fiscal Services, Montgomery College – Nadine Porter
o) Deputy General Manager for Administration, WSSC – Tom Street
p) Deputy Director / COO, Montgomery County Department of Transportation (DOT)– Emil Wolanin
q) Chief Division of Parking Management, DOT – Jose Thommana
r) Research and Special Projects Division, Montgomery County Planning Department and DOC staff – Caroline McCarthy and Nick Holdzkom

The DOC achieved almost 100 percent participation in multiple meetings. An estimated 16 county departments, agencies, related entities and local jurisdictions, comprising close to 100 representatives, participated in stakeholder interviews and other reconnaissance efforts. Two pilot project workshops targeting specific user groups included additional participants.

## III.    COLOCATION CONCEPT

**Colocation Types / Definitions**

Given the numerous applications of the colocation concept, this study applied broad-based definitions for its analysis of colocation as a planning practice: *The locating of two or more organizations of public interest sharing some significant aspect of a physical space, shared operational infrastructure and / or service delivery on a regular basis.*

For purposes of this study, the DOC agreed to use the six following more specific definitions:

1.  <u>Public Uses in the Same Building</u> –This practice can include:
    a)  Intentionally planned uses for the same building
    b)  Accidentally occurring uses ending up in the same building (i.e. backfilling excess space, adding floors, etc.).
2.  <u>Adjacent Public Uses</u> – Adjacent but not integrated public uses (not in the same building).
3.  <u>Adjacent Private Uses</u> – Colocation could include a public use adjacent to a private use on the same site / parcel (i.e. retail space) but not in the same building.
4.  <u>Joint Use of Space</u> – Shared land and common areas, such as lobbies, meeting spaces, restrooms, gymnasiums, playing / ball fields and parks, including community use of public facilities.
5.  <u>Public Private Partnerships (PPP)</u> – Implementation of colocation through a private sector venture (i.e. mixed-use projects).
6.  <u>Shared / Other Public Benefits or Interest</u> – To include more broadly defined uses of public interest beyond County services (i.e. other governmental entities, affordable housing, non-profits and other community benefits).

**Colocation Context**

*Themes*

Montgomery County agencies have engaged in a significant number of colocation projects and many agency / departmental staff recognize the benefits of a "colocation mindset." The DOC identified the following nine themes for advancing the colocation conversation:

1.  <u>Colocation is Needs-Driven</u> – Projects coalesce around explicit needs, such as finding available property, reducing cost, locating near public transportation, retaining employees, etc.
2.  <u>Mission First</u> – Colocation cannot compromise an organization's core obligations and needs.
3.  <u>Case-by-Case Application</u> – Montgomery County represents a large and diverse constituency. Agency and departmental planning at the service and facility levels are very situational specific, mandating case-by-case approaches supported by system-wide planning regimens.
4.  <u>Early Planning</u> – Many colocation projects have tended to occur on an ad-hoc basis and are not the result of systematic planning practices. From project inception, initiatives should move from being accidental to being strategically planned and integrated into the county's Capital Improvements Program (CIP) and master / sector plan processes.
5.  <u>Host and Collaborative Agency Roles</u> – Mission, needs and resources define agency roles in colocation projects. Often, a host agency takes the lead role in planning (i.e. as in being the landlord).

6. <u>Integrating Funding Priorities</u> – Colocation can create an opportunity to leverage possible cross-agency funding (and sharing of cost savings).

7. <u>Staff Level Engagement</u> – To be successful, colocation requires buy-in at every organizational level to become a mindset.

8. <u>Enhanced Community Services</u> – Colocation can help advance a holistic approach to the delivery of community services.

9. <u>Synergistic Clustering of Functions</u> – Similar user-oriented functions offer the best foundation for exploring colocation opportunities (see Exhibit 1 examples). Possible categories comprise publicly accessed services to families that are voluntary (Montgomery County's Department of Health and Human Services, public schools, libraries, recreation centers), publicly accessed services to families that are involuntary (emergency medical and police services), internal / infrastructure services (fleets, technology centers, print shops, maintenance yards) and business-oriented services (permits, finance).

**Exhibit 1**
**Natural Functional Cluster Illustrations**
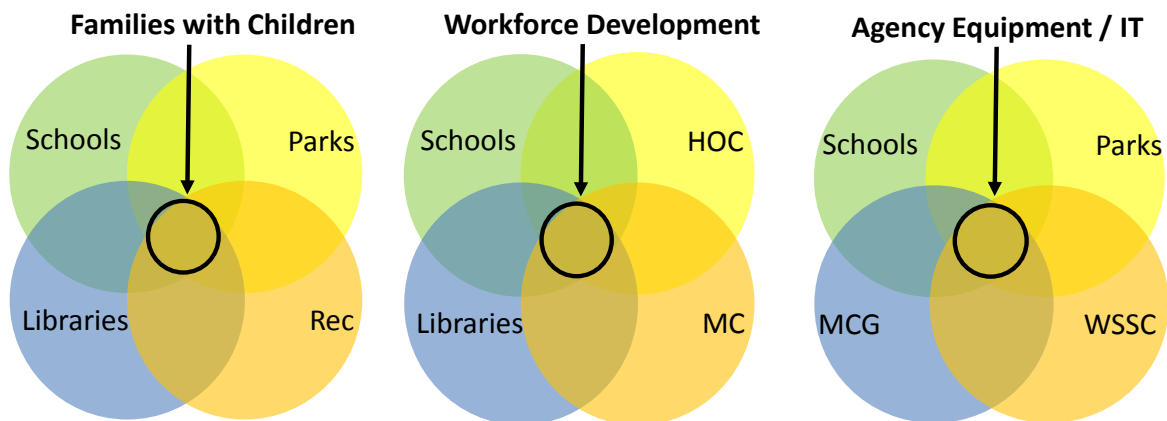


KEY: Rec = Department of Recreation, MC = Montgomery College & MCG = Montgomery County Government

*Benefits*

The generic premises for colocation include providing enhanced service delivery and potential for cost savings. Specific benefits can include:

1. <u>Enhanced Service Delivery</u>

   a) One-stop access / clustering of services for agencies that share the same customers.
   b) May offer flexibility in providing for neighborhood demographic change and growth.

2. <u>Cost Savings</u>

   a) Better utilization of limited (and high cost) land and other resources.
   b) Some reduction / consolidation in duplication of services.
   c) Possible capital and operational cost savings (see Table 1).

**Table 1**
**Possible Capital and Operating Cost Savings from Colocation**

| FUNCTION | CLEAR SAVINGS | POSSIBLE / LIMITED | NOT LIKELY | MORE COSTLY |
|---|---|---|---|---|
| **Multi Agency Planning Process** | | | *X* | *X* |
| **Land** | *X* | | | |
| **Contracting** | | *X* | | |
| **Building Size** | | *X* | | |
| **Parking** | *X* | | | |
| **Building Approvals / Fees** | *X* | | | |
| **Arch & Engineering** | | *X* | | |
| **Construction** | | *X* | | |
| **LEEDS Scoring etc.** | *X* | | | |
| **Common Spaces Maintenance** | *X* | | | |
| **HVAC** | *X* | | | |
| **Agency Operating Costs** | | *X* | | |
| **Agency Remodeling** | | *X* | *X* | |
| **Security Costs** | | *X* | | |
| **Admin Costs** | | *X* | | |

Source: 2015 Montgomery County Colocation White Paper

3. Other Colocation Benefits

   a) Can promote agency collaboration vs. competition for funds.
   b) Enhanced opportunities for staff advancement countywide.
   c) Potentially accelerated adaptive use / updating of existing facilities.
   d) Can facilitate multi-generational and multi-purpose community destinations.
   e) Often supports economic development efforts / revitalization.
   f) Stronger focus on long-term asset management best practices.
   g) Complements evolving concepts of community planning.
   h) Can take advantage of new Commercial / Residential (CR) zoning districts facilitating colocation.

*Issues / Challenges*

Coordinating and implementing cross-agency administrative and service delivery platforms are clearly more complicated than pursuing a single user approach. Some of the colocation planning issues and challenges include the following:

1. Project Planning

   a) A lack of systematic procedures for considering colocation.
   b) Colocation is not always part of interagency conversation, nor perceived as beneficial.
   c) Long-term visioning often competes with near-term budgeting needs.

    d) Regardless of current budget constraints or priority project factors, the Capital Improvements Program (CIP) could more routinely incorporate cost-benefit analyses for comparing user alternatives or long-term paybacks.

2. Agency Priorities

    a) Pressing physical needs or other project drivers seldom align across service providers.

    b) Facility standards are not the same for different county agencies.

    c) Timing variables differ between agencies, representing funding and coordination hurdles.

    d) Even when timelines coincide, geographies and other departmental priorities can vary.

    e) Numerous agency compatibility factors, including uncertain long-term service delivery changes (see Table 2, extracted from the 2015 Montgomery County Colocation White Paper).

3. Other Challenges

    a) Proactive colocation advocacy is limited at individual levels of government.

    b) No clear devices for how to share cost savings consequent from colocation.

    c) Single interest public advocacies can constrain approaches to cross-agency uses.

    d) Hard to brand multi-purpose buildings (though branding is not necessarily a colocation goal).

    e) Project-level operating agreements often lag behind facility development.

    f) Limited facility life-cycle sustainability criteria / benchmarking.

    g) Real or perceived risks at county staff level of workplace changes.

    h) Changing agency missions or service delivery over time (different futures than foreseen today).

    i) Variety of other agency governance, legal or budgetary constraints. (Per DOC guidance, this colocation study assumes governance issues would not inhibit implementation.)

*Key Implementation Factors*

The advancement of colocation initiatives and practices relies on implementation at multiple levels. Key factors include:

    a) Executive level endorsement.

    b) Clear administrative lead / sponsor agency or department.

    c) Existing staff level interagency relationships (and colocation experience).

    d) Planning process checkpoints and tool sets.

    e) On-going evaluation of aligning County geographies (i.e. the regional service centers have five different districts, M-NCPPC Planning has three major areas with more than 20 smaller / community areas in addition to differing agency / department geographic boundaries for services delivery, such as libraries, police, etc.)

    f) Community and neighborhood-level support.

    g) Flexible properties (vs. special use or purpose built).

    h) Land use flexibility (deed or zoning related).

    i) Allowance for long-term "what ifs" as missions evolve.

    j) Coordinated CIP / funding decisions.

    k) Equitable sharing of cost savings.

    l) Agencies see an opportunity for expedited execution.

    m) Give and take for all stakeholders (balanced tradeoffs).

**Table 2 - Possible Compatibility of Stakeholders by Category**

| Use | MISSION | SHARED FEATURES | | | | PROCESS / FUNDING / OPERATIONS | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| | Service Delivery | Bldgs. | Security | Access | Parking | Initial Process / Planning | Capital Costs Savings | Funding & Executive Functions | Facility Management | Operating Costs Savings | Life-Cycle / Mission Sustainability |
| **Schools** | N | N / M | N | N / M | M | N / M | N / M | N | N / M | N / M | N / M |
| **Parks** | M | M / Y | M | Y | Y | M / Y | M | M | M | M | M |
| **Rec Centers** | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | M |
| **Libraries** | Y | Y | Y | Y | Y | Y | Y | Y | Y | Y | M |
| **Police** | N / M | N / M | N | M | M | M | M | N / M | N | N / M | M |
| **Fire** | N / M | M | M | N / M | M | M | N / M | N / M | N | N / M | N / M |
| **Health** | Y | Y | Y | Y | Y | Y | M | M | M | M | M |
| **Social Services** | Y | Y | Y | Y | Y | Y | M | M | M | M | M |
| **Courts** | N | N | N | M | M | N | N | N | N | M | M |
| **Industrial** | N / M | Y | Y | Y | Y | M / Y | Y | M / Y | M / Y | Y | M |
| **Admin / Off** | Y | Y | Y | M | Y | Y | Y | Y | Y | Y | Y |
| **Cultural** | Y | Y | Y | Y | Y | M / Y | M | M | M | M | M |
| **HOC** | N / M | N / M | N | M | M | N / M | N / M | N / M | N | N / M | N |
| **Other Local** | ? | M | M | M | M | M | M | N / M | M | M | N / M |
| **State / Fed** | ? | N / M | N / M | M | M | N / M | M | N / M | N / M | N / M | N / M |
| **Non-Profit** | ? | M | M | M | M | N / M | M | N / M | N / M | N / M | N / M |
| **Private** | N / M | N / M | M | M | M | M | M | N | M | N / M | N / M |

**N** = No (incompatible)    **M** = Mixed (possibly compatible) **Y** = Yes (generally compatible)

## IV. EXISTING MONTGOMERY COUNTY COLOCATION PROJECTS AND PRECEDENTS

**Montgomery County Project Highlights**

Approximately 165 examples of colocation projects were identified in Montgomery County (150 existing and 15 planned) as part of the colocation study (see Tables 3 and Appendix A for more detail). Project observations include:

a) Many diverse examples of one-off projects.

b) Limited, if any, co-agency planning at original project inception.

c) MCPS and M-NCPPC Parks have been the primary colocation participants, followed by the Department of Health and Human Services and county government.

d) Mostly limited to bi-lateral partnerships (i.e. MCPS and M-NCPPC Parks).

e) Most often the product of executive level and / or community intervention.

f) Propensity to associate colocation with past examples and not future opportunities.

g) Mission-based planning of projects generally adheres to traditional agency-based space parameters / metrics that might benefit from being updated.

h) Colocation dialogue, when it occurs, has more commonly been championed at the agency staff-level than with agency leadership.

i) Readiness of agencies / departments to adapt (conceptually) to more sharing of resources.

j) Recognition that agency-level planning processes could benefit from transitioning to community service delivery language rather than departmental labelling.

**Table 3**
**Summary of Surveyed Montgomery County Colocation Project Types**

| Type | Definition | % of Total |
|------|------------|------------|
| 1 | Public Uses in Same Bldg | 16.7% |
| 2 | Adjacent Public Uses | 47.4% |
| 3 | Adjacent Private Uses | 6.4% |
| 4 | Joint-Use of Space | 7.2% |
| 5 | Public Private Partnerships | 7.6% |
| 6 | Other Public Benefits | 14.7% |

Note: Many projects have more than one type / definition

Source: DOC member agencies and Bolan Smart, 11/2017

**Representative Montgomery County Colocation Precedent Examples**

Six projects in Montgomery County were selected for detail profiling comprising a cross-section of facility types and agencies (see Appendix B for summary profiles):

*Colocation Service Delivery*

1. <u>Wheaton Library and Recreation Center</u> – Two adjacent but separate facilities are being consolidated and colocated into one building on the same site. Completed facility will create a multi-generational destination with enhanced and expanded community services. Project status: under construction.

2. <u>Elizabeth Square</u> – HOC, partnering with Lee Development Group, had planned to offer residents a pool amenity in its mixed-use Elizabeth Square development in Silver Spring. Based on need and the encouragement of the M-NCPPC Planning Board, the pool amenity was expanded in size so that the facility could accommodate a Recreation Department aquatic-based community facility. Both residents and the greater community benefit from expanded services, while each agency focuses on its respective mission – housing and recreation. Project status: under construction.

3. <u>Progress Place</u> – The existing Progress Place facility comprising housing and HHS services were in aging obsolete space that needed replacement. When alternative options were unavailable, existing county assets in Silver Spring were assessed for colocation opportunities. This colocation solution (adjacent public uses) was delivered through a public private partnership at minimal costs to the county. It represents community service enhancement facilities and supports downtown Silver Spring revitalization. Project status: completed.

4. <u>Gaithersburg Middle School and Gaithersburg Aquatic Center</u> – A MCPS / City of Gaithersburg partnership, dating back to the 1970s provided enhanced community services by building an aquatic center adjacent to a middle school. These adjacent public facilities allows each stakeholder to focus on its mission – housing and community services. In 2007, MCPS ground leased under-utilized land to the City of Gaithersburg now being used as the City's youth center. Project status: completed.

*Colocated Administrative Functions*

1. <u>M-NCPPC Wheaton Headquarters</u> – Consolidation of multiple county administrative functions into one building in downtown Wheaton (supports Wheaton revitalization objectives). Project status: under construction.

2. <u>Montgomery County Public Safety Training Academy (PSTA) and Multi Agency Services Park (Webb Tract)</u> – Relocation of administrative uses from aging industrial facilities in designated smart growth areas proximate to the Shady Grove Metrorail Station upcounty adjacent to industrial uses at the Montgomery County Airpark. New facilities accommodate user growth needs, have shared site infrastructure (i.e. storm water run-off, some shared parking) and two of the four users are colocated in one building. Project status: completed.

*Possible Missed Opportunities*

Montgomery County has many colocation success stories, but some colocation ideas have been difficult to implement, even when they are strategically planned. Possible missed opportunities include the following:

a) <u>Bethesda Fire Station</u> – The local community opposed a mixed-use project on this site, primarily due to the size and scale of the proposed development that exceeded the minimum needs of the fire station.

b) <u>Long Branch Park</u> – M-NCPPC Parks acquired and initiated detailed planning for this site for park purposes. Subsequently, M-NCPPC Parks became aware that HOC was also interested in the site for housing use but M-NCPPPC Parks was unable to accommodate additional HOC uses.

c) <u>Silver Spring Library</u> – Although the library includes some colocated uses, funding limitations prevented more floors from being built to house additional county users that had come forward after the project was underway.

d) <u>White Flint Fire Station</u> – Originally planned for a fire station and HOC use, the fire station is progressing while HOC's participation is on hold (see Appendix C for more details on colocation opportunities in White Flint).

As evidenced by these examples and others, the complicated process of trying to combine two or more uses on the same site can be thwarted by the best intended colocation efforts. Furthermore, colocated uses may not always end up functioning optimally. An example includes the Kingsview Middle School / Germantown Community Center's special purpose shared space which has reported to date having limited use.

## V.    MONTGOMERY COUNTY POLICIES AND PRACTICES

**Countywide Policies**

Montgomery County policies (legislative resolutions and interagency agreements) and practices (implementation procedures) impacting colocation have evolved over time. In the mid-1970s, the county's regional service centers (RSC) represented the first intentional and systematic approach to colocation. During this period, the first affordable housing legislation was enacted, eventually leading to complex mixed-use projects and various forms of public private partnerships. Thereafter, primary initiatives included the Interagency Technology Coordination Committee, the now defunct County Executive's Office of Planning Policies, and child care in public spaces requirements as well as educational and health-related programs. Each of these past experiences has been informative regarding administrative functions, policy implementation considerations and other lessons learned impacting study recommendations.

*Regional Service Centers (RSC)*

Beginning in the mid-1970s, regional service centers were established by a series of County Council resolutions to help bridge a perceived gap between citizen needs and public services. These downcounty and upcounty centers were conceived to provide a customized set of services and programs in the same building (HHS related, recreation, provisions for seniors, chamber of commerce, business bureau, community seminars, etc.), representing the first intentional colocation in Montgomery County and bringing the county closer to its residents.

As of 2017, five RSCs are situated throughout the county. They are located in Silver Spring, Wheaton, Bethesda, Burtonsville (east county), and Germantown (upcounty). Each RSC helps link citizens with agency and department services and activities within defined RSC geographic boundaries. Due to the wide range of countywide agency-driven service delivery geographies, the RSC focus areas generally do not align with any specific agency level boundaries (nor for that matter County Council districts or M-NCPPC planning areas).

A regional service director is appointed by the County Executive for each RSC. This person is responsible for anticipating and assessing localized issues and supporting collaborative interagency efforts, including public private partnerships. The RSC director works with individuals, community groups, businesses, regional citizen's advisory boards and other public entities. RSC offices provide technical assistance and mediation services to local organizations and individuals. Part of the RSC function is to promote community identity through participation in locally oriented special events.

Prior to monthly meetings with the County Administrative Office, the RSC directors meet to discuss opportunities and challenges as well as countywide developments. Some RSCs convene quarterly meetings with their building tenant representatives to coordinate issues related to improved service delivery, common area management, maintenance, security, emergency management, etc. Over time, RSC funding allocations have shifted from spending on the service center's building-related activities to more on community issue management.

*Interagency Technology Policy and Coordination Committee (ITPCC)*

The Interagency Technology Coordination Committee (ITCC) was originally established by the County Council in 1984 by County resolution. The ITCC was responsible for helping coordinate the introduction and application of county computer systems, information processing, computer hardware and software procurement and make budget recommendations.

The ITCC was reconstituted by the County Council in 1994 (Resolution No. 12-1758) as the Interagency Technology Policy and Coordination Committee (ITPCC) to expand technological planning and coordination, particularly in the areas of mapping, automated information systems and telecommunications. The ITPCC's continuing charge is to develop policies and create communication vehicles promoting interagency strategic planning and collaboration. The goal of this effort is to maximize opportunities for interagency linkages and economies of scale afforded through technological advances.

The ITPCC comprises the following government officials (called the ITPCC Principals):

a) Montgomery County Chief Administrative Officer.
b) Superintendent of Montgomery County Public Schools.
c) President of Montgomery College.
d) Chair of the Montgomery County Planning Board.
e) General Manager of the Washington Suburban Sanitary Commission.
f) Staff Director of the Montgomery County Council, who serves as an ex officio, non-voting member
g) A seventh member, the Executive Director of the Housing Opportunities Commission, has been informally added to the principals' group, although this appointment is not reflected in any formal resolution.

Three specific ITPCC subcommittees regularly convene agencies' chief executive and chief information officers. A biannual work program is developed and endorsed by the principals; the latest work program was endorsed in 2017 to drive the coordination and shared development and operations efforts of the ITPCC. Support funding is provided through an annual non-departmental account (NDA) allocation and staffing support for an ITPCC Manager is provided by the County Council. Biannual progress reports are made to the County Council.

The ITPCC thus far has provided a forum for the coordinated implementation of technology policies and guidelines, in addition to evaluation and sharing of new technologies. The ITPCC can access a designated Technology Innovation Fund to facilitate project implementation.

The ITPCC also benefited from Federal American Recovery and Reinvestment Act (ARRA) funding. Technological efforts are exemplified in the county's fibernet infrastructure, geographic information system (GIS) advances, visualization capabilities, interagency open data and web search initiatives, etc. The ITPCC' experience provides an example of interagency collaboration and a possible organizational framework already authorized by County Council resolution. This may provide a model for the continuation of the Colocation Directors Oversight Committee.

*Office of Planning Policies*

In the late 1980s, the Montgomery County executive branch took steps to integrate executive agency issues in the planning process. The Office of Planning Policies (OPP) was the result of a County Executive initiative to have a more formal role in the land use planning process. At the time, the advent of the Adequate Public Facilities Ordinance (APFO) to help manage growth increased the focus on the need for coordination across multiple county agencies / departments (WSSC, MCPS and county government departments). Although this coordination could lead to colocation, the primary purpose of the OPP was land use planning decisions, not colocation.

The functions of the OPP included coordinating required Executive Branch review and comment regarding master plans approved by the Montgomery County Planning Board. The OPP established the Planning Policies Committee (PPC) to coordinate Montgomery County transportation, economic development, environmental, fiscal and other policies with land use decisions.

The PPC, comprising directors from the Office of Management and Budget (OMB), Department of Housing and Community Development (now known as the Department of Housing and Community Affairs – DHCA), DOT, Department of Environmental Protection, Economic Development, County Attorney and OPP, made recommendations to the County Executive. The PPC was supported by an Inter-Department Planning Committee that included representatives of the PPC departments as well as OPP staff members.

The Executive's role in land use decision-making evolved under the three succeeding County Executives (Kramer, Potter and Duncan). OPP existed as a stand-alone office during the Kramer administration. After his election, Potter abolished the OPP as an independent office, but retained a portion of its staff as a unit within the Office of the County Executive known as the Office of Planning and Implementation.

During the Duncan administration, this function was transferred to the Department of Housing and Community Development (now DHCA). Thereafter, the office's original functions were discontinued due to a changes in the County's land use review process. This prior function was offset by newly enhanced interagency coordination efforts, new state and local legislative provisions regarding Executive Branch review, and changing growth management practices.

*Child Care*

Following a 1987 policy statement issued by the Department of Health and Human Services (HHS), the county is responsible for making available public facilities for child care (Child Care in Public Spaces). The policy encourages planned child care facilities in new public buildings. More recently, HHS partnered with MCPS to expand child care services per a mutually negotiated memorandum of understanding (revised August 2003).

Though not without operational challenges, the pairing of child care services in schools and other public buildings represents the essence of colocation. MCPS works closely with HHS, meeting twice a year to discuss needs and upcoming capital projects. This type of colocation is an example of when the host stakeholder (MCPS) takes the lead, builds out the designated space to accommodate child care centers in selected schools, leases these spaces to child care centers and facilitates community use of public facilities before and after school hours in school space.

As of mid-2017, approximately 120 out of 130 MCPS elementary schools offer child care services, including some schools offering multiple private vendors. Though now required as part of standard facility planning review functions in public buildings, outside of MCPS, child care public space procedures have not resulted in as many successes as originally hoped. Implementation of colocated child care programs are oftentimes limited due to the inappropriateness of the facilities (i.e. fire stations, warehouses, etc.) and / or other priority programed colcated uses.

*Health and Wellness*

MCPS provides space for HHS services in public school facilities per a memorandum of understanding. MCPS and HHS collectively undertake a process to select schools based on priority service needs. MCPS functions as project manager by undertaking the feasibility study and cost estimates (identifies projects, collects data, obtains cost estimates, hires architects, gets contracts, etc.) and bills HHS for these services. This process is akin to that used for the implementation of child care centers in schools. These facilities are typically either standalone health and wellness centers or "tag along" to school additions.

As currently practiced, the dialogued between MCPS and HHS has focused on the delivery of child care and health-related services and has not expanded to include other possible colocation opportunities.

*Affordable Housing*

In 1974, the county's moderately priced dwelling unit (MPDU) program began, involving a mandatory inclusionary zoning law giving a density bonus allowance to builders in exchange for providing affordable housing. Including several subsequent modifications, Montgomery County's MPDU policy is credited with generating more than 15,000 affordable housing units in colocated fashion with market-rate units.

Pursuing similar public interest objectives, the Department of Housing and Community Affairs and the Housing Opportunity Commission have partnered with numerous entities, including for-profit developers, to put mixed-income residential colocation principles into practice.

**Planning Practices Influencing Colocation**

The process behind planning for delivery of services in Montgomery County can be defined as occurring in four phases:

1. <u>Agency Level Planning</u> – including strategic and facilities plans and M-NCPPC's master planning process
2. <u>Approval</u> – mandatory referral regulation review
3. <u>Funding</u> – OMB oversight
4. <u>Development</u> – facility selection (as well as surplus asset disposition procedures)

*Strategic and Facility Plans*

One of the original focal points of Phase 2 of the colocation study was to review agency and department planning documents to assess how they may align with possible colocation measures. The Office of Legislative Oversight (OLO) conducted a similar analysis in 2004 (report number 2004-2). The documents reviewed for this current study include:

a) Agency / departmental CIPs FY17
b) Parks: Vision 2030 and 2012 PROS Plan
c) Recreation Facility Development Plan 2010-2030
d) MCPS: Education Facilities Master Plan FY16, Capital Budget FY17-22 CIP, Report of Cross-Agency Work Group on School Design Options
e) Montgomery College Facilities Master Plan 2013-2023
f) Public Libraries Facility Plan FY13-16
g) Fire, Rescue, Emergency Medical Services and Community Risk Reduction Master Plan 2016-2022

Observations drawn from the above review of agency documents that pertain to colocation (see Table 4) include:

a) Plans vary significantly in content and approach.
a) Different governing authorities drive different approaches.
b) Different cycles / time frames ranging from three to 20 years.
c) Different construction and facility management practices are represented (no uniform standards).
d) Individual public projects are subject to the mandatory referral regulatory review process.
e) Limited, if any, specific mentions of colocation.

Based on initial findings, the DOC concluded that there are profound reasons behind the differences in the approaches represented in these agency and departmental plans. The DOC's response was that planning process standardization is not and should not be the genesis of colocation. That said, such plans should be shared among all county stakeholders as an integral part of the colocation conversation.

**Table 4**
**Montgomery County Agency Planning Process Characteristics Comparison**

| Characteristics | County Government / DGS | | | | | | MCPS | M-NCPPC Parks[1] | Montgomery College | HOC | WSSC |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | **Police** | **Fire** | **Recreation[1]** | **Libraries** | **HHS** | **General Admin[2]** | | | | | |
| *Type of Plans* | | | | | | | | | | | |
| Strategic Plan | Yes | No | Yes | No | Partial | No | No | Yes | No | Yes | No |
| Facilities Master Plan | No | Yes | No | Yes | No | No | Yes | No | Yes | No | No |
| *Plan Timeframe* | | | | | | | | | | | |
| Duration | 4 yrs | 6 yrs | 20 yrs | 3 yrs | Single Issue | N/A | 5 yrs | 20 yrs | 10 Yrs | 4 yrs | N/A |
| Start Year | 2016 | 2016 | 2010 | 2013 | 2017 | N/A | 2017 | 2010 | 2013 | 2013 | N/A |
| | | | | | | | | | | | |
| *Plan Includes Colocation Initiatives* | No | No | Yes | Yes | N/A | N/A | Yes | Yes | Yes | Partnering | N/A |

[1] Vision 2030 is for Parks and Recreation and PROS (2012 and 2017 update)

[2] Comprises all other County offices including operational departments such as Community Engagement Cluster, CUPF and Regional Services Centers

Source: Bolan Smart and agency / department strategic and facility plans, 2/2017

Note: All agencies are required to submit a six-year CIP published in odd years (2017-2023)

## *M-NCPPC Planning Process*

The M-NCPPC planning process provides a platform for county agencies to locate new facilities for future use in specific geographies. It is an established means for agency collaboration in developing frameworks for the delivery of community services. Identification of potential agency and departmental projects during the planning process facilitates eventual project implementation, since these plans are approved by the Planning Board and adopted by the County Council.

There are three types of long-term M-NCPPC plans that are currently prepared in Montgomery County:

1. Master Plans – Comprehensive visions for future development of communities across the county. Master Plans attempt to address community concerns regarding development, transportation and community infrastructure, environmental issues, parks, historic preservation and the provision of public services.

2. Sector Plans – Are more detailed than master plans and typically focus on closely-defined, smaller areas, such as a central business district or areas around mass transit stations.

3. Functional Plans – Cover overarching countywide functions, such as mobility, transit, parks, recreation, historic preservation and environmental systems (i.e. watersheds and agriculture preservation).

All three master planning processes follow the same procedures, whereby they are prepared in cooperation with potentially impacted county agencies and in consultation with the County Executive, County Council and citizens. In addition to these three plan types, Planning Department staff recently established for select plans a <u>Biennial Master Plan Monitoring Report</u>. This report is produced every other year for the Planning Board's review and transmitted to the County Council and County Executive. Separate reports address implementation progress of the White Flint Sector Plan, Shady Grove Sector Plan and Great Seneca Science Corridor Master Plan.

Regarding colocation, the most recent biennial report for the White Flint Sector Plan highlights support for colocated facilities, but implementation of those projects has encountered many challenges (see Appendix C for details).

Noted lessons learned related to colocation during the planning process are highlighted below. These observations are based on information garnered from the biennial reports and interviews with Montgomery County Planning Department staff and other stakeholders.

a) It is a challenge for the master planning initiative to fully engage and involve non-M-NCPPPC agencies, which are more focused on six-year CIPs than a 20-year planning vision.

b) Some agencies are incentivized to participate in the planning process when they perceive it is helpful to have specific language documented in the plan that may assist project justification down the road.

c) As the county is maturing, future planning efforts will be less focused on big master plans and more in sub-centers where change is occurring. The smaller sector plans are less theoretical and broad in context than master plans, and tend to focus more on the physical environment. They may be more suited to having the colocation conversation.

d) When the idea of colocation is advanced through the planning process and not agency driven, it can be more difficult to get agency cooperation. Even when there is agency participation, there may be a disconnect between the long-range planners and implementation staff and executives of that agency.

e) Unforeseen externalities and infrastructure complications contribute to project derailments.

f) Agencies may be reluctant to colocate if it adversely impacts their current standards for their program of requirements for new facilities.

g) The Montgomery County Planning Department's organizational structure (planning teams are grouped according to areas of county geography) is perhaps more burdensome on independent agencies that are planning for facilities countywide. While the independent agency's functional planning and policy division coordinates some countywide issues (i.e. transportation) services such as schools and libraries must be coordinated through each planning area. In previous years, there was a single M-NCPPC point of contact for each agency within the countywide planning division.

h) The Subdivision Staging Policy (SSP, also known as the Growth Policy until 2010) is adopted every four years by the County Council. The SSP includes criteria and guidance for the administration of the Adequate Public Facilities Ordinance (APFO).  The purpose of the APFO is to coordinate the timing and speed of development with provision for public facilities, such as roads, schools and transit.

i) Coordination between Planning Department staff and county agencies seems to be project-driven, and not inspired by community visioning.

*Mandatory Referral Regulatory Review*

Sections 20-301 through 20-308 of Division II of the Land Use Article of the Annotated Code of Maryland, Mandatory Referral Review, require all federal, state and local governments, and public utilities to submit proposed projects to the Montgomery County Planning Board (M-NCPPC) for what is designated mandatory referral review. This legislation requires that the Planning Board review and approve the proposed location and character of public or utility-related land use initiatives in Montgomery County. The Planning Board must also review the acquisition or sale of any land by any public board, body or official.

The Planning Board communicates its approval, approval with conditions, or disapproval, along with the reasons for its decision, to the applicant. Nonetheless, mandatory referral review and comments by the Planning Board are advisory only. Although many applicants choose to work with the Board in a constructive manner and take its recommendations into account, ultimately, the applicant may do as they wish. Further complicating implementation of possible Planning Board recommendations at time of mandatory referral review is that projects are generally well into the design phase.

*Capital Improvement Program Process*

The Montgomery County Charter (Section 302) requires the County Executive to prepare a comprehensive six-year program for capital improvements, called the Capital Improvements Program, no later than January 15 of each even-numbered calendar year. The charter requires that the annual capital budget be consistent with the six-year program.

In odd-numbered calendar years, the approved CIP, together with any amendments, continues to guide capital investment. The CIP includes all capital projects and programs for all agencies for which the county sets tax rates or approves budgets or programs. The CIP includes:

 a) A statement of the objectives of capital programs.
 b) The relationship of capital programs to the county's long-range development plans.
 c) Recommendations for capital projects and their construction schedules.
 d) Estimates of costs, anticipated revenue sources and impacts of the capital program on county revenues and the operating budget.

Agency CIP submissions do not align and are staggered as follows:

 a) <u>October 1</u> – WSSC to the County Executive and County Council.
 b) <u>November 1</u> – MCPS Superintendent to the Board of Education; M-NCPPC to the County Executive .and County Council.
 c) <u>Mid-November</u> – Montgomery College to the County Executive and County Council.
 d) <u>December 1</u> – Board of Education to the County Executive and County Council.

Some county master plans include phasing elements to provide guidance about the timing and sequence of capital facilities in order to develop a CIP that serves long-range needs.

During the Council review process, the Planning Board provides comments to the Council regarding conformance with local plans. A final determination as to consistency of projects with adopted county plans is made by the County Council. The Council adopts the CIP and approves a list of applicable state participation projects.

The Office of Management and Budget (OMB) is responsible for evaluating funding requests, considering alternatives and making recommendations to the County Executive who then decides which projects to include in the recommended CIP sent to County Council. The Department of Finance (Finance) and OMB work collectively to develop projections of total CIP resources available for all county agency projects. OMB then works with the County Executive to determine, based on community programmatic priorities, how these resources should be allocated during the six-year CIP.

Finance and OMB consider a range of assumptions in preparing revenue projections, including:

a) <u>Economic Assumptions</u> – Revenue projections that depend largely on assumptions regarding economic activity, including employment, income, inflation, interest rates, construction, home sales and other economic conditions.

b) <u>Demographic Assumptions</u> – The CIP is based on demographic assumptions resulting from the Metropolitan Washington Council of Governments census estimates, as projected by M-NCPPC. MCPS student population forecasts are also considered.

c) <u>Debt Capacity</u> – To maintain its AAA bond rating, the county uses the specific guidelines in deciding how much additional county general obligation debt may be issued in the six-year CIP period.

d) <u>Spending Affordability Assumptions</u> – The County Charter (Section 305) requires that the Council adopt Spending Affordability Guidelines for the capital and operating budgets. Spending Affordability Guidelines are limited on the amount of general obligation debt and Park and Planning debt that may be approved for expenditure in the CIP.

e) <u>General Obligation Debt Limits</u> – General obligation debt usually takes the form of bond issues and pledges general tax revenue for repayment.

f) <u>Availability of Federal, State and Other Non-County Funding Resources.</u>

Executive Branch considerations of agency requests into the consolidated CIP is based on the following criteria:

a) Community programmatic needs and priorities.
b) Readiness (planning, scope definition, basis for estimates / confidence level).
c) Master / sector Plan compliance.
d) Department strategic plan compliance.
e) Reasonability of costs and return on investment.
f) Affordability.
g) Method of financing.
h) Scheduling.
i) Partners (and their abilities to provide resources).
j) Priorities (community, M-NCPPC).

A question regarding the CIP review process is how best to apply standardized cost-benefit project evaluation practices. Using cost-benefit analyses helps correlate likely higher upfront capital costs with longer-term operational cost offsets that could favor colocation. Nonetheless, priorities such as a lack of near-term funds may trump cost-benefit analysis results.

The nature of the CIP is that it is a six-year planning process that commits funds to identified projects. Barring unusual circumstances, only smaller scale colocation service opportunities could be grafted onto an existing approved CIP project in the early years of the CIP. Larger colocation projects would likely be funded in the later years of the CIP when there may be more fiscal capacity. Inserting a large colocation project in the early years of the CIP would require pushing out or delaying other previously approved projects.

*County Site Selection Policy and Practices*

Montgomery County has established administrative procedures by which all departments select sites for county facilities. Department of General Services (DGS), with the assistance of its "using" department, OMB and the pertinent RSC share the primary responsibility for managing the county's facility site selection process. DGS is responsible for determining if a request is sufficiently developed to proceed to the site selection process, identifying facility sites and providing site evaluations. OMB is responsible for assisting DGS and conducting cost-benefit analyses of proposed sites. The RSC Director is responsible for coordinating community outreach, identifying community representatives to serve on the selection committee and assisting with public outreach and public hearings once a site has been selected.

Prior to advancing to the site selection process, DGS must determine if the using department's request has been sufficiently vetted based on the following criteria:
   a) Justification of need.
   b) Already analyzed the potential to relocate to an existing county-owned site / facility.
   c) Signed project program of requirements (POR) (size, access, features).
   d) Identify CIP funding.
   e) Geographic area requirements.
   f) Initial list of proposed sites within the geographic / study area.
   g) If the proposed facility is identified within the master plan.
   h) If the proposed facility is identified or complies with the using department's strategic / facility plan.
   i) Appropriate government agencies are consulted about the proposed new facility.
   j) Public input.
   k) Impact on operating budgets.
   l) Investigation of potential acquisition funding sources.
   m) Setting the implementation schedule for acquiring the new facility.

A decision memorandum is prepared by DGS and applicant agency for submission to the County Executive's Chief Administrative Officer (CAO) to begin the site selection process. Once the CAO approves the site selection process, DGS can begin the search for acceptable sites. Selected sites are evaluated by a site selection committee, which is an ad-hoc committee that refines site selection criteria (includes both qualitative and quantitative factors), assesses sites and votes on site recommendations. The committee is composed of:

a)  Directors of DGS and RSC or their designees as non-voting members.
b)  DGS staff member as a voting member.
c)  Using a department staff member as a voting member.
d)  OMB staff member as a voting member.
e)  One or more community residents, business representatives, interest groups (i.e. civic association) from areas of the county potentially impacted by the proposed facility site, as a voting member(s).
f)  M-NCPPC and county agencies can also participate as non-voting members.

Following the County Executive's selection of a site for a county facility, DGS submits a recommendation to the M-NCPPC's Montgomery County Planning Board as part of the mandatory referral regulatory review process requirement.

*MCPS Site Selection Process*

The site selection process for MCPS is defined in the Long Range Educational Facilities Planning Policy (FAA) and Regulation (FAA-RA). MCPS determines if a new school is required based on enrollment projections, facility utilization, school boundaries and other considerations. When a new school is required in the six-year CIP, the following factors are considered when evaluating potential new school sites:

a)  Geographic location relative to existing and future student populations and existing schools.
b)  Size in acreage.
c)  Topography and other environmental characteristics.
d)  Availability of utilities.
e)  Physical condition.
f)  Availability and timing to acquire.
g)  Cost to acquire if private property.

The formal community involvement process for site selection of new schools is outlined in Board Policy ABA, Community Involvement. Participants could include parents, teachers, students, local PTAs, MCPS staff members, municipalities, local government agencies, and civic groups.

There are multiple methods of involvement, including focus groups, task forces, work groups, advisory committees, roundtables, etc. This process results in the Superintendent of Schools making a site selection recommendation to the Board of Education that is followed by a public hearing conducted by the Board and typically held annually in November.

*Surplus Asset Disposition*

The County Executive and County Council regulate the process for the disposition of any real property owned or controlled by the county, other than surplus school facilities and property of nominal value identified per the COMCOR 11B.45.01 Disposition of Real Property regulations. The regulations stipulate:

a) Coordination among public agencies, including any municipality in Montgomery County.

b) Opportunity to reserve property for alternative public use.

c) Comparative analysis of reuse proposals before any disposition actions.

d) Public notice and hearing on possible dispositions before final decision on disposition, except that the County Executive and County Council may waive public hearing requirements under certain circumstances (i.e. of nominal value, being reused by the county government, etc.).

These surplus asset disposition requirements can be a hurdle for achieving agency driven priorities. Specifically, there are:

a) Governance / legal issues (particularly for MCPS).

b) Process constraints (lengthy 2-3 year time frame).

c) Disposition proceeds concerns since funds cannot be retained by the agency and reallocated (unless by County Executive order).

d) Properties that are subject to transfer development requirements or acquisition funding stipulations.

Before a property may be considered for disposition to a third party outside of public agencies, the following actions must take place:

a) OMB must review the property for preliminary reuse review and investigate whether the real property identified has been designated for a public use in a master plan, is suitable for an approved CIP project or is appropriate for future reuse by the county.

b) All county departments and outside agencies (which include WSSC, M-NCPPC, Revenue Authority, HOC, MCPS, Montgomery College and all municipalities located in Montgomery County) must be invited to propose a reuse of the real property.

c) The DGS Director must review any proposals and provide a recommendation to the County Executive. After reviewing the recommendation of the DGS Director, the Executive may 1) determine that the property is appropriate for reuse by a county department and put the property in reservation; 2) determine that the property is appropriate for reuse by an outside agency; or 3) determine that the property is no longer needed for public use. Only if the County Executive determines that the property is no longer needed for public use may the property proceed to disposition.

County Council approval is required before the real property is sold, leased or transferred.

a) Before disposition, the County Executive must submit to the County Council material terms of the proposed disposition, including an appraisal of the property.

b) The Executive must then submit a Declaration of No Further Need with supporting documentation that the property is no longer needed for public use.

After the County Council has approved by resolution the Executive's Declaration of No Further Need, the Executive may dispose of the real property.

Existing regulations, procedures and agreements governing asset disposition include:

a) Code of Montgomery County Regulations (COMCOR) Chapter 11B Section 45.0 – Disposition of Real Property.

b) Standard Procedures of the Washington Suburban Sanitary Commission: Identification and Disposition of Surplus Real Property (March 2006).

c) Agreement between Montgomery County government and the Maryland-National Park and Planning Commission (Montgomery County Department of Parks) for all (regional) parklands which are purchased with county funds in accordance with County Resolution No. 6-2291 dated August 19, 1969 and County Resolution No. 6-2309 dated August 12, 1969 (May 1972).

## VI. PILOT PROJECTS

The DOC focused on possible near-term colocation opportunities, with the objective to illustrate how examples of pilot projects might be advanced to implementation. DOC members identified projects for enhanced profiling, selecting from a cross-section of current and future colocation opportunities.

Possible pilot projects were narrowed down to 11 examples that were highlighted for priority consideration. Each was assessed based on evaluation criteria, such as needs and priorities, range of agencies involved, types of projects and timelines. For organizational purposes, the pilot short list was divided into three general project themes: administrative / operational, geographic / site driven; and conceptual.

**Table 5**
**Short Listed Pilot Projects**

| *Administrative / Operational Theme* |
| --- |
| 1. *Fueling Stations* – centralized fuel management with technological upgrades to reduce duplicative providers and offer increased county-wide access. |
| 2. *Salt Storage Facility* – site selection for a depot county-wide to accommodate multiple agency needs. |

| *Geographic / Site Driven Theme* |
| --- |
| 1. *Rockville / Carver Site* – adaptive use of adjacent public spaces comprising more than 30 acres in a central location, including coordinating possible opportunities with the City of Rockville. |
| 2. *Clarksburg Town Center* – planning and implementation for programmed upcounty services. |
| 3. *Lyttonsville* – Purple Line-driven new master plan with multiple public uses and agency ownerships, including the State of MD. |
| 4. *Montgomery College Takoma Park Campus Initiatives* – creative ways to provide additional services to students and community. |
| 5. *Stone Street Avenue MCPS Site* – under-utilized school site and aged facilities in a central Rockville location (MCPS is currently working with the City of Rockville regarding planned future use of this site). |
| 6. *White Flint Fire Station* – multi-agency new construction supporting master plan implementation of needed services in this area of North Bethesda. |

| ***Conceptual Theme*** |
|---|
| 1. *High School Colocation* – construction of prototypical, multi-agency service delivery facility (stacked or horizontal). |
| 2. *Repurposing Parking Lots* – site utilization to enhance provision of community services and amenities. |
| 3. *Activate Transit Stations* – facilitate expanded mix of uses at central community locations. |

Source: Bolan Smart, 11/2017

Note: Other pilot projects suggested by DOC include:

a) 4th District Police Station in Silver Spring.

b) Generic county-related industrial and office uses.

c) Other fire stations in communities including Montgomery Village, Laytonsville, Clarksburg, Cabin John, Glen Echo, Bethesda and Shady Grove.

d) MCPS bus depot relocations / expansions.

e) Parking Lot District (PLD) public private partnerships.

f) Non-parking use of parking decks.

g) Rockville core on-going planning (subject to the City of Rockville's 2040 Vision plan requirements currently under development).

h) Generic park / schools / recreation colocation.

i) Affordable, workforce and / or student housing.

j) Other colocation partners, i.e. Pepco, WMATA, local jurisdictions (i.e. Gaithersburg and Rockville), state and federal users.

**Selected Pilot Projects**

The DOC selected three pilot projects to undergo more detailed profiling. A minimum of one project from each of the short listed thematic categories was recommended. Stakeholder interviews and workshops were convened. A summary including follow-up discussions and possible recommendations for each pilot project is as follows: (see Appendix D for more detail)

*Fueling Management*

Interviewed stakeholders included DGS Fleet Management, M-NCPPC Parks, MCPS, WSSC and Montgomery County Fire and Rescue Services to understand agency fueling management operations and on-going requirements. County agencies already share some fueling stations, but fueling management is administered by each agency. Colocation could be a solution to make any fueling station accessible to any agency. The benefits of countywide-serving fueling stations and consolidated fueling management are expected to be more efficient and cost-effective operational practices. Specific colocation benefits / drivers include:

a) New technology system that can track vehicle data facilitating timely maintenance and is less expensive to operate (cheaper replacement parts).

b) Possibilities for some consolidation / centralized management that reduces duplicative services at the agency level (including possible use of consolidated private sector vendors for station maintenance and fuel procurement).

c) More efficient and accountable fuel dispensing and providing more accessible / proximate facilities.

d) Increase in fleet productivity.

Establishing a Fueling Management Task Force was recommended to coordinate the possible integration of individual agency fleet management systems and guide possible near term tasks:

a) Affirm Software Capabilities - To better understand how each individual server / domain is operated and managed as well as what fleet data is captured and tracked.

b) Data Sharing – Discuss different ways to pass data from one agency to the next as a first step towards a higher degree of integration.

c) Inventory of Fueling Station Information – Facilitate agency sharing of fueling station information by inventorying each fueling station for type of fuel, above grade or below grade tanks, daily capacity, access (cars, buses, trucks, etc.) and hours of operation.

Possible longer-term tasks comprise:

a) Consolidation / Centralized Fleet Management – Eventually transition to a centralized management system / one technological application for the county's entire fleet operations. This would maximize universal access to fueling stations, allowing agencies and departments to focus on other matters. Cost savings could result due to eliminating duplicative services, consolidation of fleet management and fuel procurements contracts, etc.

b) Standardize Regulatory Compliance Procedures – Standardization of fueling station oversight and responsibilities regarding regulatory compliance is desirable.

c) Monitor Implementation – For possible additional cost savings if consolidation of fueling stations is meritious (i.e. there are multiple stations adjacent to each other in Brookville; on Crabbs Branch Road, etc.).

d) Assess Expansion Options – Additional expansion capabilities could benefit non-county public sector users such as WSSC, WMATA, local jurisdictions, state and federal entities, etc.

*Rockville / Carver Educational Service Center Site*

Multiple stakeholders (MCPS, Montgomery College and City of Rockville) and other DOC members met to discuss potential property redevelopment at a geographically central location. Acknowledged colocation benefits / drivers comprise:

a) Aged MCPS administrative headquarters on an underutilized site, no MCPS budget to address.

b) Prominent Rockville location accessible via public transportation.

c) Long term Montgomery College campus planning.

d) Timing of Rockville's 2040 master plan update for the area (objectives currently being established to include better integration of Montgomery College into the community, improved connectivity, maintaining MCPS HQ in Rockville, and historic preservation).

e) Limited sites available to provide other needed services (fire station site?).

The meeting focused on possible future site occupancy scenarios, including continued MCPS administrative services with reuse of surface parking lots to relocating MCPS and redeveloping the site (i.e. MC campus expansion). Possible future uses that could be accommodated on the site that were discussed, although not mutually exclusive, include:

a) A fire station, arena and commercial / office buildings that could be converted to future school use.

b) Creating a main street between the college, Carver site and Rockville's athletic facility to the south.

c) Leveraging improved access via the Bus Rapid Transit (BRT) system bus stops at strategic locations.

d) Bike path connecting to downtown Rockville.

e) Additional retail to serve student needs.

Establishing a Concepts Task Force was recommended to determine possible site redevelopment parameters, planning objectives and next steps. Recommended near term tasks include:

a) <u>Revisit Past Initiatives</u> – To gain a better understanding of prior redevelopment efforts and what hurdles to moving forward need to be addressed.

b) <u>Document Scenarios for Further Due Diligence</u> – Including treatment of existing facilities, historic preservation, schedule, land uses by square footages, etc.

c) <u>Approval Process</u> – Understand each stakeholder's review and approval process.

d) Cost / Benefit MCPS HQ Occupancy Analysis – Based on the possible scenarios, conduct a cost benefit analysis to better understand the most viable MCPS HQ occupancy alternative and order of magnitude comparative costs.

e) <u>Align schedule of milestones with the City of Rockville 2040 Vision Plan</u> – Collaboration of needed plan inputs.

f) <u>Meetings and Community Visioning</u>– Continue to vet / convene meetings (perhaps some in conjunction with Rockville's 2040 Vision).

g) <u>City of Rockville Coordinating</u> – Present scenarios to determine plan compliance and anticipate steps regarding the Mandatory Referral approval process.

h) <u>County CIP / OMB Involvement</u> – Establish early connections to the County Council.

*High School Community Service Colocation*

A workshop was conducted with MCPS, Health and Human Services, M-NCPPC Planning, M-NCPPC Parks, Recreation Department, Montgomery College, Department of Housing and Community Affairs and DGS. The group explored possibilities for multi-agency participation in planning for colocation in one or more of the four downcounty consortium schools. Identified colocation benefits and drivers were numerous:

a)  Few well located larger sites available.

b)  Opportunity to promote agency collaboration vs competition for resources.

c)  Possible enhancement of service delivery / more one-stop shopping for users.

d)  Potential for multi-generational destinations.

Next step recommendations focus on querying community service agencies regarding downcounty consortium high school priorities and establishing a multi-agency study group to guide continued due diligence. Tasks were broken down into two phases as follows:

Phase 1 – Background Issues and Opportunities

1.  *Near Term Tasks*

    a)  Profile Downcounty Consortium High Schools – Provide background information such as property size, location, maps / aerials, capacity, demographics, accessibility information, etc. that could help agencies assess whether there is reason to consider partnering / venturing with MCPS.  Any additional information regarding tentative timing and type of high school renovations / construction plans, available acreage and/or potential square feet, etc. could facilitate partnership opportunities.

    b)  Query Community Service Agencies Regarding Downcounty Consortium Priorities – Conduct outreach to Parks, Planning, Recreation, Libraries, HHS, HOC / DHCA and Montgomery College to determine if any Downcounty high schools are located in areas that could benefit from the colocation of community services.

2.  *Deliverable* – Based on agency response and school capacity factors, select one of two high schools for continued analysis of colocation prospects.

Phase 2 – Target High School(s) Colocation Profile

1.  *Multi-Agency Study Group* – MCPS to convene a high school community services colocation concept study group to determine tasks, milestones and schedule.

2.  *Agency Due Diligence* – Undertake additional agency-level due diligence / minimum program of requirements for potential colocation of community services at possible preferred high school locations.

3.  *Conduct Preliminary Test Fits* – To determine what might be physically possible.

4.  *Review Preliminary Findings with OMB* – To better assess funding availability and project timing.

5.  *Study Group Report* – Prepare possible study group report identifying opportunities, issues and planning process / next steps, community engagement, etc.

Preliminary analysis and discussions were conducted on these three pilot projects leading to consideration of possible next steps at a level beyond the scope of this study. Appendix D outlines steps taken and considerations for future actions for the three selected pilot projects in more detail.

## VII.   FINDINGS AND RECOMMENDATIONS

The results of the study outlined below are categorized into principles, action items and possible implementation processes that collectively would advance colocation.

### Primary Principles

A consensus for action is premised on the following primary principles:

a)  Colocation is not a goal but a tool to achieving a desired outcome.

b)  Colocation is about effective service delivery, a possible answer to resource constraints and realizing cost savings opportunities.

c)  Clustering of services and a one-stop-shop mentality can be an objective, but its application must be grounded in mission-driven priorities, including geography, to best meet the needs of local populations.

d)  Collective colocation advocacy efforts will best advance results, rather than a singularly directed initiative.

e)  Creating and supporting a framework that integrates colocation into multiple phases of the planning process will help promote the colocation mindset.

f)  Policy guidelines at the executive level across agencies are important to reinforcing colocation.

g)  Focus should include repurposing existing facilities and operational synergies, not just on new construction.

h)  Advancing community awareness of benefits can help break down barriers to multi-faceted community-building.

### Administrative Action

*Executive Branch / Council Level Policy Advancement*

a)  Possible county policies and/or County Council resolutions (i.e. Council Resolution No 12-1758 for the ITPCC).

b)  County Executive's communications role (chair of the Colocation Executive Committee to issue announcements).

c)  Executive leadership to continue to provide DOC oversight, identify DOC obligations, prescribe actions, implementation recommendations, etc.

d)  Employ incentives to offset agency / department reservations and elevate interest.

e)  Consider possible interagency land swaps since no standard mechanism exists.

f)  Facilitate interagency procurement tools and resource sharing.

g)  Encourage review of state / legal constraints to promote colocation.

h)  Facilitate case-by-case project-oriented interagency MOUs and operating agreements (i.e. perhaps by develop templates).

*Agency / Department Level*

a) Appoint and sustain agency-level designated staff for interagency communications to advance on-going collaboration.

b) Leverage and expand on existing interagency relationships (i.e. compile a list of all formal and informal interagency meetings, staff liaisons, etc. to build upon).

c) Adapt annual reports to include colocation agency self-evaluation of colocation history, progress and future goals.

d) Agencies may incorporate colocation considerations when assessing business service delivery and facility metrics (i.e. consolidation of duplicative services between agencies / departments).

e) Reliance on agency / departmental accountability and self-monitoring (fundamental to the success of colocation).

*Budget Advancement*

a) Possible funding incentives to encourage collaborative efforts:

- Funding for joint-agency / department project planning (consider multi-agency / department CIPs).

- Prioritize approvals for projects that include colocation.

- Larger CIP projects could be targeted for opportunities since they may be more flexible to integrate colocated uses.

- Facilitate mechanisms for agencies to benefit from possible multiple agency operational cost savings.

- Review Montgomery County standards for systematic cross-agency, project-based life cycle cost-benefit analyses.

b) Consider funding a non-departmental account dedicated to on-going planning of colocation initiatives (i.e. pilot projects, DOC efforts, etc.).

c) Assess the merit of using revolving funding sources, such as Advance Land Acquisition Revolving Funds (ALAR Funds) for colocation projects.

**Ongoing Colocation DOC Initiative**

a) Purpose is to advance colocation principles, process and practices.

b) CAO and M-NCPPC to Co-Chair, provide administrative support and DOC oversight.

c) Schedule semi-annual DOC meetings (add agency representatives as appropriate and consider agency reporting requirements on colocation status).

d) Develop annual agendas for goals and outreach (including coordinating with the ITPCC regarding colocation project advances).

e) Report annually to executive leadership.

f) Conduct staff agency level colocation work sessions / meetings.

g) Market colocation history, progress and future goals (host Montgomery County interactive website, etc.).

h) Pursue consolidation opportunities for agency-level duplicative administrative operations (including human resource / employee workplace factors).

i) Explore partnering opportunities with other jurisdictional interests (federal, state, public utilities and non-profits).

j) Facilitate Colocation Study roll out through the following steps:

    a. Deliver final report to the Colocation Executive Committee.

    b. Issue the report through the agencies and departments.

    c. Coordinate a possible additional outreach.

## Planning Process Implementation

### *Agency / Departmental Practices*

a) Establish early project specific agency facility / project planning (i.e. concept phase prior to mandatory referral).

b) Synchronize agency facility master planning horizons.

c) Shift planning paradigm from "today" to longer-term.

d) Host agency (i.e. prospective landlord) should take the lead in project coordination with other synergistic users to piggyback on planning process.

e) Prepare county policy and interagency MOUs to define project-related roles and responsibilities. Formulating project level multi-agency / departmental agreements (i.e. operational and task specific) are key aids to successful implementation.

f) Establish a co-agency point of contact for colocation project specific facility operations and requirements.

g) Add to CIP agency self-evaluation of colocation activities related planning steps taken (see Exhibit 2 Colocation Scorecard as a possible example).

h) Expand the use of M-NCPPC site inventory database.

i) Integrate OLO studies (three in process include: pre-kindergarten, after hours recreation and general over capacity of schools) that evaluate how programs can make better use of space with colocation measures (In 2018, OLO is looking at the changing needs of libraries since books take up more space than new technology).

j) Leverage DGS's colocation experience

    a. Coordinates facility planning for multiple county agencies / departments.

    b. Conducts monthly DGS division meetings prior to briefing the CAO.

    c. DGS Director already convenes quarterly "DOC" like meetings with DGS CIP stakeholders (includes directors from OMB, Department of Technology Services, Procurement, Department of Permitting Services, RSC Directors, Department of Environment).

k) Incorporate OMB in the early stages of planning.

l) Consider evaluating colocation opportunities through the County Land Use Committee.

m) Solicit RSC Directors' input (host monthly stakeholder meetings and quarterly RSC Director meetings to better coordinate and deliver needed county services).

*Additional Planning Factors*

a) Create a generic project planning colocation checklist (possible requirement for mandatory referral regulatory review submission).

b) Evaluate merit of aligning service delivery geographies.

c) Promote private sector developer contributions supporting colocation opportunities.

d) Explore possible other refinements in integrated planning practices (i.e. master planning process time frames).

e) Consider a requirement for a project concept plan to be submitted earlier in the planning process than initiation of mandatory referral review for purposes of exploring possible colocation opportunities.

f) Establish colocation agency-level and project-based performance measures (i.e. Exhibit 2 Colocation Sample Scorecard).

g) Recognize differences between colocation in repurposed existing facilities vs new construction.

**Exhibit 2**
**Sample Colocation Evaluation Scorecard**

| | Possible | Uncertain | Unlikely |
|---|---|---|---|
| Does service function have any co-agency synergies? | ✓ | | |
| Would a shared property have merit? | | ✓ | |
| Would shared building space have merit? | | | ✓ |
| Did agencies share needs assessments early on? | | | |
| Is management on board? | | | |
| Is staff acquainted with counterparts? | | | |
| Do all parties endorse distribution of project responsibilities? | | | |
| Any advantage from co-agency petitioning for funding? | | | |
| Can the public see any benefits / reason to collaborate? | | | |
| Were MOUs or other agreements drafted before committing? | | | |
| Is colocation temporary or permanent? | | | |

Source: Bolan Smart 11/2017

**APPENDICES**

**APPENDIX A**
**MONGOMERY COUNTY COLOCATION PROJECT MATIRX:**
**EXISTING AND PLANNED**

| # | Project Name | Address | Location | Colocation Type | | | | | | | Agency Participants | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | 1a | 1b | 2 | 3 | 4 | 5 | 6 | MCG [1] | MCPS | MNCPPC (Parks) | Mont. College [2] | HOC | WSSC | Other [3] |
| | | | | Planned Same Bldg Public/Public | Same Bldg Public / Public | Adjacent Public Uses | Adjacent Private Uses | Joint-Use of Space | Public / Private Partnership | Other Public Benefits | | | | | | | |
| *Existing Facilities* | | | | | | | | | | | | | | | | | |
| 1 | East County RSC | 3300 Briggs Chaney Rd | Silver Spring | X | | X | | | | X | H, R | | | X | | | |
| 2 | Exec Office Building/Judicial Cntr | 101 Monroe St | Rockville | X | | X | | X | | | G | | | | | | |
| 3 | PSTA & Multi-Agency Service Park | 8751 Snouffer School Rd | Gaithersburg | X | | X | | X | | | G, P, F | X | X | | | | T |
| 4 | PSTA/Police Trailer & Driver Training | 9710 Great Seneca Hwy | Gaithersburg | X | | X | | | | | P, F | | | | | | |
| 5 | Silver Spring Civic Center | 1 Veterans Plaza | Silver Spring | X | | X | | | | X | G | | X | | | | |
| 6 | Rockville Memorial Library / Town Sq | 21 Maryland Ave | Rockville | X | | | X | | X | X | L | | | | | | PS |
| 7 | SS Fire Station #1 / Progress Place | 8106-8110 Georgia Ave | Silver Spring | X | | X | | | X | X | P, F, H | | | | | | N |
| 8 | Red Brick Courthouse | 29 Courthouse Sq | Rockville | | X | | X | | | X | G | | | | | | N, PS |
| 9 | Viers Mills ES & Health Center | 11711 Joseph Mill Rd | Silver Spring | | X | | | X | | X | H | X | | | | | C |
| 10 | Weller Road ES & Health Center | 3301 Weller Rd | Silver Spring | | X | | | X | | X | H | X | | | | | C |
| 11 | Broome School | 751 Twinbrook Pkwy | Rockville | | X | | | | | X | R | | X | | | | N |
| 12 | Clara Barton School | 7425 MacArther Blvd | Cabin John | | X | | | | | X | R | | | | | | C |
| 13 | Broad Acres ES & Health Center | 710 Beacon Rd | Silver Spring | | X | X | | | | | H | X | X | | | | |
| 14 | Harmony Hills ES & Health Center | 13407 Lydia St | Silver Spring | | X | X | | | | | H | X | X | | | | |
| 15 | Highland ES & Health Center | 3100 Medway St | Silver Spring | | X | X | | | | | H | X | X | | | | |
| 16 | Montgomery County Police Dept HQ | 100 Edison Park Dr | Gaithersburg | | X | X | | | | | P, F, LQ | X | | | | | |
| 17 | Summit Hall ES & Health Center | 101 W Deer Park Rd | Gaithersburg | | X | X | | | | | H | X | X | | | | |
| 18 | Watkins Mill HS & Wellness Center | 10301 Apple Ridge Rd | Gaithersburg | | X | X | | | | | H | X | X | | | | |
| 19 | 1300 Quince Orchard Rd | 1300 Quince Orchard Rd | Gaithersburg | | X | | | | | | P, F | | | | | | |
| 20 | 255 Rockville Pike | 255 Rockville Pike | Rockville | | X | | | | | | G, H | | | | | X | |
| 21 | 600 East Jefferson St | 600 East Jefferson St | Rockville | | X | | | | | | P, H | | | | | | |
| 22 | County Bldg / Alt. Emergency Call Cntr. | 100 Maryland Ave | Rockville | | X | | | | | | G, P, F | | | | | | |
| 23 | Southlawn Maintenance Deport | 14935 Southlawn Ln | Rockville | | X | | | | | | P, F | | | | | | |
| 24 | Fueling Stations | Multiple | County-Wide | | X | | | | | | G | X | X | | | | P |
| 25 | Gaithersburg ES & Health Center | 35 North Summit Ave | Gaithersburg | | X | | | | | | H | X | | | | | |
| 26 | Gaithersburg HS & Wellness Center | 101 Education Blvd | Gaithersburg | | X | | | | | | H | X | | | | | |
| 27 | Montgomery College (MC) Germantown Innovative Center | 20271 Goldenrod Ln | Germantown | | X | | | | | | G | | | X | | | |
| 28 | Grey Courthouse | 27 Courthouse Sq | Rockville | | X | | | | | | G | | | | | | |
| 29 | Holiday Park Former ES | 3950 Ferrara Dr | Wheaton | | X | | | | | | H | | | | | | |
| 30 | MC Takoma Park Campus Data Center [4] | 7600 Takoma Ave | Takoma Park | | X | | | | | | G | | X | X | | | |
| 31 | New Hampshire Estates ES & Health Cntr | 8720 Carroll Ave | Silver Spring | | X | | | | | | H | X | | | | | |
| 32 | Northwood HS & Wellness Center | 919 University Blvd W | Silver Spring | | X | | | | | | H | X | | | | | |
| 33 | Rolling Terrace ES & Health Center | 705 Bayfield St | Takoma Park | | X | | | | | | H | X | | | | | |
| 34 | Seneca Valley HS & Wellness Center | 19401 Crystal Rock Dr | Germantown | | X | | | | | | H | X | | | | | |
| 35 | South Lake ES & Wellness Center | 18201 Contour Rd | Gaithersburg | | X | | | | | | H | X | | | | | |
| 36 | Wheaton HS & Wellness Cener | 12401 Dalewood Dr | Silver Spring | | X | | | | | | H | X | | | | | |
| 37 | Health Science Center / Holy Cross | 7987 Georgia Ave | Silver Spring | | X | | | | | | | | | X | | | N |
| 38 | MC Workforce Development Programs | Multiple | County-Wide | | X | | | | | | G | X | | X | | | |
| 39 | Elizabeth Square (existing & planned) | 1424 Fenwick Ln | Silver Spring | | X | | | X | X | X | R | | | | X | | PS |
| 40 | Diamond Square | 80 Bureau Dr | Gaithersburg | X | | | | | | | H | | | | X | | |
| 41 | Colesville Center | 14015 New Hampshire Ave | Silver Spring | | X | X | | | | X | H | | | | | | N, PS |
| 42 | Damascus Library & Senior Center | 9701 Main St | Damascus | | X | X | | | | X | G, L | | | | | | C, N |
| 43 | Lone Oak Center & Day Care | 1010 Grandin Ave | Rockville | | X | X | | | | X | G | | | | | | C, N |
| 44 | Arcola ES | 1820 Franwall Ave | Silver Spring | | X | | | X | | X | | X | X | | | | C |

1

| # | Project Name | Address | Location | Colocation Type | | | | | | | Agency Participants | | | | | | |
| | | | | 1a Planned Same Bldg Public/Public | 1b Same Bldg Public / Public | 2 Adjacent Public Uses | 3 Adjacent Private Uses | 4 Joint-Use of Space | 5 Public / Private Partnership | 6 Other Public Benefits | MCG [1] | MCPS | MNCPPC (Parks) | Mont. College [2] | HOC | WSSC | Other [3] |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 45 | Bel Pre ES | 13801 Rippling Brook Dr | Silver Spring | | | X | | X | | X | | X | X | | | | C |
| 46 | Galway ES | 12612 Galway Dr | Silver Spring | | | X | | X | | X | | X | X | | | | C |
| 47 | Glen Haven ES | 10900 Inwood Ave | Silver Spring | | | X | | X | | X | | X | X | | | | C |
| 48 | Metropolitan Bethesda-CC RSC | 4805 Edgemoor Ln | Bethesda | | | X | | X | | X | G, H | | | | X | | C |
| 49 | James Lawton Comm Cntr / Leland Park | 4301 Willow Ln | Bethesda | | | X | | | | X | H | | X | | | | N |
| 50 | SS Metro/Commuter Service Cntr | 1110 Bonifont St | Silver Spring | | | X | | | | X | H | | | | | | W |
| 51 | Strathmore Mansion / Venue | 10701 Rockville Pike | Rockville | | | X | | | | X | G | | | | | | PS |
| 52 | Sidney Kramer Upcounty RSC | 12900 Middlebrook Ln | Germantown | | | X | | | | X | H, R | X | | | | | C |
| 53 | Silver Spring Library & Senior Housing | 900 Wayne Ave | Silver Spring | | | | X | | X | X | G, L | | X | | | | N, P |
| 54 | Thurgood Marshall ES | 12260 McDonald Chapel Dr | Gaithersburg | | | | | X | | X | | X | | | | | C |
| 55 | William Tyler Page ES | 13400 Tamarack Rd | Silver Spring | | | | | X | | X | | X | | | | | C |
| 56 | Sargent Shriver ES | 12518 Greenly Dr | Silver Spring | | | | | X | | X | | X | | | | | C |
| 57 | Takoma Park ES | 7511 Holly Ave | Takoma Park | | | | | X | | X | | X | | | | | C |
| 58 | Wheaton Woods ES | 4510 Faroe Pl | Rockville | | | | | X | | X | | X | | | | | C |
| 59 | Clarksburg Community Building | 23201 Stringtown Rd | Clarksburg | | | | | | | X | G | | | | | | |
| 60 | Davis Library | 6400 Democracy Blvd | Bethesda | | | | | | | X | L | | | | | | N |
| 61 | Potomac Community Center | 11315 Falls Rd | Potomac | | | | | | | X | R | | | | | | C |
| 62 | Montgomery College Rockville / Carver | Mannekee | Rockville | | | X | | | | | | X | | X | | | |
| 63 | MC Germantown Campus / Holy Cross | Observation Dr | Germantown | | | X | | | | | | | X | X | | | N |
| 64 | Health Human Services (HHS) | 103, 5 & 7 Fleet St | Rockville | | | X | | | | | H | | | | | | |
| 65 | HHS Mens Shelter | 600 East Gude Dr | Rockville | | | X | | | | | H | | | | | | |
| 66 | Judicial Center (state facility) | 50 Maryland Ave | Rockville | | | X | | | | | G | | | | | | |
| 67 | Kingsview MS & Germantown Pool | 18905 Kingsview Rd | Germantown | | | X | | | | | R | X | | | | | |
| 68 | Long Branch Rec Cntr & Library | 8700 Piney Branch Pkwy | Silver Spring | | | X | | | | | R, L | | X | | | | |
| 69 | Moneysworth Farm House | 24510 Clarksburg Rd | Boyds | | | X | | | | | G | X | | | | | |
| 70 | Multiple Bay Industrial Building | 2201 Tech Rd | Silver Spring | | | X | | | | | G | | | | | | |
| 71 | Oaks Landfill | 6001 Laytonsville Rd | Gaithersburg | | | X | | | | | G | | | | | | |
| 72 | Seven Locks Shop | 1283 Seven Locks Rd | Potomac | | | X | | | | | G | | | | | | |
| 73 | Shady Grove Recycling Center | 16105 Frederick Rd | Derwood | | | X | | | | | G | | | | | | |
| 74 | Shady Grove Transfer Station | 16101 Frederick Rd | Derwood | | | X | | | | | G | | | | | | |
| 75 | UC Community Cntr & Outdoor Pool | 8201-11 Emory Grove Rd | Gaithersburg | | | X | | | | | R, DHCA | | | | | | |
| 76 | Town of Chevy Chase Offices | 4301 Willow Ln | Chevy Chase | | | X | | | | | | | X | | | | N |
| 77 | Beall ES | 451 Beall Ave | Rockville | | | X | | | | | | X | X | | | | |
| 78 | Bradley Hills ES | 8701 Hartsdale Ave | Bethesda | | | X | | | | | | X | X | | | | |
| 79 | Brown Station ES | 851 Quince Orchard Blvd | Gaithersburg | | | X | | | | | | X | X | | | | |
| 80 | Burning Tree ES | 7900 Beech Tree Rd | Bethesda | | | X | | | | | | X | X | | | | |
| 81 | Cannon Road ES | 901 Cannon Rd | Silver Spring | | | X | | | | | | X | X | | | | |
| 82 | Clearspring ES | 9930 Moyer Rd | Damascus | | | X | | | | | | X | X | | | | |
| 83 | Clopper Mill ES | 18501 Cinnamon Dr | Germantown | | | X | | | | | | X | X | | | | |
| 84 | Cloverly ES | 800 Briggs Chaney Rd | Silver Spring | | | X | | | | | | X | X | | | | |
| 85 | College Gardens ES | 1700 Yale Place | Rockville | | | X | | | | | | X | X | | | | |
| 86 | Capt James E Daly ES | 20301 Brandermill Dr | Germantown | | | X | | | | | | X | X | | | | |
| 87 | Diamond ES | 4 Marquis Dr | Gaithersburg | | | X | | | | | | X | X | | | | |
| 88 | Fallsmead ES | 800 Greenplace Terr | Rockville | | | X | | | | | | X | X | | | | |
| 89 | Farmland ES | 7000 Old Gate Rd | Rockville | | | X | | | | | | X | X | | | | |

| # | Project Name | Address | Location | Colocation Type | | | | | | | Agency Participants | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | 1a | 1b | 2 | 3 | 4 | 5 | 6 | | | | | | | |
| | | | | Planned Same Bldg Public/Public | Same Bldg Public / Public | Adjacent Public Uses | Adjacent Private Uses | Joint-Use of Space | Public / Private Partnership | Other Public Benefits | MCG [1] | MCPS | MNCPPC (Parks) | Mont. College [2] | HOC | WSSC | Other [3] |
| 90 | Flower Hill ES | 18425 Flower Hill Way | Gaithersburg | | | X | | | | | | X | X | | | | |
| 91 | Fox Chapel ES | 19315 Archdale Rd | Germantown | | | X | | | | | | X | X | | | | |
| 92 | Garrett Park ES | 4810 Oxford St | Kensington | | | X | | | | | | X | X | | | | |
| 93 | Georgian Forest ES | 3100 Regina Dr | Silver Spring | | | X | | | | | | X | X | | | | |
| 94 | Greenwood ES | 3336 Gold Mine Rd | Brookeville | | | X | | | | | | X | X | | | | |
| 95 | Little Bennett ES | 23930 Burdette Forest Rd | Clarksburg | | | X | | | | | | X | X | | | | |
| 96 | Luxmanor ES | 6201 Tilden Lan | Rockville | | | X | | | | | | X | X | | | | |
| 97 | S. Christa McAuliffe ES | 12500 Wisteria Dr | Germantown | | | X | | | | | | X | X | | | | |
| 98 | Ronald McNair ES | 13881 Hopkins Rd | Germantown | | | X | | | | | | X | X | | | | |
| 99 | Meadow Hall ES | 951 Twinbrook Pkwy | Rockville | | | X | | | | | | X | X | | | | |
| 100 | Roscoe R Nix ES | 1100 Corliss St | Silver Spring | | | X | | | | | | X | X | | | | |
| 101 | Oakland Terrace ES | 2720 Plyers Mill Rd | Silver Spring | | | X | | | | | | X | X | | | | |
| 102 | Pine Crest ES | 201 Woodmoor Dr | Silver Spring | | | X | | | | | | X | X | | | | |
| 103 | Piney Branch ES | 7510 Maple Ave | Takoma Park | | | X | | | | | | X | X | | | | |
| 104 | Sequoyah ES | 17301 Bowie Mill Rd | Derwood | | | X | | | | | | X | X | | | | |
| 105 | Sligo Creek ES | 500 Schuyler Rd | Silver Spring | | | X | | | | | | X | X | | | | |
| 106 | Strathmore ES | 3200 Beaverwood Ln | Silver Spring | | | X | | | | | | X | X | | | | |
| 107 | Watkins Mill ES | 19001 Watkins Mill Rd | Mont Village | | | X | | | | | | X | X | | | | |
| 108 | Westbrook ES | 5110 Allan Terr | Bethesda | | | X | | | | | | X | X | | | | |
| 109 | Wood Acres ES | 5800 Cromwell Dr | Bethesda | | | X | | | | | | X | X | | | | |
| 110 | Benjamin Banneker MS | 14800 Perrywood Dr | Burtonsville | | | X | | | | | | X | X | | | | |
| 111 | Lakelands Park MS | 1200 Main St | Gaithersburg | | | X | | | | | | X | X | | | | |
| 112 | Col E Brooke Lee MS | 11800 Monticello Ave | Silver Spring | | | X | | | | | | X | X | | | | |
| 113 | Newport Mill MS | 11311 Newport Mill Rd | Kensington | | | X | | | | | | X | X | | | | |
| 114 | Parkland MS | 4610 West Frankfort Dr | Rockville | | | X | | | | | | X | X | | | | |
| 115 | Rosa M Parks MS | 19200 Olney Mill Rd | Olney | | | X | | | | | | X | X | | | | |
| 116 | Redland MS | 6505 Muncaster Mill Rd | Rockville | | | X | | | | | | X | X | | | | |
| 117 | Silver Spring International MS | 313 Wayne Ave | Silver Spring | | | X | | | | | | X | X | | | | |
| 118 | Sligo Creek MS | 1401 Dennis Ave | Silver Spring | | | X | | | | | | X | X | | | | |
| 119 | Takoma Park MS | 7611 Piney Branch Rd | Silver Spring | | | X | | | | | | X | X | | | | |
| 120 | Earle B Wood MS | 14615 Bauer Dr | Rockville | | | X | | | | | | X | X | | | | |
| 121 | Montgomery Blair HS | 51 University Blvd | Silver Spring | | | X | | | | | | X | X | | | | |
| 122 | Albert Einstein HS | 11135 Newport Mill Rd | Kensington | | | X | | | | | | X | X | | | | |
| 123 | Northwest HS | 13501 Richter Farm Rd | Germantown | | | X | | | | | | X | X | | | | |
| 124 | Springbrook HS | 201 Valleybrook Dr | Silver Spring | | | X | | | | | | X | X | | | | |
| 125 | Walt Whitman HS | 7100 Whittier Blvd | Bethesda | | | X | | | | | | X | X | | | | |
| 126 | Rock Creek | 7901 Meadowbrook Dr | Chevy Chase | | | X | | | | | | | X | | | X | |
| 127 | Brighton Dam | Brighton Dam Rd | Brookeville | | | | | | X | | | | | | | X | |
| 128 | Browns Bridge / Ednor Park | 2201 Ednor Road | Ednor | | | | | | X | | | | | | | X | |
| 129 | Gwendoyn Coffield Community Cntr. / RH-Lyttonsville Park / Paddington Sq Apts | 2450 Lyttonsville Rd | Silver Spring | | | X | | | | | R, G | | X | | X | X | |
| 130 | Camp Hill Square | 17825 Wash Grove Ln | Gaithersburg | | | X | | | | | G | | X | | X | | |
| 131 | Emory Grove | 8107 Morning View Dr | Gaithersburg | | | X | | | | | G | | X | | X | | |
| 132 | Fairfax Court Apartments | 1 Fairfax Ct | Chevy Chase | | | X | | | | | | | X | | X | | |
| 133 | McGruder's Discovery | 10508 Westlake Dr | Bethesda | | | X | | | | | R | | X | | X | | |
| 134 | Metropointe | 11175 Georgia Ave | Wheaton | | | X | X | | X | | | | | | X | | W, PS |

| # | Project Name | Address | Location | Colocation Type | | | | | | | Agency Participants | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | 1a | 1b | 2 | 3 | 4 | 5 | 6 | | | | | | | |
| | | | | Planned Same Bldg Public/Public | Same Bldg Public / Public | Adjacent Public Uses | Adjacent Private Uses | Joint-Use of Space | Public / Private Partnership | Other Public Benefits | MCG[1] | MCPS | MNCPPC (Parks) | Mont. College[2] | HOC | WSSC | Other[3] |
| 135 | Oaks @ Four Corners | 321 University Blvd W | Silver Spring | | | X | | | | | G | | X | | X | | |
| 136 | Pomander Court | 1620 University Blvd | Silver Spring | | | X | | | | | | | X | | X | | |
| 137 | Pond Ridge | 18100 Pond Ridge Ct | Olney | | | X | | | | | | X | | | X | | C |
| 138 | Pooks Hill | 3 Pooks Hill Rd | Bethesda | | | X | | | | | | | X | | X | | |
| 139 | Seneca Ridge | 19568 Scenery Dr | Germantown | | | X | | | | | G | | X | | X | | |
| 140 | Shady Grove Apartments | 16125 Crabbs Branch Way | Derwood | | | X | | | | | | | X | | X | | |
| 141 | Stewartown Homes | 9310 Merust Ln | Gaithersburg | | | X | | | | | | | X | | X | | |
| 142 | Strathmore Court | 5440 Marinelli Dr | N. Bethesda | | | X | | | | | | | | | X | | W |
| 143 | Tanglewood and Sligo LP | 8902 Manchester Rd | Silver Spring | | | X | | | | | | X | X | | X | | |
| 144 | Town Center Apartments | 90 Monroe St | Rockville | | | X | | | | | G | | | | X | | RV Park |
| 145 | Washington Square | 8343 Fairhaven Dr | Gaithersburg | | | X | | | | | | | X | | X | | |
| 146 | Beverly Farms ES | 8501 Postoak Rd | Potomac | | | X | | | | | | X | X | | | | |
| 147 | 2nd District Police Station | 4823 Rugby Ave | Bethesda | | | X | | | X | | P | | | | | | T, PS |
| 148 | Bethesda Parking Lot 31 | 7171 Woodmont Ave | Bethesda | | | | X | | X | | | | | | | | T, PS |
| 149 | Fenton Street Village Parking Lot 3 | 8100 Fenton St | Silver Spring | | | | X | | X | | | | | | | | T, PS |
| 150 | Chevy Chase Lake | 3719 Chevy Chase Lake | Chevy Chase | | | | X | | X | | | | | | X | | PS |
| 151 | Print Shop MOU | North Stonestreet Ave | Rockville | | | | | X | | | G | X | | | | | |
| *Planned / Redevelopment Facilities* | | | | | | | | | | | | | | | | | |
| 1 | Wheaton Library & Recreation Cntr | 11701-11 Georgia Ave | Wheaton | X | | X | | X | X | X | L, R | | X | | | | |
| 2 | East County RSC Addition (#1 above) | 3300 Briggs Chaney Rd | Silver Spring | | | X | X | | X | | G, DHCA | | | | | | PS |
| 3 | Sidney Kramer Upcounty RSC (#52 above) | 12900 Middlebrook Ln | Germantown | | | X | | | X | | G, DHCA | | | | | | PS |
| 4 | White Flint Fire Station | Chapman Ave & Randolf Rd | White Flint | | | X | | | | | F | | | | X | | N |
| 5 | M-NCPPC Wheaton HQ | Georgia Ave & Reedie Dr | Wheaton | | X | X | X | | X | X | G | | X | | | | C |
| 6 | 6th District Police Station | 45 W Watkins Mill Rd | Clarksburg | | | X | | | | X | G | | | | | | T |
| 7 | Former Silver Spring Library Reuse | 8901 Colesville Road | Silver Spring | | | X | | | | X | G | | | | | | |
| 8 | East County Life Sciences Campus | 2201 Tech Rd | Silver Spring | | | X | | | | | G | | | | | | |
| 9 | Holly Hall | 10110 New Hampshire Ave | Silver Spring | | | | X | | X | | | | | | | | PS |
| 10 | Jeremiah Park | Crabbs Branch Way | Shady Grove | | | X | | X | | | G | X | X | | | | PS, W |
| 11 | Wall Park / Kennedy Shriver Aquatic Cntr | 5900 Executive Blvd | Rockville | | | X | | | X | | R | | X | | | | PS |
| 12 | 900 Thayer | 900 Thayer Ave | Silver Spring | | | X | X | | X | | | | | | X | | T, PS |
| 13 | The Ambassador | 2715 University Blvd | Silver Spring | | | | X | | X | | | | | | X | | PS |
| 14 | Burtonsville Redevelopment | 15701 Old Columbia Pike | Burtonsville | | | | X | | X | | | | | | | | T, PS |
| 15 | Former 3rd District SS Police Station | 801 Sligo Ave | Silver Spring | | | | | | X | | G | | | | | | N |
| | TOTALS[5] | | | 9 | 33 | 119 | 16 | 18 | 19 | 37 | 83 | 86 | 87 | 7 | 24 | 5 | 53 |

[1] MCG includes County government services and offices (including the Department of General Services) = G, Department of Housing & Community Affairs = DHCA, HHS = H, Libraries = L, Liquor = LQ, Department of Recreation = R, Fire = F and Police = P.

Please note that based on the 2016 DHCA Rental Housing Study, there are 830 multifamily rental facilities (626 gardens, 65 mid-rise and 84 high-rise apartments) accounting for almost 84,000 units the majority of which involve some degree of PPP.

[2] Montgomery College provides other workforce training opportunities not captured on this matrix.

[3] Other includes Child / Day Care = C, Non-Profit Entity = N, Private Sector = PS, Department of Transportation = T and WMATA = W.

[4] In addition to Montgomery College's data center colocation, the matrix does not capture all the agency infrastructure colocation (Interagency Technology Policy and Coordinating Committee projects such as the Fibernet).

[5] Many of the 165+ projects have multiple types of colocation so the sum of the individual colocation types totals 251.

Source: Montgomery County Government, Housing Opportunity Commission, Montgomery College, Washington Suburban Sanitary Commission and Bolan Smart, 11/2017

**APPENDIX B**
**MONGOMERY COUNTY PRECEDENT EXAMPLES**

## I.     WHEATON LIBRARY AND COMMUNITY RECREATION CENTER

**Colocation Type**: Planned Public Uses in the Same Building and Adjacent Public Uses

**Colocation Function**: Community Service Delivery

**Coordinating / Host Agency:** Montgomery County Government (DGS)

**Participants:** Library, Recreation Department, M-NCPPC Parks, Department of Transportation

**Project Summary**

Two existing and adjacent facilities are being combined into one new two-story building. A new library and recreation facility are being located on existing county-owned land currently housing an older existing library. Adjacent M-NCPPC Parks-owned land with an existing Montgomery County recreation center will be transformed into an actual park. A street which currently bisects the two properties is being relocated to create a continuous block for improved site layout. As of fall 2017, the project is under construction and is anticipated to be delivered in spring 2019.

**Exhibit B-1: Building Rendering**



Source: M-NCPPC

**Project Drivers / Needs**

The Wheaton Master Plan (2012) identified the need for a new library at the same time the Recreation Department was seeking a replacement facility.

**Planning Process**

Sites evaluated in the Wheaton Central Business District for a new library facility were deemed as not viable. Around the same time (2011), the Recreation Department unsuccessfully looked at 14 sites to house a new facility. An idea to colocate a library and recreation center on the existing library site was supported by the community despite being located outside of the CBD (per the Wheaton Master Plan). Between 2012 and 2013, several public meetings were convened to discuss site layout and features, accessibility and visibility, program components, architectural character, sustainability and LEED parking and open space.

Plans for the colocated facility were approximately 30 percent complete when the project was submitted for Mandatory Referral. At this time (2014+), M-NCPPC Parks augmented the existing plan by adding a new park as part of the project by reclaiming M-NCPPC Parks-owned land that was being freed up by the relocation of the recreation center (M-NCPPC Parks was not originally involved as a project partner / land owner). The project received M-NCPPC Planning Board approval in October 2015. An MOU between all the parties was signed in 2017.

**Physical Features**

By combining both facilities into one building, this project eliminates redundant spaces provided in both existing facilities, such as lobbies, meeting rooms and common areas (restrooms, storage, circulation). Additional shared spaces include computer labs, classroom, social hall, a used bookstore, kitchen and parking. The closure of the through street (Hermitage Avenue) created a continuous block to better access the park / shared green space and enhance site utilization (green space increased from 24,000 square feet to 66,000 square feet). Parking comprises 178 garage spaces below the building and 60 surface parking spaces.

**Colocation Benefits**

1. Colocation allowed for shared infrastructure reducing the overall building footprint and related capital costs and facilitated optimal reuse of the site.
2. Street relocation allows for improved site efficiency.
3. Complimentary multi-generational uses (i.e. parents use the library while kids use the gym).

**Colocation Compromises**

1. M-NCPPC Parks involvement later in the design process resulted in some project compromises (Recreation Department allocated uses / programed space, saving trees, etc.).

**Exhibit B-2: Aerial of Existing Site**



Source: Grimm + Parker Architects

**Exhibit B-3: Site Plan**



Source: Grimm + Parker Architects

## II.    ELIZABETH SQUARE

**Colocation Type**: Public Uses in the Same Building, Adjacent Public Uses and PPP

**Colocation Function**: Community Service Delivery

**Coordinating / Host Agency:** Housing Opportunity Commission (HOC)

**Participants:** Recreation Department (Rec), community service non-profits and Lee Development Group (LDG)

**Development Summary**

Elizabeth Square is a $200 million three building mixed-use project being developed on a 3.6 acre site. The project is located on an entire city block bordered by Fenwick Lane, Apple Avenue, Second Avenue and railroad / Metrorail tracks in downtown Silver Spring. The project is being developed via a partnership between a private developer (LDG) and HOC. LDG executed a ground lease with the county for the property they own adjacent to the train tracks and is responsible for demolishing the existing improvements (townhomes) on that parcel. The county is constructing the Elizabeth Square III apartment building (Phase IIA) on the LDG site followed by Phase III (see details below) in addition to modernizing the Alexander House currently underway as part of Phase I (HOC owns all three buildings).

The development totals approximately 766,000 square feet of residential space (907 units, net gain of 381 units), 6,000 sf of retail space, 7,500 square feet of health / wellness uses (Holy Cross Hospital partnership), and over 120,000 sf of a county operated recreation and aquatic facilities. Of the residential units, slightly less than 40 percent are moderately priced / affordable, including 10 percent workforce units. A 12-foot wide path will be constructed within a public use easement serving as the Metropolitan Branch Trail (future Capital Crescent Trail / regional shared-use path).

**Exhibit B-4: Aerial Rending of Planned Project**



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**Exhibit B-5: Existing Block Aerial and Architectural Rendering**



Source: Bing Maps and Bolan Smart

The project will be developed in two+ phases:

*Phase I* (already underway with anticipated completion in August 2018): Modernization of Alexander House, a 16-story 311-unit apartment building built in 1992.

*Phase IIA (anticipated to start in spring 2018 followed by 30 months of construction)*: Construction of a 267-unit, 10 to 15-story mixed-use, mixed-income, affordable, senior housing apartment building (Elizabeth House III), including a Senior Wellness Center and Primary Care Facility (7,500 sf) and the first phase (swim portion) of an Aquatic and Recreation Center.

*Phase IIB (anticipated to start after completion of Phase IIA)*: The existing Elizabeth House, a 10-story 1966 vintage building with 160 affordable senior housing units, will be demolished and replaced with a 274-unit, 19-story mixed-use apartment building (Elizabeth IV). The second phase of the Aquatic and Recreation Center will be constructed housing basketball courts, community rooms, social hall, a cafe, a conference/business center, a leasing office, a fitness area and a rooftop multi-purpose community room (120,000 sf total county-operated public use space).

**Project Drivers / Needs**

The project grew out of HOC's desire to replace the Elizabeth House while minimizing disruption to current Alexander House residents. It supports HOC's mission to provide energy efficient and cost effective units for HOC's long-term ownership.

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**Planning Process**

*Site Selection Process*:  In 2014, HOC committed to a long-term ground lease with LDG for the adjoining property on the block, the Fenwick Professional Park, which comprised a 1953 two-story townhouse style office complex. The ground lease was executed in 2016.

*Multi-Agency Collaboration:*  HOC reached out to county agencies (DGS and Recreation Department) to explore the possibility of integrating other community services. An HOC planned swimming pool to serve project residents was increased in size and transformed from an HOC housing amenity to a county operated community aquatic and recreation facility. To help solidify the deal, HOC capped the size and cost of Rec facilities.

*Plan Approval Process:*  The Preliminary Plan for Elizabeth Square was approved by the Montgomery County Planning Board in July 2015 followed by site plan approval in October 2016. Although the Planning Board has approved the site plan, aspects of the project continued to be refined in 2017 related to the expanded aquatic and recreation center. The revised plan relies on reclaiming county-owned land that follows the original alignment of Fenwick Lane.

*Operating Agreement:*  An operating agreement amongst participating users was executed in 2017. The county Council approved $4.0 million in funding (FY18) for design of the Recreation Department's facility and $51 million for construction (FY19). The Recreation Department will have the responsibility for maintaining the aquatic facility while HOC maintains the building structure and grounds.

**Community Space**

Public spaces include an art exhibition promenade, a bistro kitchen, a large multi-purpose room, and a public Senior Wellness Center. The public aquatic and recreation center includes a 25 meter eight-lane lap pool, multi-purpose therapy pool, spa, fitness area, basketball court, locker rooms and supportive spaces. There are plans for an adjacent central plaza accessible from 2nd and Apple Avenues. Total on-site (central plaza area and building entries) and off-site (streetscape improvements and access to the Metropolitan Branch Trail) outdoor amenity space is approximately 35,000 sf.

**Colocation Benefits**

1. Scale of the project permitted more and updated housing units along with expanded community / public health-based amenities.
2. HOC financed (bond issuance for government use) the facility shell for the county's aquatic and recreation center (reducing delivery costs compared to a standalone facility).
3. Satisfied Recreation Department's master plan for needed facilities in Silver Spring (no other sites big enough).
4. Established stronger lines of communication going forward related to multi-agency collaboration.

**Colocation Compromises**

1. HOC's use of Federal funding required the Recreation Department to accelerate the design of the county facility.
2. Indoor public use space is included when calculating permissible height and site density. Allocating significant public use space is not exempt (at 4.9 of 5.0 FAR permissible).
3. Inclusion of the expanded Recreation Department facility added an estimated 12-months to the entitlement phase.
4. At project inception, there was no formal framework to facilitate interagency collaboration.
5. On-site energy efficiency facilities could have provided additional capacity (all three buildings and perhaps even the adjacent courthouse) / not maximized.
6. Apartment units above pool require humidity control buffers.

**Exhibit B-6: Aquatic Center Entrance Rendering**



Source: KGD Architecture

## III.     PROGRESS PLACE

**Colocation Type**: Public Uses in the Same Building, Adjacent Public Uses and PPP

**Colocation Function**: Community Service Delivery

**Coordinating / Host Agency:** Fire Department

**Participants:** DGS, Department of Health and Human Services (HHS) and Private Sector (Washington Property Company)

**Project Summary**

Progress Place provides services to low income and homeless populations in the Silver Spring area. A new and expanded Progress Place facility was recently built adjacent to the Silver Spring Fire Station #1 on the station's underutilized surface parking lot at 8110 Georgia Avenue. The prior Progress Place, which was located nearby on Colonial Lane south of Ripley Street, was sold to the developer to pay for the replacement facility.

**Project Drivers / Needs**

The county exchanged an existing property for the construction of a new replacement facility at minimal cost to the government. The prior building was over 20 years old and in need of major renovations. Programs in this facility had expanded to the point that the building was no longer adequate to meet the needs of the community being served. Relocation of Progress Place to existing county-owned land allowed the private sector to redevelop the old site while advancing revitalization initiatives in the Ripley District of Silver Spring.

**Exhibit B-7: Progress Place**

**Planning Process**

DGS began the site selection process in 2008/2009. When no viable sites emerged within the designated downtown Silver Spring district, the parking lot of Fire Station #1 was evaluated and selected (colocation became the solution to a county need). In November 2011, DGS issued a Request for Expressions of Interest seeking proposals from developers interested in redeveloping the Progress Place parcels and relocating the current operations at no or minimal cost to the county. Washington Property Company (WPC) was selected as the county's development partner for the design and construction of a new Progress Place on county-owned land located behind Fire Station #1 in Silver Spring. The prior site is to be redeveloped by WPC into a high-rise residential development (in support of Ripley District revitalization) now that the new facility has been delivered. The entire process for site selection to building delivery spanned eight to nine years.

**Physical Features**

The new Progress Place facility is a four-story 39,000 sf building with three floors of office space housing Progress Place programs and a fourth floor that includes 21 Personal Living Quarters (PLQs) for low income singles.

**Colocation Benefits**

1.  Better site utilization of county-owned land by allowing new construction on an existing site (no other viable sites).
2.  Good example of identifying and using an existing county-owned property for a colocation solution providing improved county service delivery.
3.  Redevelopment of the existing facility allows the site to accommodate the planned Dixon Avenue extension, a path for the Metropolitan Branch Trail and advances redevelopment initiatives.
4.  Public private partnership in which the private sector delivered the new colocated facility almost entirely at its own cost in exchange for the vacated property.

**Colocation Compromises**

1.  Although not a compromise resulting from colocation, the new facility has an inferior location (between a fire station and railroad track).

## IV.    GAITHERSBURG MIDDLE SCHOOL AND GAITHERSBURG AQUATIC CENTER

**Colocation Type**: Public Uses in the Same Building

**Colocation Function**: Community Service Delivery

**Coordinating / Host Agency:** Montgomery County Board of Education / Public Schools (MCPS)

**Participants:** City of Gaithersburg (City) and Recreation Department

### Development Summary

The Gaithersburg Aquatic Center (GAC) opened in January 1977 as an addition to the existing Gaithersburg Middle School (GMS). MCPS built the facility which was jointly funded by MCPS and the City. Ongoing operations are also jointly funded by these two parties. As of mid-2017, pool expansion possibilities are being considered. Separately in 2007, MCPS entered into a 20-year ground lease with the City to allow the City to construct and operate a youth center across the street (Teachers Way) in exchange for constructing 65 new parking spaces for the GMS.

### Project Summary

The original "joint-use" agreement from 1975 outlined that MCPS operates, schedules and staffs the facility for its use during school hours. The City operates, programs and staffs the pool for community use after school hours, on weekends, and during summer vacation. The agreement was renewed in 1993. The renewal agreement was modified by both parties in 2003 to better define the responsibilities of both agencies. Since 2003, the City operates, programs and staffs the facility and is reimbursed by MCPS for staff time during school use.

### Project Drivers / Needs

The City of Gaithersburg identified the need for community services and the GMS was determined as geographically desirable. Subsequently, a jointly funded pool was developed.

**Exhibit B-8: Project Aerial**
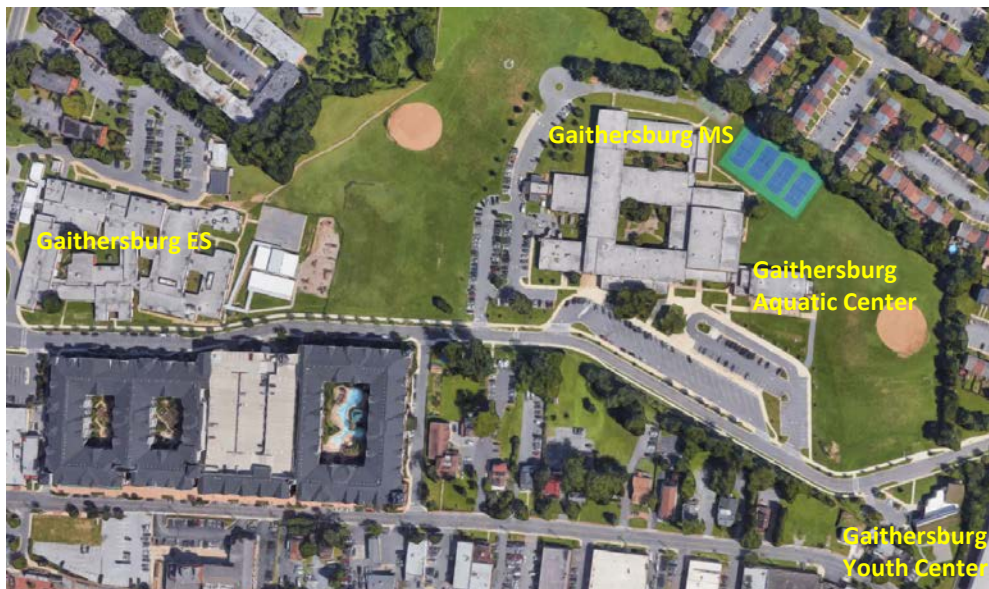


Source: City of Gaithersburg

**Planning Process**

A joint-use agreement was signed in 1975 between MCPS and the City. This agreement outlined respective operational responsibilities, scheduling, maintenance and repairs for both agencies.

**Physical Features**

The GAC comprises a six-lane indoor pool, a 25-yard main pool with two one-meter diving boards and an adjacent shallow water "teach" pool area. The facility recently underwent a $1.1 million renovation program in which MCPS repaired the building and the City took the lead on pool related deficiencies. Multiple funding sources comprised the City, MCPS and the Recreation Department.

**Colocation Benefits**

1. Service delivery model allows each agency / party to focus on their mission (MCPS = education and City = community services) while sharing expensive delivery costs.
2. Represents a successful implementation of longer-term colocated public uses including recent three-way funded renovations.
3. Promotes the efficient use of public facilities.

**Colocation Compromises**

1. Requires on-going collaborative effort and oversight resulting in modifications to prior agreements.

**Exhibit B-9: GAC Entrance**



Source: City of Gaithersburg

## V.     M-NCPPC WHEATON HEADQUARTERS (HQ)

**Colocation Type**: Planned Public Uses in the Same Building and Adjacent Public Uses

**Colocation Function**: Countywide Services

**Coordinating / Host Agency:** M-NCPPC Planning

**Participants:** Montgomery County Government (DGS) and M-NCPPC Parks

**Project Summary**

The 300,000+ square foot multi-user government complex on Parking Lot 13 (Reedie Drive) in Wheaton is currently under construction. Anticipated delivery is in late 2019 / early 2020. The project will house new headquarter facilities for consolidated M-NCPPC administrative functions, 400-underground public parking spaces and an adjacent 35,000 square foot town square. The 14-story building will also house the Department of Permitting Services, Department of Environmental Protection, the Recreation Department, the Mid-County Regional Service Center, Community Use of Public Facilities, Health and Human Services (HHS) offices, ground floor retail and a private child care facility.

**Exhibit B-10: Builidng Rendering**



Source: M-NCPPC

**Project Drivers / Needs**

Needed replacement facilities for existing separate M-NCPPC Park and M-NCPPC Planning office functions into a single M-NCPPC headquarters, other consolidated government services (especially out of existing leased facilities) and downtown Wheaton revitalization. Location maximizes use of public transit since it is across the street from the Wheaton Metrorail Station.

**Planning Process**

The project was planned to consolidate M-NCPPC Planning with M-NCPPC Parks into one building (one agency with two missions that are currently in separate buildings). Original plans for M-NCPPC's new headquarters comprised the redevelopment of their existing property into a mixed-use block comprising 140,000 square foot HQ plus residential. The project stalled for economic reasons. Subsequently, M-NCPPC began searching for headquarter sites in Wheaton. Many sites were too small (i.e. Regional Service Center site), but there was a Department of Transportation (DOT) site, Parking Lot 13, that suited the locational criteria. The building started out as a seven-story facility but was expanded as other departments were added to the project. Although not conceived of as a colocation project, colocation became the County Council's viable solution to consolidate other government services. What started out as a single tenant seven-story building eventual resulted in a 14-story colocation project with at least five additional county departments, a 6,000 square foot private child care facility and first floor retail.

As original owner of the property, DOT was designated to oversee the design and construction of the building. An MOU was created between the agencies describing their respective roles and responsibilities throughout the design and construction process.

Parking Lot 13 was not planned as a single-use public facility development in the Wheaton Master Plan. However, the community supported the project since it preserved the concept of providing a new town square and supports downtown Wheaton revitalization efforts. The site has additional development capacity, which is proposed for future housing use.

M-NCPPC Planning will own and manage the building and the other agencies are "tenants" (note that M-NCPPC Parks currently manages the Silver Spring Planning Department HQ).

**Physical Features**

The completed mixed-use building will have ground-floor retail and upper-floor offices. The building faces directly onto a landscaped plaza and town square. The open lobby will include an information desk and publicly accessible staircase leading to the Planning Board auditorium on the second floor. A child care center will be located on the third floor.

Despite having multiple government services consolidated in one building, most of the individual agency reception areas and other services (i.e. information counters) are not being consolidated. That said, the intake areas for Parks, Recreation, Permitting and Planning are all located on the same (second) floor.

**Colocation Benefits**

1. Consolidated county functions for comprehensive customer service delivery.
2. Fulfilled Wheaton revitalization in addition to community initiatives such as child care and park facilities.
3. Consistent with downtown Wheaton revitalization efforts / economic development while leveraging redevelopment of M-NCPPC's existing property (including unused parking lot air rights).
4. Multi-agency tenancy provided funding justification for the facility.

**Colocation Compromises**

1. Requires long-term inter-agency leases / MOUs and operating agreements.
2. Some design complications regarding access, security, space configurations, etc. to combine all the special purpose spaces (auditorium, day care, regional service center, etc.) into one building.
3. Limited space savings resulting from consolidation since actual joint-use space is minimal.

**Exhibit B-11: Building Entrance and Town Square Rendering**



Source: M-NCPPC

## VI. MULTI-AGENCY SERVICE PARK (MASP) AND PUBLIC SAFETY TRAINING ACADEMY (PSTA)

**Colocation Type**: Planned Public Uses in the Same Building and Adjacent Public Uses

**Colocation Function**: Agency Internal Operational Services

**Coordinating / Host Agency:** Montgomery County Department of General Services (DGS)

**Participants:** MCPS, M-NCPPC & PSTA (Police, Fire, DOT, Department of Corrections and Rehabilitation - DOCR)

**Project Summary**

DGS acquired a privately-owned 49.8 acre industrial parcel (Webb Tract) in Gaithersburg. The property offered a convenient opportunity to relocate and colocate existing older facilities. Delivered in fall 2016 / winter 2017, three primary new facilities comprise the Montgomery County Public Schools (MCPS) Food Distribution Facility, a shared maintenance depot for MCPS and M-NCPPC (LEED Gold rated facility) and the Montgomery County Public Safety Training Academy (PSTA). The combined project has over 900 parking spaces, half of which are located in a shared four-story garage.

**Exhibit B-12: MASP and PSTA Site Plan**



**Project Drivers / Needs**

The project allowed the county to repurpose prior occupied sites located adjacent to the Shady Grove Metrorail Station into a mixed-use transit oriented development. The county also benefited from reinvesting site sale proceeds. The initiative advanced the replacement and expansion of aging, obsolete facilities. Colocation was originally confined to coordinating site acquisition and the delivery of shared infrastructure, but as the project proceeded, the fiscal and functional merits of combining maintenance depot facility operations became more apparent.

**Planning Process**

Planning for the Webb Tract relocation represented the confluence of agencies' prior defined facility needs with a countywide desire to repurpose higher value existing sites. At the direction of the Montgomery County political leadership, DGS initiated a site search resulting in the purchase of the Webb Tract in 2009. During this period, a collaborative engagement moved forward with the agencies targeted for relocation, a process coordinated by DGS. For each user, DGS was the existing landlord. Community engagement was extensive regarding site uses and design but was somewhat expedited due to executive level priorities.

The preliminary site plans placed each agency in separate maintenance depots, with some sharing of common elements (including parking). As the project proceeded, a combination of site characteristics and potential cost savings drove a relook at expanded colocation opportunities (sharing a single building), a direction reinforced by high-level county oversight. The MCPS and the M-NCPPC Parks facility maintenance depots were eventually colocated into the same building. DGS built the facilities, serves as the overall property landlord, and maintains some of the common areas. The agencies are responsible for managing their occupied spaces.

**Physical Features**

The shared maintenance depot building is a long narrow two-story warehouse in which the users are stacked, one on top of the other (taking advantage of the sites grade). Although both MCPS and M-NCPPC Parks facilities maintenance depots include similar features (i.e. vehicle/equipment repair shop), most of this space was duplicated for each users, including separate building access. Shared components include oil tanks, gas pump, a training room, an exercise room, car wash and parking (a four-story shared parking garage with 450 spaces that houses a 13,900 sf central utility plant in the basement).

**Colocation Benefits**

1. Project coalesced around a significant public policy (Smart Growth Initiative – redevelopment of public land proximate to the Shady Grove Metrorail Station).
2. Ability to leverage reuse / income from existing sites can be highly motivational.
3. Expedited delivery of new facilities via colocation can be inspirational for agencies.
4. Centralized project management can offer cost savings via consolidated planning, contracting and construction. Other financial benefits include security and operating costs savings (especially due to campus environment).
5. Stacking maintenance depot tenants (colocated in one building taking advantage of the site's steep slope) combined with shared parking (more initial expense) resulted in a condensed site layout with more open space and neighborhood buffering.

**Colocation Compromises**

1. Increased level of agency coordinating at the planning, implementation and operational levels.

2. Some relinquishing of agency control resulted in some design compromises and periodic revisiting of operating agreements.

3. M-NCPPC Parks depot is smaller in size than Park's program of requirements (no expansion space). Future growth will have to be accommodated elsewhere.

4. Degree of locational and building configuration limitations (site not perfect).

5. Colocation required more meetings / coordinating (30-35% more labor intensive).

**Exhibit B-13: Process Flow Chart / Plan of Action**



Source: M-NCPPC Parks, 8/2017

**APPENDIX C**
**WHITE FLINT SECTOR PLAN COLOCATION PROCESS AND**
**IMPLEMENTATION CASE STUDY**

# WHITE FLINT SECTOR PLAN COLOCATION PROCESS
# AND IMPLEMENTATION CASE STUDY

*Case Study Purpose* – Track and monitor the status of colocation concepts at the planning level through the early years of plan implementation in White Flint.

**White Flint Colocation Related Background**

Exploring the potential for colocation was an integral part in the preparation of the new White Flint Sector Plan. Against a backdrop of limited existing public facilities or county-owned sites, the White Flint plan area comprises major new proposed additions of population, presenting a clear need for solutions to providing for expanded county services. The most intense planning period, between 2008 and 2010, was also a time when county budgets were coming under severe financial strain, begetting consideration of new ways to achieve cost efficiencies for future projects and service delivery.

**Master Plan Process**

In the early 2000s, it became apparent to the Planning Department that the 1992 North Bethesda / Garrett Park Master Plans would need an earlier update than the more typical 20+ year anticipated master plan life span. Furthering the vision of the 2003 10-Year Transportation Policy Report was also a stimulus.

In 2008, M-NCPPC began routine outreach to different public agencies, asking that agency planners try to assess both near- and longer-term agency requirements related to White Flint. Background meetings were held at various times and at different levels, and continued throughout the public vetting process. At the time of recommending the new White Flint Sector Plan to the Planning Board, the sense at M-NCPPC was that all impacted Montgomery County agencies had played integral roles in the planning process and were committed to as much as the plan could anticipate as of 2010. Potential sites for facilities had been identified, and timeline coordination issues qualified. Though the word "colocation" was only used a few times in the 2010 plan, the colocation concept clearly ran deep as a solution for locating and operating desired facilities. That said, the planners recognized that there was no surety of implementation, related to the nature of individual agency's operations, and importantly, unknown and changing conditions concerning site specifics.

The White Flint Sector Plan identified several potential colocation opportunities for public amenities, including:

a) Community Recreation Center.
b) Library.
c) Satellite Office for Regional Services Center.
d) Fire and Emergency Medical Station / Police Station (though not included in implementation strategy).

**Exhibit C-1:**
**2010 White Flint Sector Plan Existing and Proposed White Flint Public Facilities**
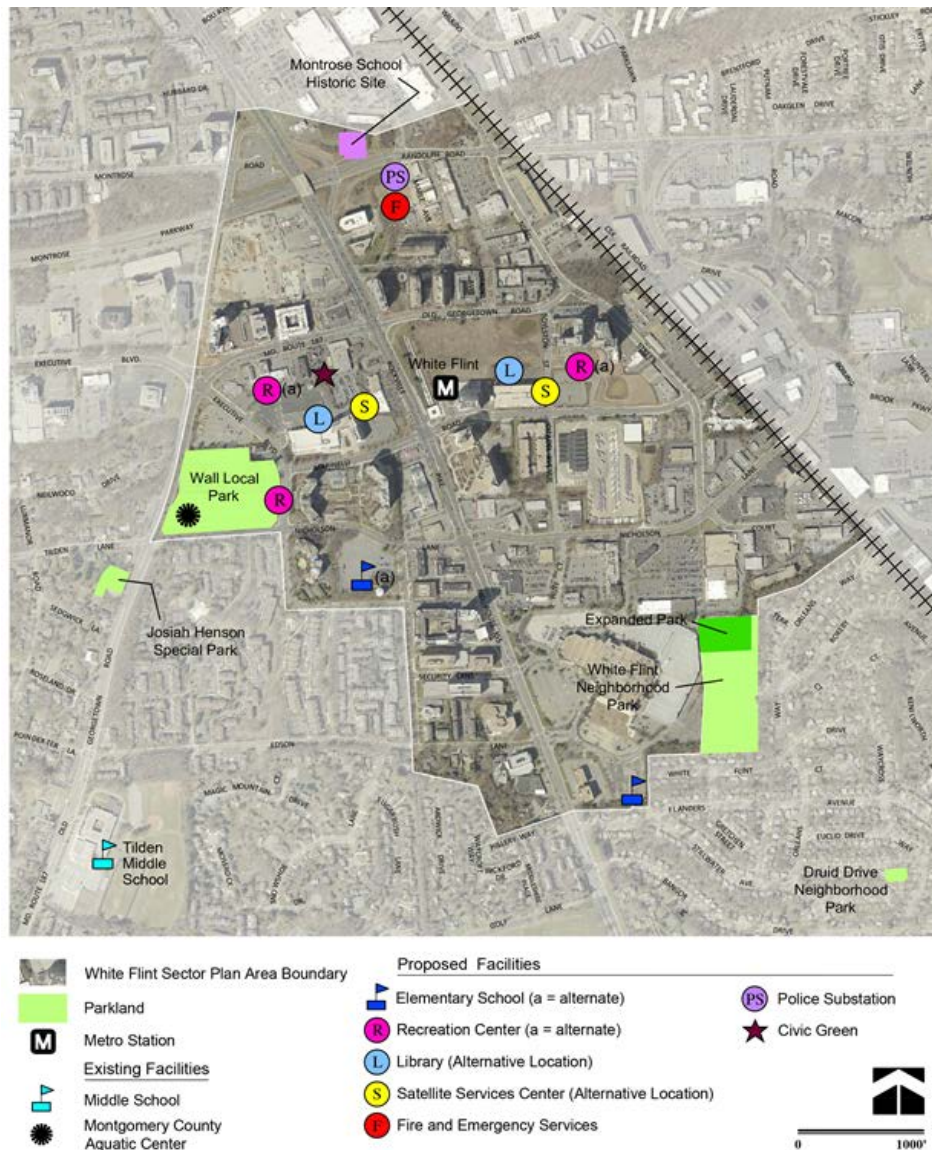


**Master Plan Implementation**

Given the complexities of potential implementation, and consistent with best practices, a comprehensive follow-up process was put in place as part of passing the Sector Plan. This first manifested in 2011 in the "White Flint: Integrated Model and Implementation Strategy for Public Amenities" report. As required by the Sector Plan, the Planning Board also appointed a White Flint Sector Plan Advisory Committee consisting of property owners, civic and homeowners' and other stakeholders from the White Flint area. Executive Branch staff are represented on the Committee by including one member from the Department of Transportation, one from the Finance Department, and the White Flint Implementation Coordinator from the Office of the County Executive. The Advisory Committee reviews all public and private development proposed

for the Plan area. Additionally, planning status updates are regularly published by the Planning Department in the White Flint Biennial Monitoring Report.

**Implementation Strategy Summary**

A 2011 report summarized the collaborative work of stakeholders to create the above referenced Integrated Model and Implementation Strategy for Public Amenities in the White Flint area. Its purpose was to create a post Sector Plan platform to develop more specific amenity plans, with colocation opportunities featured prominently. Related to colocation, the implementation strategy process was intended to:

   a) Avoid redundancy.
   b) Optimize use and efficiency.
   c) Create synergies with existing and planned public and private facilities.
   d) Maximize the benefits to the public.

The implementation strategy identified that an integrated public amenities plan would require a coordinated effort including:

   a) Montgomery County Planning Board.
   b) M-NCPPC Parks Department.
   c) Office of the County Executive.
   d) Montgomery County Department of General Services.
   e) Montgomery County Public Libraries.
   f) Montgomery County Recreation Department.
   g) Regional Services Center.
   h) Landowners/developers, citizen's groups, and individual citizens.

   (Note:  Since the White Flint Sector Plan recommends general locations for most of the defined amenities, the implementation strategy process was not intended to reopen those decisions.)

The implementation strategy process was organized around five sequential meetings:

   1. Joint Meeting(s) with Designated County Departments.
   2. Community Meeting (saw value of colocation, but not universally supportive).
   3. Stakeholders Meeting.
   4. Second Meeting(s) with Designated County Departments.
   5. Public Presentation.

**Specific Colocation Projects**

*Community Recreation Center (CRC)*

The Recreation Department built a major indoor pool complex (Eunice Kennedy Shriver and Sargent Shriver Aquatic Center) in the 1980s on M-NCPPC Parks land at a central location to White Flint. Separate plans for community recreational uses at nearby Rock Spring never materialized, leaving the Recreation Department to contemplate other options. Leading up to the kick-off of the Sector Plan update, the Recreation Department had identified a concept of a combined new Community Recreation Center, including improvements to the existing Aquatic Center. A hurdle was that the land area of the existing facility and parking area was insufficient to support an expansion. A solution lay in partnering again with M-NCPPC Parks to, in some way, re-use a surface parking lot that already impinged on the planned adjacent Wall Park. The concurrent master planning process provided a platform to consider development options. The implementation strategy process recommended the following:

a) It is most advantageous to locate the CRC near the Eunice Kennedy Shriver and Sargent Shriver Aquatic Center in order to take advantage of shared resources.

b) Expansion of the Aquatic Center facility to house the CRC should be minimized to avoid impacts to Wall Park, by using as compact a footprint as possible and by abutting it against existing buildings.

c) To preserve and increase Wall Park's green space such that all parking except for necessary accessible spaces need to be located offsite.

Undeclared as of 2011, a site-adjacent private mixed-use development proposal subsequently emerged that presented a possible land bay to support proximate parking. During the course of project plan approval, the private developer, Gables Development, agreed that they could increase the size of their private garage to accommodate the 400 spaces requested to replace the 250 surface parking spaces for the future Recreation Center. An additional 150 spaces would also be accommodated, as long as the county paid for and managed the total of 550 spaces. In July 2017, County Council approved funding to cover the cost of the county purchasing 250 parking spaces, to be owned under a condominium regime as part of the larger privately built and owned parking garage so that green space could be provided in Wall Park. Since there were no plans for the added Recreation Center in the six-year CIP, it was agreed that the county could expand the garage to accommodate the additional 150 parking spaces at a later date, but not later than December 1, 2026, based upon Gables' site plan approval.

*Library*

There was no existing library within the White Flint defined or immediately proximate geography. The implementation strategy process recommended the following:

a) The Library Department identified its needs for a Library "Branch", a working part of a larger system, to serve the White Flint area at approximately 10,000 sf.

b) The location of the library should anchor a civic destination and help to foster a synergy between its use and other adjacent civic and commercial uses.

c) The community expressed a desire for a coffee shop or other casual seating area to be in the library. This could either be located in a lobby area, a shared civic space, or in an adjacent commercial space. It cannot be located in the library, next to the stacks.

d) It is possible that the library could be located in a second floor space, but if that is the case, there should be a lobby on the first floor that ensures a visible presence to the public street frontage.

e) It was understood that timing of a new library investment was uncertain, subject to countywide Library priorities, which may delay development at this location.

While the Library department has had preliminary discussions about locating within new current private development projects, no preferred proposal has yet emerged as of fall 2017. The library model for services continues to evolve subsequent to the 2010 Master Plan. Moreover, there is no current CIP funding for a White Flint Library, due to other library priorities.

*Satellite Regional Services Center*

The White Flint Sector Plan recommends colocating a Satellite Regional Services Center, perhaps as part of the public Library. This would be in addition to the main Regional Services Center in Bethesda, one of five such centers dispersed geographically throughout the county. The implementation strategy process recommended the following:

a) The Regional Services Center was defined as comprising approximately 4,000 sf.

b) It would serve as a one-stop-shop for a variety of county services, plus be a place to meet (i.e. the living room of the White Flint community).

c) It would include a meeting room that could be subdivided.

d) Colocation with other civic uses to create a Town Hall was seen as a way to increase efficiency and effectiveness. (e.g. a shared facility with the Library, Town Office, Conference Center).

e) The Town Hall of White Flint – The program of uses and colocation would still need to be clarified.

As of fall 2017, there were no active proposals to locate the Satellite Regional Services Center. Nonetheless, space is being included in the new White Flint Fire Station to accommodate an Urban District or Business Improvement District facility, which is tied to the Regional Services Center.

*Fire and Emergency Medical Services Station*

As articulated in the White Flint Sector Plan, the existing fire station for the White Flint area (Fire Station 23 on Rollins Rd) is not ideally suited to serving its existing geography and expanded volume of new development. An evaluation of public sites (including State owned) of sufficient size with appropriate access in the specified geography pointed to a Maryland DOT parcel located at the southeast quadrant of Rockville Pike (MD 355) and Randolph Road (see Exhibit C-2). Larger than needed solely for fire station requirements, the preferred site offered possibilities for accommodating additional uses. Initial supplemental public uses contemplated for colocation included a police substation and satellite space for the Regional Service Center. At a later stage, the possibility of colocating an affordable housing component emerged.

**Exhibit C-2: Maryland DOT / Fire Station Site**
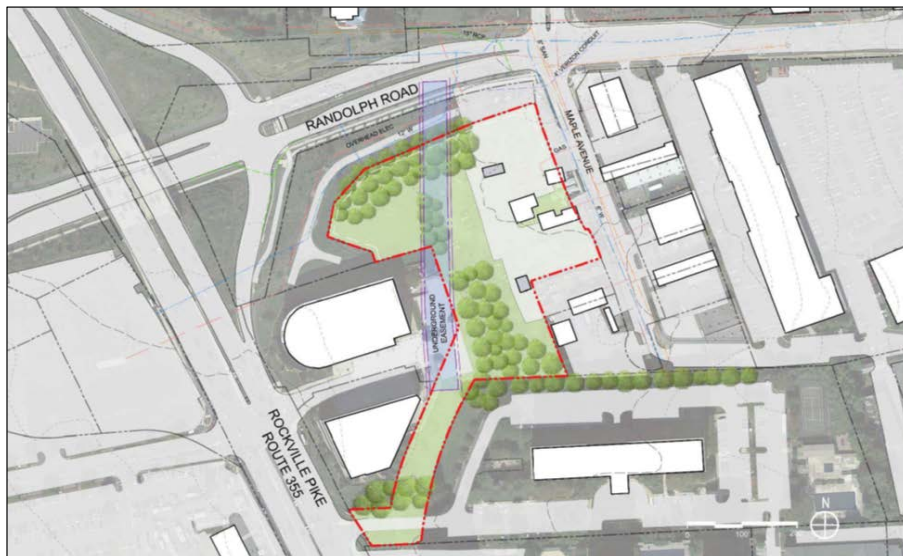


Note: 3.5+/- acre site to be improved with a 20,000 sf 5 bay fire station and a possible mid-rise affordable housing facility.

Though conceptually appealing as an idea, legal and cost issues complicated public agencies' ability to co-venture with the fire station initiative. To begin, a State of Maryland statute limits the ability of property acquired for transportation related purposes to be transferred to third parties (for a land price at close to original site acquisition costs) for uses that are not transportation / public related. The fire station use qualified, but affordable housing built by a private sector developer including some market rate units did not. This meant that if the Montgomery Department of Housing and Community Affairs (DHCA) were to become involved, as it was considering at one point, the site could only be transferred at current full market value. The impact of this provision not only reduced the cost effectiveness of a possible affordable housing project, but lengthened the predevelopment period. The process of having to time a development parallel with uncertainties concerning the funding and scheduling of the fire station rendered the subject development prospect less attractive to DHCA to pursue than more readily available alternatives elsewhere. Moreover, DHCA's mission to maximize public investment value countywide through private sector development partnerships meant that the cost-geography trade-offs of locating in White Flint did not make sense for this property and DHCA's resources were better spent on other projects.

The Housing Opportunity Commission (HOC) was engaged as an alternative affordable housing delivery and operational partner. The same legal transfer hurdle existed, however, and there was the practical matter of cost efficient construction. The site can accommodate colocated emergency service and residential uses, in the same building or adjacent to each other. Test fits were done for a combined colocated high-rise and mid-rise on the existing site, including working around a WMATA tunnel easement that traverses the property. While the site was larger than necessary for fire station use, the configuration of access (including fire truck drive-thru provisions), and requirements to employ mid / high-rise construction rendered per affordable residential unit costs higher than that offered at alternative lower threshold cost locations.

The future White Flint Fire Station is currently in the design phase in the Fire Department's Capital Improvements Plan. The Department of General Services is working with other public agencies to determine what other public uses, such as offices for the future White Flint Urban District, could colocate with the fire station.  Construction is anticipated to begin by FY21. If a housing component were to go forward, and regardless of cost, a horizontal positioned building footprint approach would be necessary, since the two projects are on different time lines. The site is zoned for a 3.5 FAR and will be underutilized without some form of more dense development.

*Other*

1. Schools – MCPS is pursuing a multi-pronged approach across the spectrum of school types, including looking at non-traditional concepts. Though not directly related to the White Flint process, since 2008 MCPS continues to review its stance on the minimum site requirements.
2. Montgomery County / Marriott Conference Center – The stated preference was not to crowd the Conference Center with other public uses.
3. WMATA – As a major land owner, WMATA participated in the master planning dialogue but was subject to a joint development agreement with a private developer.
4. WSSC – More limited participation, with one land parcel that could come into play if ultimately not needed for agency use.
5. HOC – Has one existing property in the White Flint boundary area (Strathmore Court). Other than the Fire / EMS Station dialogue, HOC participated in the master plan process primarily as a property owner.

**Summary Observations**

1. At initiation of the Master Plan update, colocation was a recognized opportunity for select county interests, a sense which was elevated during the ensuing public planning process.
2. Those responsible for the Master Plan sought early and specific input from all identified stakeholder county agencies. It was the respective agencies' responsibility to participate and take ownership, including correlating the White Flint sector planning effort with their agencies' respective countywide programing, planning horizons, funding and implementation timing factors.

3.  The master plan process formalized a strong follow-up implementation review procedure, among other things focused on colocation. This first manifested in 2011 in a report titled "White Flint: An integrated Model and Implementation Strategy for Public Amenities". Through 2017, systematic attention on implementation has been reinforced by an assigned County Administrative Office White Flint Coordinator, an ongoing White Flint Sector Plan Advisory Committee, and the White Flint Partnership. Updates are routinely published by the Planning Department in the "White Flint Biennial Monitoring Report".

4.  Colocation opportunities in White Flint have been difficult to realize in part because so little development has gone forward (only Pike & Rose), while projections made during the planning process were much more robust.

5.  Notwithstanding the logic of the colocation opportunities embedded in the Sector Plan, the plethora of details in execution, including basic legal mandates, could not and were not fully comprehended until later. While this was expected, it in some ways left the impression of a disconnect between well intended planning efforts and practical matters of execution.

6.  The triumvirate of: (1) varied countywide agency priorities; (2) disparate funding hurdles, and; (3) independent timing schedules combined to accentuate the challenge of coordinating individual agency investments in colocation. Of specific note, each Montgomery County agency has different geographic service areas, needs and priorities. Some have to invest and locate within a defined service zone, while others are less geographic bound, measured more by countywide mission objectives and value based cost-benefit investment decisions. One major implication is that while there may be natural interagency service delivery affinities in concept, disparities in geographic need and balancing of funding will generally define actual investments in colocation.

7.  While master plan flexibility is an important dimension in implementation, agencies can find it difficult to prioritize projects that emerge later on that are not already in the County Council acknowledged and blessed plan.

8.  The role of advancing colocation concepts in the master plan process had a varied response in the eyes of the public. First, colocation presented a solution to the problem of limited public land or available sites for desired amenities. Second, it tended to raise expectations about desired outcomes, particularly regarding project timing. Third, mixed community response to specific use colocations illustrated that there was not universal support for colocation in its own right. Related, there was no articulated evidence of colocation being perceived as a way to bring single mission advocates closer together as a way to help with broader based project approval (and funding). What was observed is that the colocation conversation can positively bridge multi-generational perspectives, (i.e. schools to seniors). Finally, the potential to leverage colocation as a community-building / identity enhancement device seemed an assumed implicit benefit. (Note in the case of White Flint identity branding was already a major master plan and implementation focus, as evidenced in the priority given to place making and neighborhood naming identification.)

**APPENDIX D**
**PILOT PROJECT SUMMARIES**

# I.    FUELING MANAGEMENT COLOCATION

*Pilot Profile Purpose* – Explore the prospects for leveraging the on-going installation of a new technology / fuel management system to achieve consolidated / centralized management of fueling stations facilitating countywide universal access to all (49) fueling stations.

## Background

The technology based update has been 10+ years in the making, dating back to when Montgomery County Fire and Rescue Services (MCFRS) identified fuel management as a best practice goal. At the time, while many of the fire rescue stations had fueling stations, only equipment assigned to those stations could obtain fuel. In FY14, the County Council approved funding for the installation of a countywide fuel management technological system, known as "Faster", that tracks fuel usage (dispensing) and fleet / vehicle data. However, the technology that tracks inventory fuel levels, such as Department of General Service's (DGS) Inform system, is not reportedly used by other agencies.

The recently installed Faster fueling management technology was expanded to not only include DGS and MCFRS but other agencies as well so that all county vehicles could be capable of sharing fuel stations while maintaining fuel security. Pro-keys and AIM 2 modules have been installed on most county vehicles and facilitate access to most of DGS's fueling sites. Despite some improvement in cross-agency fuel station access, each agency continues to individually operate, manage, maintain and control their own version of Faster for their stations on their own servers. As a result, cross-agency access / sharing of fueling stations has not yet been realized beyond most of DGS's facilities.

Colocation of fueling stations requires integration of the technology amongst all the user agencies to facilitate universal fueling station access. DGS is currently working to advance this colocation initiative. As of late fall 2017, all of DGS's 13 fueling stations and some of MCFRS's fueling stations currently have online / integrated capabilities but are still operated by the respective department. With installations of Pro-keys and AIM 2, MCFRS, MCPS and M-NCPPC vehicles can use DGS's fueling stations.

## Stakeholder Interviews

Colocation research involved stakeholder interviews to understand user needs and possible barriers to advancing universal fueling station access.

1. *Colocation Drivers* – Countywide universal fueling stations could create savings due to:
   a) New technology system can track vehicle data facilitating timely maintenance and is less expensive to operate (cheaper replacement parts).

b) Possibilities for some consolidation / centralized management that reduces duplicative services at the agency level (including possible use of consolidated private sector vendors for station maintenance and fuel procurement).

c) More efficient and accountable fuel dispensing and providing more accessible / proximate facilities.

d) Increase in fleet productivity.

2. *Key Participants*

a) <u>DGS Fueling Management Division</u> – Currently taking the lead to oversee implementation of the county's new fuel management system, Faster.

b) <u>MCFRS</u> – Initiated the process dating back to 2004 and are still working to get fire trucks equipped with the fuel management pro-keys and AIM 2 modules.

c) <u>MCPS</u> – Already uses two county drive-through bus lanes (stations in Kensington and on Crabbs Branch Way) and operate four other MCPS-owned fueling stations.

d) <u>M-NCPPC Parks</u> – Although M-NCPPC parks has Faster software, their fueling stations are not currently integrated / online with DGS's new feeling management system. Fueling stations are located in maintenance yards which are only accessible when the yards are open (early morning to mid-afternoon).

e) <u>Montgomery College</u> – Does not own any fueling facilities. Montgomery College receives an invoice each month from County Fleet Services detailing the fuel drawn for each vehicle.

e) <u>HOC</u> – Does not own any fueling stations. Currently uses DGS facilities.

f) <u>WSSC</u> – Operates two fueling stations located in their maintenance / service centers that are not currently integrated with the county's Faster system.

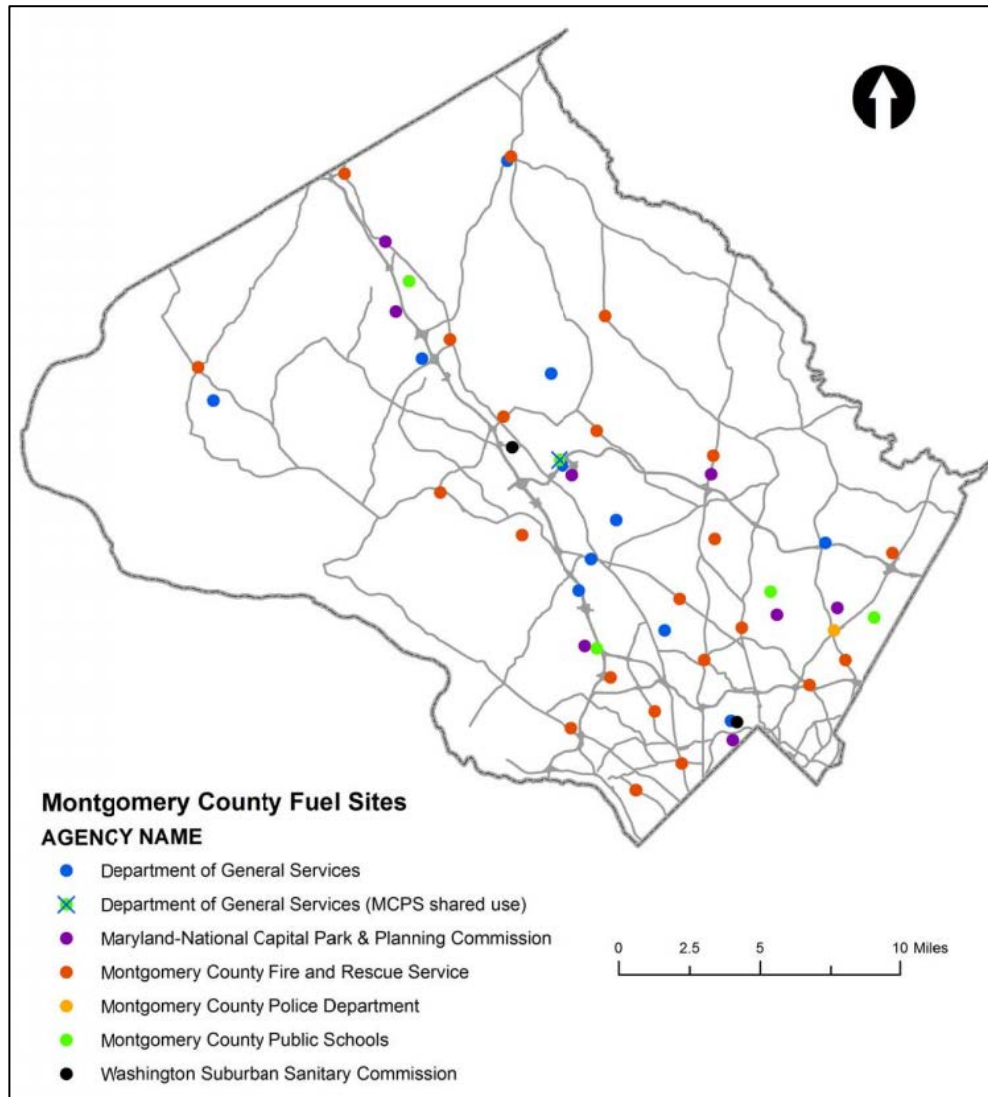g) <u>Other</u> – The system does not currently provide universal access to vendors, WMATA, state or federal users.

3. *Existing Facilities* – The current inventory of fueling stations is categorized by stakeholder:

a) DGS operates 13 fueling stations of which the one station, the Compressed Natural Gas (CNG) site on Crabbs Branch Way, has public access. These 13 fueling stations were recently equipped with a new fueling management system that can provide for approximately 3,600 vehicle at up to 30 fueling stations. All county vehicles equipped with a pro-keys or an employee with a card key can now access these fueling stations. Only seven (#1-7 below) are accessible 24/7. Facilities comprise:

1) Council Office Building @ 100 Maryland Ave in Rockville.
2) Colesville Highway Depot @ 14335 Cape May Rd in Silver Spring.
3) EMTOC @ 16700 Crabbs Branch Way (CNG site) in Gaithersburg.
4) Germantown Police Station @ 20000 Aircraft Dr.
5) Multi-Agency Service Park @ 8751 Snouffer School Rd in Gaithersburg.
6) Seven Locks Maintenance Facility @ 1283 Seven Locks Rd in Bethesda.
7) South Lawn Maintenance Facility @ 14935 Southlawn Ln in Rockville.
8) Damascus Highway Depot @ 26149 Ridge Rd (locked after 2:30pm).
9) Gaithersburg Highway Depot @ 17000 Crabbs Branch Way (Ride-On Buses only).
10) Kensington Bus Depot @ 4935 Nicholson Ct (Ride-On Buses only).
11) Poolesville Highway Depot @ 19200 Jerusalem Rd (locked after 2:30pm).
12) Silver Spring Highway Depot @ 8710 Brookville Rd (Ride-On Buses only).

13) Third District Police Station @ 1002 Milestone Dr in Silver Spring (police use only).

b) MCFRS operates 22 fueling stations of which seven (approximately a third) have the new system with online capabilities. These fueling stations are smaller facilities and MCFRS only want their vehicles using them. Fueling stations are located within existing fire stations as follows:

1) Rescue #2 @ 2400 Arcola Ave in Wheaton.
2) Fire Station #5 @ 10620 Connecticut Ave in Kensington (online).
3) Fire Station #6 @ 6600 Wisconsin Ave in Bethesda.
4) Fire Station #8 @ 801 Russel Ave in Gaithersburg.
5) Fire Station #9 @25801 Frederick Ave in Clarksburg.
6) Fire Station #10 @ 8001 River Rd in West Bethesda.
7) Fire Station #11 @ 5920 Massachusetts Ave in Bethesda (online).
8) Fire Station #12 @ 10617 New Hampshire Ave in Silver Spring.
9) Fire Station #13 @ 26334 Ridge Rd in Damascus.
10) Fire Station #14 @ 19081 Beallsville Rd in Beallsville.
11) Fire Station #15 @ 13900 Old Columbia Pike in Burtonsville (online).
12) Fire Station #16 @ 111 University Blvd in Silver Spring (online).
13) Fire Station #17 @ 21400 Laytonsville Rd in Gaithersburg.
14) Fire Station #20 @ 9041 Old Georgetown Rd in Bethesda.
15) Fire Station #21 @ 12500 Viers Mills Rd in Rockville (online).
16) Fire Station #25 @ 14401 Connecticut Ave in Silver Spring.
17) Fire Station #26 @ 6700 Democracy Blvd in Bethesda.
18) Fire Station #28 @ 7272 Muncaster Rd in Derwood (online).
19) Fire Station #31 @ 12100 Darnestown Rd in Gaithersburg.
20) Fire Station #32 @ 9615 Darnestown Rd in Rockville.
21) Fire Station #34 @ 20633 Boland Farm Rd in Germantown (online).
22) Fire Station #40 @ 1694 Georgia Ave in Olney.

c) M-NCPPC Parks operates eight fueling stations located in Montgomery County Parks Maintenance Yards (does not include the closed station in the Rock Creek Maintenance Yard on Beach Drive):

1) Black Hill @ 21020 Lake Ridge Dr in Boyds.
2) Cabin John @ 7700 Tuckerman Ln in Potomac.
3) Little Bennett @ 23701 Frederick Rd in Clarksburg.
4) Martin L King @ 1120 Jackson Rd in Silver Spring.
5) Meadowbrook @ 8000 Meadowbrook Ln in Chevy Chase.
6) Olney Manor @ 16601 Georgia Ave.
7) Shady Grove @ 16641 Crabbs Branch Way in Rockville.
8) Wheaton @ 12012 Kemp Mill Rd.

d) MCPS operates over 1,300 buses and another 2,000 vehicles (maintenance vehicles, dump trucks, etc.). MCPS's fleet uses the county owned facility on Crabbs Branch Way and in Kensington but operates four additional fueling stations:

    1) Clarksburg Bus Depot @ 13100 Shawnee Lane (services 230 +/- buses).

    2) Bethesda Maintenance Depot at 10901 Westlake Drive (services 171 +/- buses).

    3) Randolph Depot @ 1800 Randolph Road in Silver Spring (services 209 +/- buses).

    4) West Farm Depot @ 11920 Bournefield Way in Silver Spring (not locked up, accessible 24/7 (services 269 +/- buses).

e) WSSC operates two fueling stations at their maintenance depots / service centers in Gaithersburg and Brookeville. WSSC uses E.J. Ward for their fueling management which is not compatible with the county's Faster technology and is unable to access to DGS's fueling stations:

    1) 111 W Diamond Ave in Gaithersburg.

    2) 2501 Lyttonsville Rd in Silver Spring.

**Exhibit D-1**
**Montgomery County Fueling Stations Map**



**Montgomery County Fuel Sites**
**AGENCY NAME**

- ● Department of General Services
- ✕ Department of General Services (MCPS shared use)
- ● Maryland-National Capital Park & Planning Commission
- ● Montgomery County Fire and Rescue Service
- ● Montgomery County Police Department
- ● Montgomery County Public Schools
- ● Washington Suburban Sanitary Commission

0    2.5    5    10 Miles

Source: M-NCPPC 11/17

**Possible Next Steps**

1. *Fueling Management Task Force Team Members*
   a) DGS
   b) MCFRS
   c) MCPS
   d) M-NCPPC Parks
   e) WSSC

2. *Mission* – To coordinate eventual integration of individual agency fleet management systems to provide universal access.

3. *Near-Term Tasks*
   a) <u>Affirm Software Capabilities</u> - To better understand how each individual server / domain is operated and managed as well as what fleet data is captured and tracked.
   b) <u>Data Sharing</u> – Discuss different ways to pass data from one agency to the next as a first step towards a higher degree of integration.
   c) <u>Inventory of Fueling Station Information</u> – Facilitate agency sharing of fueling station information by inventorying each fueling station for type of fuel, above grade or below grade tanks, daily capacity, access (cars, buses, trucks, etc.) and hours of operation.

4. *Longer-Term Tasks*
   a) <u>Consolidation / Centralized Fleet Management</u> – Eventually transition to a centralized management system / one technological application for the county's entire fleet operations. This would maximize universal access to fueling stations and allow agencies and departments to focus on mission delivery instead of administrative support functions.  Cost savings would result due to eliminating duplicative services, consolidation of fleet management and fuel procurements contracts, etc.
   b) <u>Standardize Regulatory Compliance Procedures</u> – Standardization of fueling station oversight and responsibilities regarding regulatory compliance (EPA and Maryland Department of Environment) is desirable.
   c) <u>Monitor Implementation</u> – For possible additional cost savings if consolidation of fueling stations if meritious (i.e. there are multiple stations adjacent to each other in Brookville; on Crabbs Branch Road, etc.).
   d) <u>Assess Expansion Options</u> – Additional expansion capabilities could benefit non-county public sector users such as WSSC, WMATA, local jurisdictions, state and federal entities, etc.

5. *Coordination / Project Planning Funding* – TBD.

6. *Schedule*
   a) Establish detailed work program spring / summer 2018.
   b) Align path to integrate technology with needed system upgrade investments.
   c) Translate possible actions into CIP projects.

## II.     ROCKVILLE / CARVER EDUCATIONAL SERVICE CENTER

*Pilot Profile Purpose* – Outline an approach for multi-stakeholder collaboration regarding potential property redevelopment at a geographically central location.

**Exhibit D-2**
**Vicinity Aerial**



Source: M-NCPPC, June 2017

**Background**

The MCPS property is divided between 21 acres known as the Carver site and 10 acres comprising the Rock Terrace School.

1. *Carver Educational Service Center* – Dating to, and expanded during, the 1950s, the former high school facility was repurposed in the early 1960s to serve as MCPS's headquarters. From 1951 until 1959, the building functioned as the first African American junior college and high school in Montgomery County, a portion of which is designated as an historical landmark (see Exhibit D-3 and D-4). As currently used, the 200,000 sf facility houses some 500 MCPS administrative staff. While the building was never efficient for office use, and has numerous operating deficiencies, MCPS reinvestment has been constrained by alternative demands for capital for school construction. MCPS leases the portion of the site fronting Route 355 to Montgomery College for use as a surface parking lot. Property redevelopment efforts over the years have considered various approaches to adding a broader range of land uses (most recently for a fire station) and consolidating MCPS's administrative offices with other off-site locations. Among other things, any redevelopment must preserve the historic view shed spanning from Route 355 to the historic portion of the building.

2. *Rock Terrace School* – Originally built in the 1950s as an elementary school, Rock Terrace currently serves as a special needs facility for approximately 120 students. While the present use is anticipated to be relocated to Tilden Middle School in 2020, MCPS has plans to back fill the school with another program (possibly from the Blair G. Ewing Center). Note that the Rock Terrace play field is underutilized and was leased and maintained by the City of Rockville until 2016.

**Exhibit D-3**
**Carver Educational Services Center Entrance**

**Exhibit D-4**
**Carver Building Historic Plaque**
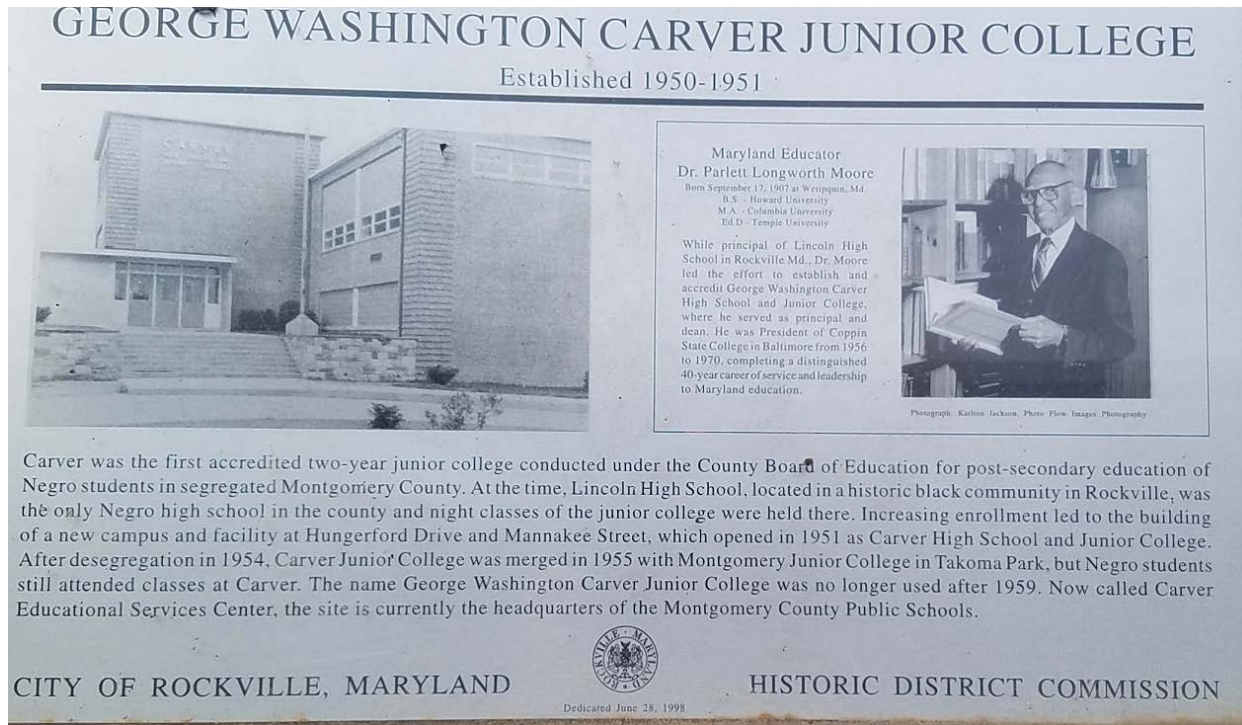


## June 2017 Colocation Study Workshop

With the encouragement of the DOC, a colocation study workshop was convened to engage primary Carver property stakeholders, discuss colocation opportunities and possible next steps summarized as follows:

1. *Colocation Drivers*

   a) Aged MCPS administrative headquarters on an underutilized site, no MCPS budget to address.

   b) Prominent Rockville location accessible via public transportation.

   c) Long term Montgomery College campus planning.

   d) Timing of Rockville's 2040 master plan update for the area (objectives currently being established to include better integration of Montgomery College into the community, improved connectivity, maintaining MCPS HQ in Rockville, and historic preservation).

   e) Limited sites available to provide other needed services (fire station site?).

2. *Key Participants*

   a) <u>Montgomery County Public Schools (MCPS)</u> – If MCPS were to relocate / consolidate, the space requirement would be a minimum of 500,000 sf (Carver plus 260,000 sf leased at 45 W. Gude Drive). To date, addressing this requirement has not been a MCPS budget priority. Before taking any actions, MCPS needs a comprehensive site development plan (not piecemeal) and may need to set aside acreage for future school use.

b) <u>Montgomery College</u> – Long term desire for campus enhancements and possible expansion. Potential opportunities include relocation of the athletic fields, use as a STEM High School (shared educational resources) and student housing.

c) <u>City of Rockville</u> – Per the 2002 Comprehensive Master Plan (CMP), preferred uses could include an educational facility, which may include the Montgomery County Board of Education administrative offices, or facilities serving Montgomery College or other education-related or public safety purposes. Historic preservation / commemoration of cultural significance is important and there are concerns regarding impacts on adjacent neighborhoods. Rockville 2040 vision is currently in process to update the CMP. There is a general desire to better integrate Montgomery College into the community and improve connectivity to the Rockville core, including accommodating proposed Bus Rapid Transit (BRT). The Rockville 2040 process milestones and timeline are presented in Exhibit D-5. The City of Rockville seeks that for any redevelopment to be pursuant to, and compliant with, the City's master plan and zoning. A project submitted by a public agency would be subject to review by the City of Rockville, under the State-regulated Mandatory Referral review process. An educational facility, which may include the Montgomery County Board of Education administrative offices, or facilities serving Montgomery College or other education-related or public safety purposes, is the preferred use for the site.

**Exhibit D-5**
**Rockville 2040 Process, Milestones and Schedule**



d) <u>Montgomery County Department of General Services (DGS)</u> – Described the need to replace a nearby volunteer fire station.

e) <u>Maryland National Capital Parks and Planning Commission (M-NCPPC Planning)</u> – Several uses / needed services were mentioned, including the lack of a hospital in the Rockville vicinity, continued county search for an arena site, and BRT impacts.

f) <u>Montgomery County Administrative Office (CAO)</u> – Conveyed sensitivity regarding the community engagement process including the respective roles of the City of Rockville and Montgomery County.

3. *Primary Use Scenarios*:  Three possible future Carver site occupancy scenarios were discussed:

    a) MCPS administrative services remain with reuse of the surface parking lots.

    b) Preserving the site for future school use.

    c) Relocating MCPS and redeveloping the site (i.e. Montgomery College campus expansion).

These three site use scenarios are not mutually exclusive, and could also accommodate other possible uses and/or access implications, including:

- A fire station, arena and commercial / office buildings that could be converted to future school use.
- Creating a main street between the college, Carver site and Rockville's athletic facility to the south.
- Leverage improved access via the Bus Rapid Transit (BRT) system bus stops at strategic locations.
- Bike path connecting to downtown Rockville.
- Additional retail to serve student needs.

## Possible Next Steps

The June 2017 Carver Workshop brought together primary stakeholders with a new focus for going forward. Subsequently, Montgomery College met with both MCPS and the City of Rockville to explore in more detail possible common interests and planning directions. As of fall 2017 these three agencies identified a coordinated desire to establish a *Rockville / Carver Concepts Task Force*, conceived to address the following possible tasks:

1. *Concepts Task Force Team Members*
   a) Montgomery College – SVP Administrative and Fiscal Services, Director of Facilities and / or Director of Capital Planning Design and Engineering.
   b) MCPS – Real Estate Management Team Leader and / or Senior Planner.
   c) City of Rockville – Chief of Long Range Planner and / or staff assigned by the City Manager.
   d) County Administrative Office – Assistant Chief Administrative Officer.
   e) Colocation Coordinator – TBD.

2. *Mission* – Determine possible site redevelopment parameters, planning objectives and next steps.

3. *Near Term Tasks*
   a) Revisit Past Initiatives – To gain a better understanding of prior redevelopment efforts and what hurdles to moving forward need to be addressed.
   b) Document Scenarios for Further Due Diligence – Including treatment of existing facilities, historic preservation, schedule, land uses by square footages, etc.
   c) Approval Process – Understand each stakeholder's review and approval process (i.e. M-NCPPC Planning's mandatory referral, Rockville's plan and historic requirements, Montgomery College master plan compliance, etc.)
   d) Cost / Benefit MCPS HQ Occupancy Analysis – Based on the possible scenarios, conduct a cost benefit analysis to better understand the most viable MCPS HQ occupancy alternative and order of magnitude comparative costs.
   e) Align schedule of milestones with the City of Rockville 2040 Vision Plan – Collaboration of needed plan inputs.
   f) Meetings and Community Visioning– Continue to vet / convene meetings (perhaps some in conjunction with Rockville's 2040 Vision).
   g) City of Rockville Coordinating – Present scenarios to determine plan compliance and anticipate steps regarding the Mandatory Referral approval process.
   h) County CIP / OMB Involvement – Establish early connections to the County Council.

4. *Coordination / Project Planning Funding* – TBD.  Possible engagement of a third party consultant.

5. *Schedule*
   a) Establish detailed work program spring / summer 2018.
   b) Align benchmark deliverables to help inform the 2040 Rockville planning process.
   c) Translate possible actions as next CIP planning processes advance.

## III.     HIGH SCHOOL COMMUNITY SERVICES COLOCATION

*Pilot Project Purpose* – To outline possibilities for multi-agency participation in planning for the co-delivery of community services at high schools.

**Background**

High schools have large accessible sites that can accommodate a range of colocated community services. Though most educational related building standards still prevail, new designs and construction can allow for flexibility to accommodate other uses, both at project initiation, and as properties may be adapted over time. As with evolving property development concepts, MCPS is interested in expanding upon existing and possible new public relationships that advance the overall co-delivery of community services. Most common school anchored colocation experiences to date include:

- Health- and wellness-based clinics with HHS.
- Colocated athletics and recreation with M-NCPPC Parks and the Recreation Department.
- Campus sharing with Montgomery College to facilitate transition to higher education as well as workforce training programs.

**Exhibit D-6**
**Illustrative Possible High School Shared Uses**
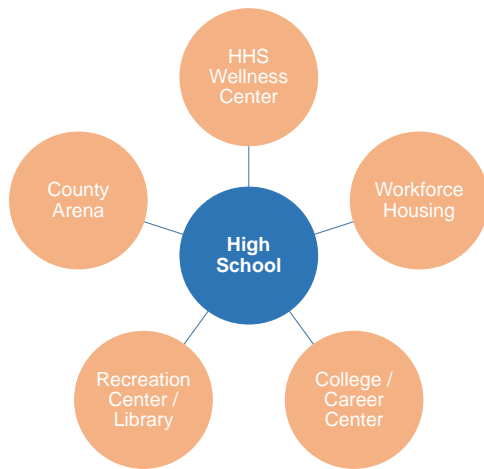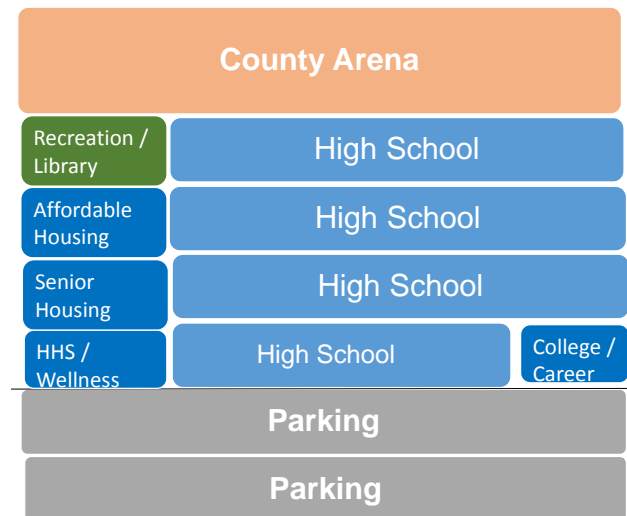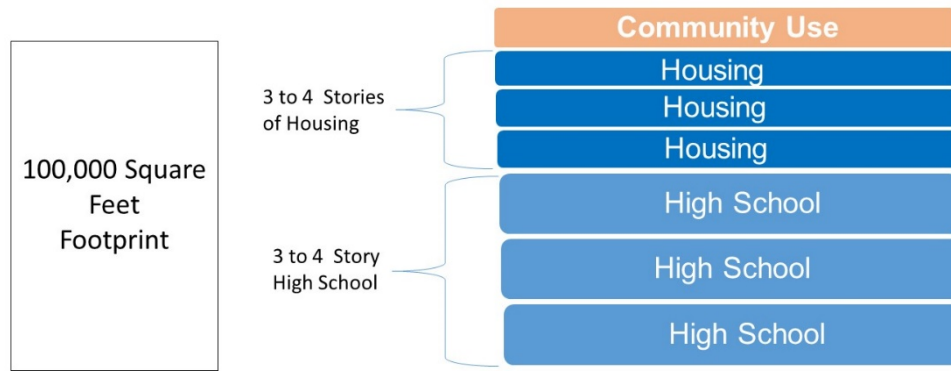


Source: MCPS, March 2017

**Exhibit D-7**
**Possible High School Footprint and Supporting Uses**



Source: MCPS, March 2017

There are 26 existing high schools countywide that serve as a baseline pool of resources from which to evaluate community service colocation opportunities. Selecting a specific high school to assess future colocation community uses is based on criteria such as an accessible and central location, timing of school construction (3 - 5+ year CIP renovation / expansion currently programed), adjacent land uses and overcrowded schools. The FY18 MCPS CIP includes 11 high schools in various stages of being renovated and / or expanded and an enrollment capacity study of four high schools located within the Downcounty consortium.

**June 2017 Colocation Study Workshop**

With the encouragement of the DOC, a colocation study workshop was convened to engage primary property stakeholders, discuss colocation opportunities and possible next steps summarized as follows:

1. *Colocation Drivers*

    a) Few well located larger sites available.

    b) Opportunity to promote agency collaboration vs competition for resources.

    c) Possible enhancement of service delivery / more one-stop shopping for users.

    d) Potential for multi-generational destinations.

2. *Key Participants*

    a) Montgomery County Public Schools (MCPS) – Took a lead role in affirming MCPS's visionary interest in alternative future school facility configurations and the potential for expanding multi-agency participation.

    b) Department of Health and Human Services (HHS) – HHS has benefited from having a close relationship with MCPS. HHS historically has tended to partner "inside" other agency "host" facilities. Examples include five school based Wellness Centers in high schools (Northwood, Gaithersburg, Watkins Mill and Wheaton as well as one planned to open in 2019 at Seneca Valley). Going forward, HHS priority is to align specific community needs (determined by locational, school population / demographics) with potential colocation opportunities. HHS acknowledges that it would benefit if there was a mechanism to have conversation to understand in advance what's on other agencies countywide planning horizons.

c) <u>M-NCPPC Parks</u> – Beneficial features of colocation, particularly between parks and schools include:

- The mental and physical health of children is positively impacted by opportunities to be outdoors reinforcing schools / parks synergies.
- Workforce development facilities colocated with parks help accommodate children while adults use / participate in the workforce services.
- Parks, recreation and libraries all have defined operational standards that must be met, but not necessarily by the agency responsible. Intergovernmental coordination can accomplish economies of scale not otherwise available to individual agencies. An example is that M-NCPPC Parks currently maintains 110 school fields for MCPS.
- Converting surface parking lots to parking garages can free up land that currently exists within the parks system for alternate use. While single users may not be able to support the cost of structured parking, colocation may help remedy the expense hurdle. Furthermore, structured parking with recreational options on the top level have already been configured in schools, including basketball courts in Wheaton and tennis courts at Bethesda-Chevy Chase.

d) <u>Recreation Department</u> – Long term plan is to build fewer standalone facilities by integrating / colocating facilities with other services not unlike the Kingsview Middle School and Recreation Center complex in Germantown.

e) <u>Montgomery College</u> – Colocation opportunities specifically related to high schools focused on integrating college level courses / continuing education, career development and / or workforce training into high school spaces and programming.

f) <u>Department of Housing and Community Affairs (DHCA)</u> – Colocation of affordable housing on school sites may achieve land and infrastructure cost savings, but residential project development and operations is beset with other issues that may complicate synchronized colocation delivery. The provision of school proximate affordable housing may be beneficial to MCPS and other public service employees, albeit current laws do not permit set aside preferences for these potential user groups.

g) <u>Department of General Services (DGS)</u> – With numerous client agencies to manage, DGS maintains a list of client agency needs and space requirements that could facilitate identification of high school community service colocation opportunities.

## Possible Next Steps

Subsequent to the June colocation study workshop, MCPS, the CAO, and M-NCPPC collaborated to recommend targeting specific geography for more detailed evaluation of possible high school community services concepts.

*Focus on the Downcounty Consortium of High Schools* – Marrying geographic specific consideration of colocation opportunities with MCPS's recently initiated capacity study for the Downcounty Consortium presents a ready framework for further study. The four targeted high schools comprise Montgomery Blair, Albert Einstein, John F. Kennedy and Northwood (note Wheaton High School is already under construction / 2018 completion). Other high schools were considered but are not being featured at this time due to reasons of location, project timing and other already ongoing advanced planning efforts.

Phase 1 – Background Issues and Opportunities

1.  *Near Term Tasks*

    a)  Profile Downcounty Consortium High Schools – Provide background information such as property size, location, maps / aerials, capacity, demographics, accessibility information, etc. that could help agencies assess whether there is reason to consider partnering / venturing with MCPS. Any additional information regarding tentative timing and type of high school renovations / construction plans, available acreage and/or potential square feet, etc. could facilitate partnership opportunities.

    b)  Query Community Service Agencies Regarding Downcounty Consortium Priorities – Conduct outreach to M-NCPPC Parks, M-NCPPC Planning, Recreation Department, Libraries, HHS, Housing Opportunity Commission / DHCA and Montgomery College to determine if any Downcounty high schools are located in areas that could benefit from the colocation of community services.

2.  *Deliverable* – Based on agency response and school capacity factors, select one of two high schools for continued analysis of colocation prospects.

Phase 2 – Target High School(s) Colocation Profile

1.  *Multi-Agency Study Group* – MCPS to convene a high school community services colocation concept study group to determine tasks, milestones and schedule.

2.  *Agency Due Diligence* – Undertake additional agency-level due diligence / minimum program of requirements for potential colocation of community services at possible preferred high school locations.

3.  *Conduct Preliminary Test Fits* – To determine what might be physically possible.

4.  *Review Preliminary Findings with OMB* – To better assess funding availability and project timing.

5.  *Study Group Report* – Prepare possible study group report identifying opportunities, issues and planning process / next steps, community engagement, etc.

**APPENDIX E
INVENTORY DATABASE TOOL:
ILLUSTRATIVE COUNTY-OWNED PROPERTIES**

## INVENTORY DATABASE TOOL

While the DOC continues to advance colocation via pilot projects, other county stakeholders are encouraged to propose colocation as a solution to their critical needs. One such tool that can facilitate geographic and use related opportunities is M-NCPPC's site monitoring and selection tool. This is an up to date inventory database with significant search capabilities.

*Property Query Potential*

1. Ownership (i.e. by agency, see Table E-1 and Exhibits E-1 and E-2 for a countywide agency ownership map).
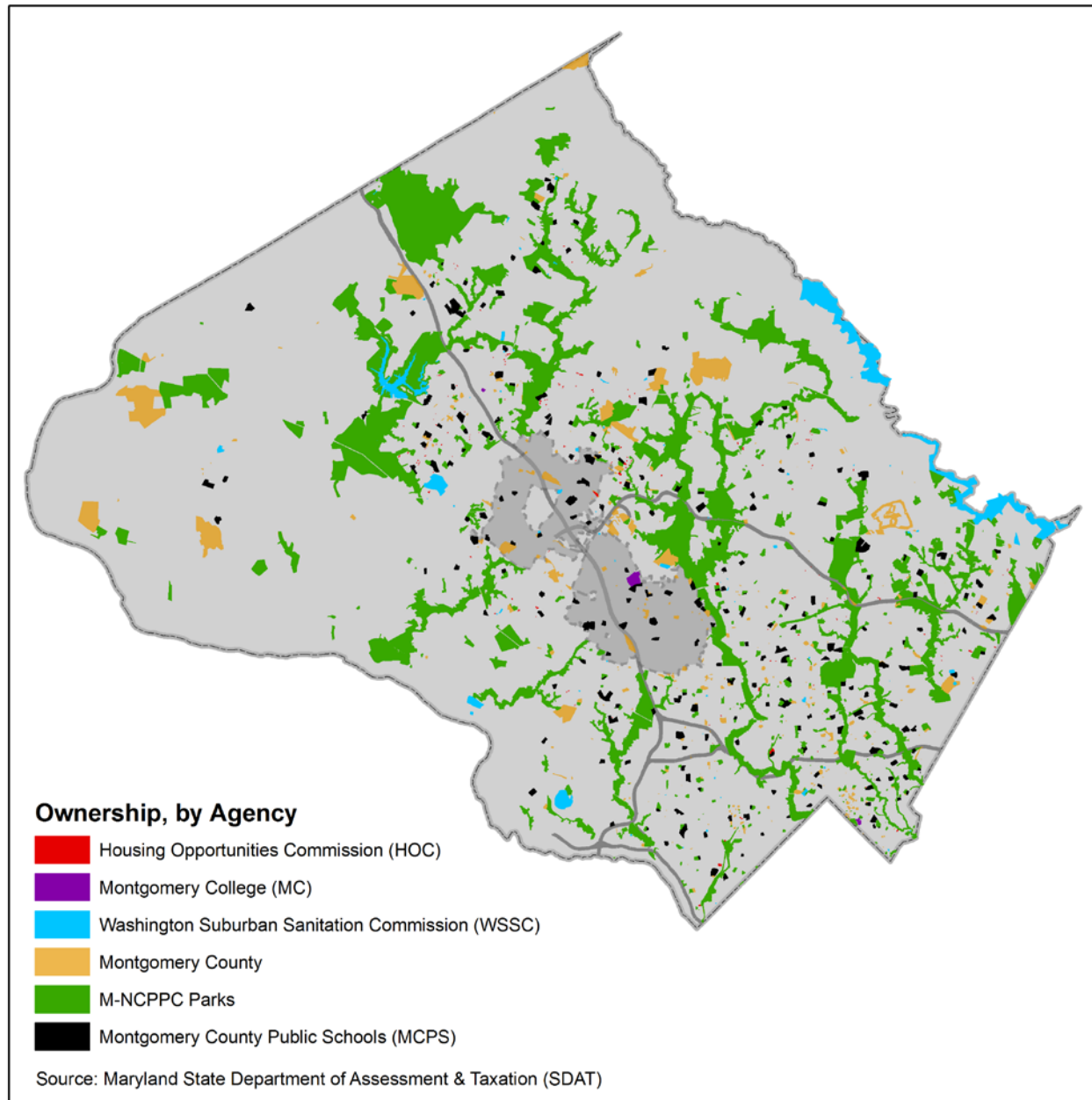
**Table E-1**
**Ownership by Agency / Department**

| Agency | # of Properties | Acreage |
|--------|-----------------|---------|
| MCPS | 470 | 3,458 |
| Parks | 486 | 36,800 |
| HOC | 338 | 47 |
| WSSC | 250 | 3,437 |
| MC | 13 | 100 |
| County | 738 | 5,238 |

Source: M-NCPPC 3/2018

2. Vacant / Property Utilization.
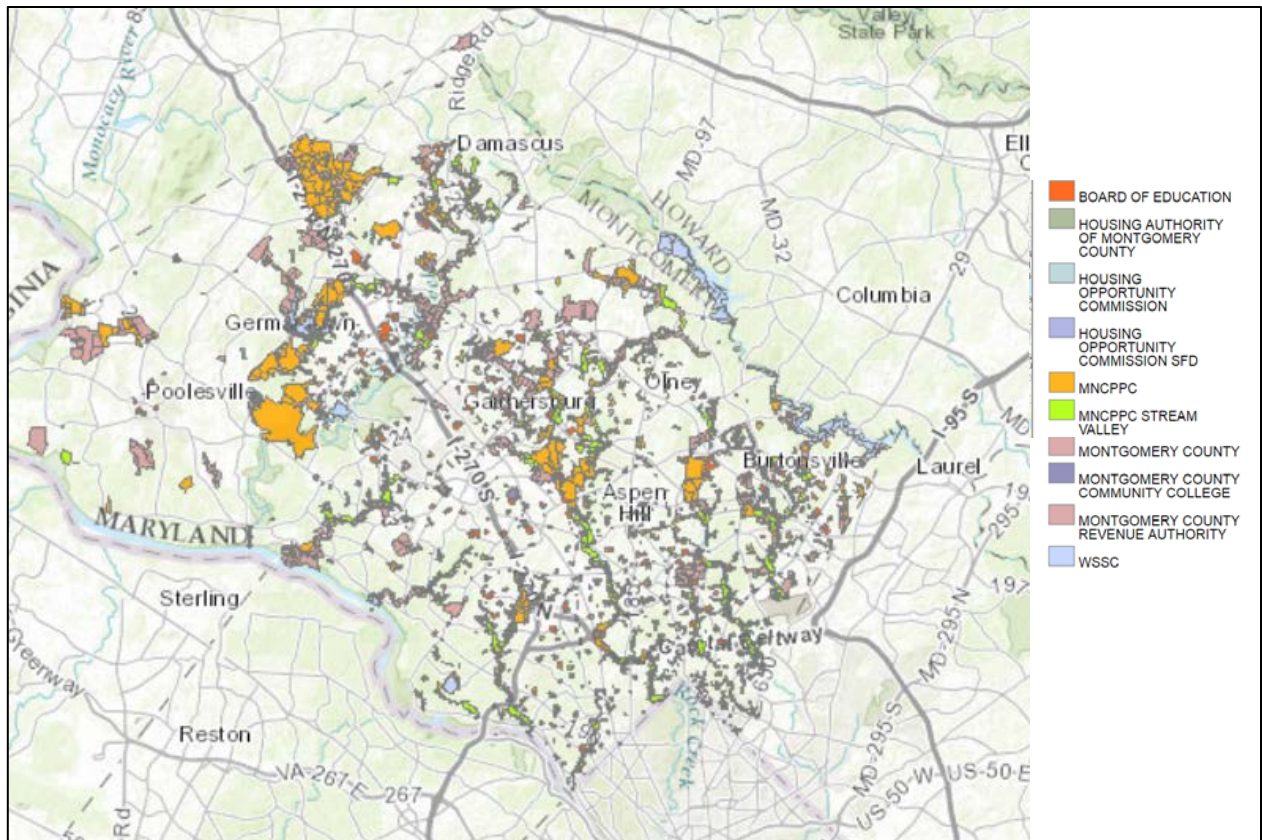3. Parcel Size.
4. Zoning / Use
5. Geography.

To further demonstrate the capabilities of using the county's database to facilitate geographic site searches, maps illustrating DOC member agency properties was created (see Exhibits E-1 and E-2).

**EXHIBIT E-1**

**Countywide Agency Ownership Map**



**Ownership, by Agency**

- Housing Opportunities Commission (HOC)
- Montgomery College (MC)
- Washington Suburban Sanitation Commission (WSSC)
- Montgomery County
- M-NCPPC Parks
- Montgomery County Public Schools (MCPS)

Source: Maryland State Department of Assessment & Taxation (SDAT)

Source: M-NCPPC 3/2018

**EXHIBIT E-2**
**Countywide Agency Ownership Map**



Source: M-NCPPC 3/2018