Welcome!
## Workshop Program

<table>
<thead>
<tr>
<th>Start of Workshop</th>
<th>7:00 pm</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome and Introductions</td>
<td>10 minutes</td>
</tr>
<tr>
<td>Presentation on SSP and Related Data</td>
<td>30 minutes</td>
</tr>
<tr>
<td>Table Introductions</td>
<td>5 minutes</td>
</tr>
<tr>
<td>Table Discussions</td>
<td>75 minutes</td>
</tr>
<tr>
<td><strong>End of Workshop</strong></td>
<td>9:00 pm</td>
</tr>
</tbody>
</table>
About the Subdivision Staging Policy
What is the Subdivision Staging Policy?

• The County’s Adequate Public Facilities Ordinance (APFO) became law in 1973:
  
  • “The [Planning] Board may only approve a preliminary plan when it finds that public facilities will be adequate to support and service the subdivision. Public facilities and services to be examined for adequacy include roads and transportation facilities, sewer and water service, schools, police stations, firehouses, and health clinics.” §50.4.3(J) of the County Code

• The SSP is the set of policy tools that administer the APFO, guiding the timely delivery of public facilities to serve existing and future development.
# History of the SSP and Related Policies

<table>
<thead>
<tr>
<th>Year</th>
<th>Transportation</th>
<th>Schools</th>
</tr>
</thead>
<tbody>
<tr>
<td>1973</td>
<td>Council adopts the APFO</td>
<td></td>
</tr>
<tr>
<td>1986</td>
<td>First “Annual Growth Policy”</td>
<td></td>
</tr>
<tr>
<td>2001</td>
<td>• Impact Tax introduced</td>
<td></td>
</tr>
</tbody>
</table>
| 2003 | • Policy Area test eliminated | • Impact Tax introduced  
• Facility Payments introduced |
| 2007 | • Impact taxes recalibrated  
• Policy Area test reintroduced | • Impact taxes recalibrated |
| 2010 | | Renamed “Subdivision Staging Policy” |
| 2016 | • Impact taxes recalibrated  
• Policy Area test eliminated  
• Multimodal Local Area test  
• Unified Mobility Programs established | • Impact taxes recalibrated  
• Individual school test introduced  
• School Facility Payments eliminated  
• Required biannual update to Student Generation Rates |
Transportation
What Does the SSP Do?

- Groups our 38 policy areas into **four policy area categories** based on:
  - Current land use patterns
  - The prevalence of different modes of travel
  - The planning vision for the policy area
What Does the SSP Do?

• Establishes a set of multi-modal Local Area Transportation Review (LATR) tests for determining transportation adequacy
  • Forecasts travel demand generated by existing, pipeline and proposed development and compares it to the capacity of existing and programmed roads and transit
What Does the SSP Do?

- **Unified Mobility Programs (UMPs)** include an area-wide analysis of needed transportation improvements
  - Applicants pay their proportion of the UMP cost
Schools
What Does the SSP Do?

• Requires the Planning Board to annually approve the results of a **school test** evaluating projected school capacity

• Establishes the criteria for enacting **development moratoria** based on projected school capacity utilization

• Identifies **exceptions to the moratoria**
## Moratorium Thresholds

<table>
<thead>
<tr>
<th>Test Level</th>
<th>Moratorium Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cluster</td>
<td>Projected <em>cumulative utilization greater than 120%</em> at any school level (elementary, middle or high school) across the entire cluster.</td>
</tr>
<tr>
<td>Individual Elementary School</td>
<td>Projected <em>utilization greater than 120%</em> and projected capacity <em>deficit of 110 seats or more.</em></td>
</tr>
<tr>
<td>Individual Middle School</td>
<td>Projected <em>utilization greater than 120%</em> and projected capacity <em>deficit of 180 seats or more.</em></td>
</tr>
</tbody>
</table>
Current Moratorium Coverage

FY2020 Annual School Test - Service Area Status

- Cluster Boundary
- School Status
  - Open
  - Cluster Moratorium
  - School Moratorium

Montgomery Planning
Functional Planning and Policy Division
Data Source: Montgomery County Public Schools and Montgomery Planning
June 20, 2019
Exceptions to the Moratorium

• **Non-residential** projects
• **De minimis** projects of 3 units or less
• **Age-restricted** senior housing
• Certain projects that generate 10 or fewer students at any one school and meet other conditions related to the removal of a condemned structure or provide high quantities of deeply affordable housing
Impact Taxes
## Transportation Impact Taxes

### Residential (per unit)

<table>
<thead>
<tr>
<th></th>
<th>Red Policy Areas</th>
<th>Orange Policy Areas</th>
<th>Yellow Policy Areas</th>
<th>Green Policy Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Family Detached</td>
<td>$7,838</td>
<td>$19,591</td>
<td>$24,490</td>
<td>$24,490</td>
</tr>
<tr>
<td>Single Family Attached</td>
<td>$6,413</td>
<td>$16,030</td>
<td>$20,038</td>
<td>$20,038</td>
</tr>
<tr>
<td>Multifamily Low-rise</td>
<td>$4,986</td>
<td>$12,465</td>
<td>$15,582</td>
<td>$15,582</td>
</tr>
<tr>
<td>Multifamily High-rise</td>
<td>$3,561</td>
<td>$8,904</td>
<td>$11,130</td>
<td>$11,130</td>
</tr>
<tr>
<td>Multifamily Senior</td>
<td>$1,424</td>
<td>$3,562</td>
<td>$4,452</td>
<td>$4,452</td>
</tr>
</tbody>
</table>

### Non-Residential (per square foot GFA)

<table>
<thead>
<tr>
<th></th>
<th>Red Policy Areas</th>
<th>Orange Policy Areas</th>
<th>Yellow Policy Areas</th>
<th>Green Policy Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Office</td>
<td>$7.15</td>
<td>$17.90</td>
<td>$22.40</td>
<td>$22.40</td>
</tr>
<tr>
<td>Industrial</td>
<td>$3.60</td>
<td>$8.90</td>
<td>$11.20</td>
<td>$11.20</td>
</tr>
<tr>
<td>Bioscience Facility</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Retail</td>
<td>$6.35</td>
<td>$16.00</td>
<td>$19.95</td>
<td>$19.95</td>
</tr>
<tr>
<td>Place of Worship</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Private Elementary and Secondary School</td>
<td>$0.55</td>
<td>$1.45</td>
<td>$1.85</td>
<td>$1.85</td>
</tr>
<tr>
<td>Hospital</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Social Service Agency</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Other Non-Residential</td>
<td>$3.60</td>
<td>$8.90</td>
<td>$11.20</td>
<td>$11.20</td>
</tr>
</tbody>
</table>
## Schools Impact Taxes

<table>
<thead>
<tr>
<th>Residential (per unit)</th>
<th>Countywide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single Family Detached</td>
<td>$26,207</td>
</tr>
<tr>
<td>Single Family Attached</td>
<td>$27,598</td>
</tr>
<tr>
<td>Multifamily Low-rise</td>
<td>$21,961</td>
</tr>
<tr>
<td>Multifamily High-rise</td>
<td>$6,113</td>
</tr>
<tr>
<td>Multifamily Senior</td>
<td>$0</td>
</tr>
</tbody>
</table>
Impact Taxes Exemptions

• All moderately priced dwelling units (MPDUs) are exempt
• Any project that includes 25% or more MPDUs are fully exempt on all units
• Any project in a current or former Enterprise Zone (including Downtown Silver Spring)
2020 Update Scope
Transportation: Focused Update

• Update of the transportation element is focused on two primary tasks:
  • Identifying opportunities to incorporate the County’s Vision Zero travel safety objectives into the Local Area Transportation Review process
  • Reintroducing a policy area transportation adequacy test for the purposes of evaluating master/sector plan balance
Schools: All Aspects Under Review

- The moratorium policy and its thresholds and exceptions
- The Annual School Test procedures
- Estimating enrollment impacts
- Development queue impacts
- Impacts of neighborhood turnover on enrollment
- Potential reintroduction of school facility payments
Schools: Seeking Innovative Solutions

• We are seeking an innovative set of policy tools that:
  • Better ensure school capacity adequacy within the County’s current growth paradigm
  • Support the County’s other policy priorities
• Will include an extensive review of policies from other similar jurisdictions across the country
### 2020 Update Schedule

- **Council adoption required by November 15, 2020**

<table>
<thead>
<tr>
<th>Planning Staff and Planning Board Review</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>September</td>
<td>October</td>
</tr>
<tr>
<td>2020</td>
<td>January</td>
<td>February</td>
</tr>
</tbody>
</table>

**Key**
- B: Planning Board Briefing
- CW: Community Workshop
- PH: Public Hearing
- V: Planning Board or Council Vote
- W: Planning Board Workshop
- ●: Meeting, scheduled
- ○: Meeting, if needed/Estimated date
- Engagement and Data Gathering
- Policy Development

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*2020 Subdivision Staging Policy Update*
Relevant Data
Slower growth in a maturing Montgomery County

Most populous county in Maryland with over 1 million people since 2012

38% population increase since 1990

Forecasting a 7.2% gain of 76,235 people between 2018 and 2030


2020 Subdivision Staging Policy Update
Population Change 1990-2016 by Census Tract

Population Change:
- 4,000 or more
- 1,000 - 3,999
- 225 - 999
- No significant change
- Decrease

Roads and Transitways:
- Major Highways
- MARC Line
- Metro Line
- Metro Stations


2020 Subdivision Staging Policy Update
Population Density
1990
by Census Tract

Population Density
1 Dot = 100 people
• 1990 population

Roads and Transitways
Major Highways
-+-+ MARC Line
Metro Line
Metro Stations

Source: 1990 Census, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division

2020 Subdivision Staging Policy Update
Population Density
2016
by Census Tract

Source: 2012-2016 American Community Survey 5-year estimate, U.S. Census Bureau. Created by: M-NCPPC, Research and Special Projects Division

2020 Subdivision Staging Policy Update
Sources of Population Growth
1990-2018

Components of Population Growth

Net Domestic Migration
Net International Migration
Natural increase
Population Change

Source: U.S. Census Bureau, Population Estimate Program, 3/2019

2020 Subdivision Staging Policy Update
Increasingly Older Population

Aging baby boom generation:
- 1990: ages 26 to 44
- 2018: ages 54 to 72
- Increased median age from 33.9 years in 1990 to 39.2 in 2018
- Forecasted to increase 65+ population from 16% in 2018 to 21% in 2040

18% of residents are young adults age 20 to 34 in 2018

23% of the population are children <18, in 2018

Source: U.S. Census Bureau, 1990 U. S. Census, 2018 American Community Survey, 1-year estimate; Maryland Department of Planning Age Forecast
Percent of People Age 65 and Older, 2017 by Census Tract

- 2.4% - 9.9%
- 10% - 14.9%
- 15% - 29.9%
- 30% - 87.8%

Some:

Percentage of Owner-Occupied Households, 1990-2016 by Age of Homeowners

Increase in 55+ homeowners
- 34% in 1990
- 54% in 2016

Decrease in the number of younger homeowners
- 18% in 1990
- 7% in 2016

Demand Shifts
- Population Changes
- Millennial tastes & preferences
- Affordability
- Product Diversity

Wider Variety of Household Types Since 1960, but Distribution Relatively Stable Since 1990

% of Households by Type

- **Other Non-Family**
- **Householder living alone**
- **Other Family**
- **Married-Couple, NO children < 18**
- **Single-Parent, children <18**
- **Married-Couple, children < 18**

Source: 1960-2010 US Census, 2018 American Community Survey, 1-year estimate

2020 Subdivision Staging Policy Update
Growth of multifamily housing outpacing all other types of housing

From 1990 to 2016:

- **32% increase** in the number of housing units from 295,723 to 390,563
- **49% increase** in the number of multi-family units
- **25% increase** in the number of single-family units

Number of Housing Units by Type

<table>
<thead>
<tr>
<th>Type</th>
<th>1990</th>
<th>2016</th>
<th>1990 to 2016 Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 or More Units</td>
<td>69,314</td>
<td>107,663</td>
<td>38,350</td>
</tr>
<tr>
<td>2 to 9 units</td>
<td>20,137</td>
<td>25,942</td>
<td>5,805</td>
</tr>
<tr>
<td>1-Unit, Attached</td>
<td>50,536</td>
<td>73,799</td>
<td>23,263</td>
</tr>
<tr>
<td>1-Unit, Detached</td>
<td>153,872</td>
<td>182,333</td>
<td>28,461</td>
</tr>
<tr>
<td>TOTAL HOUSING UNITS</td>
<td>295,723</td>
<td>390,563</td>
<td>94,840</td>
</tr>
</tbody>
</table>


2020 Subdivision Staging Policy Update
Percent of Students (K-12) in Public School by Census Tract

Source: 2013-2017 American Community Survey 5-Year Estimates

2020 Subdivision Staging Policy Update
Percent of Students (K-12) in Public School by Census Tract

Source: 2013-2017 American Community Survey 5-Year Estimates

2020 Subdivision Staging Policy Update
Changing Travel Trends (Nationwide)

84 Million Trips on Shared Micromobility in 2018

Source: NACTO

Shared Micromobility encompasses all shared-use fleets of small, fully or partially human-powered vehicles such as bikes, e-bikes, and e-scooters.
Changing Travel Trends (County)

VMT and VMT Per Capita Trends, 2000-2018

Year


Per Capita Annual VMT

Total VMT (millions)

Sources: Maryland State Highway Administration, Office of Planning and Preliminary Engineering, Data Services Division, Annual Vehicle Miles of Travel Report (retrieved from http://sha.md.gov/OPPEN/Vehicle_Miles_of_Travel.pdf) and U.S. Census Bureau; American Community Survey 1-Year Estimates.

2020 Subdivision Staging Policy Update
Enrollment vs. Population, 1990-2018

Enrollment and Population Growth Indexed to 1990 (1990-2018)

- MCPS Enrollment
- Total Population

Source: Montgomery County Public Schools Enrollment; U.S. Census Bureau, Decennial U.S. Census, Population Estimate Program
New Housing Unit Density (All Types), 1994-Current

Legend
- Major Highways and US Routes
- New Unit Density (Since 1994)
  - 0 - 50
  - 50 - 250
  - 250 - 500
  - 500 - 1,000
  - 1,000 - 2,000
  - 2,000 - 3,000
  - 3,000 - 4,000
  - 4,000 - 5,000
  - 5,000 - 6,000
  - 6,000 - 7,000

Source: SDAT

2020 Subdivision Staging Policy Update
Housing Units Built by Year and Type, 1994-Current

Source: SDAT

2020 Subdivision Staging Policy Update
Housing Growth, 2015-18

- Clusters with the most housing growth between 2015 and 2018:
  - Gaithersburg – 2,689 units
  - Walter Johnson – 1,698 units
  - Bethesda-Chevy Chase – 1,461 units
  - Clarksburg – 1,121 units
  - Richard Montgomery – 862 units

Source: SDAT
Housing Growth, 2015-18 by Cluster

Source: SDAT

2020 Subdivision Staging Policy Update
Enrollment Growth, 2015-18
K-12

- Clusters with the highest enrollment growth between 2015 and 2018:
  - Walter Johnson – 789 students
  - Clarksburg – 776 students
  - Wheaton – 576 students
  - John F. Kennedy, Jr. – 492 students
  - Damascus – 490 students

Sources: MCPS FY 2020 and FY 2017 Master Plans
Change in Enrollment, 2015-18
K-12
by Cluster

Sources: MCPS FY 2020 and FY 2017 Master Plans
Percent Change in Enrollment, 2015-18
K-12
by Cluster

Enrollment Increase (+11.5%)
No Enrollment Change
Enrollment Decrease (-11.5%)

Sources: MCPS FY 2020 and FY 2017 Master Plans
Share of MCPS Enrollment Growth, 2015-18
K-12
by Cluster

Highest Share (13.5%)
Lowest Share (no growth)
Negative Share (-13.5%)

Sources: MCPS FY 2020 and FY 2017 Master Plans
Heat Map of Student Residences
2015

Source: MCPS
Heat Map of Student Residences
2018

Source: MCPS
Average Length of Time Since Units Were Last Sold by Census Tract

Source: SDAT
Average Length of Time Since Units Were Last Sold by Census Tract with Cluster Borders

Longest (14+ years)

Shortest (~5 years)

Source: SDAT
Table Discussions
Table Discussion Ground Rules

1. Lean in and Lean out.
   - If you easily jump into conversation, wait 10 seconds.
   - If you are typically quieter, lean in more quickly.

2. Listen to understand. Suspend your beliefs to hear someone else’s experience.

3. Speak for yourself, not a group, and use “I” statements.

4. Disagree with people without being disagreeable.

5. It's okay to disagree. We are not aiming to agree. You do not have to persuade each other.
Thank you!

www.MontgomeryPlanning.org/SSP