Thrive Montgomery 2050
Let’s Plan Our Future. Together.

www.thrivemontgomery.com

Montgomery Planning

Worksession 3
Thrive Montgomery 2050 Public Hearing Draft Plan
Today’s Presentation

1. Residential Development Capacity Analysis

2. Proposed draft of Housing chapter

3. Summary of Transportation Analysis Report
   (for worksession #4 on 1-21-21)

4. Outline of the revised transportation chapter
   (for worksession #4 on 1-21-21)
Residential Development Capacity Analysis (RDCA)

- The Residential Development Capacity Analysis (RDCA) is an estimate of the total potential residential development that may be built in Montgomery County, MD under a certain set of assumptions and constraints.
- These assumptions include applicable market trends, zoning rules and existing policy decisions. These assumptions, further, do not include Municipalities that govern their own zoning.
- The RDCA will serve as a baseline measure that aims to estimate current residential capacity in Montgomery County in dwelling units.
Factors that can affect residential development or feasibility

1. Market forces
2. Public policy decisions
3. Development pattern
4. Infrastructure costs
5. Development and Demographic trends
6. Master Plans life span
7. Height limits
8. Parcel level conditions
9. Assemblage
10. Competing priorities
11. Development Incentives
12. Accessory Dwelling Units
13. Size of multi-family buildings
14. Unit Size
RDCA Methodology

1. Establish the existing dwelling unit count.

2. Add current development pipeline to the existing dwelling unit count to account for parcels currently approved for development.

3. Apply attributes to all parcels to enable identification of environmental or man-made factors that constrain the development potential.

4. Filter remaining parcels for environmental or man-made constraints to determine remaining additional residential development capacity.

5. Determine the residential development potential allowed by the existing zoning for all remaining parcels in the county.
1. **Environmental Constraints**: Environmental constraints may exist due to government policies that protect land or factors that limit the development potential of a site. These areas include areas protected under existing laws, regulations, and guidelines.

2. **Man-made Constraints**: Constraints that are man-made, such as transportation and utility infrastructure, may impede the ability for a site to reach its development potential and were removed from the consideration for capacity.

3. **Assumptions**: To the extent possible, trends and market forces on realized density may impact the final calculation of capacity.
Net Dwelling Unit Capacity

Residential Capacity Analysis Results

<table>
<thead>
<tr>
<th>Remaining parcels with development or redevelopment potential</th>
<th>3,733</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total additional existing residential capacity (in units)</td>
<td>66,569</td>
</tr>
</tbody>
</table>
## RDCA Results

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Parcel Count</th>
<th>Percent of Parcels</th>
<th>Sum of Net Capacity</th>
<th>Percent of Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Centers</td>
<td>1,129</td>
<td>12%</td>
<td>43,112</td>
<td>65%</td>
</tr>
<tr>
<td>Priority Funding Areas</td>
<td>2,461</td>
<td>25%</td>
<td>61,449</td>
<td>92%</td>
</tr>
<tr>
<td>Downcounty</td>
<td>1,068</td>
<td>11%</td>
<td>20,403</td>
<td>31%</td>
</tr>
<tr>
<td>Mid-county</td>
<td>828</td>
<td>9%</td>
<td>31,708</td>
<td>48%</td>
</tr>
<tr>
<td>Up-county</td>
<td>1,837</td>
<td>19%</td>
<td>14,458</td>
<td>22%</td>
</tr>
<tr>
<td>WMATA Red Line Stations Half-Mile</td>
<td>687</td>
<td>7%</td>
<td>25,179</td>
<td>38%</td>
</tr>
<tr>
<td>Purple Line Stations Half-Mile</td>
<td>590</td>
<td>5%</td>
<td>15,179</td>
<td>23%</td>
</tr>
<tr>
<td>MARC Stations Quarter-Mile</td>
<td>279</td>
<td>3%</td>
<td>10,469</td>
<td>16%</td>
</tr>
<tr>
<td>BRT Route Quarter-Mile</td>
<td>936</td>
<td>10%</td>
<td>34,478</td>
<td>52%</td>
</tr>
</tbody>
</table>
Residential Capacity Analysis Results

| Remaining parcels with development or redevelopment potential | 3,733 |
| Total additional existing residential capacity (in units)       | 66,569 |
## RDCA Results

<table>
<thead>
<tr>
<th>Parcel Size</th>
<th>Parcel Count</th>
<th>Percent of Parcels in Size Range</th>
<th>Sum of Net Capacity</th>
<th>Percent of Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>0-1 Acre</td>
<td>1,926</td>
<td>52%</td>
<td>21,104</td>
<td>32%</td>
</tr>
<tr>
<td>1-5 Acres</td>
<td>950</td>
<td>25%</td>
<td>24,436</td>
<td>37%</td>
</tr>
<tr>
<td>5.01-25 Acres</td>
<td>419</td>
<td>11%</td>
<td>11,746</td>
<td>18%</td>
</tr>
<tr>
<td>25.01-50 Acres</td>
<td>216</td>
<td>6%</td>
<td>4,297</td>
<td>6%</td>
</tr>
<tr>
<td>50.01-100 Acres</td>
<td>117</td>
<td>3%</td>
<td>1,978</td>
<td>3%</td>
</tr>
<tr>
<td>Over 100.01 Acres</td>
<td>105</td>
<td>3%</td>
<td>3,008</td>
<td>5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3,733</strong></td>
<td><strong>100%</strong></td>
<td><strong>66,569</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
## RDCA Results

<table>
<thead>
<tr>
<th>Zone family</th>
<th>Parcel Count</th>
<th>Percent of Parcels</th>
<th>Sum of Net Capacity</th>
<th>Percent of Capacity</th>
<th>Developable Acres</th>
<th>Percent of Developable Acres</th>
</tr>
</thead>
<tbody>
<tr>
<td>AR</td>
<td>346</td>
<td>9%</td>
<td>1,066</td>
<td>2%</td>
<td>30,622</td>
<td>72%</td>
</tr>
<tr>
<td>CR</td>
<td>885</td>
<td>24%</td>
<td>52,871</td>
<td>79%</td>
<td>1,240</td>
<td>3%</td>
</tr>
<tr>
<td>Residential Detached</td>
<td>1,962</td>
<td>53%</td>
<td>9,491</td>
<td>14%</td>
<td>5,383</td>
<td>13%</td>
</tr>
<tr>
<td>Residential Multifamily</td>
<td>238</td>
<td>6%</td>
<td>1,815</td>
<td>3%</td>
<td>83</td>
<td>0.2%</td>
</tr>
<tr>
<td>Rural Residential</td>
<td>262</td>
<td>7%</td>
<td>965</td>
<td>1%</td>
<td>5,319</td>
<td>12%</td>
</tr>
<tr>
<td>Residential Townhouse</td>
<td>11</td>
<td>0.3%</td>
<td>70</td>
<td>0.1%</td>
<td>7</td>
<td>0.0%</td>
</tr>
<tr>
<td>Other</td>
<td>29</td>
<td>1%</td>
<td>291</td>
<td>0.4%</td>
<td>45</td>
<td>0.1%</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>3,733</strong></td>
<td><strong>100%</strong></td>
<td><strong>66,569</strong></td>
<td><strong>100%</strong></td>
<td><strong>42,700</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>
https://mcatlas.org/rdca
Top 5 Takeaways from RDCA

1. While Montgomery County, MD has theoretical capacity for over 65,000 housing units on 3,733 parcels, most of the capacity is concentrated near transit, and along the original corridor, the I-270 corridor.

2. Most residential capacity is tied up on the small sites – on sites less than 5 acres, highlighting Montgomery County’s development pattern shifting from greenfield development and toward infill development and compact form.

3. Montgomery County has a diminished availability of available land for redevelopment or development, with the parcels available for development or redevelopment representing only 15 percent of the county’s land.

4. Findings demonstrate that the county can prioritize agriculture and rural open space and also build more housing, by reevaluating previously made policy decisions, like the preservation of single-family zoning near our accessible single-family neighborhoods.

5. There are many barriers to building housing, these variables are unable to be fully quantified but are important to consider when discussing future capacity. These barriers will be more pronounced in the future as the county continues to build out.
Affordable and attainable housing: more of everything

Public Testimony Themes:
1. Go bold
2. Missing Middle housing
3. Single-family zoning
4. Affordable Housing
Affordable and attainable housing: more of everything

• **PART 1:** What is the problem / existing conditions that fall short?
• **PART 2:** Therefore, Thrive Montgomery 2050 proposes the following policies and actions.
• **PART 3:** The rationale for how these policies and actions will further the key objectives of Thrive Montgomery 2050.
• **PART 4:** How will we know we are making progress?
Affordable and attainable housing: more of everything

PART 1: What is the problem / existing conditions that fall short?

1. Not enough new housing to meet demand.
2. Anemic supply is driving the price of housing up for both renters and home buyers.
3. A growing gap between changing living patterns and the older housing stock.
4. The high cost and limited variety of available housing exacerbate inequality.
5. Expansion and diversification of our housing stock is an essential step toward reducing these kinds of racial and socioeconomic inequalities.
1.) Not enough housing to meet demand.

Montgomery County Building Permits

- 1-unit
- 2-units
- 3-4 units
- 5+ units
- Population

Population

Units
2.) Anemic supply is driving the price of housing up for both renters and home buyers.
3.) A growing gap between changing living patterns and the older housing stock.

Household Family Types 1960-2018

- Other Non-Family
- Non-Family, householder living alone
- Other Family
- Single Parent, children <18
- Married Couple, no children <18
- Married Couple, children <18
4.) The high cost and limited variety of available housing exacerbate inequality.
5.) Expansion and diversification of our housing stock is an essential step toward reducing racial and socioeconomic inequalities.

Housing Forecasts by Type and Tenure, 2020-2040 (%)

- Single-Family Owner: 13.50%
- Multifamily Owner: 27.40%
- Single-Family Renter: 4.40%
- Multifamily Renter: 54.80%
PART 2: Therefore, Thrive Montgomery 2050 proposes the following policies and actions.

1. Encourage the production of more housing to better match supply with demand

2. Plan for a wide range of housing types and sizes to meet diverse needs

3. Promote racial and economic diversity and equity in housing in every neighborhood
Encourage the production of more housing to better match supply with demand

- Expand opportunities to increase **residential density near high-capacity transit** and assist in the development of Complete Communities.

- Reform building codes to **reduce costs by accommodating innovative construction methods** and materials including modular prefabricated housing and mass timber.

- **Prioritize use of public land for co-location of housing and other uses**, particularly where government agencies design new facilities or dispose of real property.

- **Increase regulatory flexibility** to incentivize residential infill, redevelopment, and repositioning of office parks, shopping malls, and other underutilized properties.

- **Provide financial incentives** such as Payment in Lieu of Taxes to boost housing production for market rate and affordable housing, especially near transit and in Complete Communities.
Plan for a wide range of housing types and sizes to meet diverse needs

- Facilitate the development of a variety of housing types in every part of the county but especially in areas near transit, employment and educational opportunities.

- Support creative housing options including single-room occupancy units (SROs); “missing middle” housing types such as tiny houses, cottages, duplexes, multiplexes, and small apartment buildings; shared housing, co-housing, accessory dwelling units (ADUs), social housing and cooperative housing to help meet housing needs and diversify housing options.

- Encourage provision of multi-bedroom units suitable for households with children in multifamily housing.

- Integrate people with disabilities, people transitioning from homelessness, and older adults into attainable housing with appropriate amenities and services.
Promote racial and economic diversity and equity in housing in every neighborhood

- Develop **targeted strategies to minimize gentrification and displacement** while promoting integration and avoiding the concentration of poverty.

- Refine regulatory tools and financial incentives with **the goal of avoiding a net loss of market-rate and income-restricted affordable housing stock** without erecting disincentives for the construction of additional units.

- **Calibrate the applicability of the Moderately Priced Dwelling Unit (MPDU) program and other affordable housing programs** to provide price-regulated units appropriate for income levels ranging from deeply affordable to workforce.

- Identify and **allocate additional revenue for the Housing Initiative Fund (HIF)** to meet the needs of low-income households.

- **Expand existing programs designed to increase access to homeownership**, especially among low-income residents, people of color, and young adults; create new programs and entities such as community land trusts to maintain long term affordable home ownership opportunities.

- Improve collection of data on neighborhood change to **monitor and address involuntary displacement, disinvestment, and related phenomena.**
Affordable and attainable housing: more of everything

PART 3: The rationale for how these policies and actions will further the key objectives of Thrive Montgomery 2050.

1. Increasing the supply of new housing near transit, jobs and amenities will improve the quality of life for everyone and help attract and retain a broadly skilled workforce that employers need, making the county more economically competitive.

2. A wider variety of housing and a focus on affordability and attainability will diversify the mix of incomes in neighborhoods across the county and improve access to services, amenities and infrastructure for low- and moderate-income residents, who are disproportionately people of color.

3. A broader range of housing types – particularly the inclusion of multifamily buildings – will reinforce the benefits of Complete Communities.
PART 4: How will we know we are making progress?

Relevant measures to assess new housing developments and measure the success or failure of the approaches recommended in this plan.
Relevant measures to assess new housing developments and measure the success or failure of the approaches recommended in this plan.

- Number of residential units issued building permits, overall and by area of county
- Number of affordable units by type, overall and by area of county
- Rates of home ownership by race, income and area
- Number of and Proportion of cost-burdened households
- Number of homeless residents
- Rent and mortgage payments as a fraction of the cost of living
- Combined housing and transportation costs
- Naturally Occurring Affordable Housing preserved, overall and by area of county
- Number of low-income households in a census tract (concentration of poverty)
- Number of low-income households lost in a census tract over a period of time (displacement)
- Proportion of missing middle housing units and units in multifamily buildings
- Greenhouse gas emissions from residential buildings and transportation per capita
- Proportion of housing units proximate to transit routes and job centers
- Range of home prices
- Racial and income diversity within neighborhoods
Preview of Worksession 4 on January 21, 2021
Summary of Transportation Analysis Report
Key Questions

• How could the County be impacted by ongoing trends related to the economy, climate change, demographics, technology, and lifestyle choices?
• Do these trends support the County’s vision for the future, or are policy interventions needed to achieve the County’s vision?
Analytical Approach

• Evaluate Impact of External Factors
• Evaluate Impact of Thrive Montgomery Policies
Metrics Evaluated

- General Metrics: Person Trips, Vehicle Trips
- Non-Auto Driver Mode Share (NADMS)
- Vehicle Miles Traveled (VMT)
- Travel Time
- Job Access
Policies Evaluated

- Land use changes
  - Complete communities
  - Concentration of growth in transit areas
- Transportation changes
  - Converting traffic lanes to transit lanes on BRT corridors
  - Implementation of premium transit (BRT, MARC)
  - Improving local bus service (frequency)
  - Reducing parking capacity and increasing parking pricing
  - Increase auto travel pricing and affordability
  - Improve street network/block
Outline of Revised Transportation Chapter

- **PART 1:** What is the problem / existing conditions that fall short?
- **PART 2:** Therefore, Thrive Montgomery 2050 proposes the following policies and actions.
- **PART 3:** The rationale for how these policies and actions will further the key objectives of Thrive Montgomery 2050.
- **PART 4:** How will we know we are making progress?
Montgomery County built an auto-oriented transportation system that funnels traffic to a limited number of high-speed roads.
Part 2: Proposed policies and actions

- Develop a safe, comfortable and irresistible walking and bicycling network.
- Build a world-class transit system.
- Adapt policies to reflect the economic and environmental costs of driving alone.
- Develop and extend advanced communications networks.
Reverse decades of auto-focused design and dependence by making walking, bicycling and transit irresistible.
Part 4: How will we know we are making progress?

Relevant measures to assess progress in implementing the vision of the plan