



Montgomery Planning Countywide Planning and Policy

10/17/2023

2024 Growth and Infrastructure Policy Update

Community Kickoff



What informs planning recommendations



Introductions and Welcome

- Darcy Buckley Project Manager
- Lisa Govoni Project Manager
- Jason Sartori Division Chief
- David Anspacher Transportation Supervisor
- Hye-Soo Baek Schools Planner
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Agenda

- Overview and Context
 - How Does the Policy Work?
 - 2024 Update: Themes to Explore
- Deeper Dives
 - Schools Element
 - Transportation Element
- What to Expect
 - Community Outreach and Engagement Strategy
 - Project Schedule
- Q&A
- Breakout Rooms
- Report Out



Overview and Context

Overview

- Montgomery Planning initiates an update of the County's Growth and Infrastructure Policy (GIP) every 4 years, with the current update due in 2024
- County Code directs the Planning Board to transmit a draft of the GIP to the County Council by **August 1**, and for the County Council to adopt the 2024-2028 policy by **November 15, 2024**

What is the Growth and Infrastructure Policy?

- The **Growth and Infrastructure Policy (GIP)** directs the Planning Board's administration of adequate public facility requirements
- The County's **Adequate Public Facilities (APF)** requirement states:
 - *“The [Planning] Board may only approve a preliminary plan when it finds that public facilities will be **adequate** to support and service the subdivision.”*



History of the Policy

General Plan Update

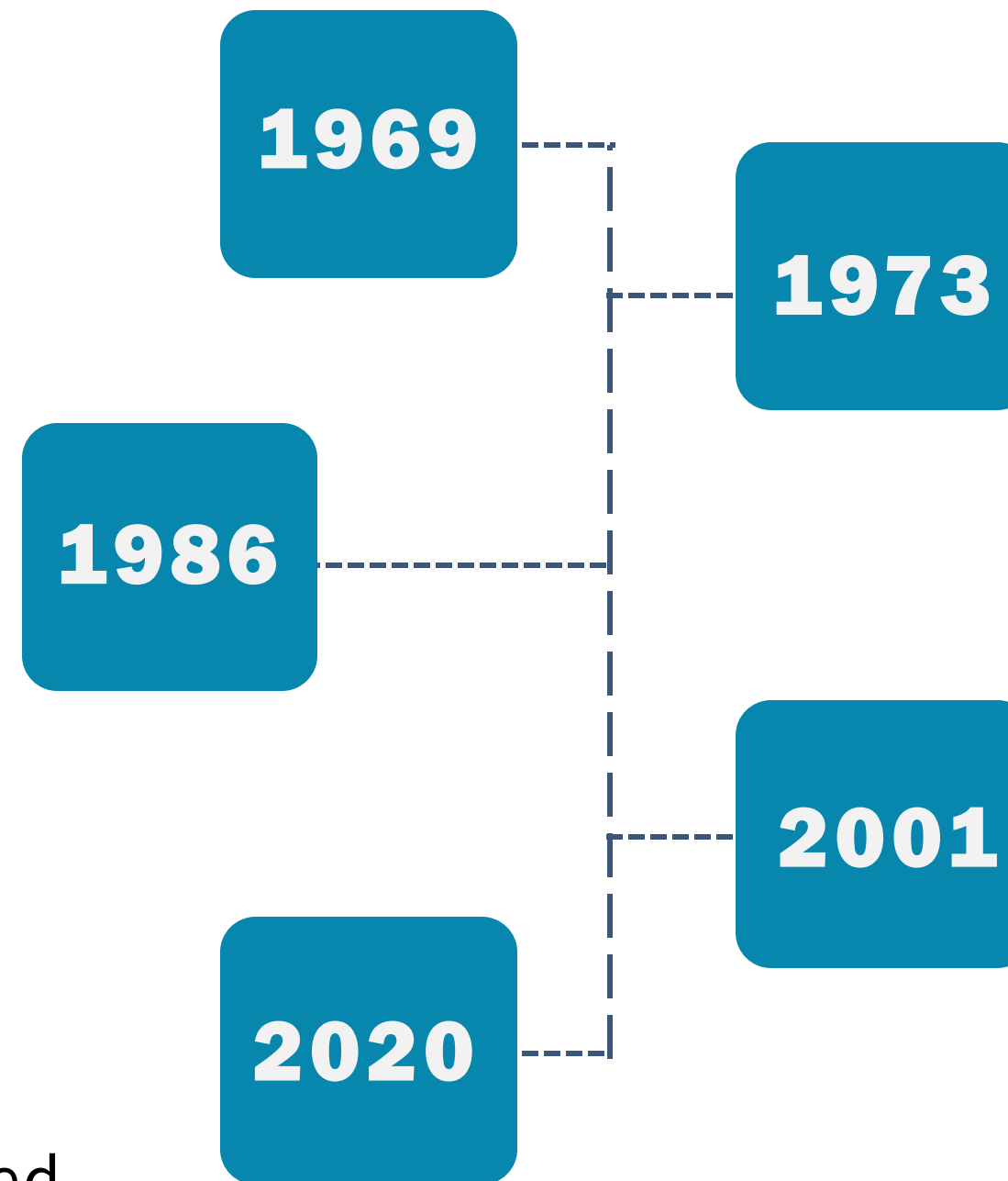
recommends adequate public facility (APF) requirements to support growth

Growth Policy

adopted by Council to direct the Planning Board's administration of the APF

Growth and Infrastructure Policy

adopted with a new name, ended moratorium for schools



Adequate Public Facilities (APF)

requirement adopted by Council, following landmark case

Transportation Impact Tax

introduced countywide, followed by the Schools Impact Tax in 2003



Policy Reflects County's Growth Context and Goals

- When the growth policy was initially adopted, much of the land in the County was undeveloped
- The policy has shifted to respond to the county's changing growth context and reflect its planning goals



How Does the Policy Work?

How Does the GIP Work?

- Guides the assessment of the adequacy of public facilities during the regulatory or development review process
- Sets the standards for adequacy, criteria for evaluation, and requirements for mitigation
- Making an adequacy determination involves both predicting future demand from private development *and* assessing the condition of existing public infrastructure



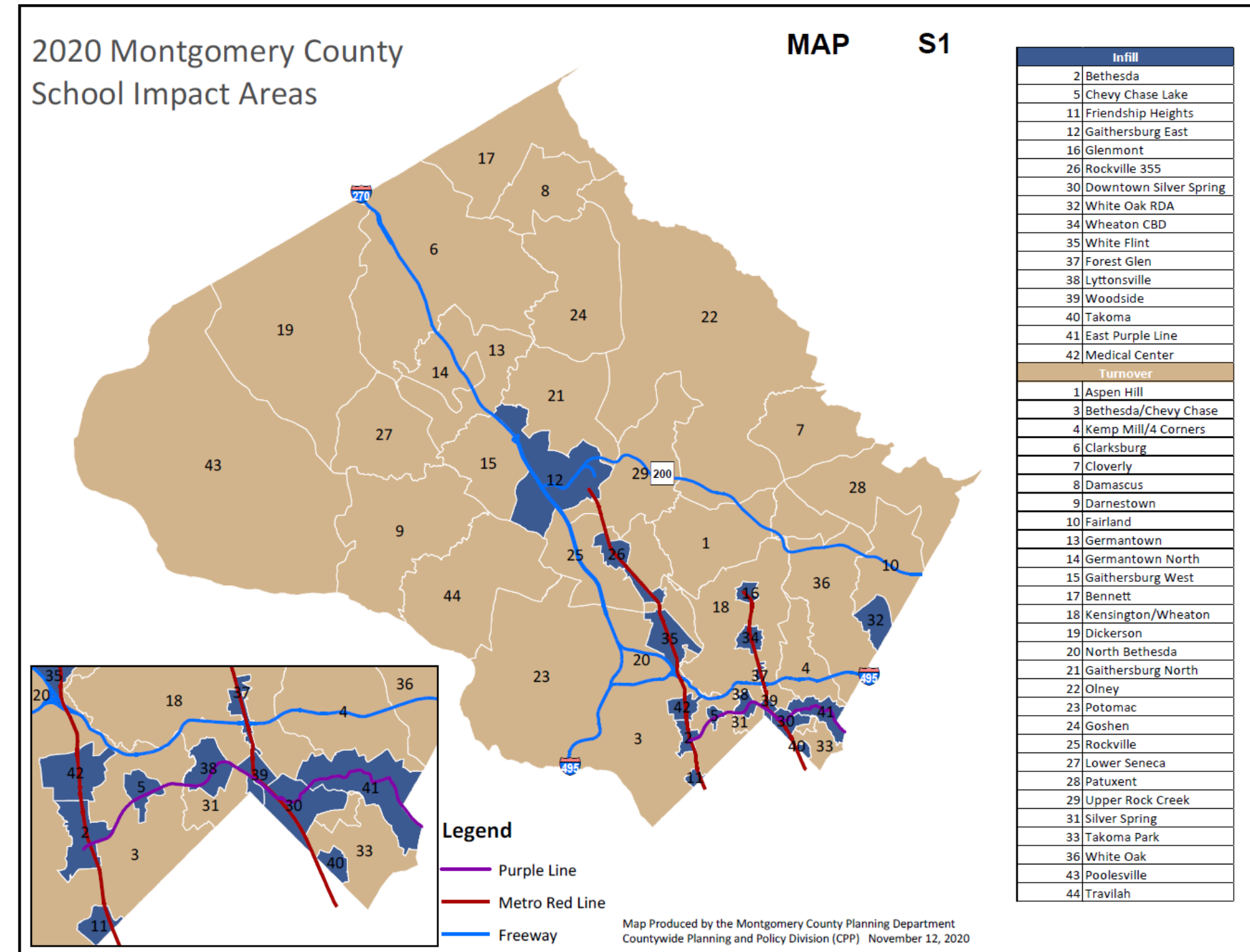
Implementation Guidelines

- The Council-adopted GIP establishes the broad rules for defining adequacy
- The GIP is then implemented through subject-specific guidelines approved by the Planning Board:
 - Annual School Test Guidelines
 - Local Area Transportation Review (LATR) Guidelines



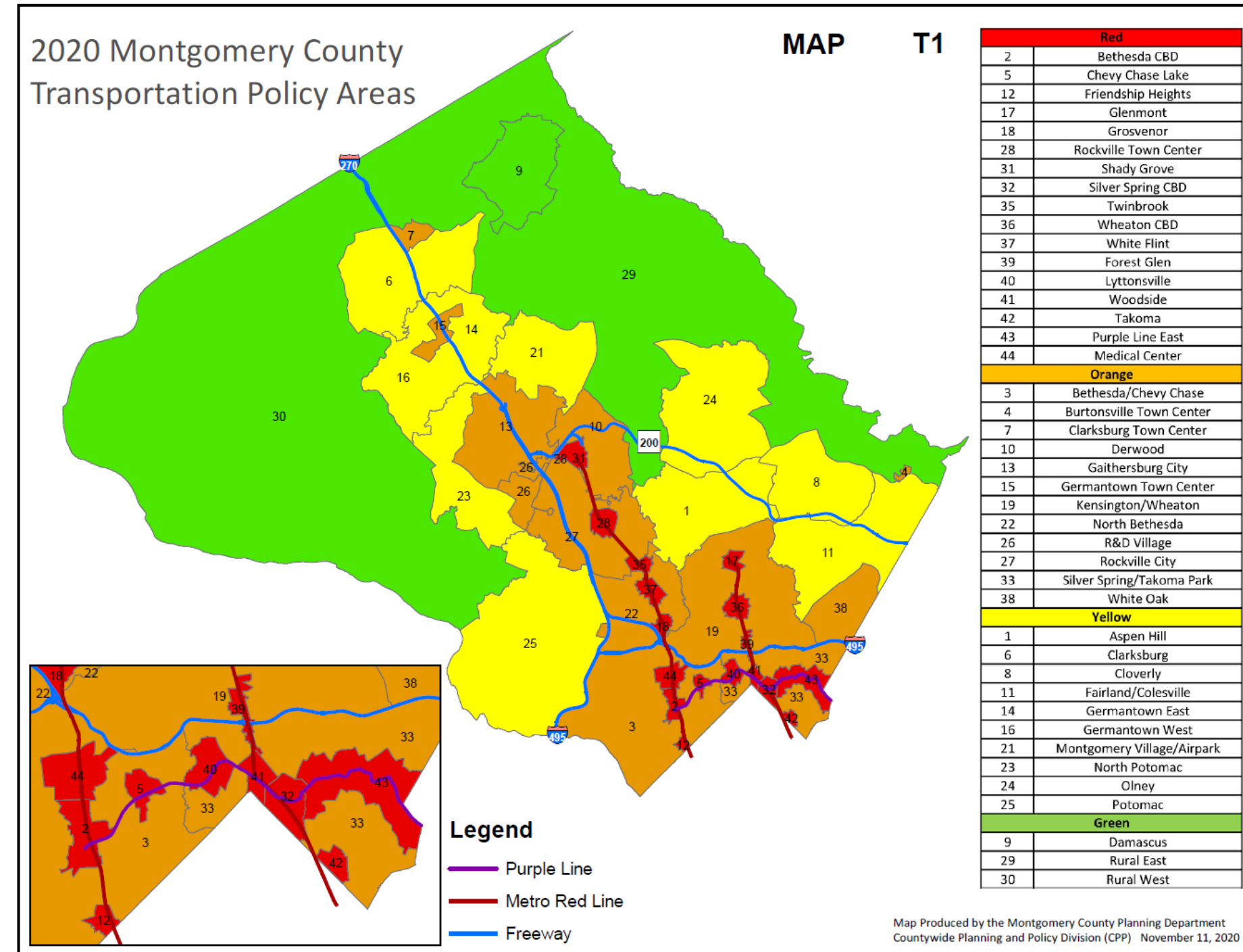
Adequacy – Schools

- Each residential development application is evaluated to forecast its demand for school facilities and to determine if and how the applicant will mitigate inadequacies
 - Annual Schools Test
 - School Utilization Report
 - School Impact Taxes
 - Utilization Premium Payments



Adequacy – Transportation

- Requires forecasting travel demand **and** evaluating the condition of nearby transportation infrastructure
- Local Area Transportation Review (LATR)
 - Multimodal “tests” for any development project expected to generate 50+ net new trips
- Transportation Policy Areas



Adequacy – Other

- Water and Sewer
- Police, Fire and Health Services



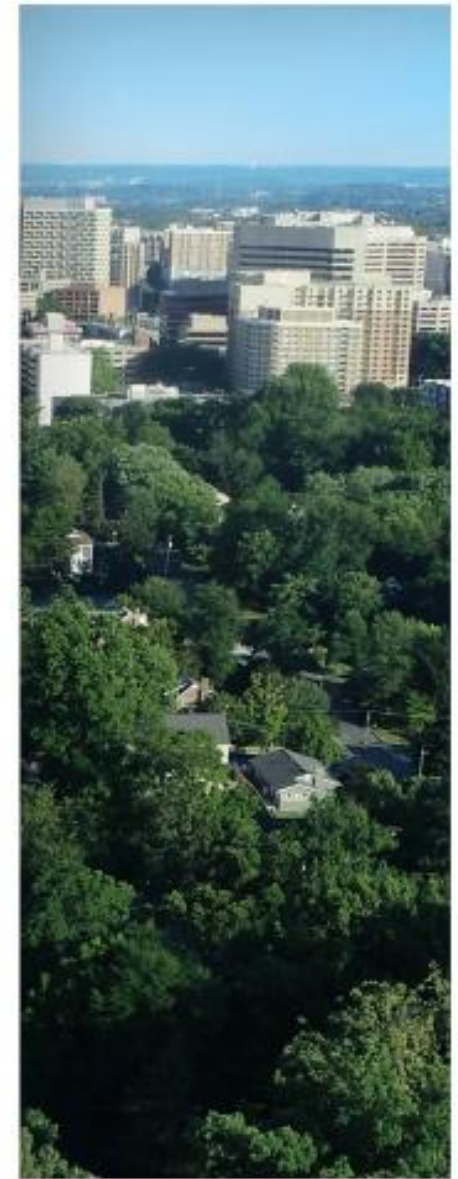
2024 Update Themes to Explore



2024 Update: Themes to Explore

Review the Performance of the 2020-2024 GIP

- Collect data and evaluate the adequacy findings and required mitigations since the previous GIP update
- Recent updates resulted in significant overhauls
- This update will hone existing tools to ensure they are equitable, fair, and effective



2020
2024

 **County Growth Policy**
Montgomery County Planning Board Draft


2024 Update: Themes to Explore

Align with Updated County Priorities

- Examine the adopted General Plan, *Thrive Montgomery 2050*, the Climate Action Plan, and the Racial Equity and Social Justice Act
- Consider how the policy can better align with the goals stated in these visionary documents



2024 Update: Themes to Explore

Consider the Current Growth Trends

- Prepare a status report on the county's general land use conditions and forecast probable growth trends
- Examine changes from the 2020 analysis
- Consider revisions to policy area classifications



2024 Update: Themes to Explore

Make Policy Implementation Clearer and More Efficient

- Evaluate implementation guidelines and recommend revisions
- Revise the LATR Guidelines document to make it easier to understand and use
- Revised version will address frequently asked questions and include example templates and checklists



2024 Update: Themes to Explore

Review Development Impact Taxes

- Not part of the GIP, but closely related
- Chapter 52 of the County Code requires a new development project to pay its pro rata share of needed infrastructure
- The tax rates are updated biennially and posted on the Department of Permitting Service's website



Schools Element



Annual School Test – Standards & Method

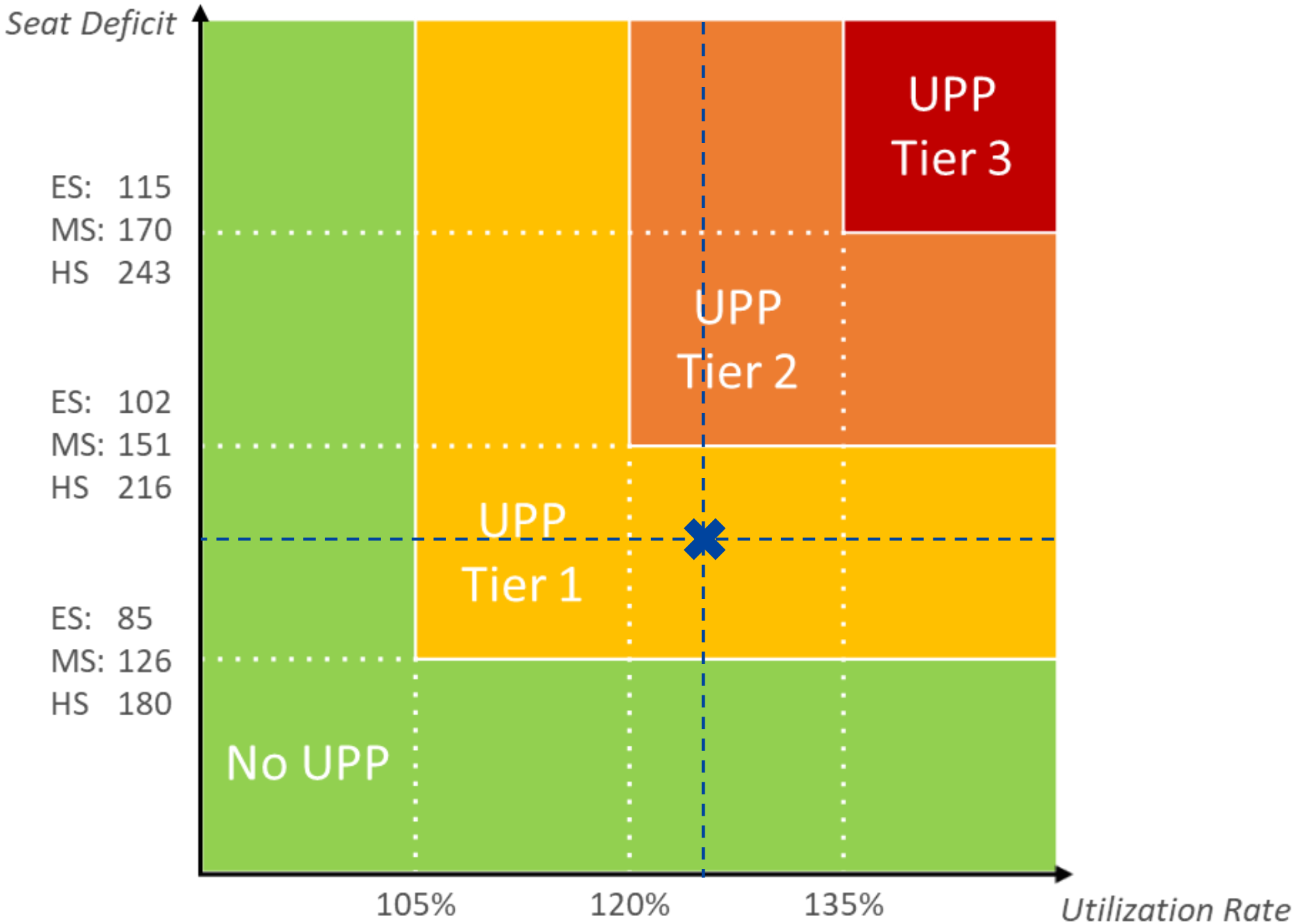
❖ [Ex.] If the 4-yr projections of a HS indicate:

- Utilization Rate = 125 %
- Seat Deficit = 200

» The HS service area will be placed in **Tier 1 UPP**, with a *16 seat adequacy ceiling*.

▪ Utilization Rate
= *Enrollment / Capacity*

▪ Seat Deficit
= *Capacity – Enrollment*



Annual School Test – Results

Growth and Infrastructure Policy FY 2024 School Test

Reflects Approved FY 2024 Capital Budget and Amendments to the FY 2023-2028 Capital Improvements Program

High School Test

Tier 1 UPP: ≥ 105% utilization and ≥ 180 seat deficit
 Tier 2 UPP: ≥ 120% utilization and ≥ 216 seat deficit
 Tier 3 UPP: ≥ 135% utilization and ≥ 243 seat deficit

Effective: July 1, 2023

High School	Projected 2027-2028				UPP Status	UPP Adequacy Ceilings		
	Capacity	Enrollment	Utilization	Deficit/Surplus		Tier 1	Tier 2	Tier 3
Bethesda-Chevy Chase ¹	2,475	2,420	97.8%	55		235	550	922
Montgomery Blair ¹	2,867	2,804	97.8%	63		243	637	1,067
James Hubert Blake	1,743	1,935	111.0%	-192	Tier 1 UPP		157	419
Winston Churchill	1,991	2,129	106.9%	-138		42	261	559
Clarksburg	2,034	2,612	128.4%	-578	Tier 2 UPP			134
Crown ²	2,219	2,120	95.5%	99		N/A	N/A	N/A

¹ Projected enrollment reflects the estimated impact of CIP P651908, which will reassign students between the Downcounty Consortium, Bethesda-Chevy Chase HS, Walter Johnson HS, Walt Whitman HS, and Charles Woodward HS in 2026.

² Projected enrollment reflects the estimated impact of CIP P651909, which will reassign students between Gaithersburg HS, Richard Montgomery HS, Northwest HS, Quince Orchard HS, Wootton HS, and Crown HS in 2027.

Annual School Test – Results

Growth and Infrastructure Policy FY 2024 School Test

Reflects Approved FY 2024 Capital Budget and Amendments to the FY 2023-2028 Capital Improvements Program

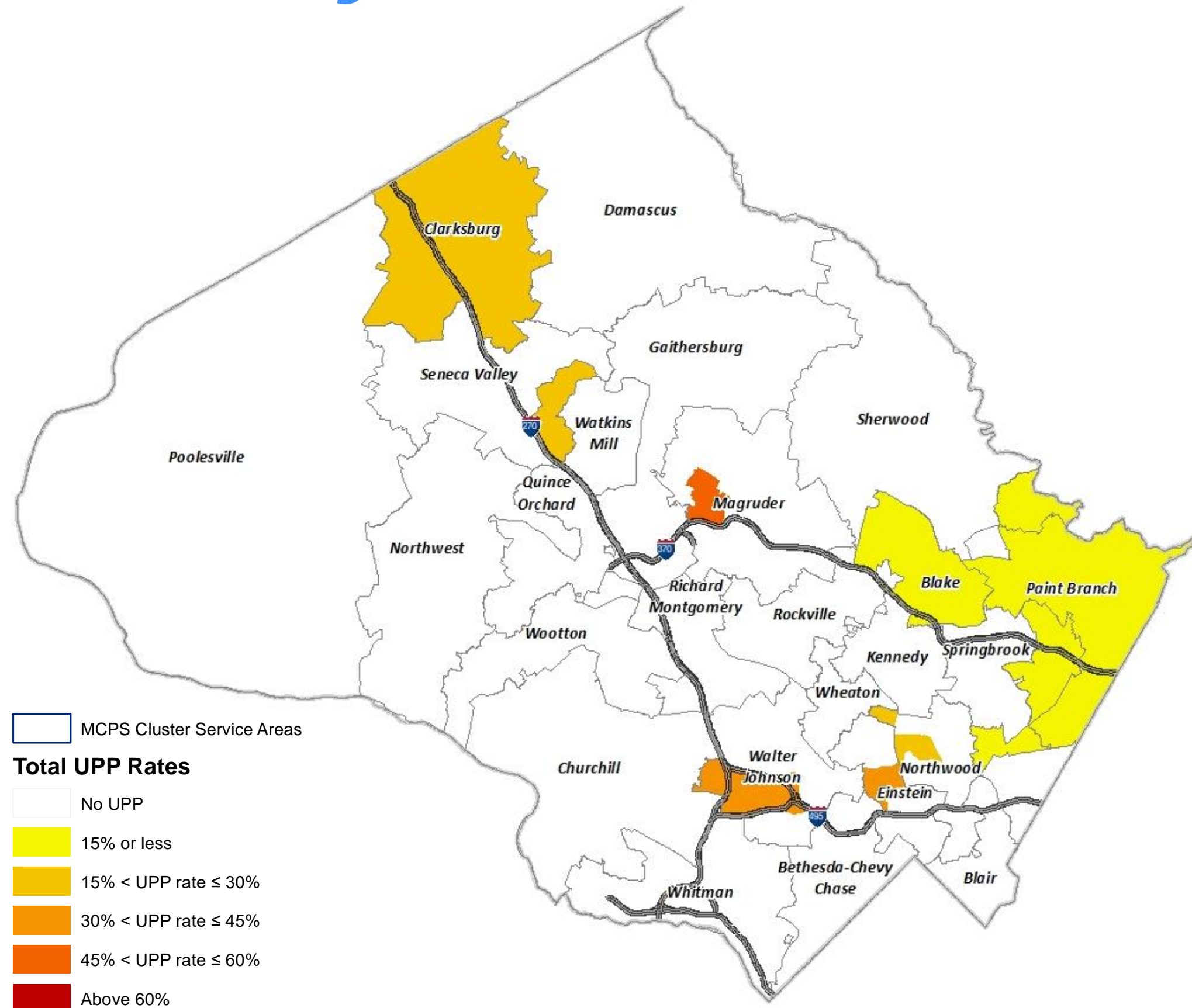
School Test Summary

Effective: July 1, 2023

UPP Tier	High Schools	Middle Schools	Elementary Schools
TIER 1 UPP Utilization: ≥105% Seat Deficit: ≥ 85 for ES ≥ 126 for MS ≥ 180 for HS Payment Level: 40% total	13⅓% of Impact Tax James Hubert Blake HS Paint Branch HS	10% of Impact Tax (none)	16⅔% of Impact Tax Arcola ES
TIER 2 UPP Utilization: ≥ 120% Seat Deficit: ≥ 102 for ES ≥ 151 for MS ≥ 216 for HS Payment Level: 80% total	26⅔% of Impact Tax Clarksburg HS	20% of Impact Tax (none)	33⅓% of Impact Tax Ashburton ES Oakland Terrace ES
TIER 3 UPP Utilization: ≥135% Seat Deficit: ≥ 115 for ES ≥ 170 for MS ≥ 243 for HS Payment Level: 120% total	40% of Impact Tax (none)	30% of Impact Tax (none)	50% of Impact Tax Mill Creek Towne ES

Utilization Premium Payments

UPP Tier	UPP Factor (Rate of Impact Tax)			
	HS	MS	ES	Total
TIER 1 UPP	13⅓%	10%	16⅔%	40%
TIER 2 UPP	26⅔%	20%	33⅓%	80%
TIER 3 UPP	40%	30%	50%	120%



Development Review

School Adequacy Analysis

❖ [Ex.] A development project proposing 330 MFH units in downtown Bethesda applies for preliminary plan approval during FY2024.

➤ FY2024 Annual School Test Results:

School	Program Capacity	Projected School Totals, 2027			Adequacy Status	Adequacy Ceilings		
		Enrollment	% Utilization	Surplus/Deficit		Tier 1	Tier 2	Tier 3
Somerset ES	540	369	68.3%	+171	No UPP	256	279	360
Westland MS	1,073	862	80.3%	+211	No UPP	337	426	587
Bethesda-Chevy Chase HS ¹	2,475	2,420	97.8%	+55	No UPP	235	550	922

¹ Projected enrollment reflects the estimated impact of CIP P651908, which will reassign students between the Downcounty Consortium, Bethesda-Chevy Chase HS, Walter Johnson HS, Walt Whitman HS, and Woodward HS in 2026.

➤ Enrollment Impact Estimate:

Type of Unit	Net # of Units	ES Infill SGR	ES Students Generated	MS Infill SGR	MS Students Generated	HS Infill SGR	HS Students Generated
SFD	0	0.202	0.000	0.096	0.000	0.141	0.000
SFA	0	0.161	0.000	0.087	0.000	0.126	0.000
MFL	0	0.065	0.000	0.030	0.000	0.040	0.000
MFH	330	0.039	12.870	0.016	5.280	0.018	5.940
TOTALS	330		12		5		5

Transportation Element



Local Area Transportation Review (LATR)

- Multimodal “tests” for any development project expected to generate 50+ net new trips
 - Motor Vehicle (red policy area exempt)
 - Pedestrian
 - Bicycle
 - Transit (green policy area exempt)
- Requires forecasting travel demand **and** evaluating the condition of nearby transportation infrastructure



Mitigating Inadequacies

- **Motor vehicle deficiencies:**

Applicants must mitigate, often by reducing vehicular demand or through traffic operational changes.

- **Pedestrian, bicycle, and bus transit deficiencies:**

LATR Proportionality Guide limits required mitigations to ensure requirements are proportional to the size of the project.

- **Mitigation typically involves constructing or installing transportation infrastructure.**

If constructing is not practicable or negatively impacts safety, an applicant may meet this requirement with a mitigation payment.

Case Study

Wisteria Business Park - LIDL Germantown

- 30,000-square-foot LIDL grocery store, replacing an office.
- Preliminary Plan and Site Plans approved by the Planning Board in July 2022

[DAIC #120220030](#)



Case Study: Wisteria Business Park - LIDL Germantown

Policy Area

Orange

Trip Generation

136 /417 (AM/PM)

Policy area and trip generation dictate

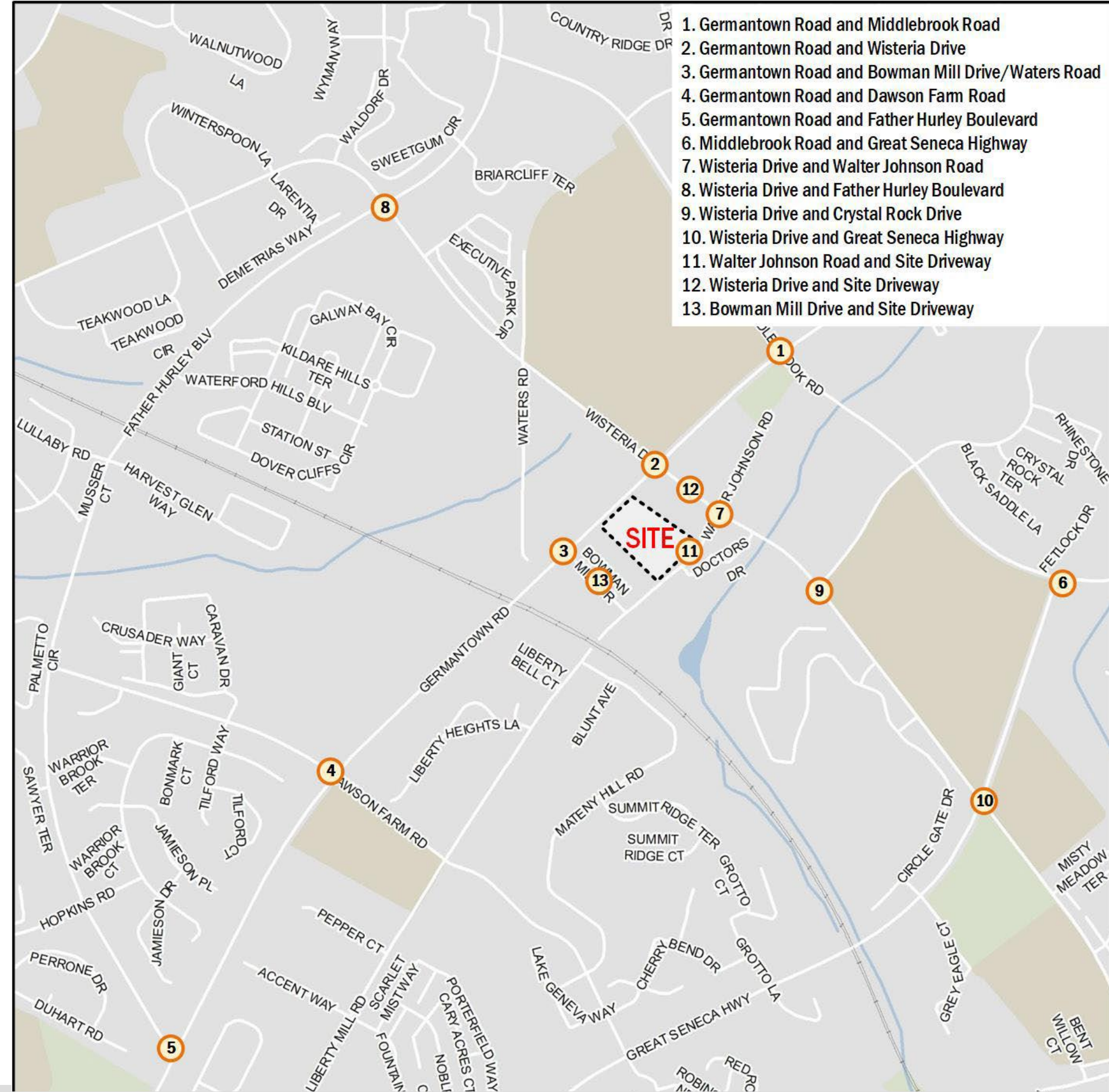
- Test types
- Geographic scope of study area
- Standards for adequacy



Motor Vehicle Tests

- Established study area
- Studied thirteen intersections
- Used the Highway Capacity Manual (HCM) Methodology and the using the HCM and Critical Lane Volume (CLV) methodologies
- **All intersections will operate under the congestion limit.**

Motor vehicle adequacy met without improvements



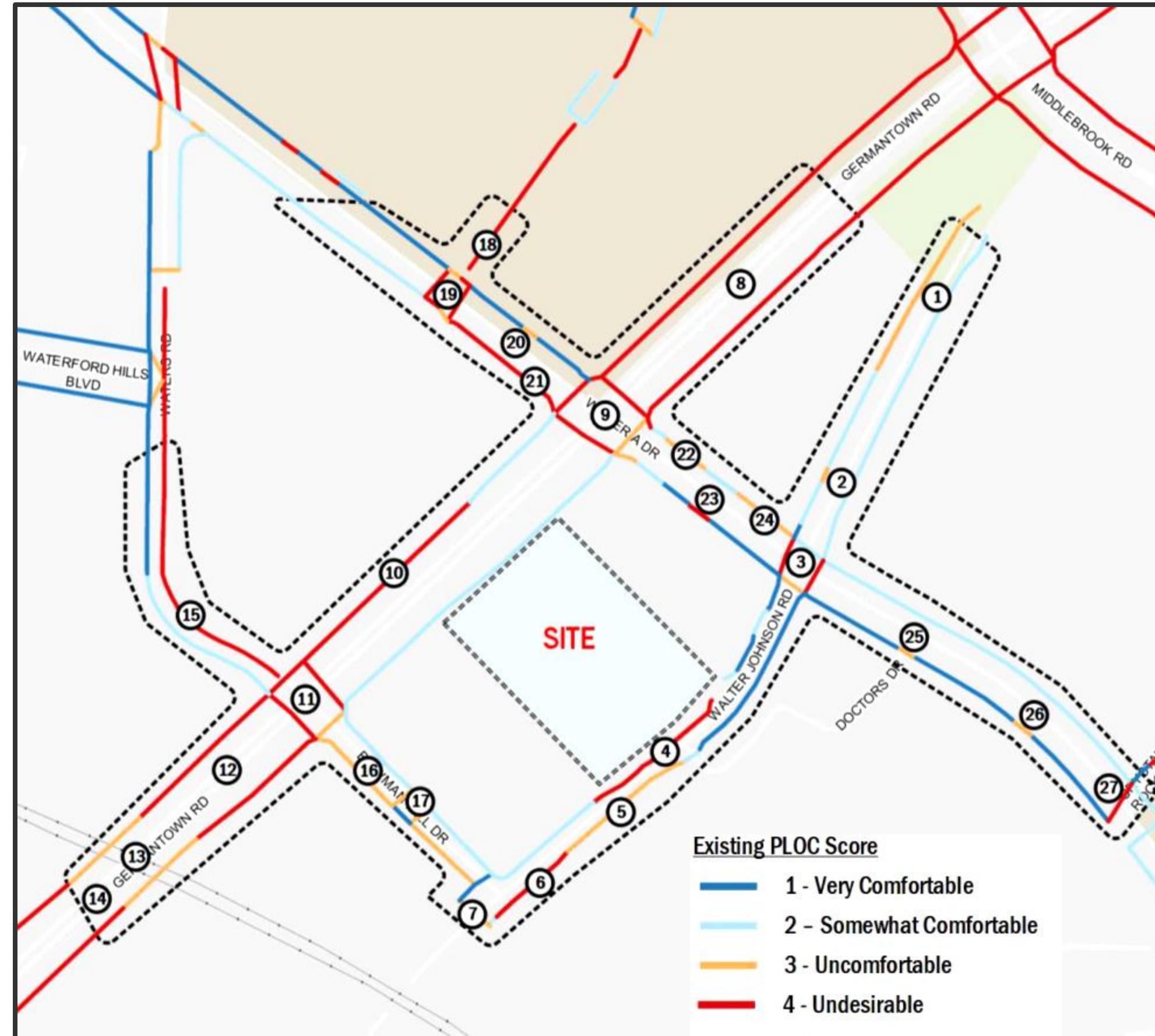
Pedestrian Adequacy

- **Pedestrian Level of Comfort (PLOC)**

5,195 linear feet not to standard (PLOC-3 or 4)

- **Streetlight Spacing**

- **ADA Compliance**



Pedestrian Adequacy

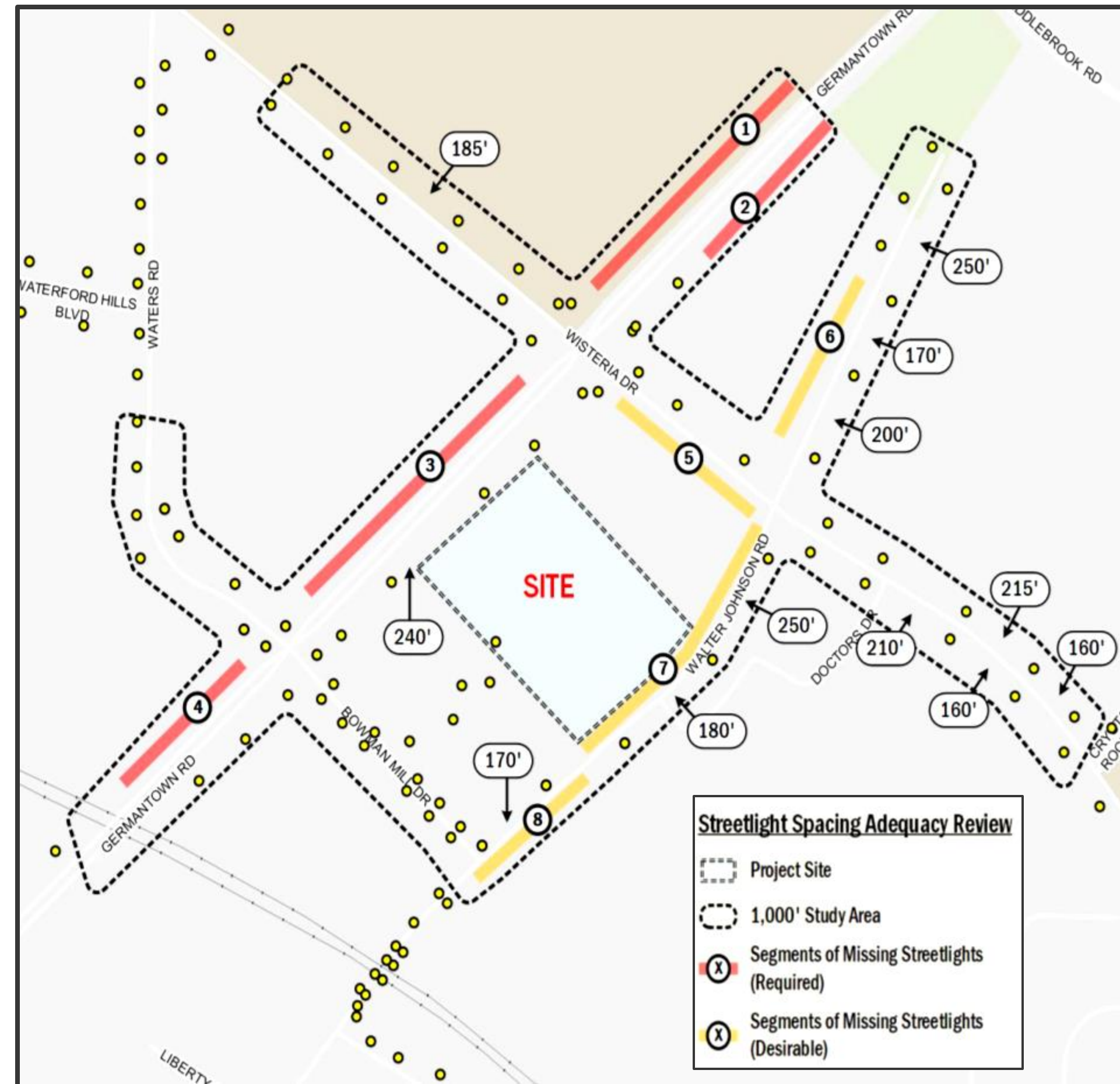
- **Pedestrian Level of Comfort (PLOC)**

5,195 linear feet not to standard (PLOC-3 or 4)

- **Streetlight Spacing**

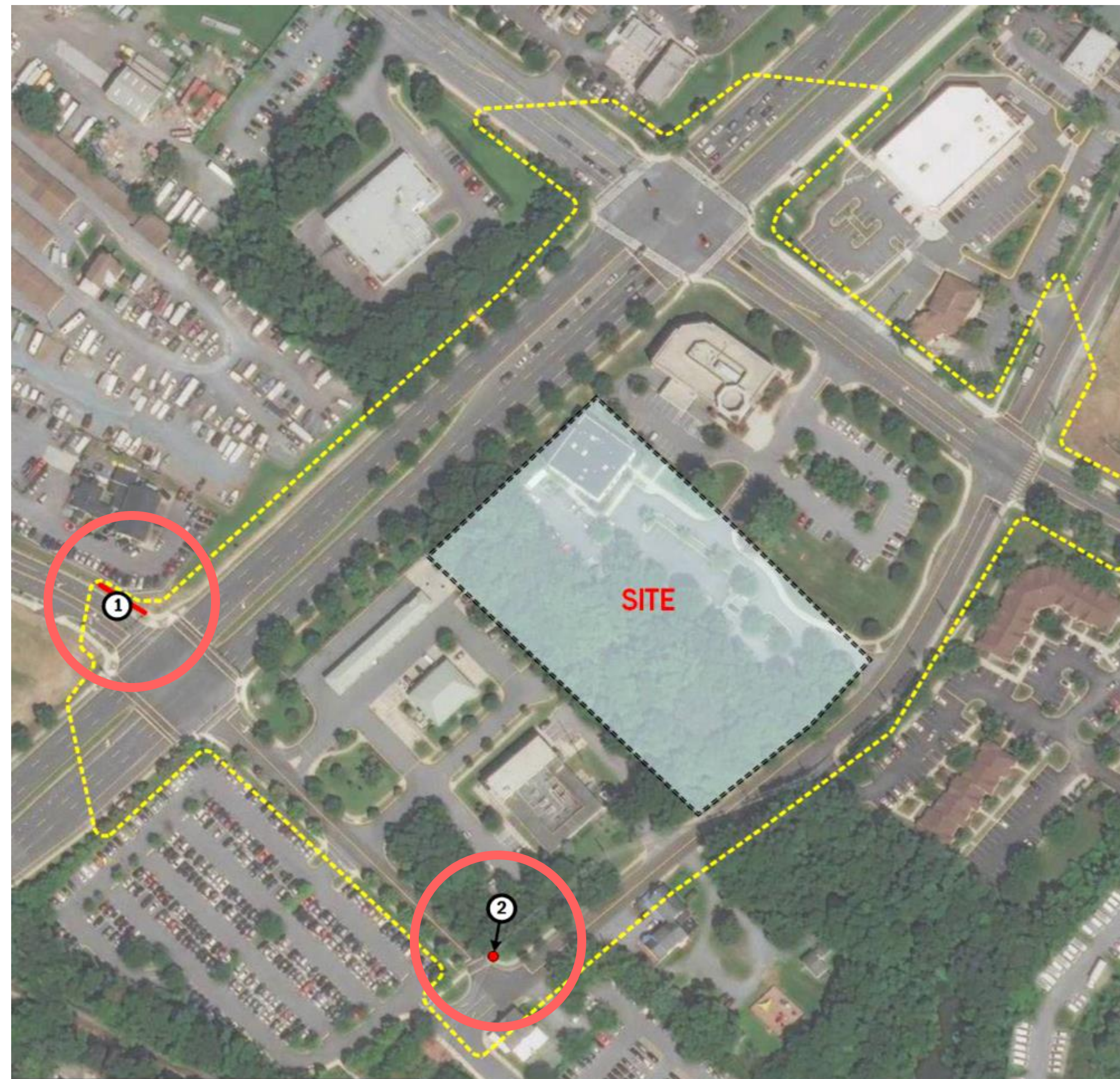
3,900 linear feet not to streetlight standard

- **ADA Compliance**



Pedestrian Adequacy

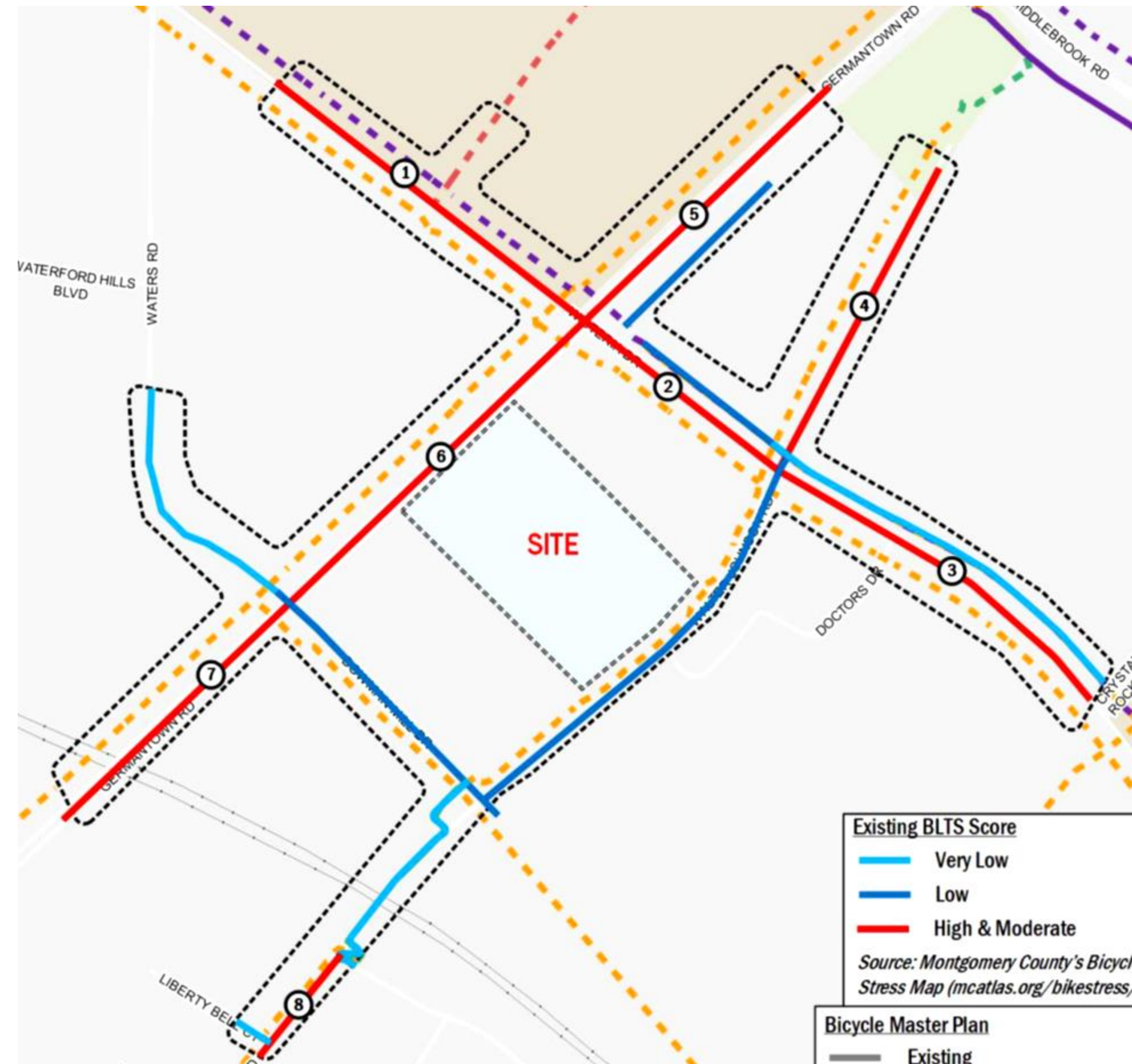
- **Pedestrian Level of Comfort (PLOC)**
5,195 linear feet not to standard (PLOC-3 or 4)
- **Streetlight Spacing**
3,900 linear feet not to streetlight standard
- **ADA Compliance**
80 feet of missing sidewalk, 1 ramp needs DWS



Bicycle Adequacy Test

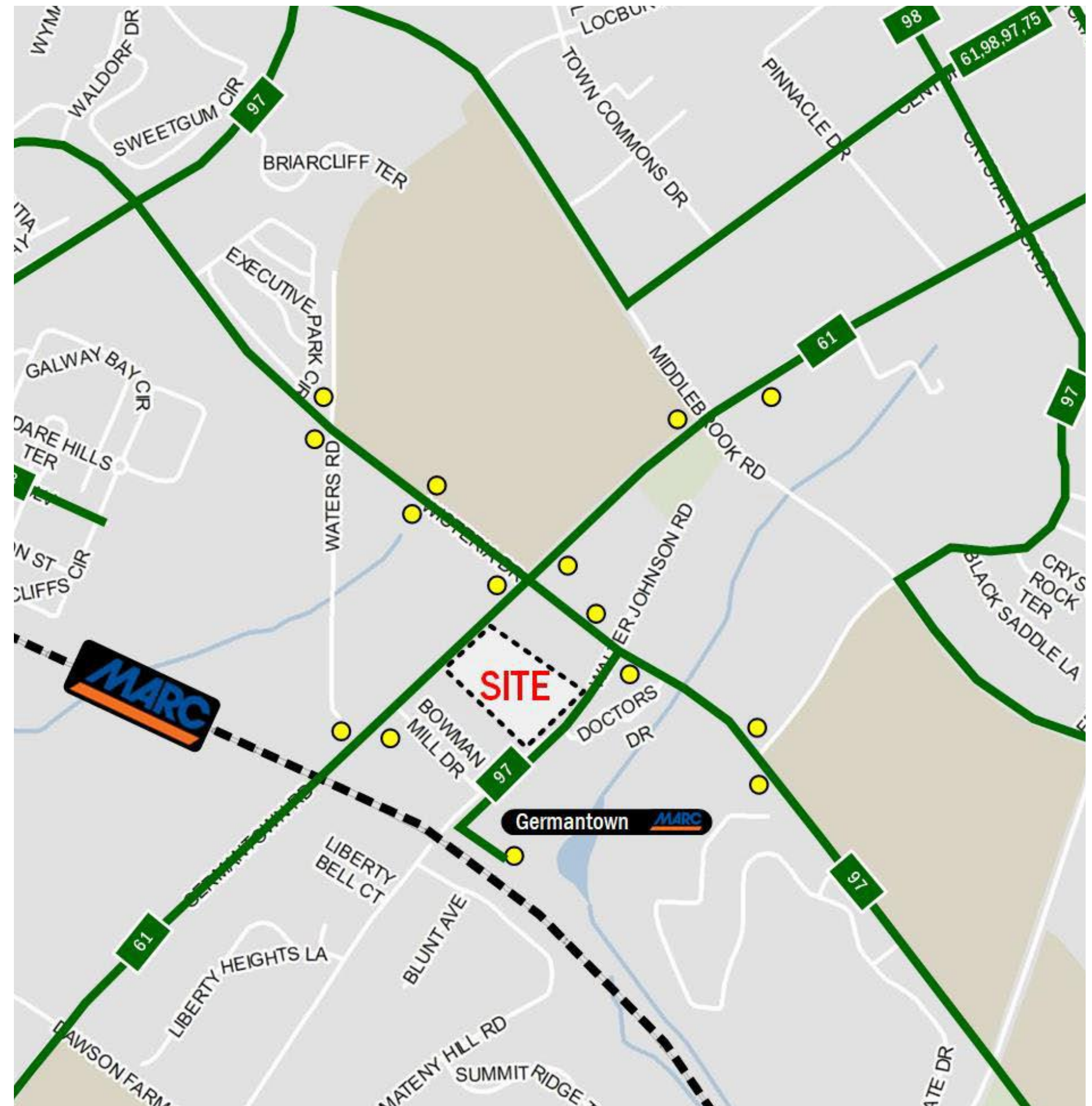
- **Bicycle Level of Traffic Stress (BLTS)**

1,965 linear feet do not meet adequacy



Transit

- Four shelters lack RTI displays
- RTI display is available without shelter



Proportionality Guide

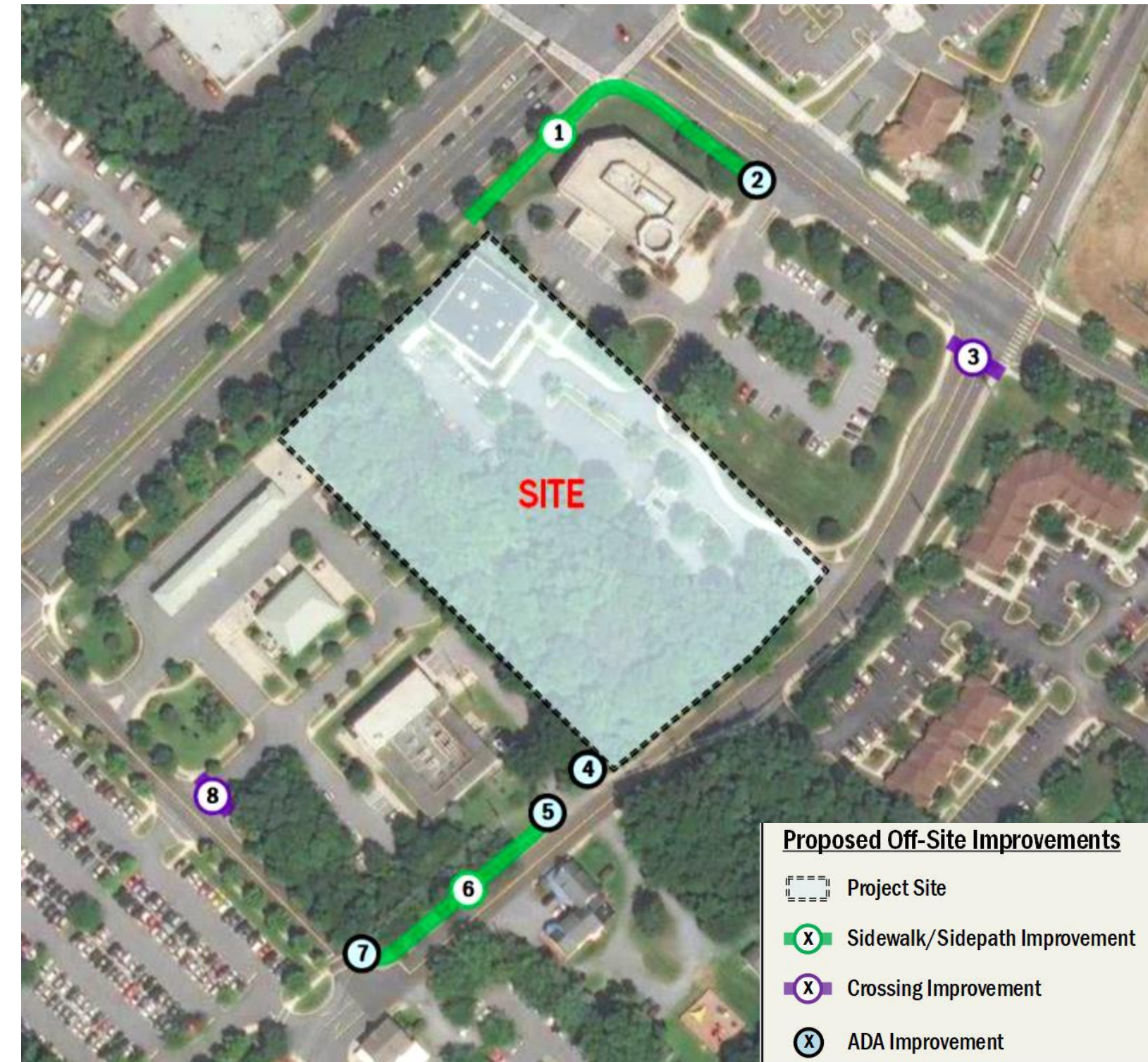
- Ensures that required off-site transportation improvements are reasonable as they relate to a project's impact.
- Calculates a recommended maximum cost of improvements to address deficiencies identified in pedestrian, bicycle, and bus transit system adequacy tests.
- Added in March 2022 in response to concerns that the guidelines were likely to impose transportation improvement costs that are out of proportion to the impacts of an individual development project.

Prioritized Mitigation: Off-Site Improvements

- 8-foot wide sidepath along the Walter Johnson Road (north)
- 10-foot wide sidepath of Wisteria Drive (west)
- 10-foot wide sidepath along Germantown Road (south)
- 10 ft-wide bikeable crossing of Walter Johnson Road at the western leg of the Walter Johnson Road / Wisteria Drive intersection.

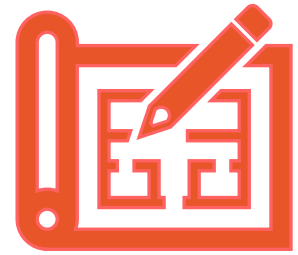
Proportionality Guide

\$123,375



Community Outreach and Engagement Strategy

Engagement and Outreach Strategy



Technical Working Groups

- Schools Technical Advisory Team (STAT)
- Transportation Advisory Group (TAG)



Community and Stakeholder Group Meetings



Public Meetings

Both in-person and virtual



Videos, explainers, blog posts, social media, e-Letter and Website

Montgomeryplanning.org/GIP

Schools Technical Advisory Team (STAT)

- City of Gaithersburg
- City of Rockville
- City of Takoma Park
- Montgomery County Council of PTAs
- Montgomery County Public Schools
- Regional Student Government Association
- Coalition for Smarter Growth
- Maryland Building Industry Association
- National Association for Industrial and Office Parks
- Housing Opportunities Commission
- Montgomery County Economic Development Corporation
- Latino Economic Development Center
- Montgomery County MD Branch of National Association for the Advancement of Colored People

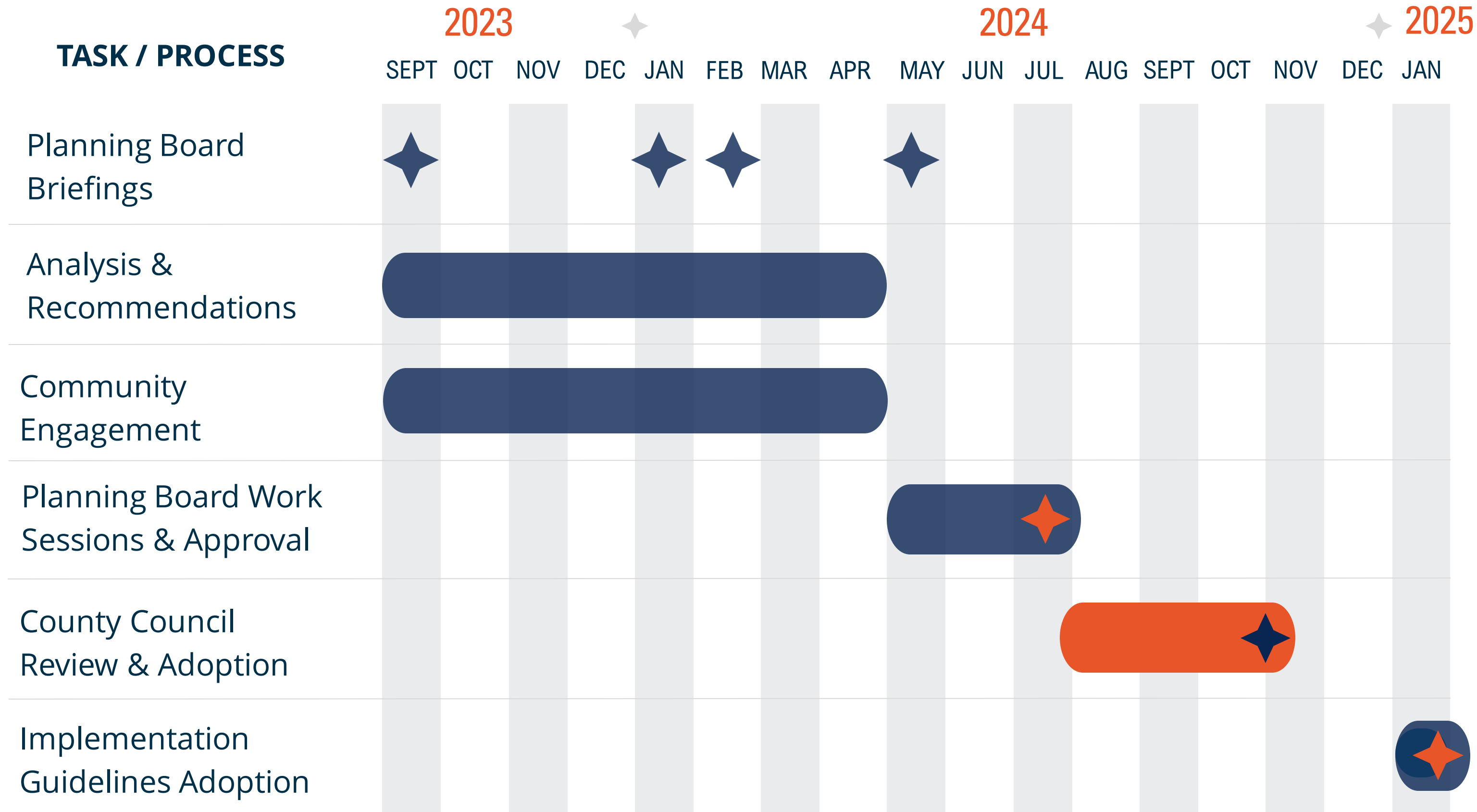
Transportation Advisory Group (TAG)

Stakeholders and technical experts, including representatives from:

- Montgomery County Department of Transportation (MCDOT)
- Maryland Department of Transportation (MDOT)
- City of Gaithersburg
- City of Rockville
- City of Takoma Park
- Maryland Building Industry Association (MBIA)
- NAIOP, the Commercial Real Estate Development Association

Project Schedule

Project Schedule



Q&A

Breakout Rooms

Schools Breakout Room Questions

School Breakout Room Questions

1. What are your most important priorities for schools in the 2024 update of the Growth and Infrastructure Policy?
2. Are there any policy changes that you think the Planning staff should investigate for the 2024 update?
3. What trends do you think will change when Planning staff reexamines trends found in the 2020?
4. Are there other analyses or metrics you would like the Planning staff to complete to support the 2024 update?

Transportation Breakout Room Questions

Transportation Breakout Room Questions

1. What are your most important transportation priorities?
2. Are there any policy changes Planning staff should investigate for the 2024 update?
3. What analyses or metrics would you like to see?

Report Out



Thank you!

Montgomery County Planning Department

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Instagram: @montgomeryplanning

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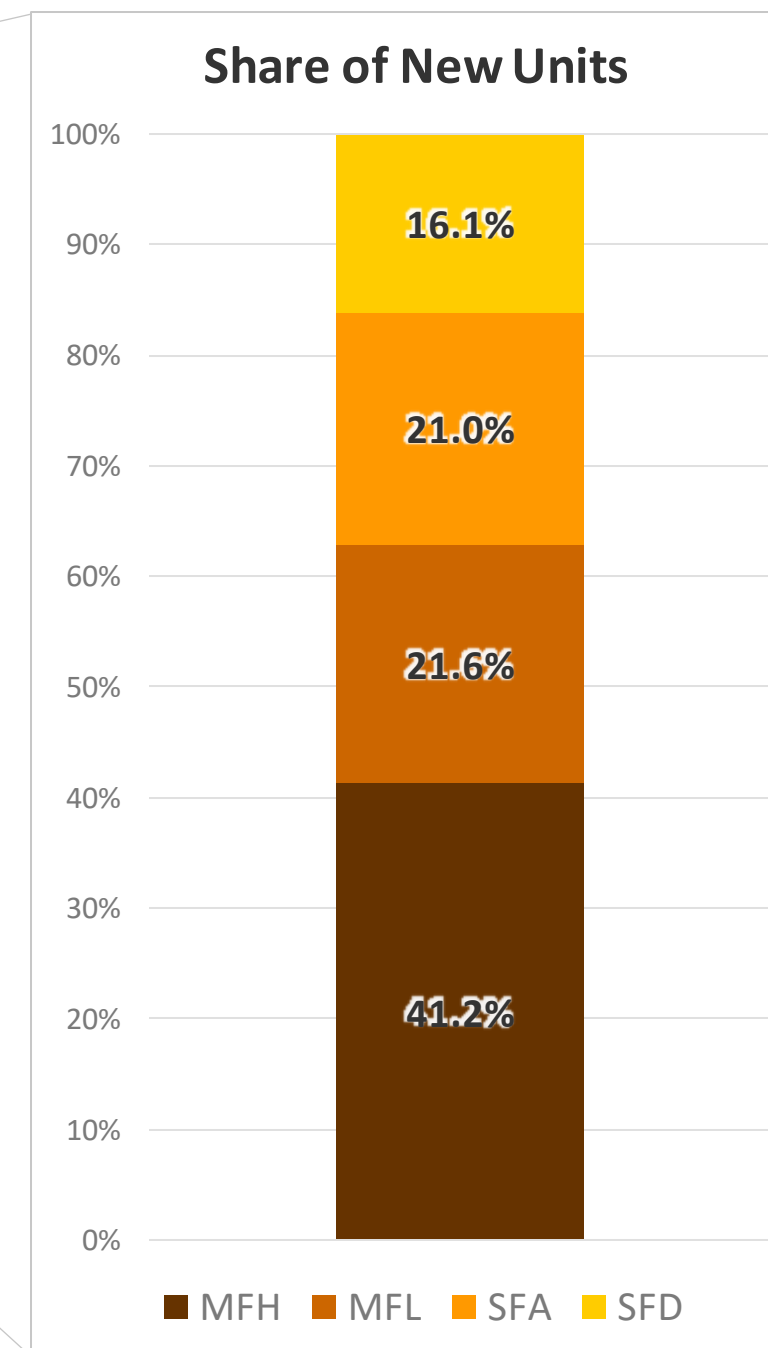
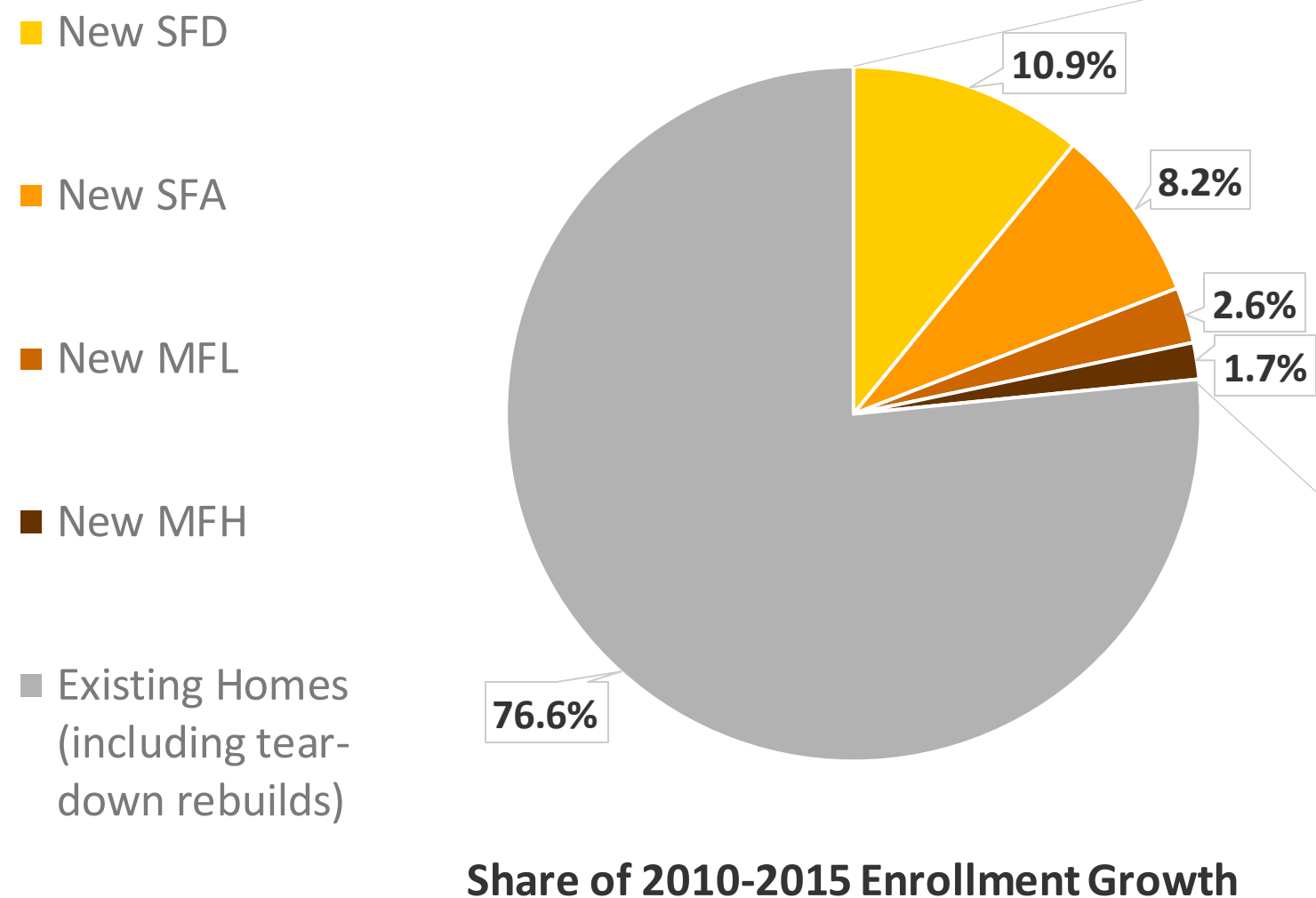
(301) 650-5624

School Trends to Examine

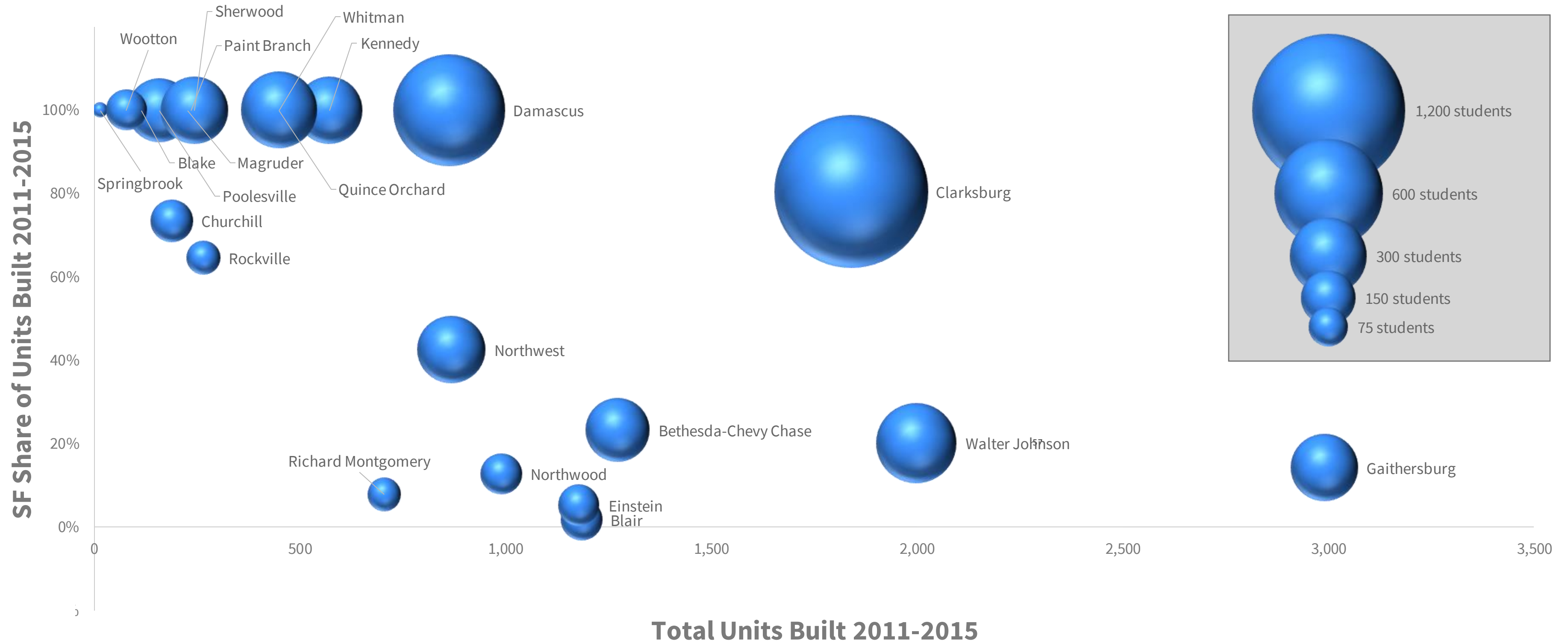


The Role of New Development vs. Turnover

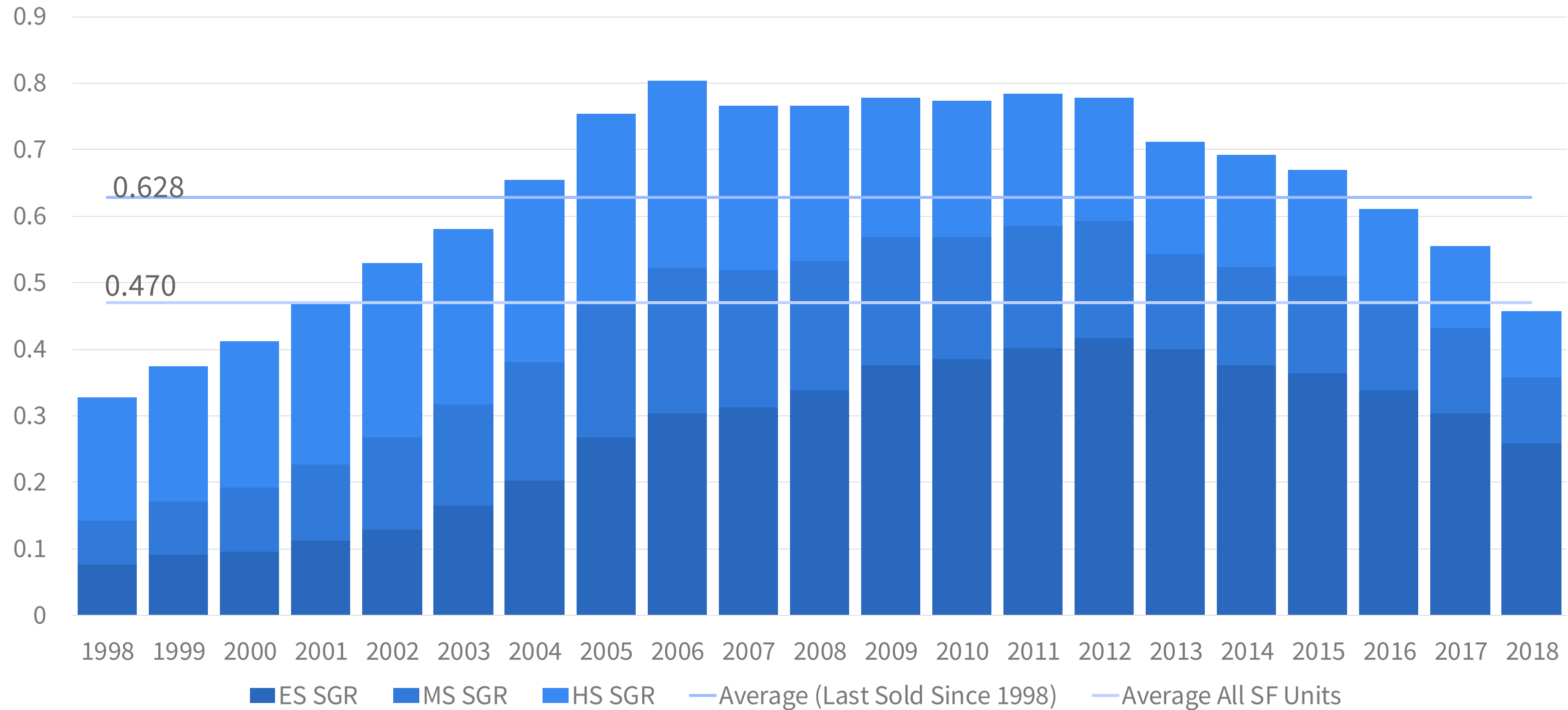
- Where is the enrollment growth coming from?



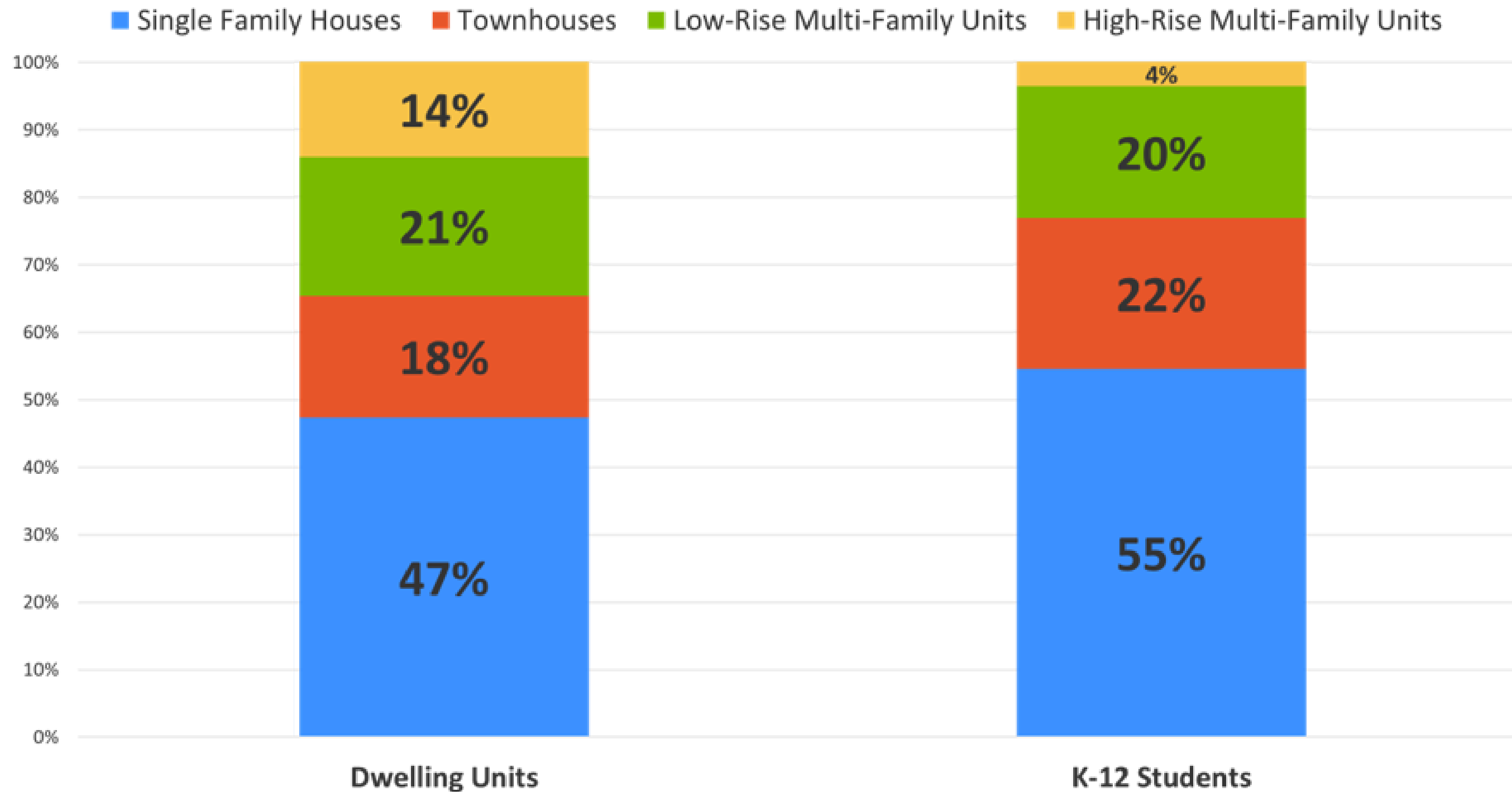
2018 Students Residing in Units Built 2011-15



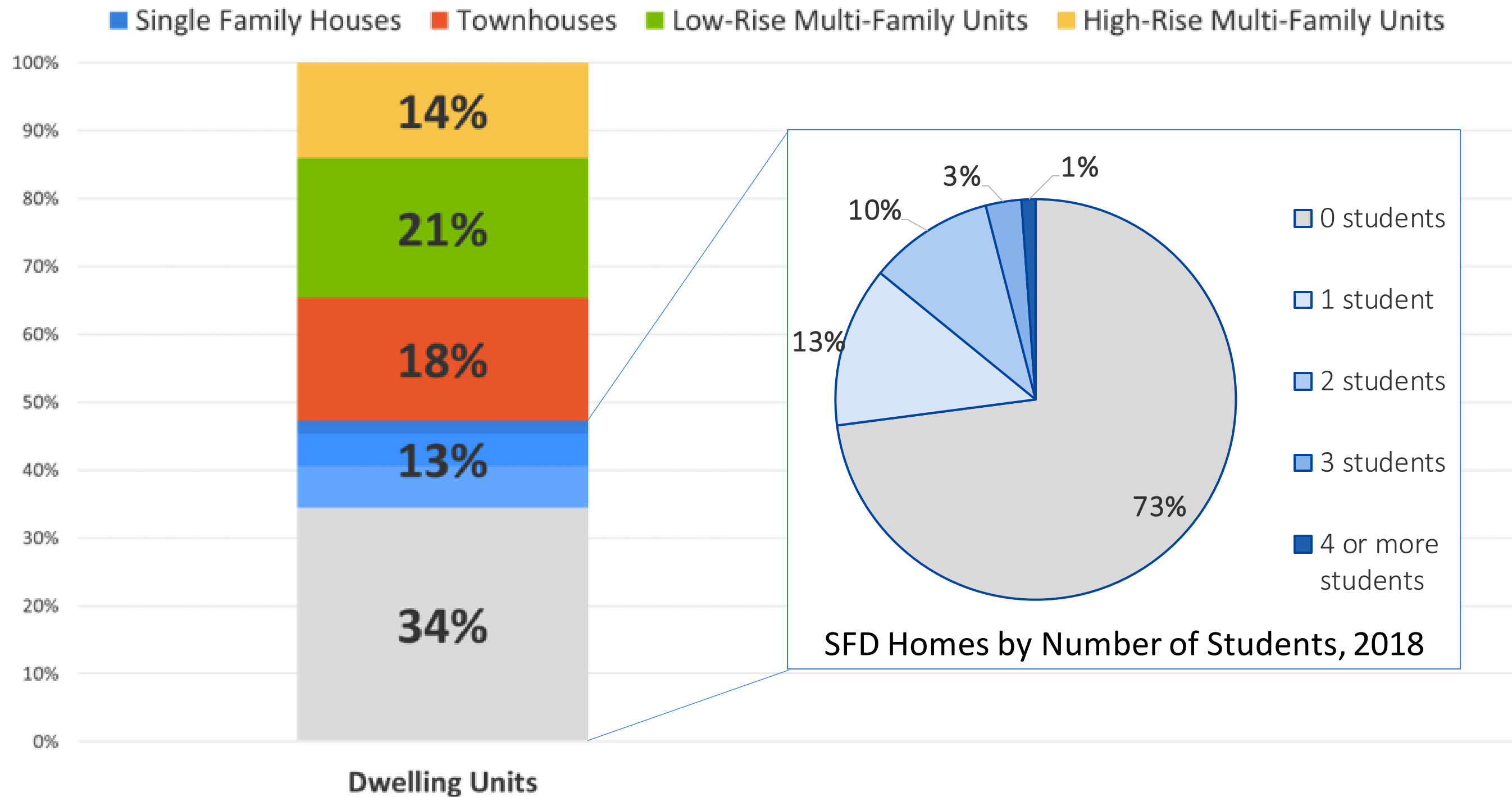
Student Generation Rates by Year Last Sold (2018)



Single Family Homes by Number of Students (2018)



Single Family Homes by Number of Students (2018)



Multifamily Student Generation Rates by Decade Built (2018)

Multifamily SGR by Decade Built (2018)

