



# GERMANTOWN

Sector Plan Amendment

## Existing Conditions Report

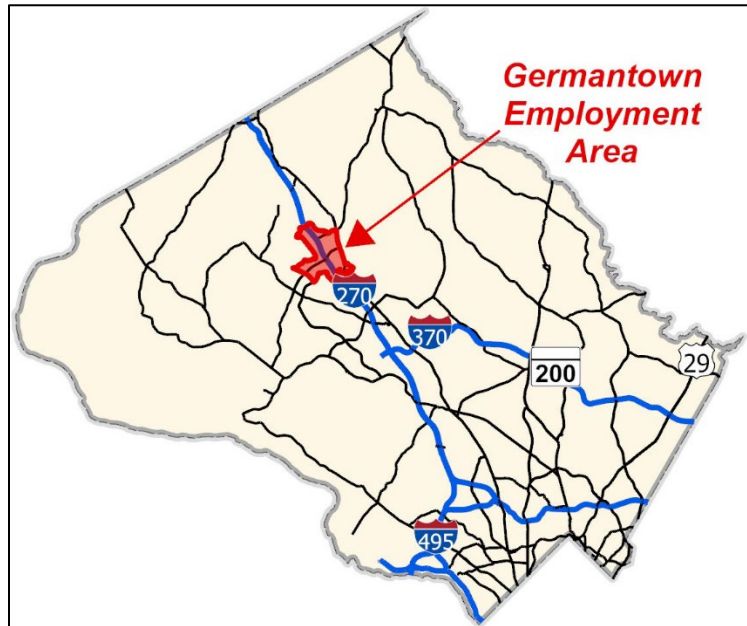
February 13, 2025

### Contents

Introduction.....	2
Demographics .....	6
Land Use .....	14
Employment.....	36
Transportation.....	39
Environment.....	57
Parks .....	64
Community Facilities .....	72
Findings of the Germantown Employment Area Study .....	75
Conclusion.....	77
Links.....	77
Appendixes .....	78

## Introduction

The Germantown Sector Plan Amendment (“Plan Amendment”) is an update to the 2009 *Germantown Employment Area Sector Plan* (“2009 Plan” or “GEASP”), which did not lead to the job and housing growth envisioned in the plan and contains barriers to residential development which could help the county address the housing shortage. Since 2009, 2,000 new housing units have been built in the plan area, which remains well below the 10,000 new housing units envisioned in the plan. Additionally, instead of adding 50,000 jobs, approximately 200 private sector jobs have been lost within the Plan area since 2009. This is very concerning given the heavy emphasis on employment uses in the 2009 Plan and the shortage of housing units in the county and region.



In addition to rethinking employment and housing in Germantown, the Plan Amendment will examine several other aspects of the community, including planned transportation projects, transit service, urban design, recommended land uses, and zoning. Several policies and initiatives enacted since 2009, such as the county’s Racial Equity and Social Justice Act, Vision Zero, and Climate Action Plan, to name a few, may also lead to changes to the 2009 Plan. The county’s new general plan, *Thrive Montgomery 2050*, also contains ideas to explore in Germantown.

This report contains a summary of existing conditions in the 2009 Plan area. The boundary used for the report is the same as the 2009 Plan’s boundary (Figure 1), which was used for the study that has now transitioned into a plan amendment; the final boundary of the amendment will be discussed with the revised Scope of Work. Current demographic information and a comparison to population characteristics in 2009 will be instructive in understanding how Germantown has evolved in recent years and what we can expect in the future. Existing land uses, recently completed developments, and approved but unbuilt projects in the development pipeline will help us understand what works and what doesn’t in the area. The current commercial real estate market conditions should further inform land use and zoning recommendations. An examination of the environment, parks, and community facilities may also lead to new plan recommendations. Overall, this comprehensive analysis will provide valuable insights for future planning and development in Germantown.

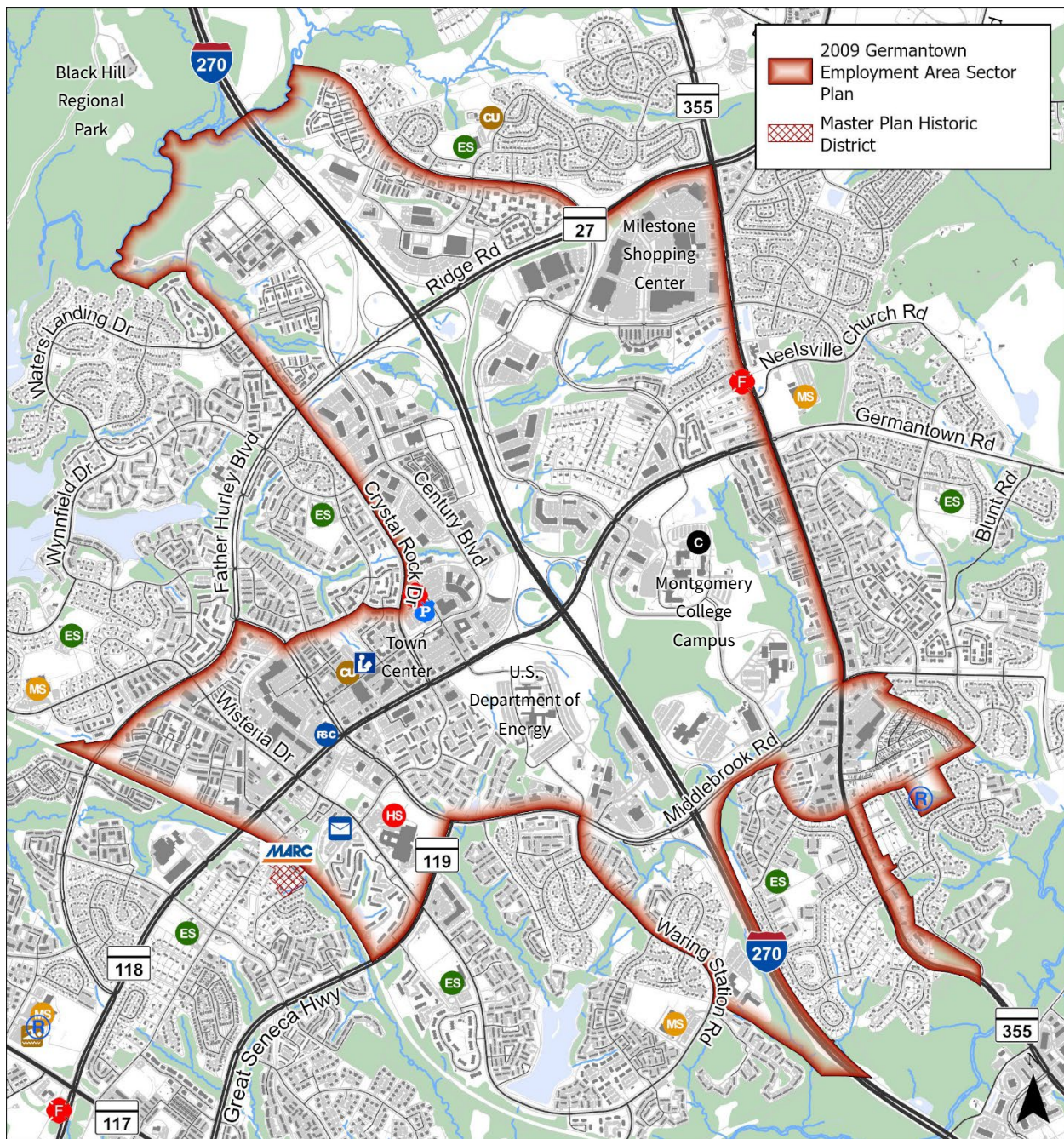


Figure 1. 2009 Germantown Employment Area Sector Plan boundary

## Background

The challenges of constructing and occupying new commercial space in a post-pandemic era, especially considering the 2009 Plan area’s distance from high-frequency transit and urban amenities, explains part of the shortfall in planned employment growth. Yet the plan amendment aims to assess more deeply why employment-oriented development has not occurred to the extent envisioned in the GEASP—even before the post-pandemic challenges—and what changes may be needed to support development in the future.

In early 2024, Planning staff began a study of the area to assess the strengths, weaknesses, opportunities, and challenges Germantown faces relative to the recommendations of the 2009 Plan and other countywide policies passed since 2009. The study examined Germantown’s ability to attract new employment and housing opportunities and began reviewing planned roadway improvements, urban design shortcomings, changes to the planned transit network, and issues created by specific public benefits requirements and site-specific development targets in the sector plan. As the study progressed, it became clear that the only way to address many of the problems in Germantown was through an amendment to the 2009 Plan. The County Council approved the transition from a study to a plan amendment in November 2024.

The main factors identified thus far that are preventing a shift in Germantown from a suburban-style development—with low-rise buildings and large areas of surface parking—into the kind of compact, walkable place envisioned in *Thrive Montgomery 2050* include:

- A global downward trend in office market development that began prior to the 2007-2009 Great Recession,
- A nationwide shift towards teleworking catalyzed by COVID-19,
- The BLT purchase requirement disincentivizing building above a density of 0.5 FAR in Germantown,
- Site-specific commercial-to-residential development targets,
- A lack of access to transit that would attract businesses and office workers, and
- Several of the most dangerous High Injury Network road segments are in Germantown, leading to unsafe conditions and an unpleasant pedestrian and bicycling experience.

The area covered by the GEASP contains a mix of residential neighborhoods (multi-unit buildings and attached and detached houses), suburban-scale retail centers and office parks, and large institutional uses. Small portions of the 2009 Plan area have achieved the plan’s vision, but most of the area has yet to develop per the plan’s recommendations. A few sites that have been developed have densities, occupancies, or public improvements that fall short of expectations. Perhaps most important, commercial areas with low-rise buildings and large areas of surface parking have been very slow to transition into denser developments.

Due in large part to the GEASP’s land use and transportation visions not being fully realized, the 2009 Plan’s anticipated residential and employment growth has not kept pace with projections. While the number of dwelling units in the Sector Plan area grew by 32 percent from 2009 to 2023, the Sector Plan area lost about two percent of its private sector jobs between 2010 and 2023 (see Table 1). Nearly 69,000 jobs were projected by the 2009 Plan at full build-out of its land use recommendations, yet a 2023 estimate of employment found only 12,975 private sector and 1,800 public sector jobs, or 14,775 total jobs in the Sector Plan area.

Table 1. Development Conditions and Projections Over Time

	<b>Projected by 1989 Master Plan<sup>b</sup></b>	<b>As of 2009/2010</b>	<b>Projected by 2009 Sector Plan<sup>b, d</sup></b>	<b>As of 2023/2024</b>
Dwelling Units <sup>a</sup>	6,379	6,214 <sup>b</sup>	16,418	8,204 <sup>e</sup>
Commercial Area (square feet)	18,552,310	8,077,085 <sup>b</sup>	24,104,248	8,425,262 <sup>e</sup>
Jobs	53,000	13,183 <sup>c</sup>	68,870	12,975 <sup>f</sup>

<sup>a</sup> Not including bonus dwelling units that may be applicable under the Optional Development Method

<sup>b</sup> Published in the 2009 *Germantown Employment Area Sector Plan*

<sup>c</sup> Source: Maryland Department of Labor Quarterly Census of Employment and Wages Microdata, 2nd quarter 2010. Includes private sector jobs only. The 2009 GEASP estimated 23,080 total existing jobs, but this number cannot be verified and appears to be an overestimate even when including approximately 2,000 public sector jobs.

<sup>d</sup> Assumes 650 dwelling units and 3,339,000 s.f. of non-residential space would be demolished and redeveloped

<sup>e</sup> Source: Montgomery Planning GIS property data, 2024

<sup>f</sup> Source: Maryland Department of Labor Quarterly Census of Employment and Wages Microdata, 2nd quarter 2023. Includes private sector jobs only.

The information contained in this report will inform the recommendations in the sector plan amendment and will serve as a baseline for measuring the impact of the plan in the future.

# Demographics

Demographic information for the plan amendment is derived from ten U.S. Census Tracts that straddle I-270 in Germantown and most closely overlap the study boundary. Census Tracts are the smallest geographic unit with available population statistics. Because Census Tracts don't typically align well with master plan boundaries, planners define a "study area" to be used for demographic analysis. This report will use the term Germantown Study Area and the abbreviation "GSA" to refer area used for demographic and other research based on the ten Census Tracts to distinguish it from the area covered by the 2009 Plan.

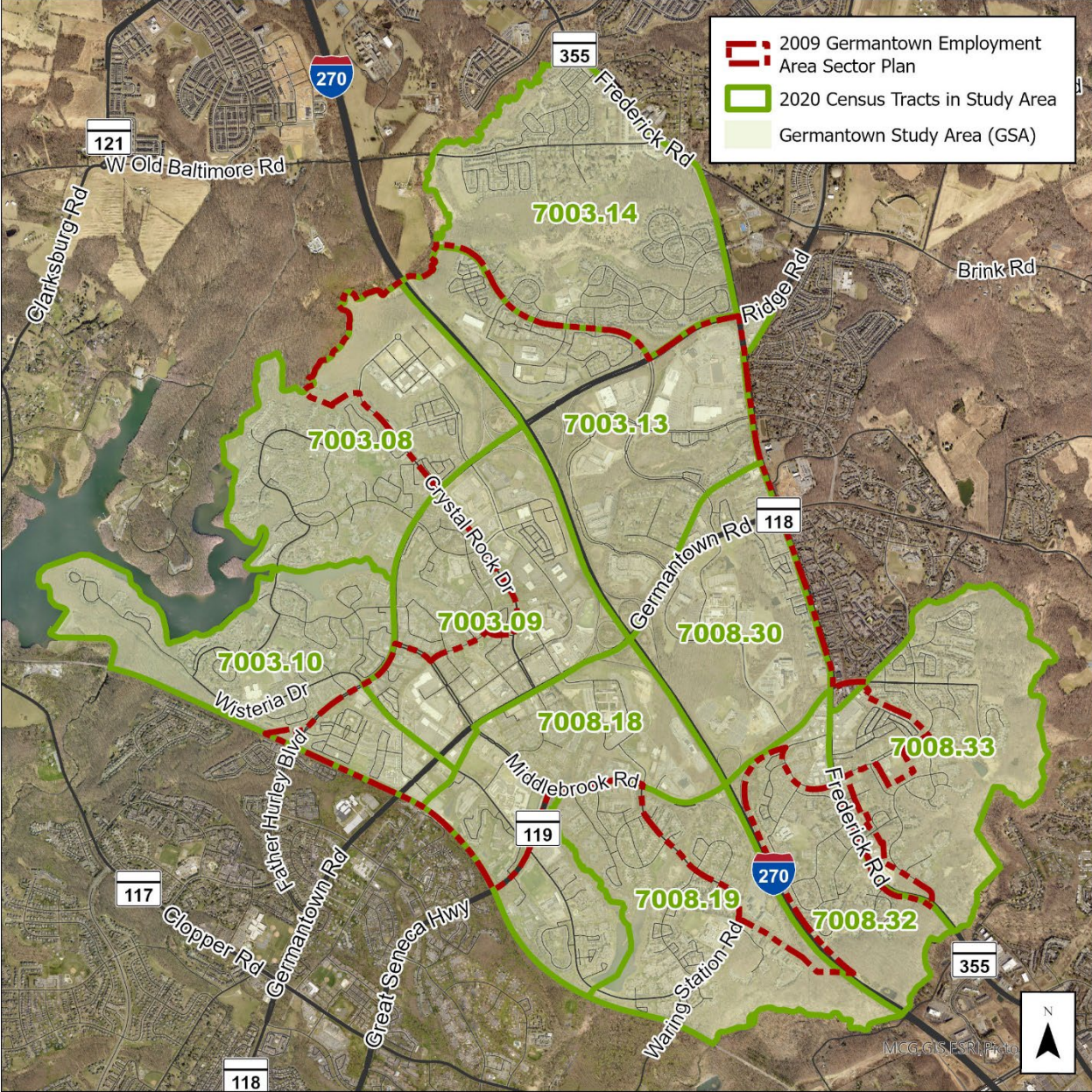


Figure 2. 2020 Census Tracts comprising the Germantown Study Area demographic analysis area

Overall, the Germantown Study Area is a highly diverse place in a highly diverse county, with nearly equivalent representation across four major races and ethnicities. More than a third of its residents are foreign-born. However, people living in the GSA have less educational achievement and are less wealthy than county averages. The demographics may be related to the large stock of townhouses in Germantown, mainly built in the 1980s, that serve as some of the county’s most attainable family-sized housing. Residents are also younger in the GSA than in the county overall, but the area is aging more rapidly than the county. Unless otherwise noted, all demographic data in this section are from the U.S. Census Bureau American Community Survey five-year sample. Data labeled “2009” are from the 2005-to-2009 sample, and data labeled “2022” are from the 2018-to-2022 sample.

### Population and Housing

The Germantown Study Area grew 12% from 2009 to 2022, from a population of 43,678 to 48,830. This growth rate was identical to the county’s rate over this period.

*Table 2. Population in Germantown Study Area and Montgomery County, 2009 to 2022*

Place	2009	2022	Change	% Change
Germantown Study Area	43,678	48,830	5,152	12%
County	946,172	1,056,910	110,738	12%

However, its rate of housing supply growth at 8% is lower than the county’s 12% growth over the same time, suggesting that households in the GSA are growing larger.

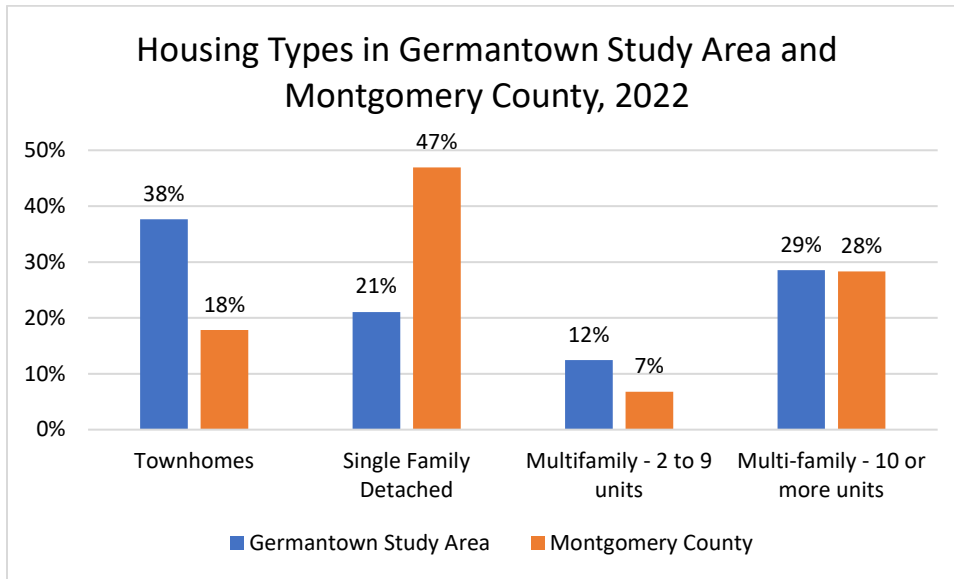
*Table 3. Housing Supply Germantown Study Area and Montgomery County, 2009 to 2022*

Place	2009	2022	Change	% Change
Germantown Study Area	17,001	18,370	1,369	8%
County	361,760	403,643	41,883	12%

Indeed, the GSA’s population-to-housing ratio surpassed the county’s, growing from 2.57 people per housing unit in 2009 to 2.66 people per housing unit in 2022, while the county’s ratio remained at 2.62. We cannot make assumptions about what is causing the GSA’s increase in population-to-housing ratio with these high-level tables, but potential factors include increasing birth-rates, increasing numbers of multi-generational households, and increases in shared living arrangements.

The GSA has a significantly higher proportion of townhomes and a lower proportion of single-family detached homes than the county. One reason for Germantown’s heavy reliance on townhomes is that its period of most active housing construction was during the 1980s, which was the decade during which Montgomery County saw both its largest housing boom and more townhomes built than any other type of housing. It was also a response to extremely high interest rates in the late 1970s and early 1980s, making larger homes difficult to afford.

Chart 1. Housing Types



Residents in Germantown are less likely to own and more likely to rent their homes compared to overall county rates.

Table 4. Housing tenure in Germantown Study Area and Montgomery County in 2022

Place	Owner Occupied	Renter Occupied	Percent Owner Occupied	Percent Renter Occupied
Germantown Study Area	10,750	7,484	59%	41%
Montgomery County	252,457	132,827	66%	34%

Germantown’s rates of housing cost burden are similar to countywide rates, with just over 31% dedicating at least 30% of their income to housing expenses, and 12% paying over 50% of their income.

Table 5. Housing Cost Burden in Germantown Study Area and Montgomery County in 2022

Place	Cost Burdened (Over 30% of income)	Severely Cost Burdened (Over 50% of income)
Germantown Study Area	31%	12%
Montgomery County	30%	14%

### Race, Ethnicity, and Nativity

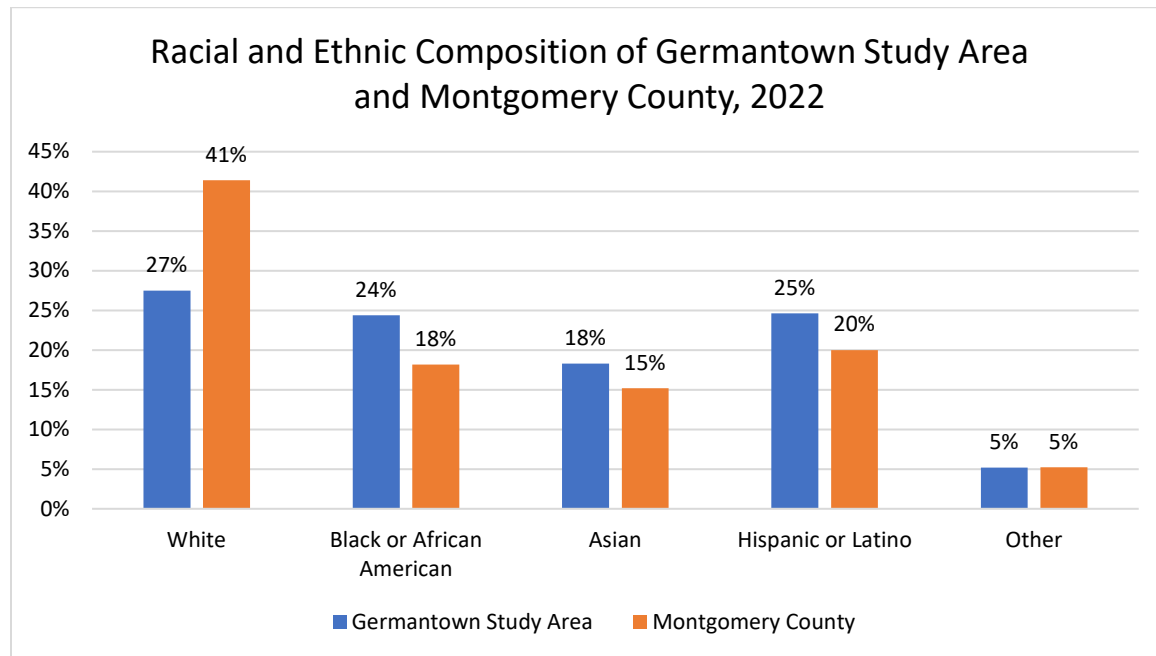
Germantown is one of the most racially and ethnically diverse places in a very racially and ethnically diverse county. In fact, WalletHub ranked Germantown the third most ethnically diverse city in the



nation in a 2024 study<sup>1</sup> and the most diverse overall when only looking at race and ethnicity, and many of our survey respondents ranked diversity as one of their favorite things about Germantown.

In 2022, the three largest racial/ethnic groups—White, Black or African American, and Hispanic or Latino—each accounted for around a quarter of the GSA’s population. Asians were another 18%. The GSA is truly unique as a place where four major races/ethnicities are represented in the population at nearly equal rates.

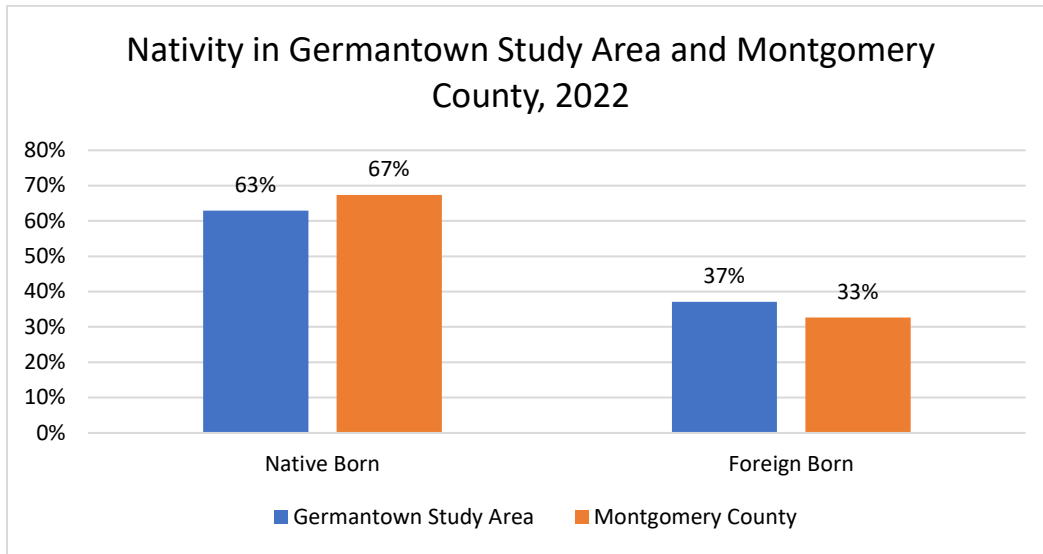
*Chart 2. Racial and Ethnic Composition*



Much of the GSA’s racial and ethnic diversity is due to its high proportion of people who have emigrated to the area. The same is true for the county, but the GSA’s proportion of the population that is foreign born was slightly higher than the Montgomery County’s—37% versus 33%—in 2022.

<sup>1</sup> WalletHub. “Most and Least Ethnically Diverse Cities in the U.S.” <https://wallethub.com/edu/cities-with-the-most-and-least-ethno-racial-and-linguistic-diversity/10264>. February 21, 2024.

Chart 3. Nativity



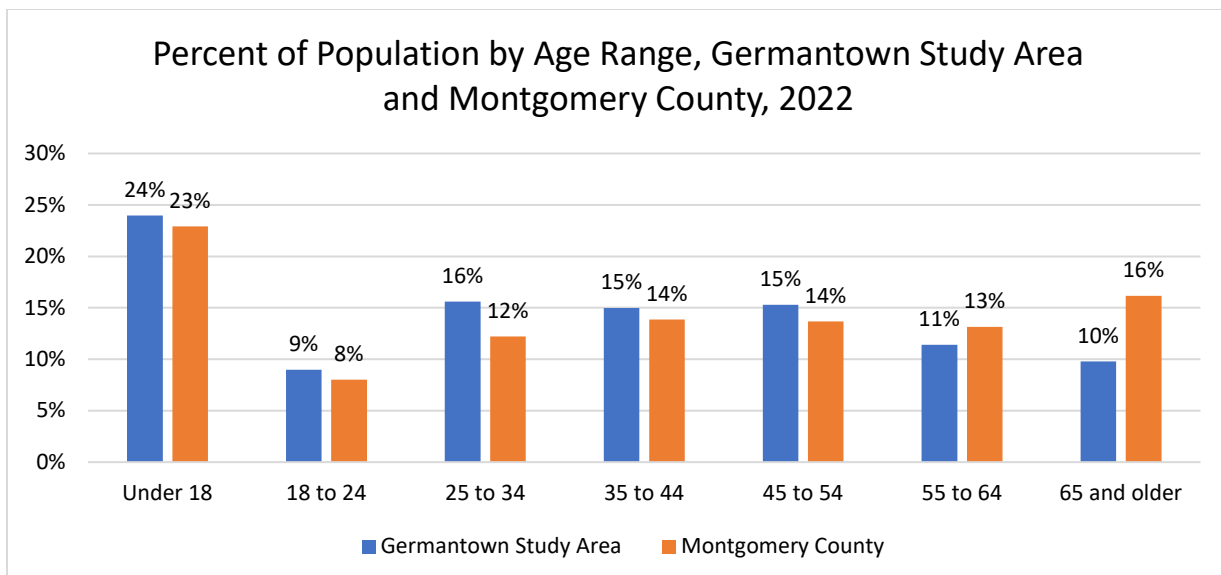
Trends also show that both the GSA and Montgomery are becoming more racially and ethnically diverse while their foreign-born populations are increasing. Moreover, the GSA is moving in this direction slightly faster than the county. For example, the GSA’s non-Hispanic white population decreased by 16 percentage points from 2009 to 2022 while the county’s decreased by 12 percentage points, and the GSA’s foreign-born population increased by four percentage points compared to the county’s three (2009 to 2022 trends not shown).

### Age

Both the GSA and the county are also aging, but the GSA is aging more rapidly than the county.

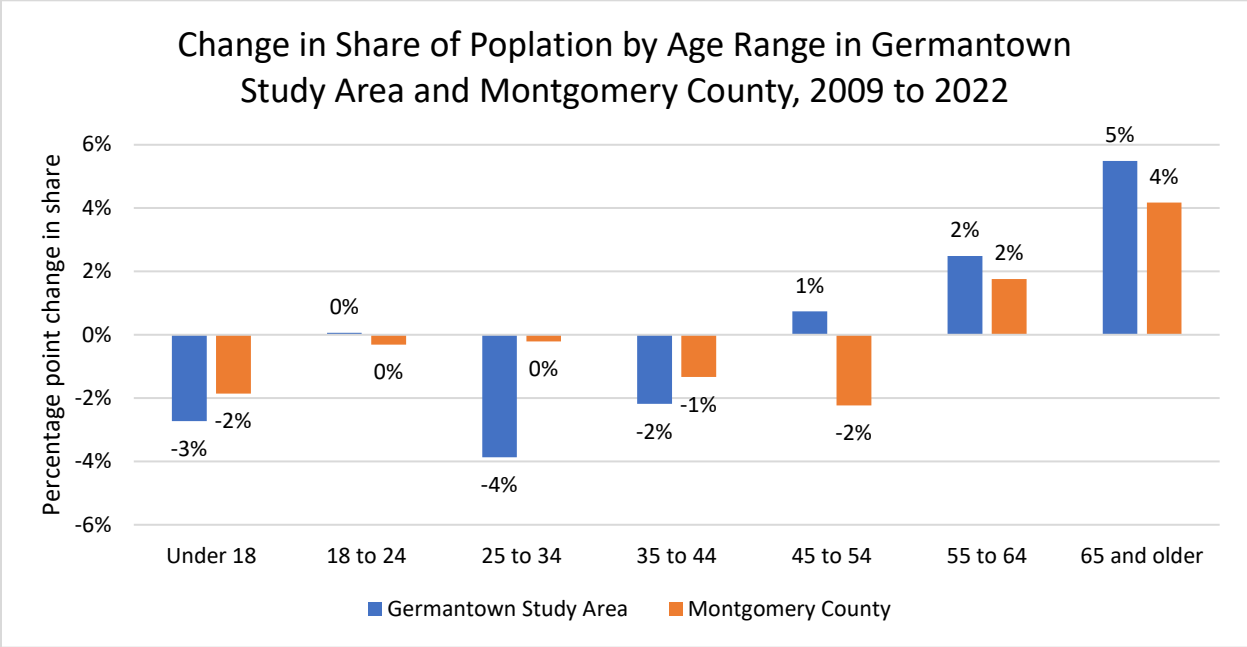
The GSA is still younger overall than the county, with a lower proportion of those 55 and older and a higher proportion of all younger groups than the county.

Chart 4. Population by Age Range



But the GSA’s age mix is changing more rapidly than the county’s. From 2009 to 2022, the GSA’s share of people under 18 decreased by one percentage point more than the county’s, while it had a steep (four percentage point) decline in 25 to 34 year-olds. On the other end, the GSA’s shares of all groups over 45 years old increased more quickly than the county’s.

Chart 5. Change in Population Share by Age Range



This demographic profile cannot determine the cause of the GSA’s changing age composition, but it is likely caused by several factors. The trends of Baby Boomers aging in place, falling fertility rates, and a slowdown in housing construction have influenced the countywide aging trend, so the same circumstances are likely true for Germantown. It could also be the case that people are more likely to remain in their homes in the GSA as they age relative to other parts of the county, or that existing county residents have a propensity to move to the GSA from other parts of the county as they age. Finally, feedback from outreach suggests that the GSA lacks dining, entertainment, and nightlife options which could be a factor in declining shares of 25- to 44-year-olds as they look for these amenities elsewhere.

Income and Poverty

Because the GSA is a combination of multiple Census Tracts, the median household income statistic is not directly available. Instead, we use per capita income, which is equal to the total aggregate income of the entire study area divided by study area’s total population, including children and others who do not earn income. Per capita income in Germantown is about 74% of the county average.

Table 6. Per Capita Income in Germantown Study Area and Montgomery County, 2009 and 2022

Place	2009	2022	% Change
Germantown	\$45,017	\$47,577	6%
County	\$62,901	\$64,126	2%

In 2022 dollars. 2009 adjusted for inflation by Montgomery Planning using Consumer Price Index - All Urban Consumers.

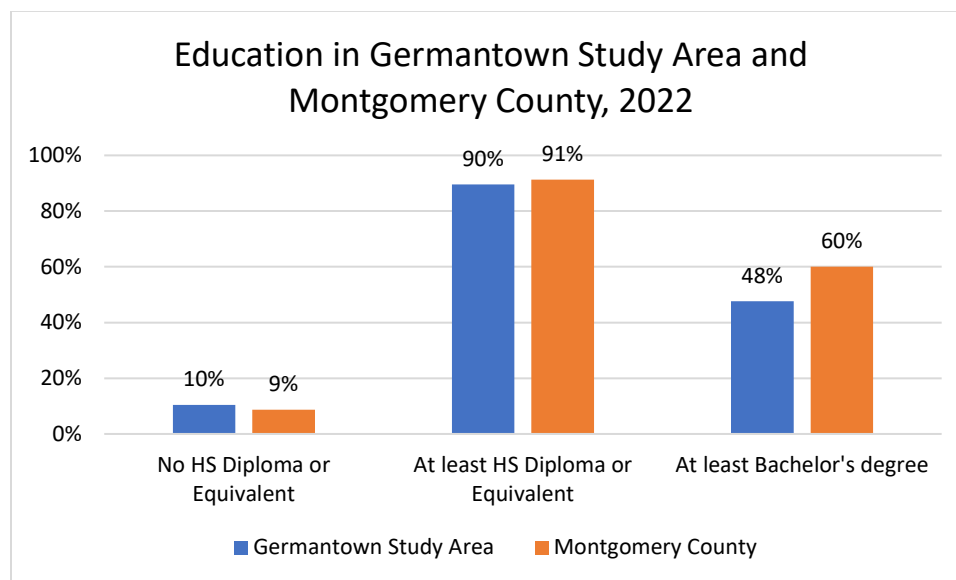
The rate of GSA residents living under the poverty level in 2022 is 10%, three percentage points higher than the county's rate. Because Montgomery County has a relatively high cost of living and the Federal poverty level is not adjusted based on cost of living, it can be helpful to look at those up to twice the poverty level to gauge the degree of economic hardship. In this tier, the GSA has a one percentage point lower rate than the county, but taking the two together, its overall rate of economic hardship was 19% in 2022, two points higher than the county's.

Additionally, Germantown's rate of severe economic hardship, measured by those living under the poverty level, rose rapidly—five percentage points—between 2009 and 2022. For reference, the county's rate rose two percentage points during this time. This trend suggests that residents in the GSA need economic resources and that it could be helpful to address conditions that are leading to this concentration of poverty.

### Education

Fewer than half of the adult residents of the GSA have a bachelor's degree, while the countywide rate is 60%. This rate suggests that GSA residents may have lower wage jobs that cannot be performed remotely compared to the rest of the county.

Chart 6. Educational Attainment



### Equity Focus Areas and Community Equity Index

Montgomery Planning's Research & Strategic Projects Division developed two tools as part of the department's Equity Agenda for Planning work: the Equity Focus Areas analysis and the Community Equity Index. Equity Focus Areas are census tracts within Montgomery County that are characterized by high concentrations of lower-income people of color who may also speak English less than very well. The Community Equity Index is a composite measure of equity-related indicators that help us understand socio-economic conditions that drive advantage and disadvantage across the county. The Community Equity Index areas are shown in Figure 3 below.

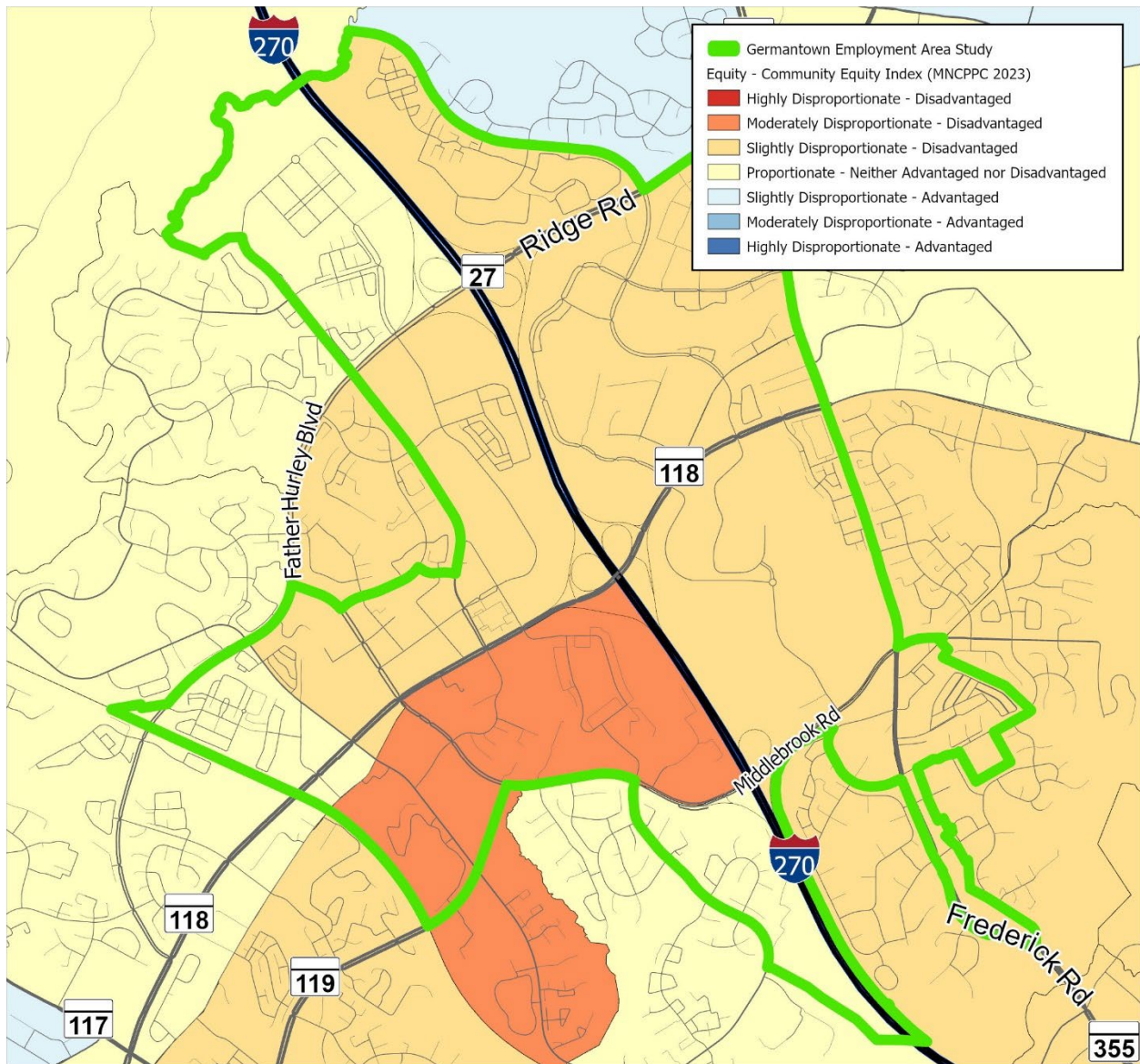


Figure 3. Community Equity Index in the Study Area

Most of the Germantown Plan Area is classified as disadvantaged and is either moderately (dark orange) or slightly (light orange) disproportionate. This classification means that residents in the GSA are, on average, more socio-economically disadvantaged than county residents overall. The main contributor to this disadvantage is relatively low per capita incomes throughout the plan area. Three of the main tracts also have significantly lower rates of homeownership than the county overall. While all types of new housing are appropriate for the plan area, attainable market-rate housing with ownership options could help to promote equity.

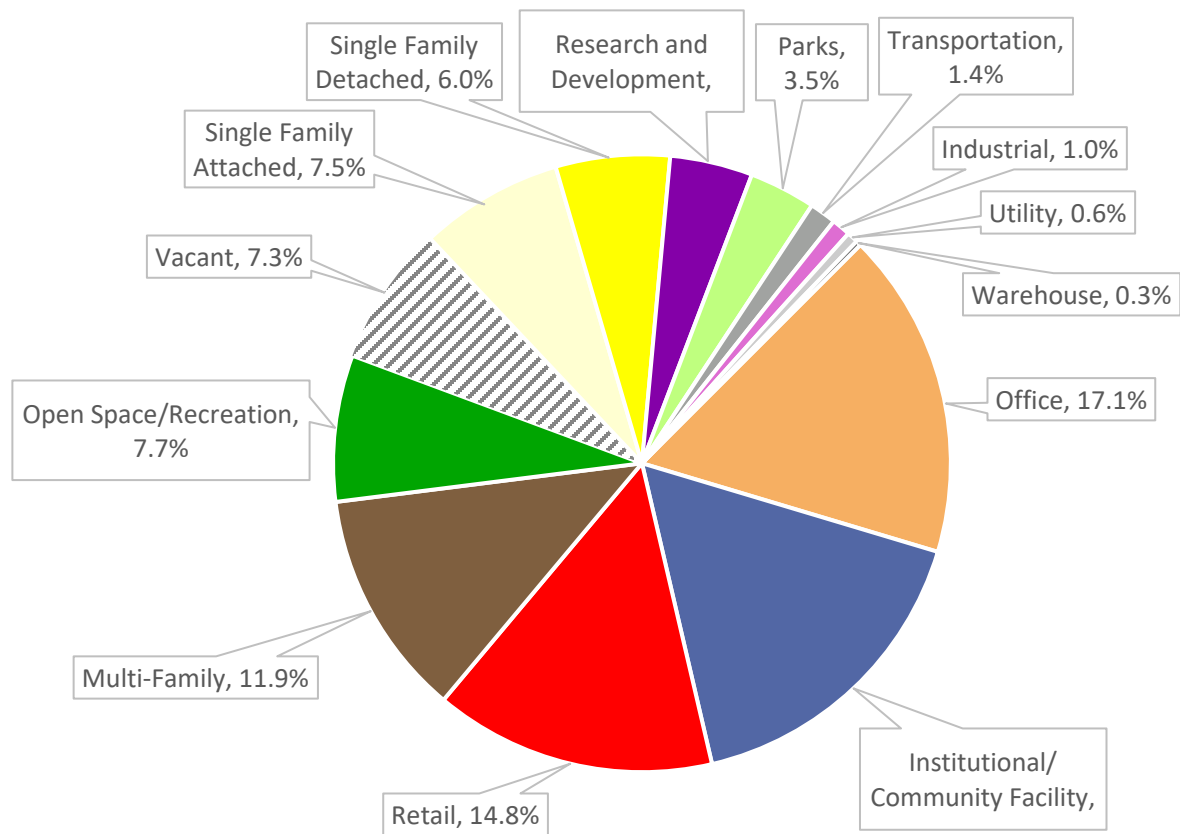
## Land Use

Data in the Land Use section covers only the area of the 2009 Plan. This is a smaller geography than was used for the demographic data above, which was based on the Germantown Study Area.

### Current Land Use

There is no single predominant land use in the 2009 Plan area, with somewhat equal distribution amongst the top four uses: office, institutional/community facility, retail, and multi-family developments (Chart 7 and Figure 4). Several of these largest uses, however, are marked by campus-like settings with large amounts of undeveloped land surrounding one or only a few buildings, such as on the Montgomery College campus or the U.S. Department of Energy.

Chart 7. Land Use



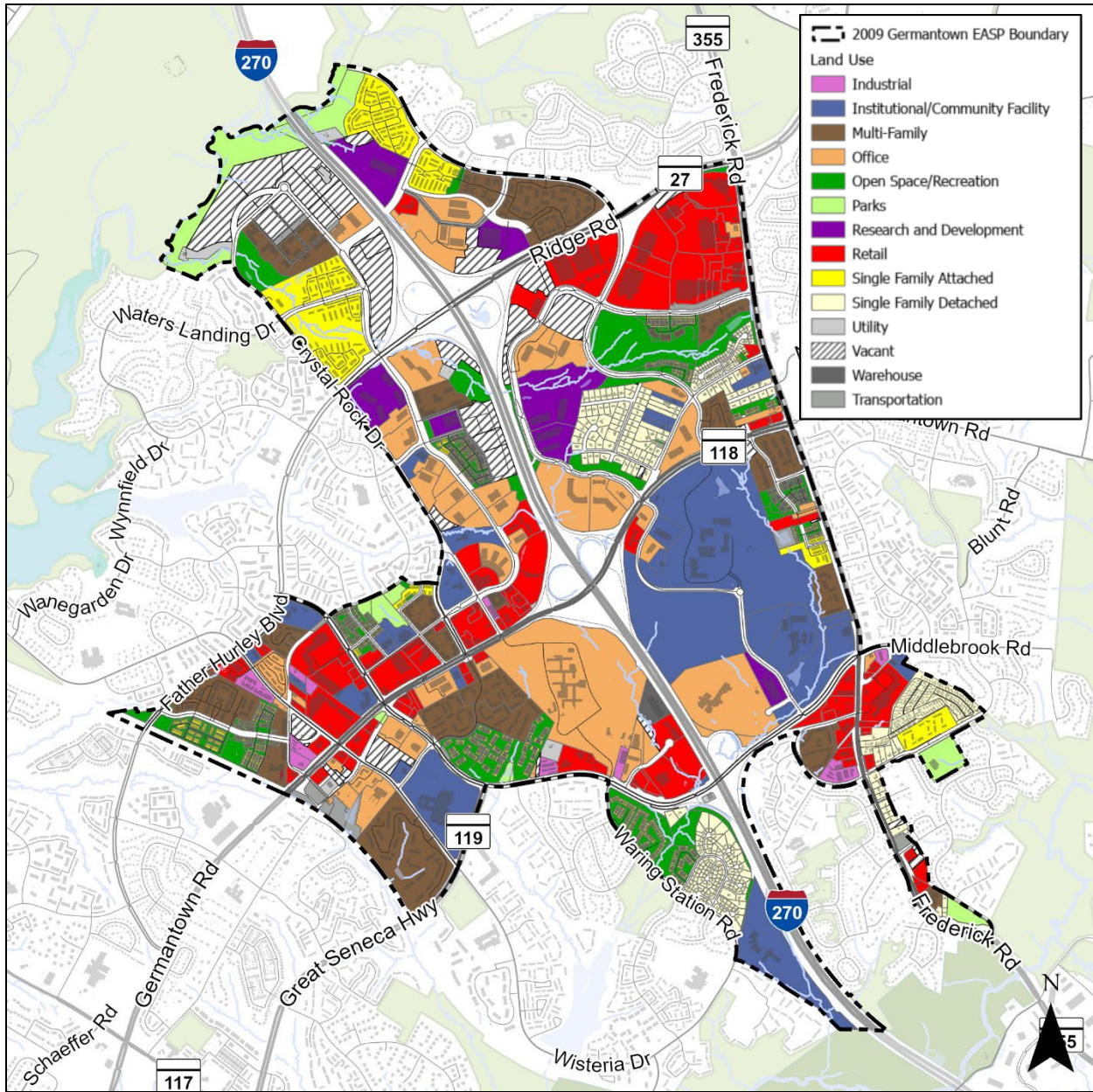


Figure 4. Current land use in the 2009 Plan area

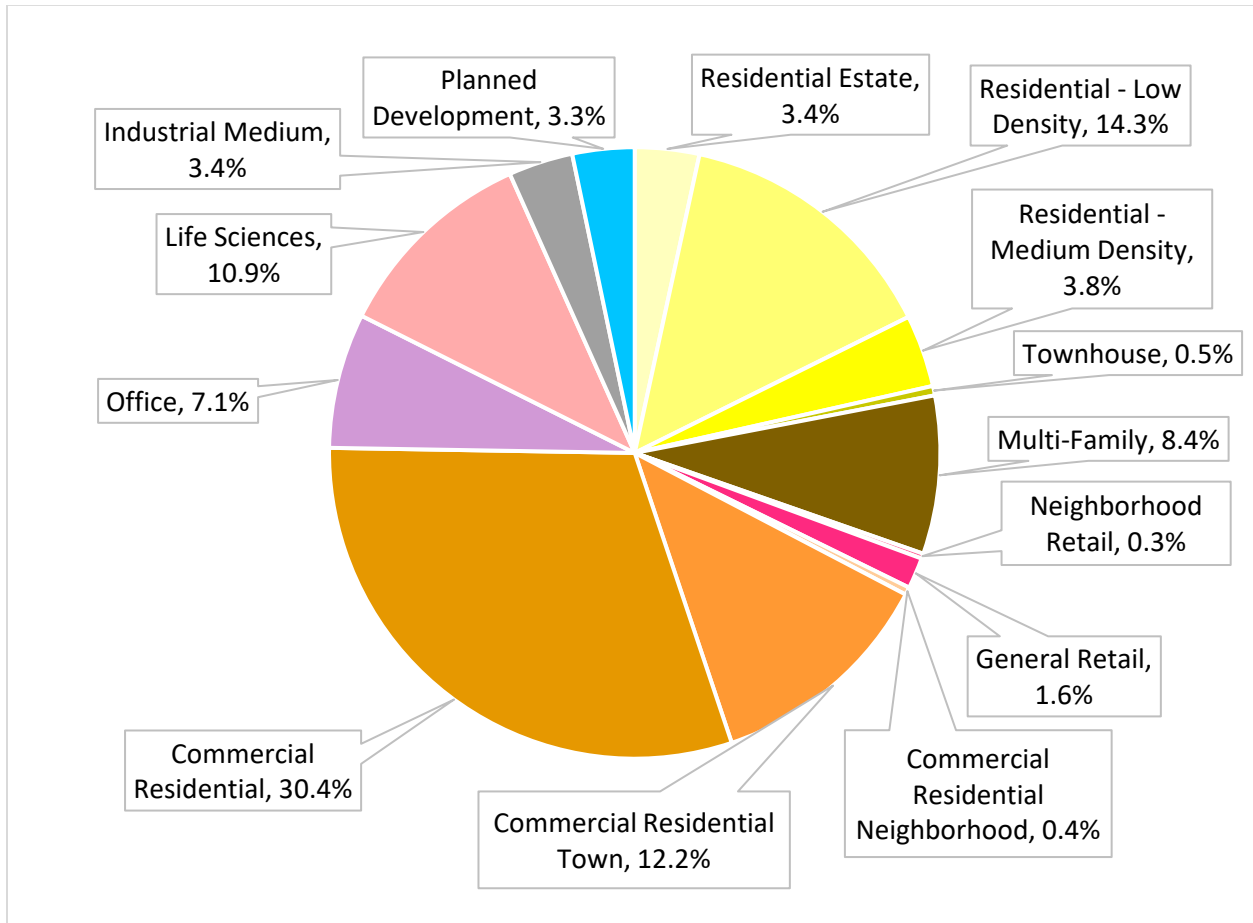
### Current Zoning

Zoning determines how land can be used, although most zones allow for a range of uses. The largest zoning category in the 2009 Plan area is the Commercial-Residential family of zones, which comprises 43% of the area. Although only 0.5% of the land is specifically zoned for townhouses, much of the land zoned for low and medium residential, multi-family housing, and is occupied by townhouse units. Many parts of the CR-zoned areas also contain townhouses.

There are also several overlay zones in the 2009 Plan area. The Germantown Transit Mixed Use (GTMU) Overlay zone was created in 2014 during the rewrite of the Zoning Ordinance to preserve the Building Lot Termination (BLT) purchase requirement from the prior TMX-2 zone for optional method

development projects. The Transferable Development Rights (TDR) Overlay Zone covers several properties on the east side of I-270. Most of the TDR overlay areas were created by the 1989 *Germantown Master Plan* and were continued by the 2009 Plan, although the 2009 Plan did introduce a TDR overlay zone in the Fox Chapel district. The Germantown-Churchill Village (GCV) Overlay Zone was applied to a small area along Father Hurley Boulevard in the Town Center district by the 2020 *Germantown Plan for the Town Sector Zone* to preserve elements of the former T-S zone.

Chart 8. Zoning





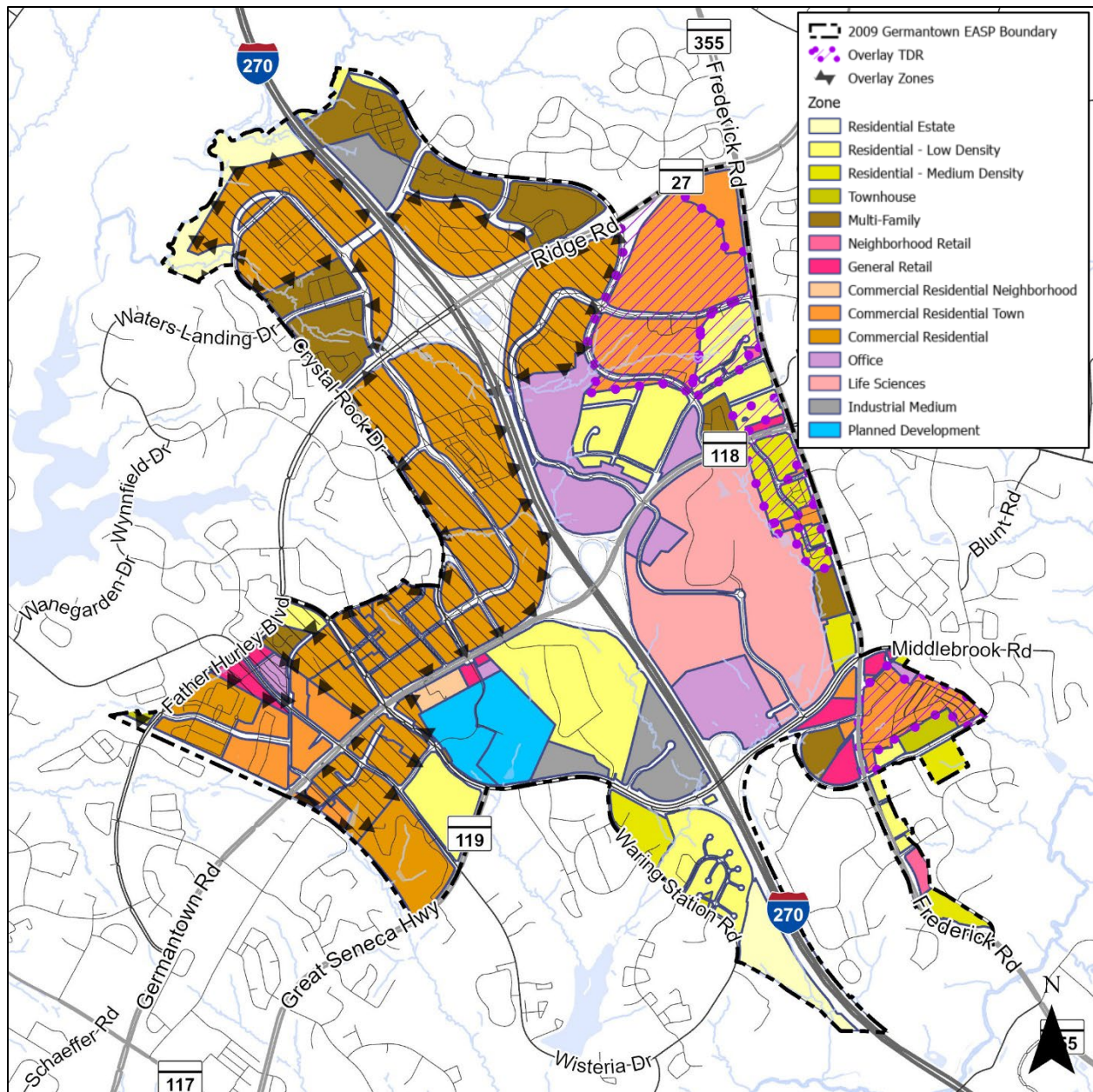


Figure 5. Current zoning in the 2009 Plan area

### Existing Commercial Development and Housing

The 2009 *Germantown Employment Area Sector Plan* provided zoning and development guidelines to densify housing and commercial development in support of affordability, mass transit, and employment goals. However, existing development has not achieved the vision set forth in the 2009 Plan. The tables below summarize existing commercial square feet and dwelling units compared with the projection from the 2009 Plan and the maximum allowed by existing zoning.

Existing square feet of commercial development are a third of what the plan originally envisioned. Based on GIS data, total commercial development in the GEASP area since 2009 is 982,602 square feet,

which is approximately 13% growth over the past 15 years. This is only about 6% of the 16,000,000 square feet of growth projected by the plan.

*Table 7. Comparison of Square Footage for Commercial Uses*

Total Land Zoned for Commercial Uses	Existing Square Feet (2024)	2009 Master Plan Projected Square Feet	Maximum Possible Square Feet
1,336 acres	8,425,262	24,104,248	65,331,794

Existing dwelling units are half of what the plan originally projected and about a fourth of what could be built with existing zoning. Based on GIS data, total residential development in the GEASP area since 2009 is 1,983 dwelling units, which is approximately 25% growth over the past 15 years. However, it is only about 25% of the 8,200 new units projected by the 2009 Plan.

*Table 8. Comparison of Number of Dwelling Units by Housing Type*

Housing Type	Existing Dwelling Units (2024)	2009 Master Plan Projected Dwelling Units	Maximum Possible Dwelling Units (Standard Method)	Maximum Possible Dwelling Units (Optional Method)
Multi-family	5,376	Not Specified by Type	24,988	30,591
Single-Family Attached	2,391		1,081	2,547
Single-Family Detached	437		1,163	186 <sup>a</sup>
Total	8,204	16,418	27,232	33,324

<sup>a</sup> Using Standard Method development, R-200, R-90, R-60, and R-40 zones typically provide single-family detached housing. However, when the Optional Method development is used, these zones are more likely to provide single-family attached housing types. For this reason, the maximum number of single-family detached homes that could be built appears to decrease, but, instead, the unit type has only shifted to a single-family attached unit type.

Overall, planned development has not been realized; the plan amendment offers an opportunity to re- envision what the Germantown Employment Area could become and make recommendations that reflect current development trends.

### Development Pipeline

Montgomery Planning maintains a list of private development projects with approved plans that have yet to be built or are only partially built. Within the 2009 Plan area, there are seven projects with an approved commercial component that has not been completed, totaling 3.4 million square feet. Four projects in the pipeline have a residential component, with 1,539 approved but unbuilt units. See the Housing Appendix for the full analysis.

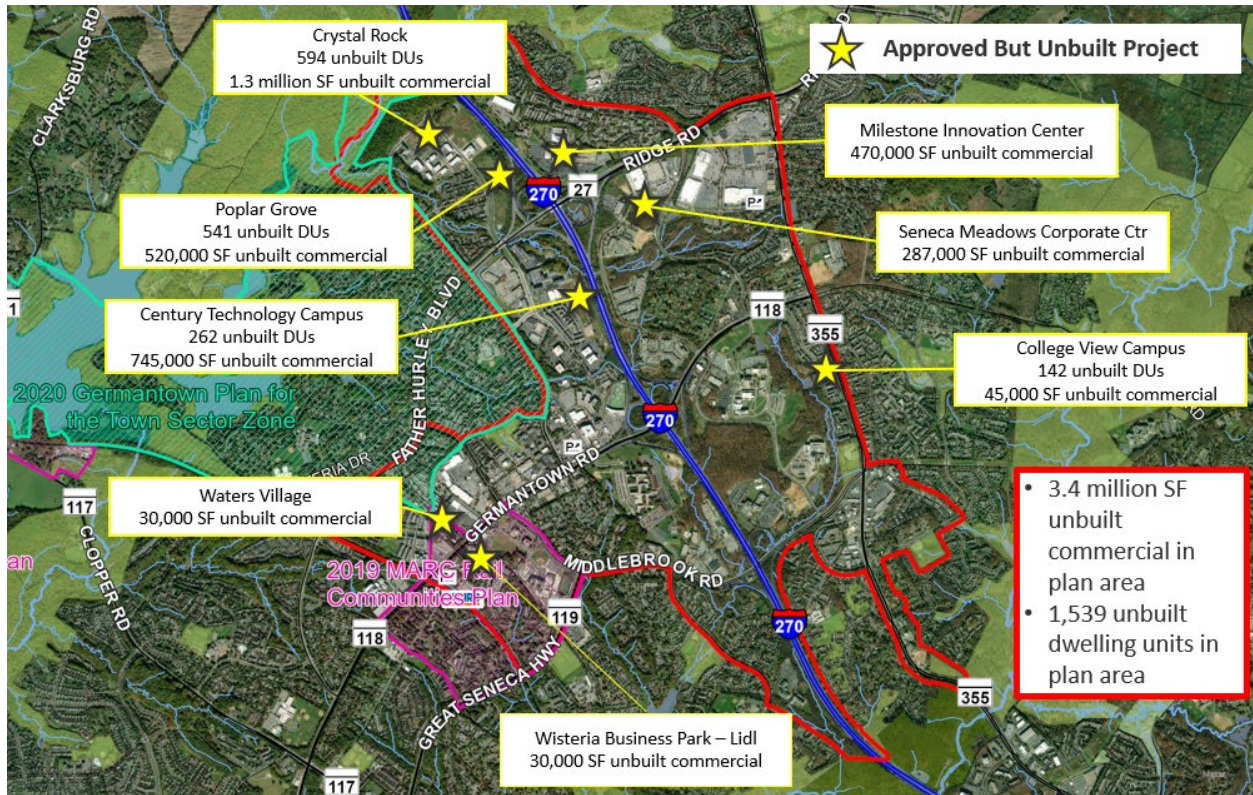


Figure 6. Development pipeline in the 2009 Plan area

## Historic Resources

The proposed Germantown Sector Plan Amendment boundary includes four Master Plan Historic Sites:

- Madeline V. Waters House (M: 19-13-01), (amendment to the *Master Plan for Historic Resources* in 1985)
- Waring-Crawford Farm (M: 19-11) (*Germantown Master Plan* in 1989)
- Cider Barrel (M: 19-33) (*Germantown Master Plan* in 1989)
- Pumphrey-Mateny House (M: 19-13-05) (*Germantown Master Plan* in 1989)

The Montgomery County Planning Board adopted the Burial Sites Inventory in 2019; the following inventory sites are within the boundary area:

- Waters Slave Cemetery (HP-330)
- Waters (Zachariah) Burying Ground (HP-219)

The boundary includes one site listed to the National Register of Historic Places and one site deemed eligible for listing to the National Register:

- U.S. Atomic Energy Commission (M: 19-41) (listed 2016)
- A portion of the Baltimore & Ohio Railroad, Metropolitan Branch (M: 37-16) (the entire railroad line was found eligible for the National Register of Historic Places by the Maryland Historic Trust [MHT] in 2000.)

Table 9. Historic sites in 2009 Plan area

Historic Name	Date of Construction	Location	Status	Maryland Inventory of Historic Properties (MIHP) Number
Waring-Crawford Farm	1881	19214 Forest Brook	Master Plan Site	19-11
Madeline V. Waters House	1899-1902 (archaeological site)	12900 Wisteria Drive	Master Plan Site	19-13-01
Pumphrey-Mateny House	Ca.1883	19401 Walter Johnson Road	Master Plan Site	19-13-05
Cider Barrel	1926	20410 Frederick Road	Master Plan Site	19-33
U.S. Atomic Energy Commission	1958	19901 Germantown Road	National Register of Historic Places	19-41
Baltimore & Ohio Railroad, Metropolitan Branch	Ca.1873		Determined Eligible for the National Register by MHT	37-16

Table 10. Burial sites in 2009 Plan area

Historic Name	Dates of Use	Location	Status	Burial Sites Inventory Number
<b>Waters Slave Cemetery</b>	Ca. 1790-1860	Nr. Shamrock Glen Circle	Burial Site Inventory	HP-330
<b>Waters (Zachariah) Burying Ground</b>	1824-1864	Field across from 20938 Mountain Lake Terrace	Burial Site Inventory	HP-219

Additionally, the northwestern edge of the plan area includes a portion of a Maryland Heritage Area associated with farming history. The Maryland Heritage Area Program is governed by the Maryland Heritage Areas Authority and managed by the MHT.

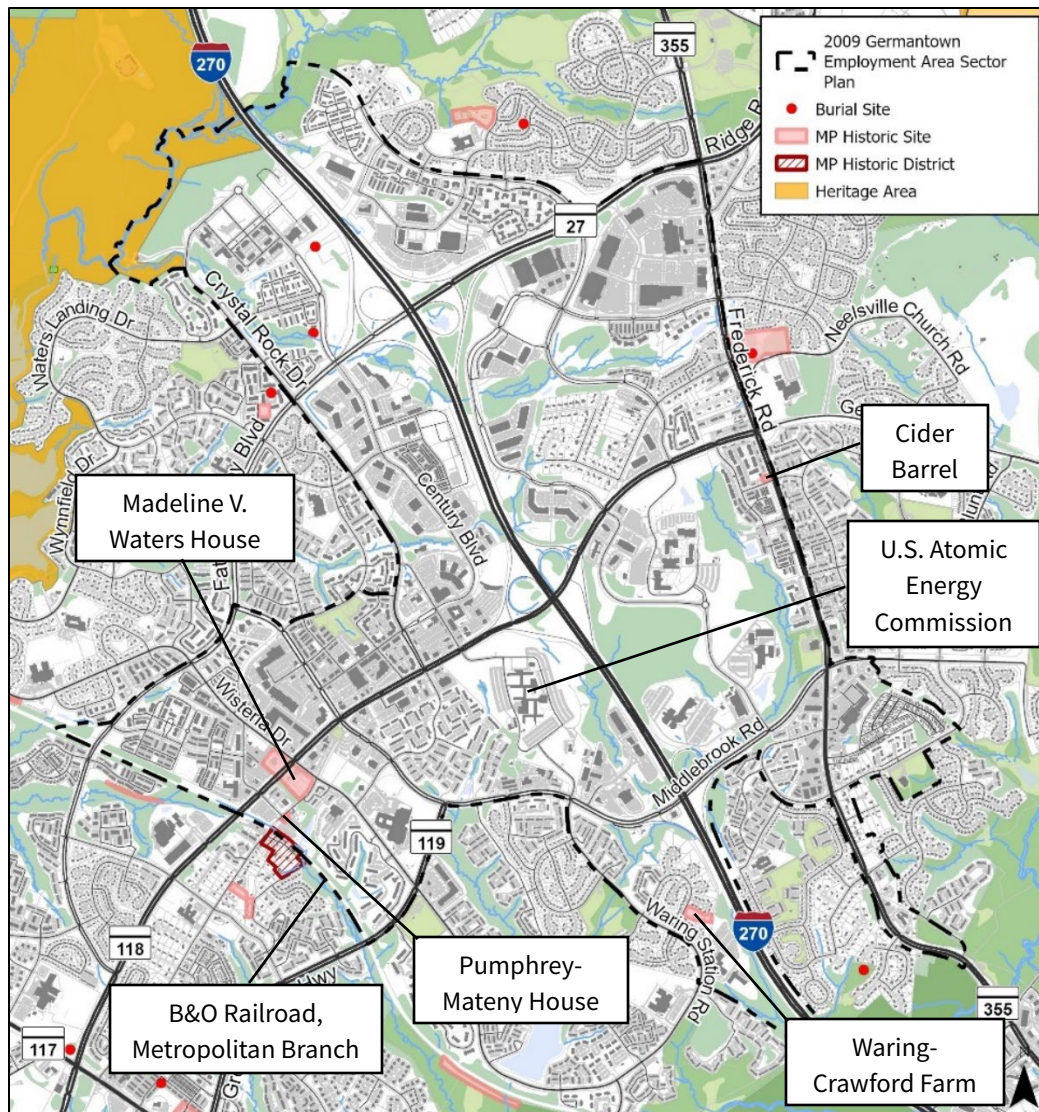


Figure 7. Historic resources in the 2009 Plan area

### Public Realm and Urban Design

The 2009 Plan envisioned that each district in the Plan area would evolve into a compact, walkable neighborhood, and that all districts would be served by robust transit. The highest density for development would occur in the Town Center district, and higher densities would also occur at other strategic locations in the plan area, such as near planned transit stops and along I-270. Natural open space areas would be expanded, and urban gathering spaces would be interspersed within districts.

In terms of the built form, the GEASP envisioned that buildings would frame streets, while parking and services would be located to the rear and/or sides of buildings. Wide sidewalks and planting strips with shade trees would be located between curbs and sidewalks. On the first floor, mixed-use buildings would have storefronts with activating retail uses. The 2009 Plan’s vision of the Town Center and Cloverleaf districts is shown at the beginning of the 2009 Plan (Figure 8). In it, Century Boulevard is envisioned as the main street of Germantown and the focal point for civic life, with restaurants, retail shops, offices, and larger apartment buildings.



*Figure 8. Massing diagram of portions from the Town Center and Cloverleaf Districts (2009 Plan page 8)*

Since the Plan was adopted, the residential component of properties within some districts has been built to the urban design guidelines of the GEASP, including the Black Hill development in the North End district, the Century development in the Cloverleaf district, and the Fairchild Apartments in the Town Center district. The Fairchild Apartments building, located southeast of the intersection of Century Boulevard and Aircraft Drive, was designed with the building sited close to the road and parking within and behind the building. The ground floor of the apartment currently has dwelling units that look like storefronts from the street, and these units can be converted to retail units if market conditions change. Wide sidewalks, street trees, and benches create an inviting pedestrian experience (Figure 9).



*Figure 9. The ground floor of the Fairchild Apartments building was designed so that it would be possible in the future to convert the units to retail spaces. Image source: Google maps.*

The built form of other neighborhoods has remained unchanged, with buildings set back from roadways and a sea of parking between buildings and roads. In most cases, the commercial components that were envisioned for the various districts have not come to fruition, nor has the large-scale transit to serve these districts. The rights-of-way (ROWs) within the GEASP, including some secondary streets, have been sized for potential new development, redevelopment, and future transit, making sidewalks and crossing distances from one side of the street to the other uncomfortable for pedestrians and bicyclists (Figure 10).



Figure 10. Existing right-of-way widths 120 feet or greater in the 2009 Plan area

Other issues of the public realm and urban design that are hard to illustrate but residents told us that Germantown lacks a sense of place and that the residential and commercial areas are too far apart. Germantown also lacks an active gathering space, and it is difficult to park once and then walk to many places.

While there are still a few greenfield development sites in Germantown, several properties have the potential to be redeveloped at greater densities based on 2009 Plan recommendations and current zoning. Germantown is home to several strip shopping centers (Figure 11) and suburban-style office parks (Figure 12 and Figure 13) that the 2009 Plan envisions as walkable, mixed-use neighborhoods.



Figure 11. Germantown Commons shopping center. Image source: EagleView Technologies, Inc.





*Figure 12. Century 21 and Regal Cinemas properties. Regal Cinemas closed its doors in December 2024. These properties have an advantage in that there is already a parking structure that could serve future infill development. Image source: EagleView Technologies, Inc.*



*Figure 13. 270 Corporate Center. Image source: EagleView Technologies, Inc.*

## Commercial Real Estate Market

Aside from office development, and even though so many projects remain in the development pipeline, the real estate market in Germantown is stable to strong, with metrics for retail, flex space, and multi-family uses indicating unmet demand. Among the four property types, office development in Germantown is the oldest, with an average building age of 35 years<sup>2</sup>. Retail and industrial spaces are slightly newer, averaging 28 and 27 years, respectively. Multi-family development in Germantown is the newest, with an average age of 22 years.

Relative to the county and comparable submarkets, the Germantown office market has had lower rents and higher vacancy rates over the past decade. Although the increasing office vacancy reflects the shift towards work-from-home arrangements, this trend in Germantown began prior to the COVID-19 pandemic and the widespread adoption of telework.

Over the past decade, retail vacancy rates in Germantown have been well below a healthy level of 5%. The 2009 Plan area witnessed positive net absorption in retail use in the second quarter of 2024, meaning that more space has been leased than vacated, demonstrating a market that may be approaching saturation.

Germantown has recently seen an uptick in flex uses. A flex building is a versatile space which can combine office, R&D, light industrial, and warehousing uses. In the past two years, 210,000 square feet of flex development, particularly for R&D and biotech space, has been delivered in the GEASP area. With more flex space being leased than vacated, and higher rents than comparable submarkets, there is continued demand for this land use type in Germantown (as seen by five currently proposed flex developments).

*Table 11. Number of Properties and Amount of Development by Property Type*

<b>Property Type</b>	<b>Number of Existing Properties in Plan Area</b>	<b>Amount of Development</b>
Office	66	3,378,465 SF
Retail	117	2,145,172 SF
Flex	23	2,650,551 SF
Total Commercial Development	206	8,174,188 SF
Multi-family	16	5,399 units

---

<sup>2</sup> The real estate data presented in this market study is sourced from CoStar, a private commercial property data vendor, unless otherwise noted. The data reflects properties that were existing within the Germantown Employment Area Sector Plan boundary as of Q2 2024. The 2009 Plan boundary was used for the real estate market analysis.

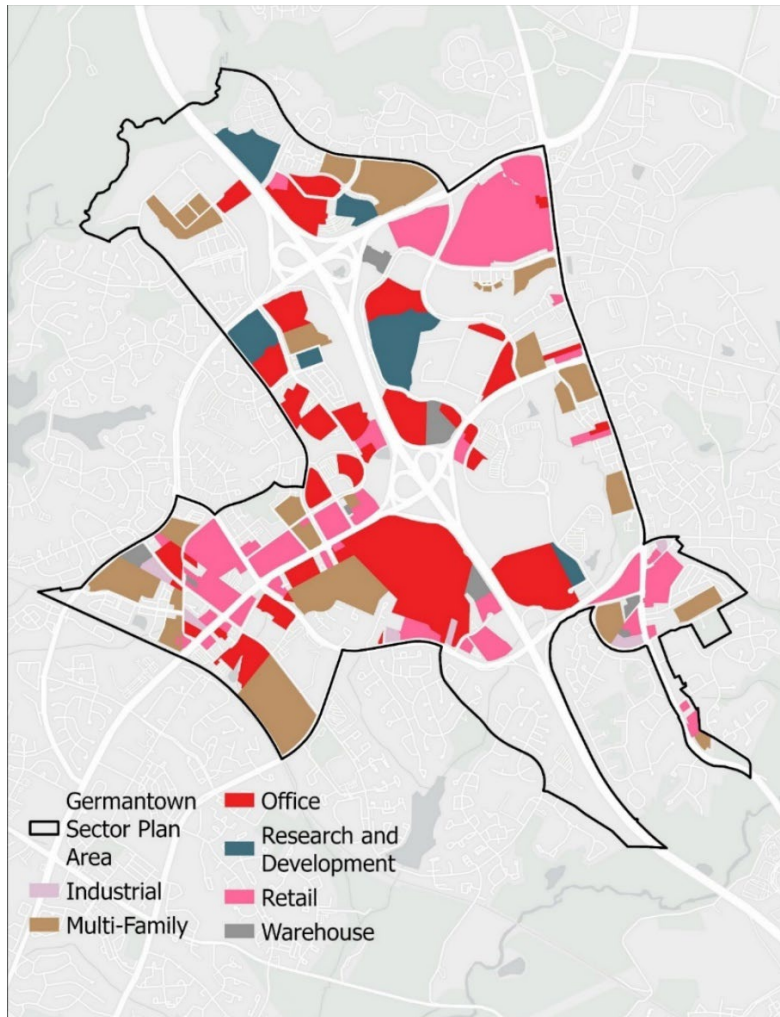
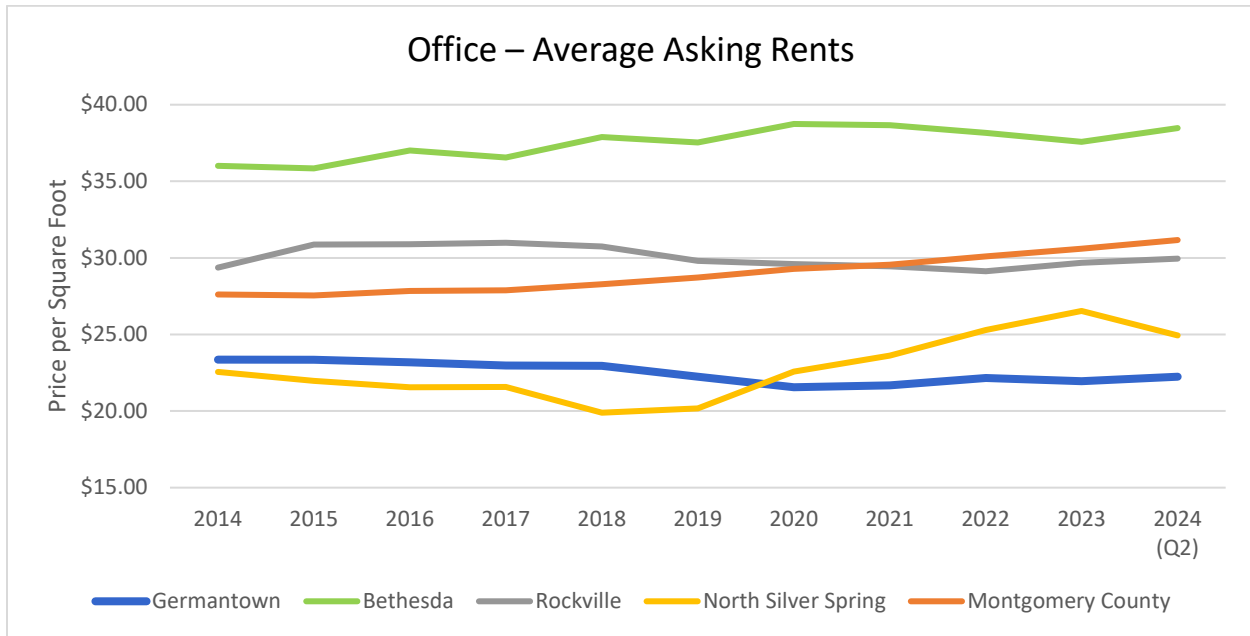


Figure 14. Real Estate Land Use in the Germantown Sector Plan Area. (Source: Montgomery Planning)

#### Office Market

There are currently 66 office properties in the 2009 Plan area, covering nearly 3.4 million square feet. Germantown office rents have been consistently lower than county and comparative submarket office rents throughout the past decade. Recently, the divide between Germantown and the county has increased as Germantown office rents have stayed relatively the same (1.27% increase last year) and county office rents have increased slightly more (2.39% increase last year). See Chart 9.

Chart 9. Office Rents

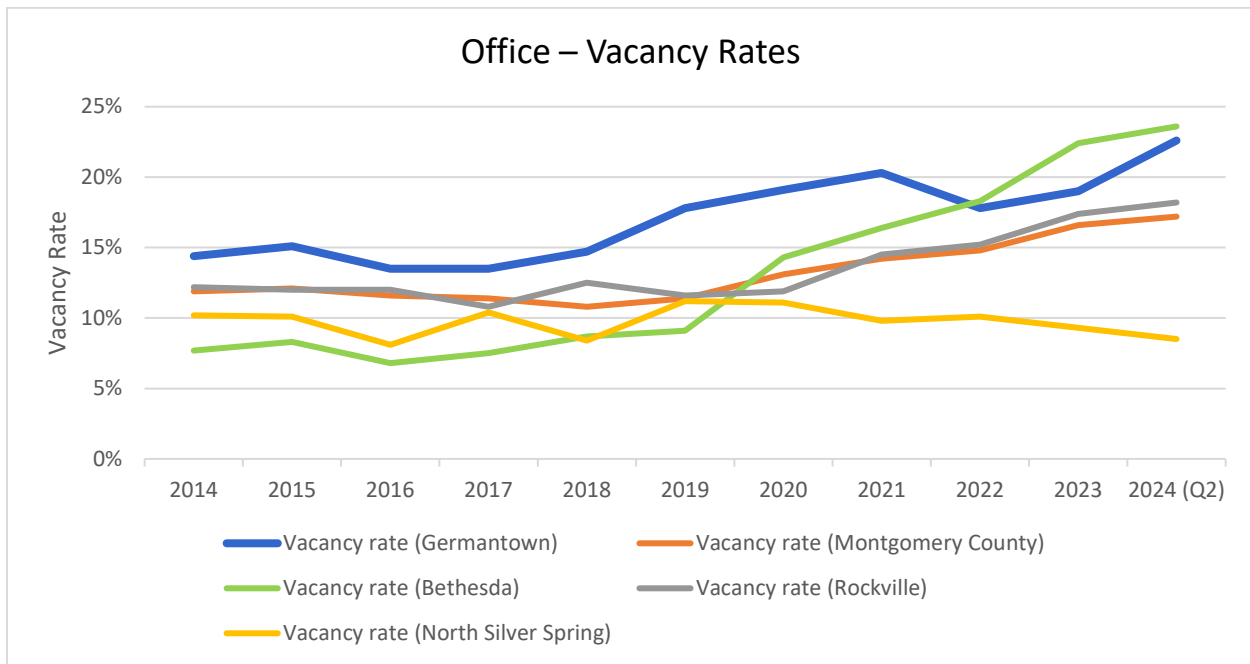


Note: For comparative geographies, CoStar submarkets were used.

The latest office addition occurred in 2024 with a 73,166 square foot bio-tech lab space built in the Seneca Meadows Corporate Center. Prior to this, in 2020, a new office building at 13135 Winged Foot Lane was built, adding 97,000 square feet of office space. Despite these deliveries, there has been a net negative absorption of 40,362 square feet in office space over the past 5 years in Germantown, reflecting limited demand for new office spaces.

Germantown had a high office vacancy rate of 22.6% at the end of Q2 2024, which was higher than the county vacancy rate of 17.2% (Chart 10). While office vacancy in Germantown has consistently been higher than in the county and comparable submarkets, it has been following the same increasing trajectory as these geographies (apart from North Silver Spring). Though this reflects the shift towards work-from-home arrangements, the trend of increasing office vacancy in Germantown began before the COVID-19 pandemic and widespread work-from-home adoption.

Chart 10. Office Vacancy Rates

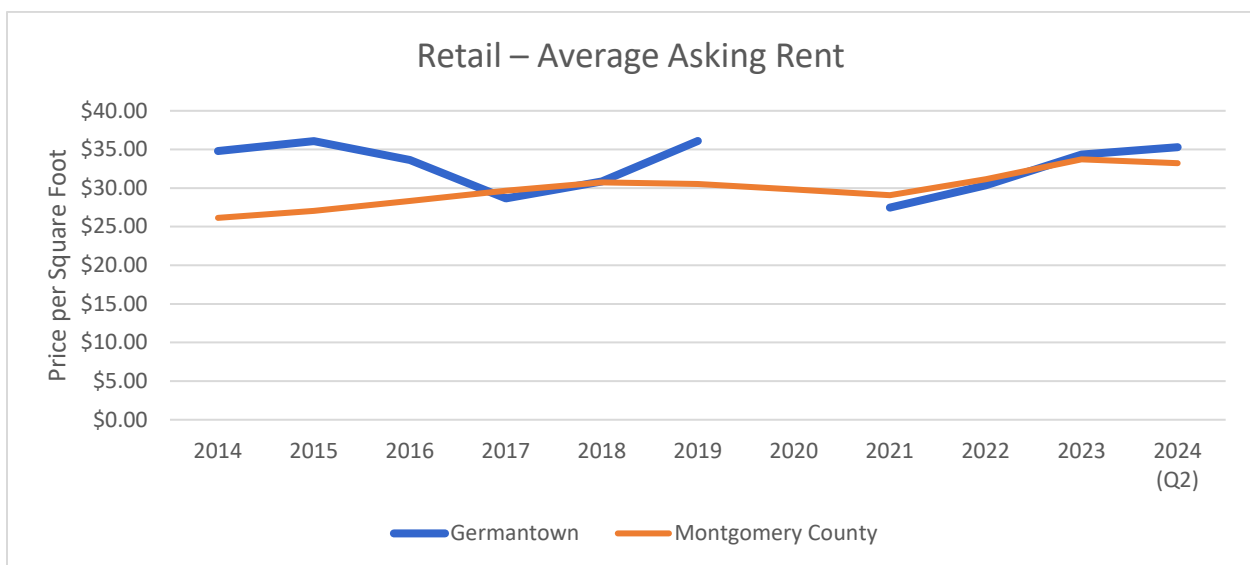


Note: For comparative geographies, CoStar submarkets were used.

### Retail Market

There are currently 117 retail businesses in the 2009 Plan area, covering over 2.1 million square feet of development. Germantown retail rents have fluctuated over the past decade, starting at high levels relative to the county, and dipping in 2017 and again in 2021. As of Q2 2024, average retail rents in Germantown exceeded those of the county (\$35.28 versus \$32.98). While Germantown saw an increase of 2.8% in average retail rents over the past year, the county experienced a decline in average rents of 3.1%. See Chart 11.

Chart 11. Retail Rents

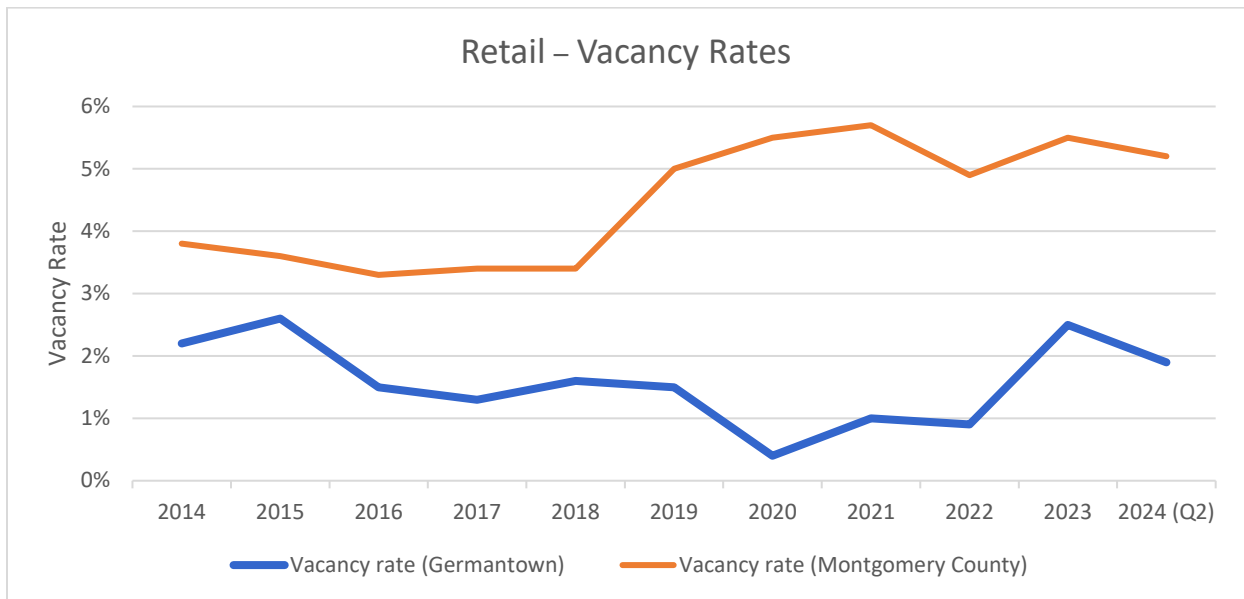


Note: There is no data available for Germantown retail rents in 2020.

Retail vacancy rates in Germantown have been quite low over the past decade. They are consistently under a healthy vacancy rate of 5% and below the county retail vacancy rate of 5.2% (Chart 12). Between 2019 and 2022, Germantown and the county retail vacancy rates diverged from one another, with decreasing vacancy in Germantown (correlated with net positive absorption) and increasing vacancy rates in the county. Over the past year, both areas have seen a slight decrease in retail vacancy.

There has been no new retail built in Germantown since 2020. Since then, there has been a negative net absorption of 30,152 square feet of retail space, meaning that more space has been vacated than leased.

Chart 12. Retail Vacancy Rates

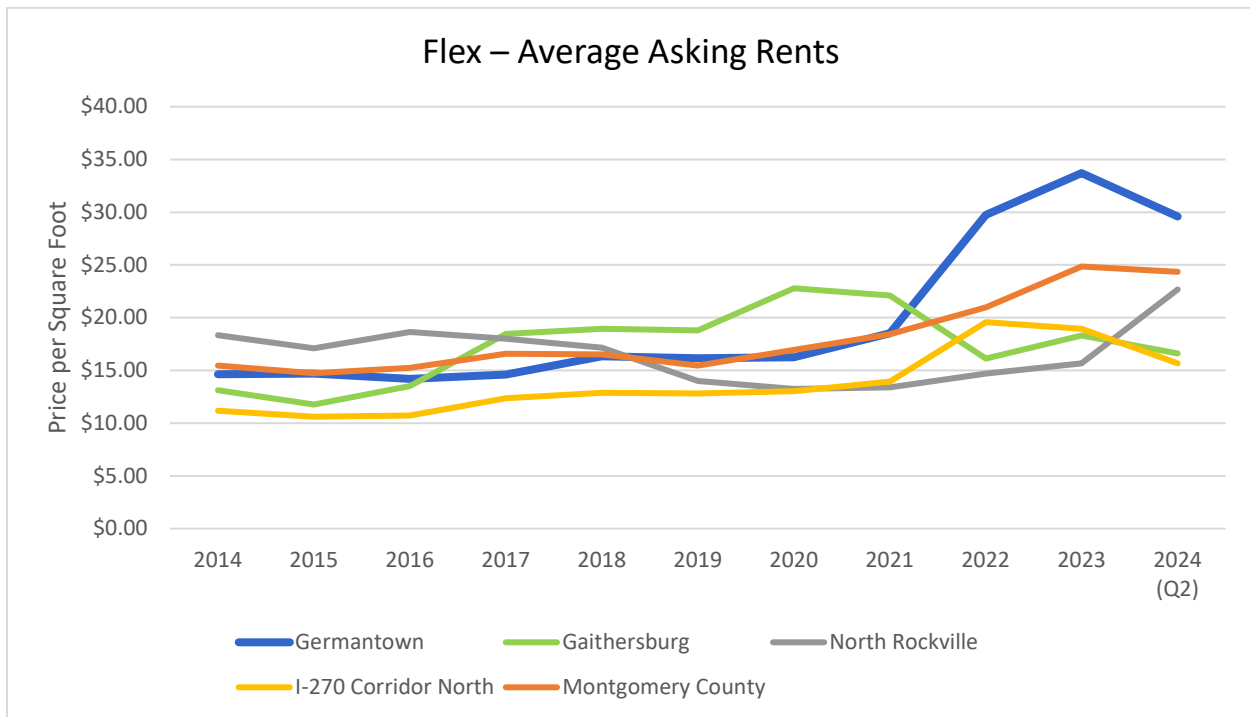


### Flex Market

A flex building is a versatile space which can combine office, R&D, light industrial, and warehousing uses. There are currently 23 flex properties in the 2009 Plan area, covering approximately 2.7 million square feet of development.

Current average rents for flex properties in Germantown are higher than those in the county as well as comparable submarkets. While these prices have increased drastically in Germantown from 2021 to 2023, the past year saw a significant drop in rents of 17.1%, perhaps in response to a recent increase in the supply of flex space. Flex rates in the county, North Rockville, and the I-270 Corridor North also followed this trend, but not at such a significant rate. See Chart 13.

Chart 13. Flex Rents



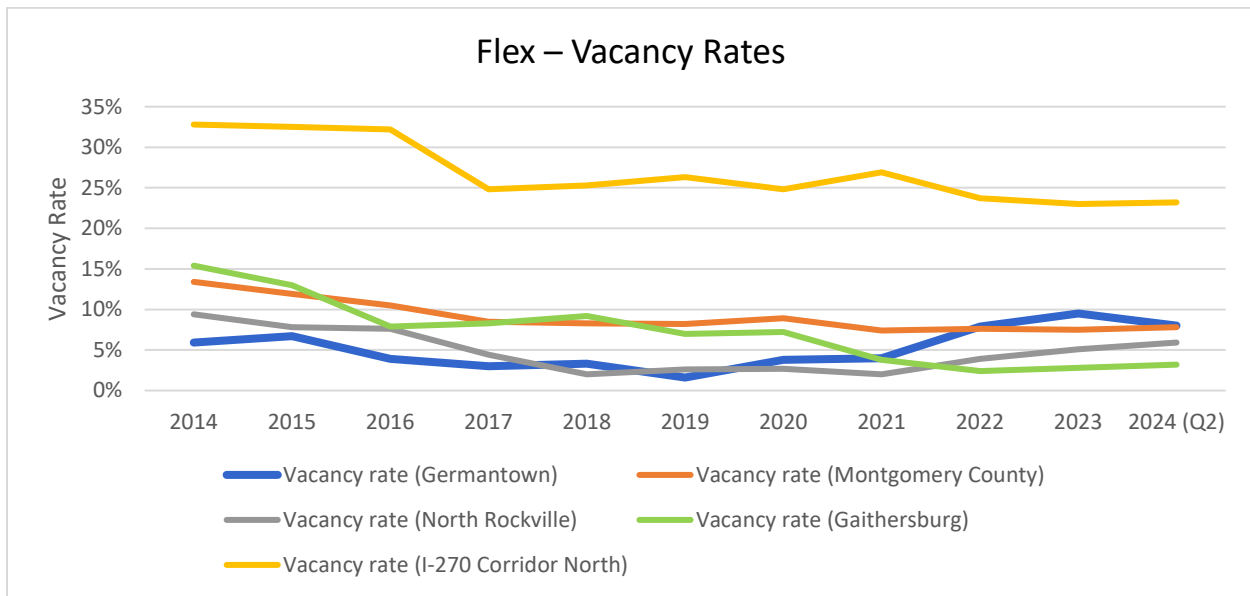
Note: For comparative geographies, CoStar submarkets were used.

Compared to similar submarkets and the county, Germantown has exhibited lower (but healthy) vacancy rates since 2014. With flex deliveries in 2023 and positive net absorption, its vacancy rate has surpassed that of North Rockville and Gaithersburg, and currently stands at 8% (Chart 14).

The two recent flex developments include Observation Labs in 2023 (70,000 sf) and 19710 Observation Drive in 2024 (140,000 sf). Both properties operate in the R&D and lab/biotech space. There are three proposed flex buildings that total 532,000 square feet of development in the Milestone Business Park that were approved in 2022.

Given that the rest of the flex building stock is from 2006 or earlier, this recent uptick in flex deliveries coupled with higher rents than neighboring markets, demonstrates the demand for this market and land use in Germantown.

Chart 14. Flex Vacancy Rates



Note: For comparative geographies, CoStar submarkets were used.

### Age of Commercial Development

Real estate development in Germantown began to flourish from the 1980s onwards. Before this time, there were very few office buildings, retail establishments, industrial buildings, or multi-family structures in the GEASP area.

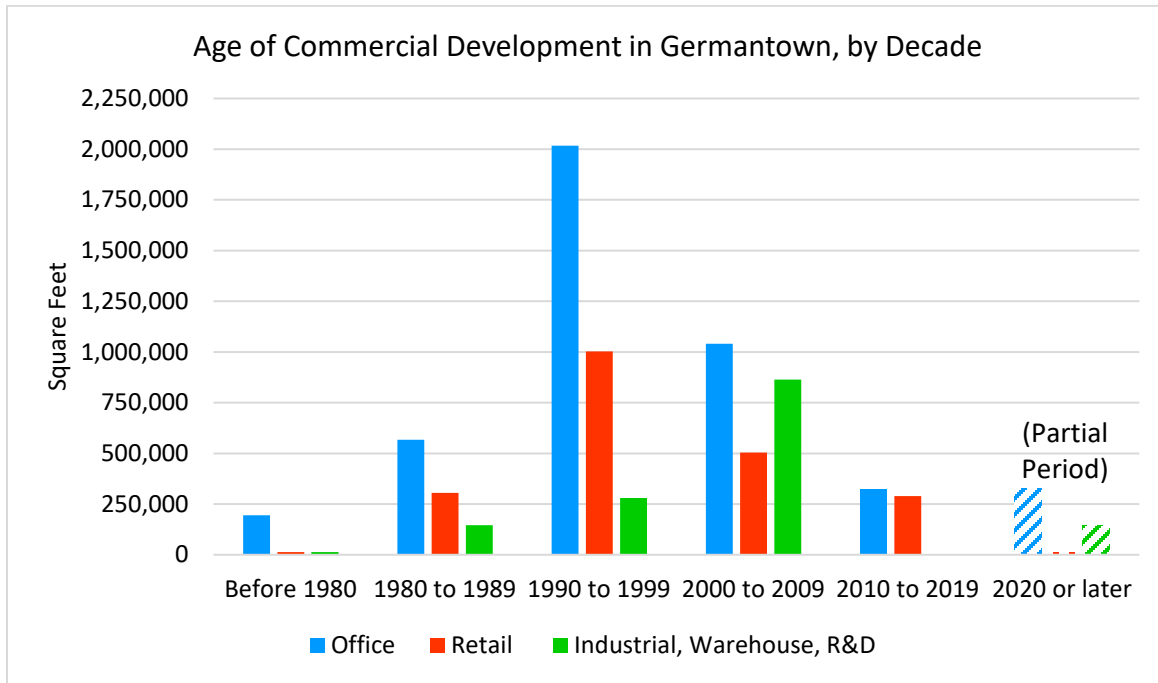
Office development accelerated in the 1990s with over 2 million square feet of office space built within this decade. However, the 2000s saw a sharp decline in office development and has continued to drop, signaling the decreased demand of this property type.

Similar to the office market, retail also witnessed growth in the 1990s, with over 1 million square feet built by the turn of the century. Since 2000, the amount of retail development has gradually decreased, demonstrating potential saturation in this market.

While office and retail development waned in the 2000s, the industrial/warehouse/research and development space took off around this time. The square feet of industrial/warehouse/research and development space built from 2000 to 2009 was greater than that of retail and similar to that of office.



Chart 15. Age of Commercial Development



Source: Maryland State Department of Assessments and Taxation, 2024.

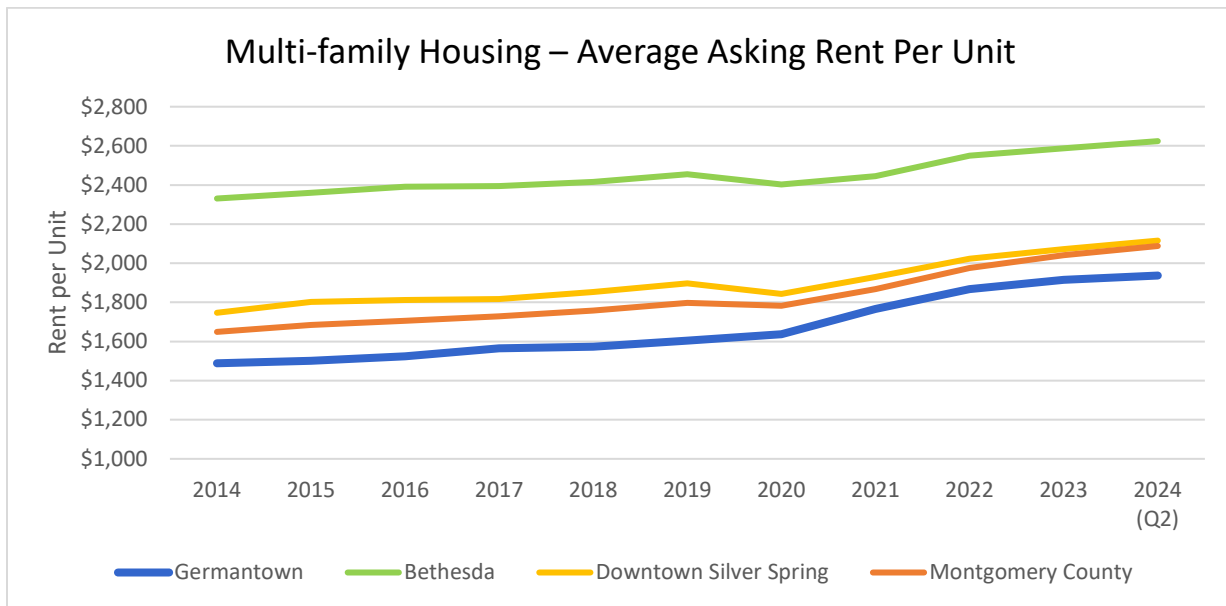
### Multi-Family Housing Real Estate Market

The multi-family market in the 2009 Plan area also appears strong and attractive, given lower rents and changes in rents compared with other submarkets and the county overall. With a healthy vacancy rate of 5% and consistency in leasing over time, Germantown exhibits an avenue for multi-family development. There are 16 existing multi-family buildings in the sector plan area with a total of 5,399 units.

Rents for multi-family units in Germantown have gradually increased over the past decade but have remained below the county average for both price per unit (\$1,958 versus \$2,100) and price per square foot (\$2.08 versus \$2.30). See Chart 16.

Compared to Bethesda and Downtown Silver Spring, rents for multi-family units in Germantown are relatively affordable. Over the past year, Germantown experienced the lowest percent change in rents relative to other submarkets and the county as a whole.

Chart 16. Multi-Family Rents

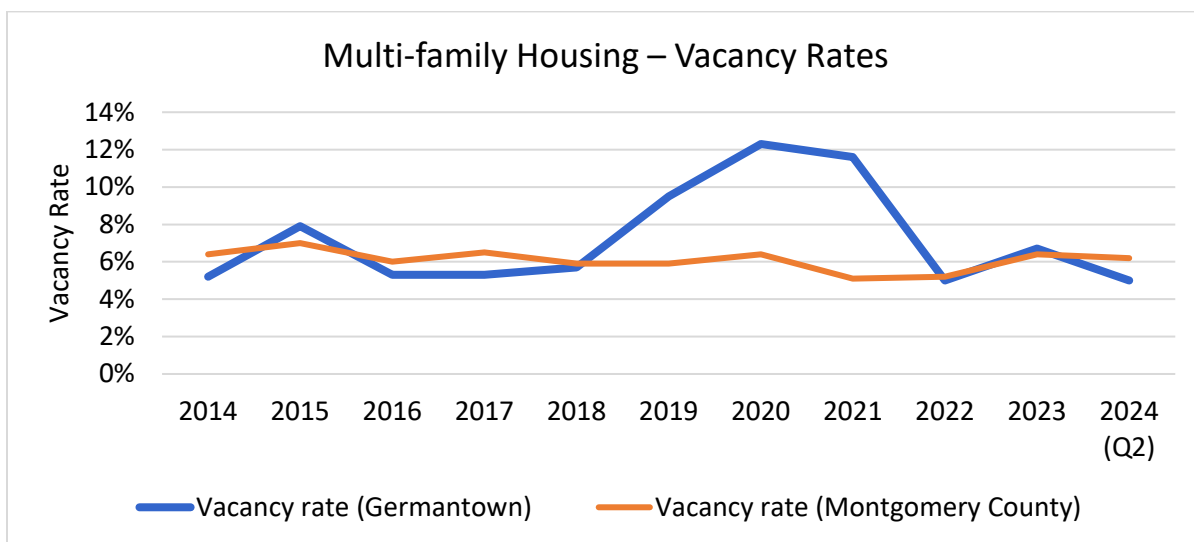


Note: For comparative geographies, CoStar submarkets were used.

Multi-family vacancy rates in Germantown have been very volatile over the past decade, mostly following trends of deliveries. In years where a lot of units are built (2019 and 2020), vacancy rates surge, but then decrease as the units get occupied (Chart 17). As of Q2 2024, the multi-family vacancy rate of Germantown was below that of the county, as it dropped from 6.7% at the end of 2023 to 5.0% in Q2 of 2024.

There is a positive net absorption in the multi-family market in Germantown, meaning that there has been an increase in the number of occupied units. The 2009 Plan area has seen recent deliveries in 2023 with the Fairchild Apartments (212 units) and Seneca Creek Senior Living in 2024 (111 units).

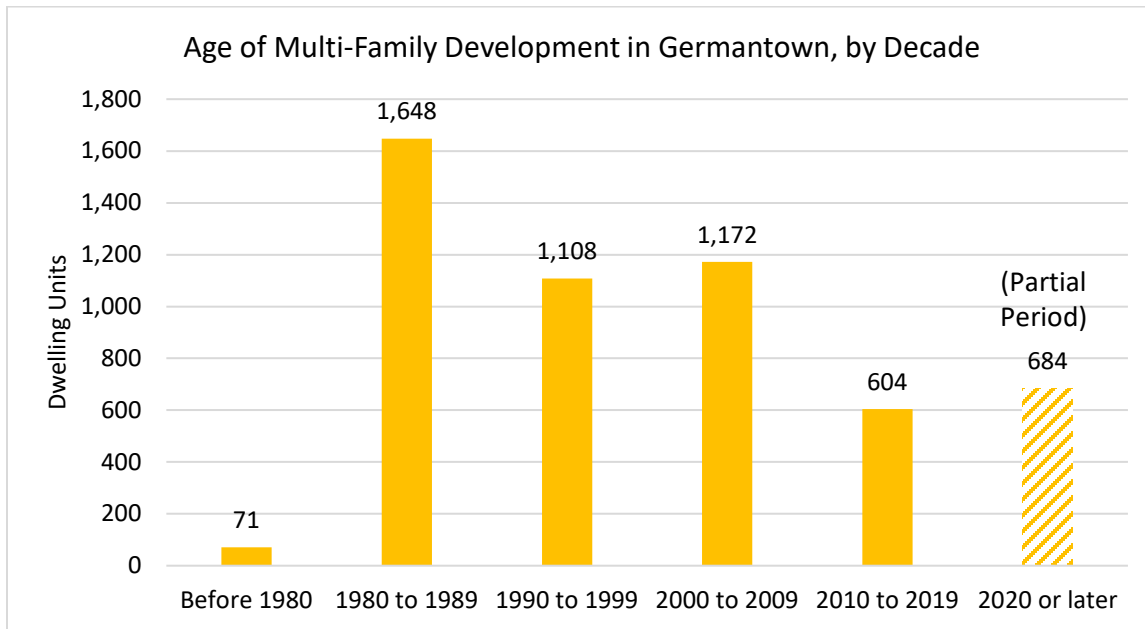
Chart 17. Multi-family Housing Vacancy Rates



### Age of Multi-Family Development

As mentioned above, multi-family development is on average the newest commercial building type in Germantown, with an average age of 22 years. Germantown saw the greatest construction of multi-family units in the 1980s and continued to build consistently up until the 2010s (Chart 18). While the previous decade saw a decline in multi-family housing construction, the past five years reflects steady growth.

Chart 18. Age of Multi-Family Development



Source: Maryland State Department of Assessments and Taxation, 2024.

# Employment

Employment in the GEASP area fell far short of expectations from the 2009 Plan, but in retrospect, those expectations were too high. Montgomery County has experienced stagnant economic growth since 2009, and the GEASP area’s job growth trends are in line with the county’s. This outcome is not surprising since Germantown’s housing and population also grew at a rate similar to the county’s overall rate. While Germantown did not perform worse than the county, it did fall short of its expectations as a target for a large portion of the county’s expected growth.

## Private Sector Employment

In 2023, the 2009 Plan area had an estimated 12,975 private sector jobs, down from an estimated 13,183 in 2010. This two percent decline is slightly less than the countywide four percent decline in private sector workers.

Table 12. Private Sector Employment in Germantown SPA and Montgomery County

Place	2010	2023	Change	% Change
GEASP Area	13,183	12,975	(208)	-2%
Montgomery County*	345,418	331,099	(14,319)	-4%

\*Not counting GEASP area. Data source: Maryland Dept. of Labor Quarterly Employment Data

Germantown has a high concentration in two of the county’s key exporting sectors: communications equipment manufacturing and biotechnology.

## Communications Equipment Manufacturing

Communications equipment manufacturing is a small high-technology sector that designs and manufactures satellite, radar, and other types of communication systems. While it does not often receive headlines, the sector is especially competitive in Montgomery County (see [Montgomery County Economic Indicators Briefing](#) for the first quarter of 2021), and Germantown is its hub. The industry accounted for 17% of total sector plan area employment in 2023.

This sector is part of the legacy of COMSAT, the federally established but now defunct communications satellite agency previously located in Clarksburg. One of the sector’s main firms, Hughes Network Systems, [was established by former COMSAT employees in 1971](#).

Table 13. Communications Equipment Manufacturing employment in Germantown SPA and Montgomery County

Place	2010	2023	Change	% Change
GEASP Area	2,753	2,225	(528)	-19%
Montgomery County*	2,600	2,487	(113)	-4%

\*Not counting GEASP area. Data source: Maryland Dept. of Labor Quarterly Employment Data; Communications Equipment Manufacturing is North American Industrial Classification System code 334.

This sector lost employment between 2010 and 2023, mainly due to downsizings in two of its large establishments. However, several establishments have grown and there is potential in investigating the sector and its potential as an economic anchor for the area.

## Biotechnology

Germantown is a secondary hub for biotechnology, which is one of the county's main economic drivers. Jobs in this sector more than doubled from 2010 to 2023 from almost 250 to almost 600 employees, growing at a faster rate than the county overall.

*Table 14. Biotechnology employment in Germantown SPA and Montgomery County*

Place	2010	2023	Change	% Change
GEASP Area	241	591	350	145%
Montgomery County*	10,465	12,379	1,914	18%

\*Not counting GEASP area. Data source: Maryland Dept. of Labor Quarterly Employment Data; Biotechnology is North American Industrial Classification System codes 325, 541711, 541712 (2010), and 325, 541714, and 541715 (2023).

## Restaurants, Bars, and Retail

The drinking and dining sector added 26 establishments and 239 employees between 2010 and 2023. Germantown's 16% growth in restaurant and bar employment is double the rate of Montgomery County's growth in this sector, which now accounts for 13% of the 2009 Plan area's employment, while only accounting for 7% of countywide private employment.

*Table 15. Eating and Drinking establishments employment in Germantown SPA and Montgomery County*

Place	2010	2023	Change	% Change
GEASP Area	1,451	1,690	239	16%
Montgomery County*	22,509	24,309	1,800	8%

\*Not counting GEASP area. Data source: Maryland Dept. of Labor Quarterly Employment Data; Eating and Drinking establishments is North American Industrial Classification System codes 7221, 7222, 7224 (2010) and 7224, 725 (2023).

The retail sector has almost 1,300 employees and has increased by 27% since 2010, nearly keeping up with the county's rate of increase in this sector.

*Table 16. Retail employment in Germantown SPA and Montgomery County*

Place	2010	2023	Change	% Change
GEASP Area	1,018	1,297	279	27%
Montgomery County*	10,298	13,741	3,443	33%

\*Not counting GEASP area. Data source: Maryland Dept. of Labor Quarterly Employment Data; Retail is North American Industrial Classification System codes 44 and 45.

## Public Sector Employment

Public sector employment in the GEASP was estimated to be about 1,800 in 2023. Local government employees work at Montgomery College, Seneca Valley High School, and the Police and Fire & Rescue stations. Federal employees work at the Department of Energy office in Germantown and the Germantown Post Office.

Table 17. Public Sector Employment in Germantown Sector Plan Area in 2023

<b>Employer</b>	<b>Employment</b>	<b>Public Sector</b>
Department of Energy	576	Federal
US Postal Service	86	Federal
Montgomery College	459	County
Seneca Valley High School	277	County
Montgomery County Police	175	County
Montgomery County Fire & Rescue (2 stations)	89	County
Montgomery County Health Department	88	County
Upcounty Regional Services Center	2	County
Germantown Library	23	County
ABC Seneca Meadows	8	County
Plum Gar Recreation Center	2	County
<b>Total</b>	<b>1,785</b>	<b>Federal and County</b>

Data source: Maryland Dept. of Labor Quarterly Employment Data, DataAxle, and County employment records

## Transportation

The transportation systems in Germantown have a major impact on residents, workers, and visitors. Germantown is a car-centric city crisscrossed by a half-dozen major roads, which generally keep the traffic moving but at the expense of a less friendly experience for bicyclists and pedestrians. Some parts of Germantown have a decent network of sidewalks and bike paths, but other areas have a low level of pedestrian comfort and a high level of bicycling stress. Many buses serve Germantown, but service isn't always available in the direction passengers wish to travel or at the time of day or day of week a bus is needed. The cancellation of the long-awaited Corridor Cities Transitway also dealt a major blow to a robust public transit option in Germantown. This section of the report describes the existing and planned transportation elements in the GEASP area.

### Commuting

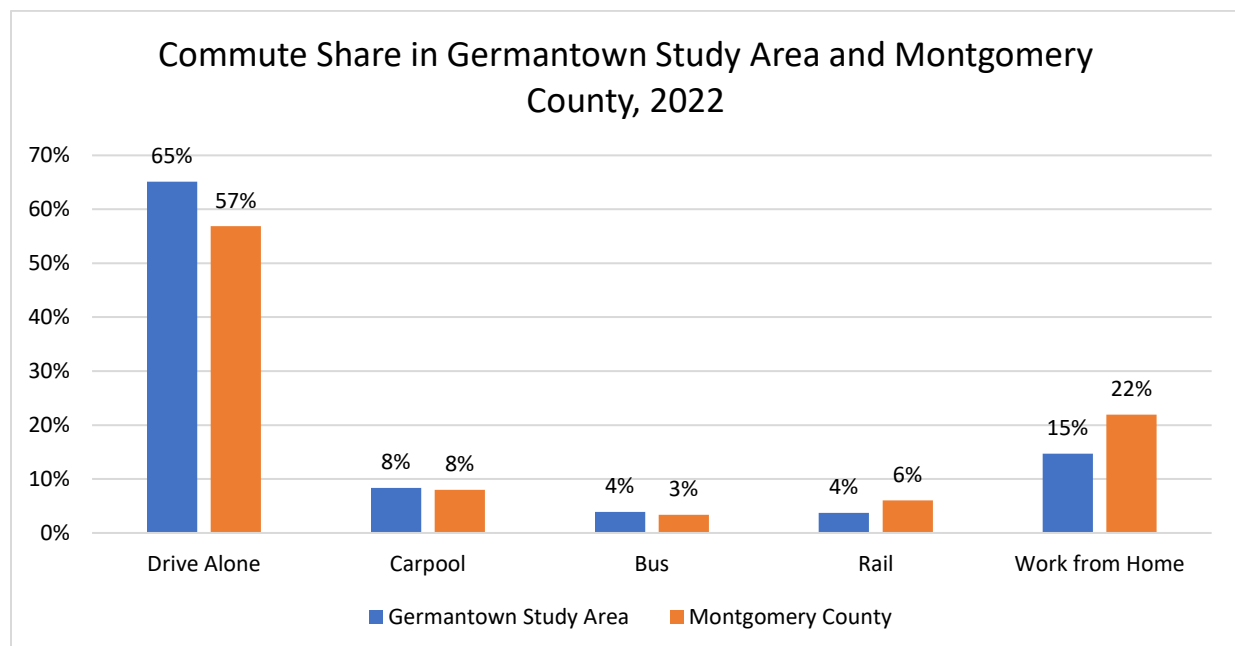
#### Car Ownership

The main mode of transportation for the households of the GEASP Area is by private vehicle. Compared to the rest of Montgomery County, households in Germantown have a slightly higher rate of car ownership. Nearly 36 percent of households own exactly one vehicle, while more than 58 percent own two or more vehicles. This means that nearly 94 percent of households have access to at least one vehicle. Only about 6 percent of households do not own a vehicle, meaning that they rely on other modes of transportation.

#### Commute Share

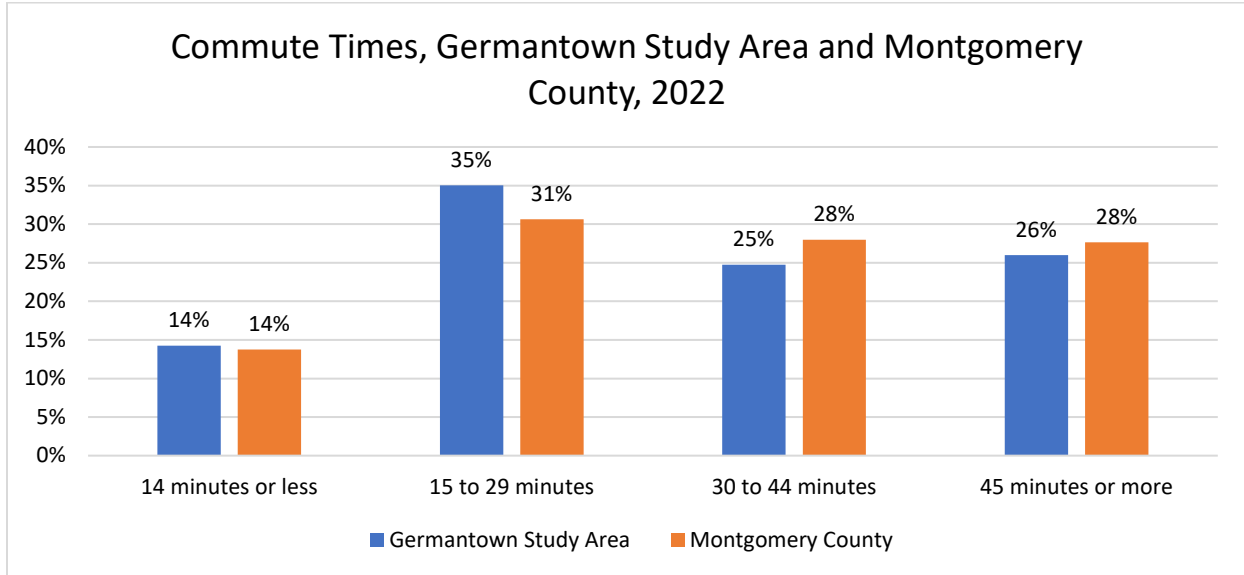
Residents of the GSA have a higher share of driving alone, a lower share of commuting by rail, and a lower share of teleworking than Montgomery County residents overall (Chart 19). These rates may be due to the GSA's location far from Metro stations or the possibility that residents have jobs that cannot be done remotely.

Chart 19. Commute Share



Commutes of GSA residents tend to be shorter than those of the average county resident (Chart 20). The GSA has a higher share of workers with 15-to-29-minute commutes and a lower share of workers with half-hour or longer commutes than the county.

Chart 20. Commute Times



#### Commute Inflow/Outflow Patterns

Although the 2009 Plan Area is home to around 16,000 of jobs, most of the workforce employed there live outside of it. More than 15,000 workers are employed in but live outside of the Plan Area. Contrary to this, nearly 8,000 workers indicated that they live in but are employed outside of the Plan Area. Only 576 workers live in and are employed in the Plan Area (Figure 15).



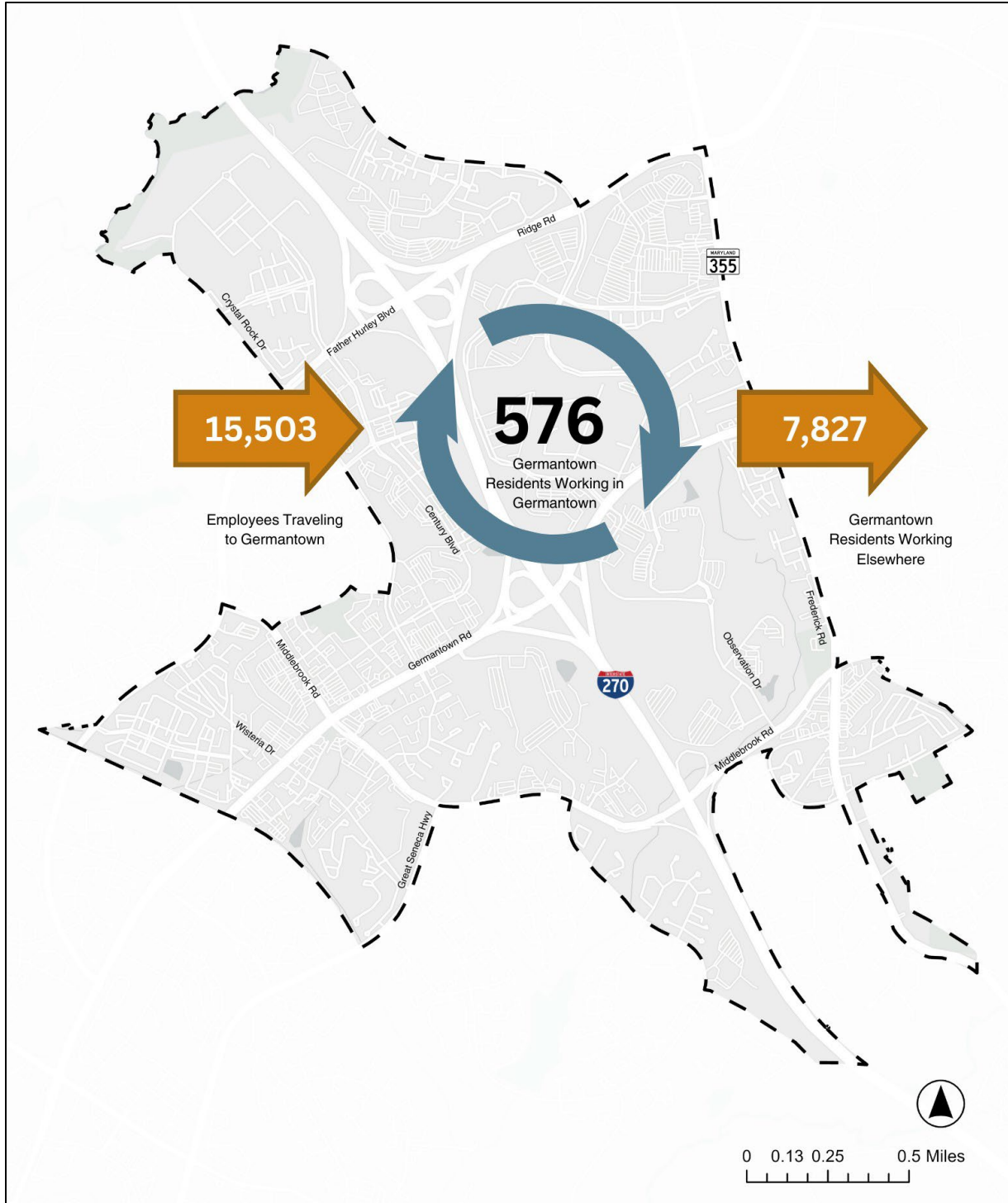


Figure 15. Commuter Inflow/Outflow Patterns in the Study Area. (Source: RSP Tabulation of 2017-2021 American Community Survey, 5-year estimates, U.S. Census Bureau)

Jobs by Distance/Direction

More than two-thirds of the workforce of the Study Area travels less than 25 miles to get to their workplace. Nearly 38 percent of the commuters travel less than 10 miles to get to their workplace,

while around 33 percent of the commuters travel between 10 and 24 miles. A lower percentage of the workforce commute between 25 to 50 miles (21%) or greater than 50 miles (9%) to their workplace.

Table 18. Jobs by Distance/Direction in the Study Area. (Source: 2017-2021 American Community Survey, 5-year estimates, U.S. Census Bureau)

Distance	Job Count	Percentage Share
Less than 10 miles	6,087	37.9 %
10 to 24 miles	5,246	32.6%
25 to 50 miles	3,379	21%
Greater than 50 miles	1,367	8.5%
<b>Total Jobs</b>	<b>16,079</b>	

Most commuters unsurprisingly head southeast towards job centers such as Rockville, Bethesda, and the District of Columbia, although a large contingent of those who travel 25 or more miles head east.

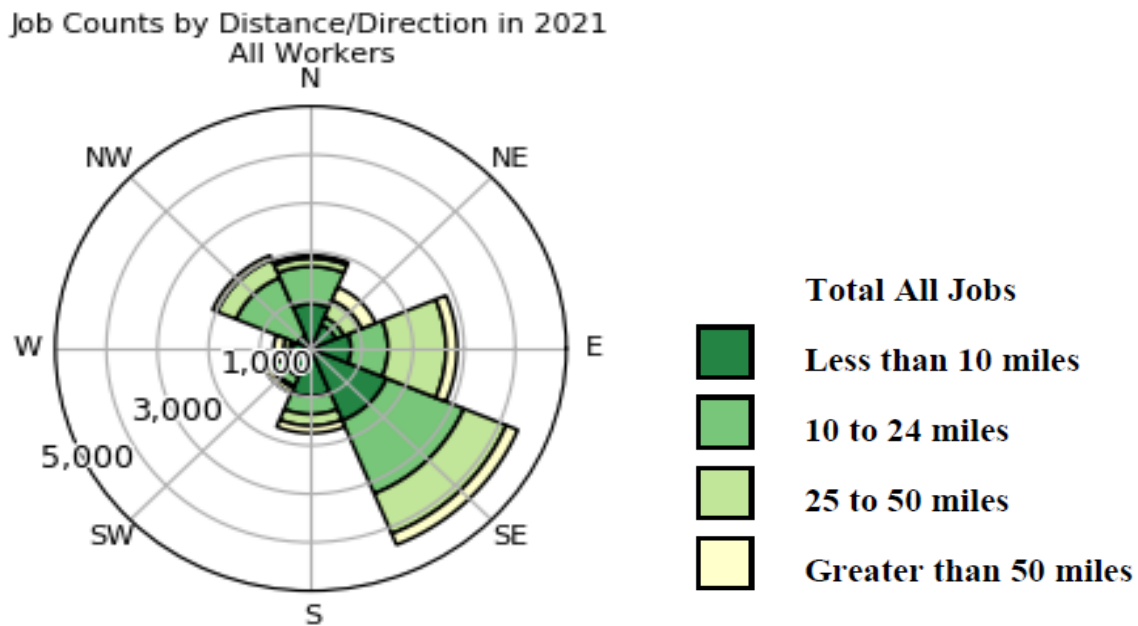


Figure 16. Jobs by Distance/Direction in the Study Area. (Source: RSP Tabulation of 2017-2021 American Community Survey, 5-year estimates, U.S. Census Bureau)

A high concentration of jobs within the 2009 Plan area is clustered around major streets and roadways such as I-270, Father Hurley Boulevard/Ridge Road, and Seneca Meadows Parkway at the north end of the Plan Area and around Germantown Road and Crystal Rock Drive in the southwest part of the Plan Area (see Figure 17).

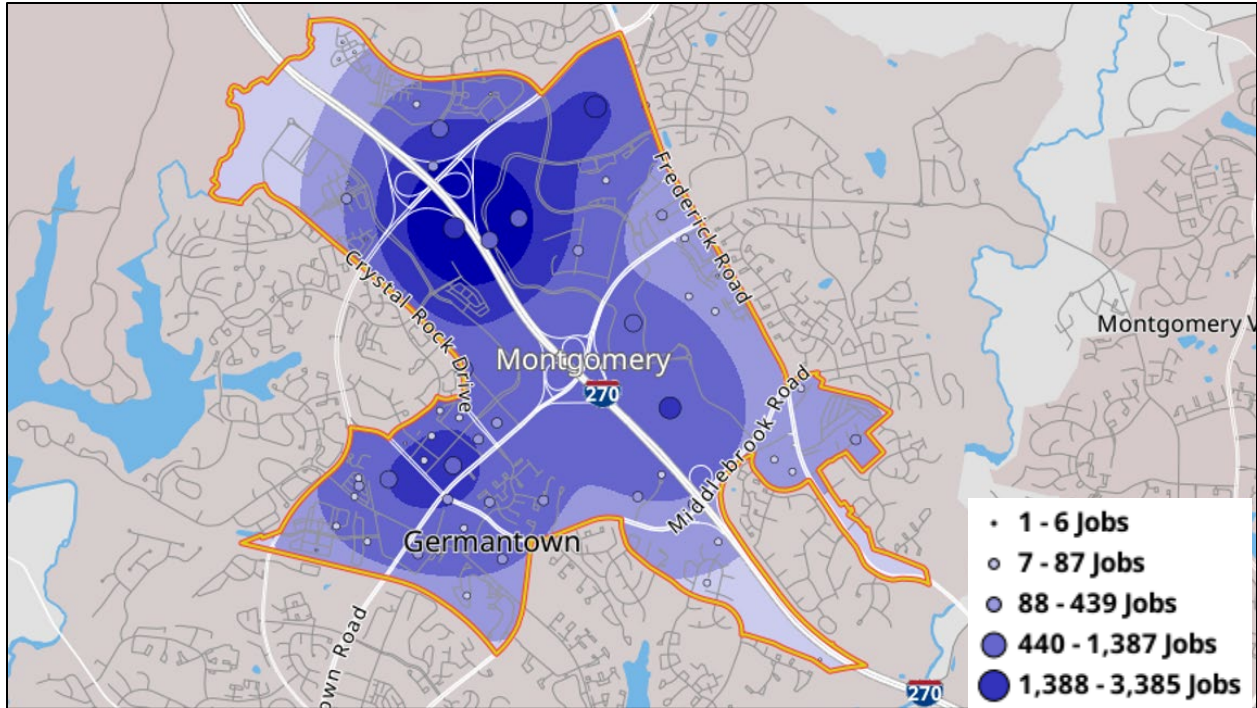
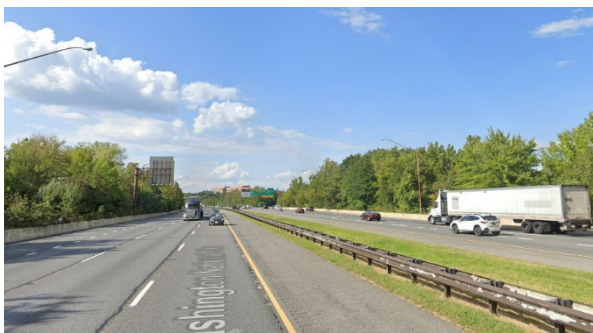


Figure 17. Employment by Location in the Study Area. (Source: 2017-2021 American Community Survey, 5-year estimates, U.S. Census Bureau)

## Street Network and Motor Vehicle Use

### Average Annual Daily Traffic Volumes on Study Area Streets

Several major roadways cross the 2009 Plan area or make up one of its boundaries. The largest roads are I-270, Frederick Road (MD 355), Father Hurley Boulevard, Germantown Road (MD 118), Middlebrook Road, and Great Seneca Highway (MD 119) (Figure 18).



I-270



Frederick Road



*Father Hurley Boulevard*



*Germantown Road*



*Middlebrook Road*



*Great Seneca Highway*

*Figure 18. Google Street View images of the largest roads in the 2009 Plan area*

I-270 is a limited access highway where pedestrians and bicycles are not allowed. While I-270 provides connectivity between Germantown and the rest of the region, it creates a dividing line that cuts the eastern and western parts of Germantown off from each other, limiting opportunities to provide greater connectivity between the two halves. The other major roadways are very wide, with fast-moving traffic, and are uninviting for non-vehicular modes of transportation. Century Boulevard and Crystal Rock Drive are also very important streets for providing connectivity in and around the town center.

Average Annual Daily Traffic (AADT) represents the average number of vehicles that travel a specific street or roadway segment in both directions per day over a year. Many of the roadways in the GEASP Area have AADT volumes of more than 20,000 daily trips. Unsurprisingly, I-270 has the highest AADT in the area at greater than 130,000. High volume roadways are listed in Table 19 and are indicated by red lines in Figure 17.

*Table 19. Streets with an Average Annual Daily Traffic (AADT) Volume of 20,000 or More. (Source: MDOT, Traffic Volume Maps by County, 2023).*

Street	Estimated AADT
I-270	>130,000
Frederick Road	>29,000
Germantown Road	>41,000

Street	Estimated AADT
Ridge Road	>29,000
Father Hurley Blvd	>20,000
Middlebrook Road	>20,000

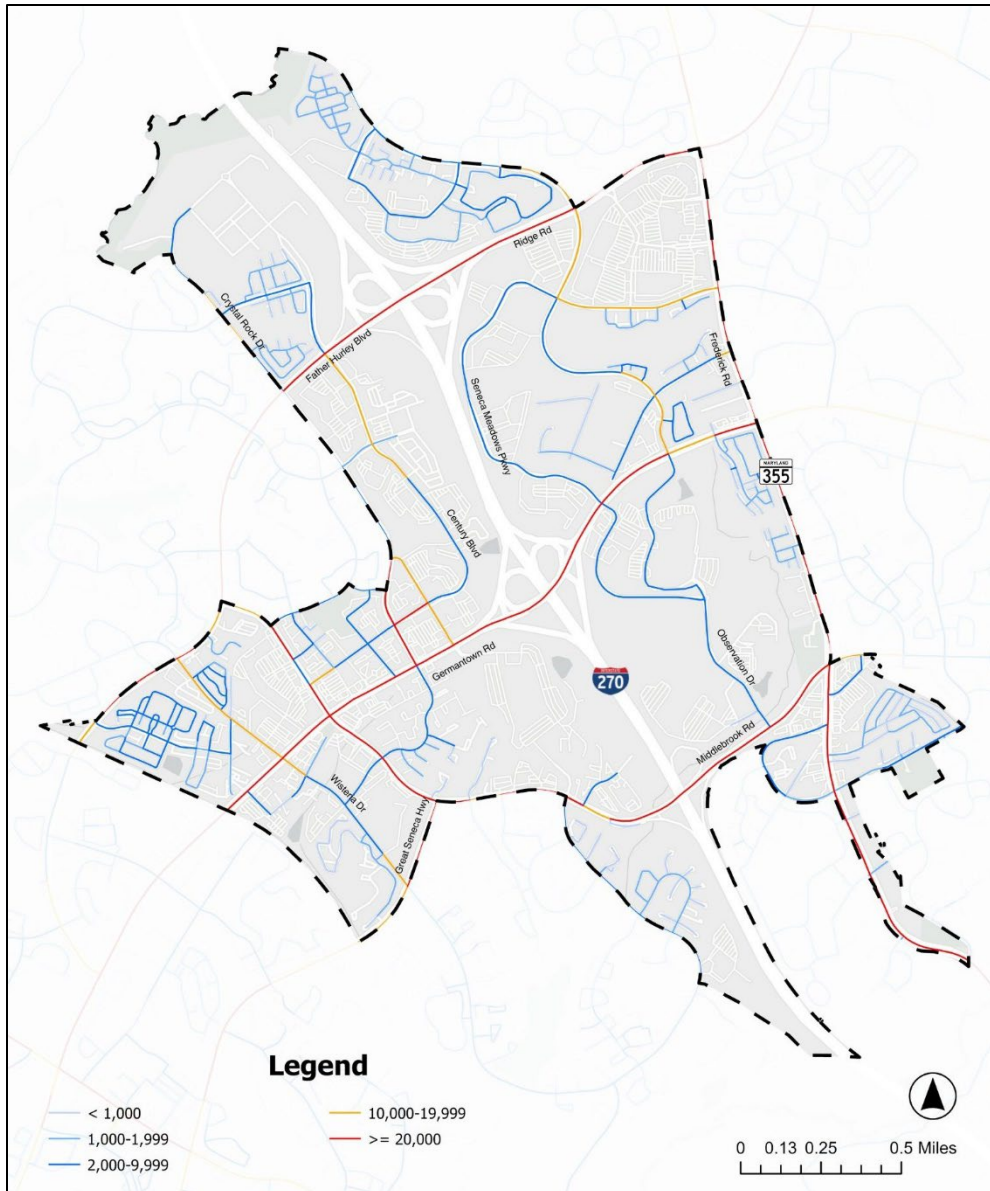


Figure 19. Average Annual Daily Traffic Volumes of the Study Area

### Street Classification and Street Typology

All existing and planned streets in the GEASP Area are summarized in an appendix. Table 20 shows the roads which are planned but unbuilt (indicated by “N/A” in the Existing Lanes column) and those which have not been built to the full specifications recommended in the master plan (Existing Lanes less than Planned Lanes). Some roads have the recommended number of existing lanes, but transit lanes have not been built. Some of these transit lanes were intended to accommodate the now-cancelled Corridor Cities Transitway, but may still be needed for the Corridor Connector BRT routes.

Table 20. Planned streets and streets not fully built to master-planned recommendations

Street	From	To	Existing Lanes <sup>a</sup>	Planned Lanes	Transit Lanes	ROW (Feet) <sup>b</sup>	Target Speed (mph)
<b>Town Center Boulevards</b>							
Aircraft Dr	Germantown Rd	Century Blvd	4	4	2	100	25
Century Blvd	Dorsey Mill Rd	Crystal Rock Dr	4	4	2	136	25
Crystal Rock Dr	Crystal Rock Trail	Waters Landing Dr/Kinster Dr	2	4		100	35
Crystal Rock Dr	Waters Landing Dr/Kinster Dr	Father Hurley Blvd	2	4		120	35
Crystal Rock Dr	Century Blvd	Germantown Rd	4	4	2	120	25
Dorsey Mill Rd	Observation Dr	Milestone Center Dr	2	4	2	150	30
Dorsey Mill Rd	Milestone Center Dr	Century Blvd	N/A	4	2	150	30
Germantown Rd	Bowman Mill Dr	Middlebrook Rd	6	6	2	150	30
Germantown Rd	Middlebrook Rd	I-270 west side ramps	6	6	2	150	35
Observation Dr	Dorsey Mill Rd	Boland Farm Rd	4	4	2	150	35
Seneca Meadows Pkwy	Seneca Meadows Corporate Park BRT Station	Observation Drive	4	4	2	130	30
Wisteria Dr	Germantown Rd	Crystal Rock Dr	2	4		115	25
Wisteria Dr	Crystal Rock Dr	Great Seneca Hwy	2	4		100	25
<b>Boulevards</b>							
Boland Farm Rd	Frederick Rd	Observation Dr	2	4		80	35
Germantown Rd	I-270 west side ramps	Frederick Rd	5	6	2	150	40
Observation Dr	Little Seneca Creek	Woodcutter Dr /Waters Discovery Ln	N/A	4	2	150	35
Observation Dr	Woodcutter Dr /Waters Discovery Ln	Dorsey Mill Rd	4	4	2	150	35
Observation Dr	Boland Farm Rd	Germantown Rd	4	4	2	150	35
Scenery Dr	Middlebrook Rd	Frederick Rd	2	4		100	35
Waring Station Rd	Middlebrook Rd	Summer Oak Dr	2	4		80	35
<b>Town Center Streets</b>							
Blunt Rd	240' south of Middlebrook Rd	Middlebrook Rd	N/A	2		60	30
Bowman Mill Rd Extended	Walter Johnson Rd	Great Seneca Hwy	N/A	2		70	25

Street	From	To	Existing Lanes <sup>a</sup>	Planned Lanes	Transit Lanes	ROW (Feet) <sup>b</sup>	Target Speed (mph)
Crystal Rock Dr	Wisteria Dr	Bowman Mill Rd Extended	N/A	2		80	25
Locbury Dr	Middlebrook Rd	Wisteria Dr	N/A	2		80	25
Walter Johnson Dr	Middlebrook Rd	500' west of Middlebrook Rd	N/A	2		80	25
Waters House Ave	Waterford Hills Blvd	Wisteria Dr	N/A	2		70	25
New Road	Observation Dr	Goldenrod Ln	N/A	2		80	25
New Road	Crystal Rock Dr	Century Blvd	N/A	2		100	35
New Road	Crystal Rock Dr	Century Blvd	N/A	2		70	35
Neighborhood Connectors							
Cider Barrel Dr	600' south of Oxbridge Dr	Gunners Dr	N/A	2		70	
Area Connectors							
Cider Press Pl	Cider Barrel Dr	Observation Dr	N/A	2		70	25
Controlled Major Highways							
Frederick Rd	Middlebrook Rd	Ridge Rd	4	6		250	40
Freeway							
I-270	Little Seneca Creek	Germantown Rd	6	12		300	
I-270	Germantown Rd	Great Seneca Creek	8	12		300	

a The number of existing and planned through lanes for each segment, not including lanes for turning, parking, acceleration, deceleration, or other purposes auxiliary to through travel. Roadways with existing lanes marked "N/A" are master-planned roadways included in the *Master Plan of Highways and Transitways*.

b Rights-of-way requirements are the minimum. These do not include lanes for turning, parking, acceleration, deceleration, or other purposes auxiliary to through travel. Additional rights-of-way may also be needed to accommodate spot master planned and required pedestrian, bicycle, and transit facilities.

As the table shows, there are still many planned roads or road segments that have not been built, especially the Town Center Streets and the Connectors, which contribute to a more efficient street grid and better connectivity. At the same time, there are several major roads with additional lanes recommended. The Plan Amendment provides an opportunity to revisit these recommendations and to consider whether improvements could be made to other major roads already built. The Plan Amendment will also reevaluate the need for dedicated transit lanes now that the CCT has been cancelled.

The 2009 Plan also includes four grade-separated interchanges, all east of I-270. Three of the four planned interchanges are along Frederick Road (MD-355) at the following roadways: Middlebrook Road, Germantown Road, and Ridge Road. The remaining master-planned interchange is at Ridge Road and Observation Drive. The 2009 Plan also recommends an access point to and from northbound I-270 at the planned Dorsey Mill Road bridge. This interchange is intended to alleviate some of the congestion on Ridge Road/Father Hurley Boulevard and provide opportunities for inter-modal connections from the planned Corridor Connector BRT stations to buses traveling along northbound I-

270, but the 2009 Plan acknowledges that it may be difficult to fit the necessary on- and off-ramps given its closeness to Ridge Road. These interchanges and the existing and planned road network are shown in Figure 20.

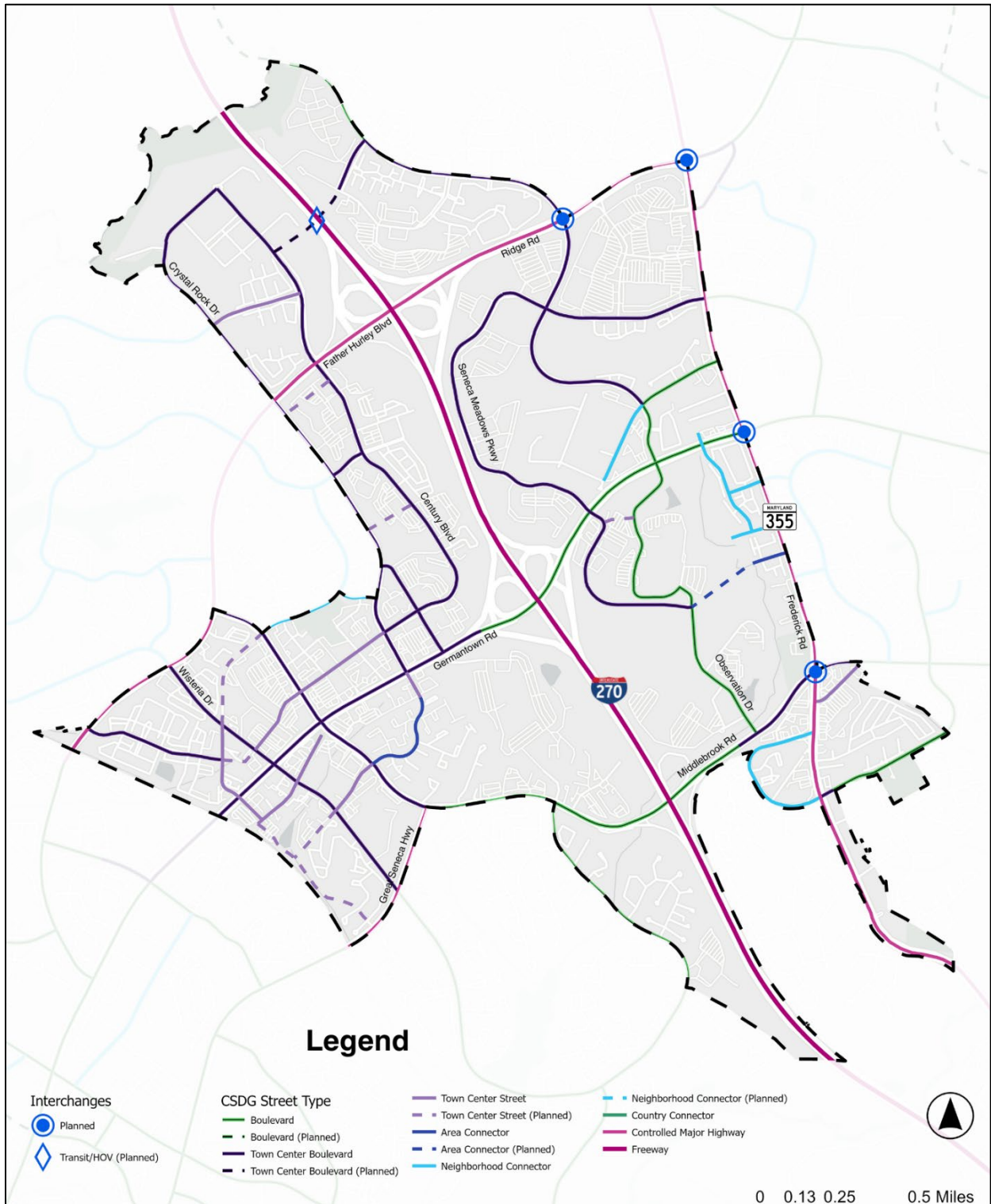


Figure 20. Existing and Planned Roadways of the 2009 Plan Area



## High Injury Networks: Safety and Vision Zero Goals

Germantown has one of the county's highest concentrations of severe and fatal collisions (Wheaton and Aspen Hill are the other two areas). To identify the most dangerous roads, the county created a High Injury Network (HIN) map that shows the roadway segments with the highest rates of serious and fatal crashes (Figure 21). The HIN constitutes only 100 miles, or three percent, of the road network in the county, but accounts for 41 percent of all serious and fatal crashes that occurred between 2015 and 2019. Eight HIN corridors are in the GEASP area, including two of the top 10 county-maintained HIN roadways (Crystal Rock Drive and Middlebrook Road) and two of the top 10 state-maintained HIN roadways (Germantown Road [MD 118] and Frederick Road [MD 355]). Crystal Rock Drive has four divided lanes in a 120-foot right-of-way, but the other top-10 roads listed all have 150-foot rights-of-way, usually with six divided lanes.

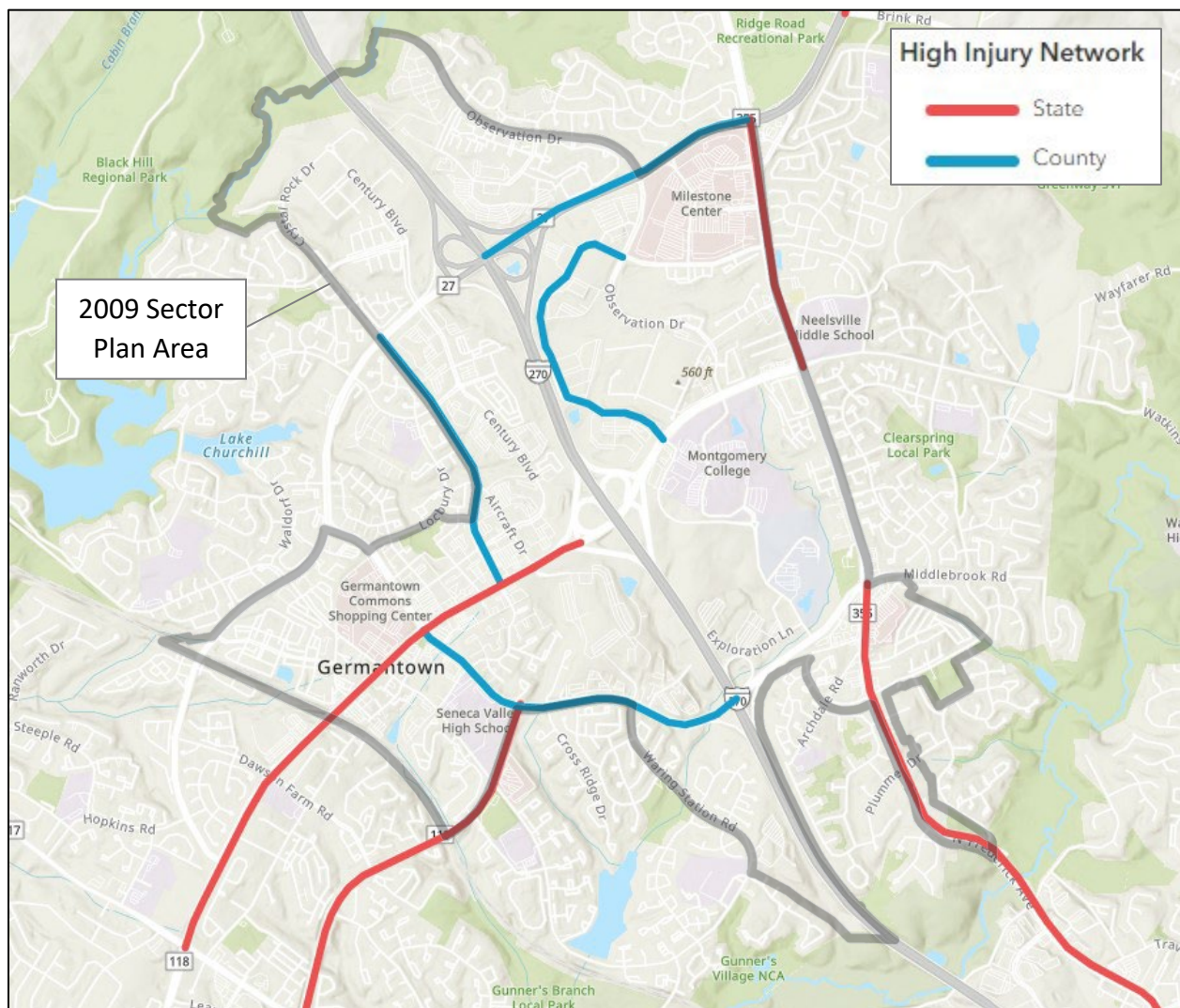


Figure 21. High Injury Network (HIN) corridors in the 2009 Plan area.

Vision Zero is a proven approach to preventing roadway-related deaths and severe injuries. It represents a fundamental change in how we plan and design roads, shifting from a focus on maximizing motor vehicle efficiency to ensuring that our roads are safe regardless of whether travel is

by car, bus, bicycle, or on foot. The Fiscal Year 2024 Work Plan outlined in the *Vision Zero 2030 Action Plan* contains several recommendations regarding the identified HIN streets in Germantown, including studies and construction work to tackle and address safety issues. The action items in Table 21 are intended to reduce the number of crashes happening in the HIN streets located in Germantown in furtherance of the County’s Vision Zero Goals.

*Table 21. Fiscal Year 2024 High Injury Network Projects in Germantown. (Source: Vision Zero 2030. Fiscal Years 2024-2025 Work Plan<sup>b</sup>)*

<b>Project</b>	<b>Location</b>
Ridge Road HIN Study <sup>a</sup>	From Frederick Rd to Crystal Rock Dr
Crystal Rock Dr HIN Design and Begin Construction	From Father Hurley Blvd to Germantown Rd
Crystal Rock Dr HIN Begin Construction of Short-Term Recommendations	From Father Hurley Blvd to Germantown Rd

<sup>a</sup> The State Highway Administration (MDOT-SHA) is the lead agency to provide resources to implement the action item or project.

<sup>b</sup> The Two-Year Work Plan includes tasks underway during fiscal years 2024 and 2025 to implement the action item. Budget sources listed are P500333—Pedestrian Safety Program, and P507017—Intersection and Spot Improvements.

### Motor Vehicle Crashes, Severe Injuries, and Deaths

The HIN corridors that have been identified have the highest crash rates in the county, but there is an alarming number of motor vehicle crashes, severe injuries, and fatalities throughout Germantown. From 2015 to 2024, more than 4,279 motor vehicle crashes have occurred, including 80 severe injuries and three fatalities in the 2009 Plan area (Figure 22).

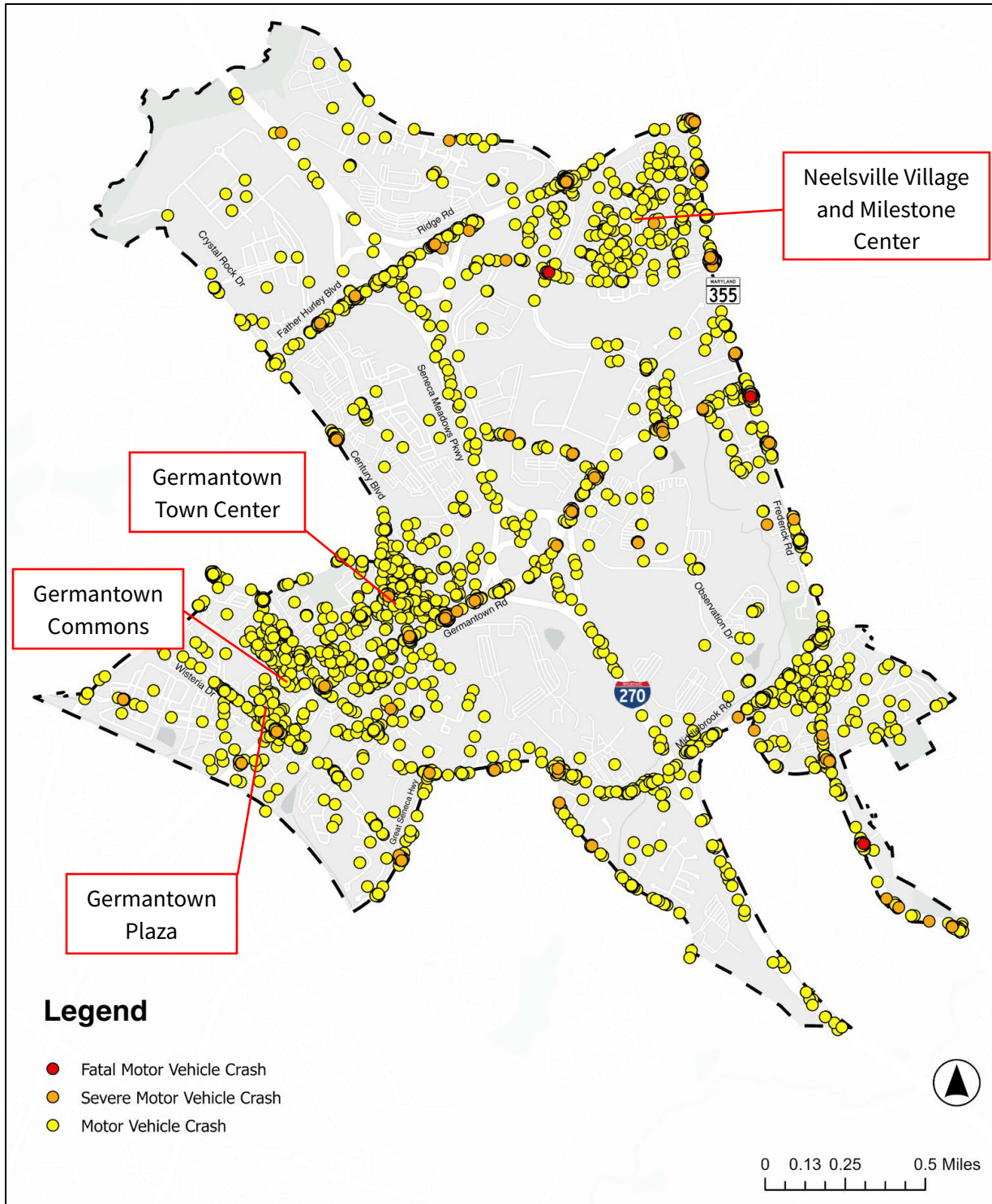


Figure 22. All Motor Vehicles Crashes in the 2009 Plan area, January 2015 – November 2024

As expected, HIN roadways like Father Hurley Boulevard, Ridge Road, Germantown Road, and Frederick Road exhibit a high concentration of crashes, especially where two such roads meet. These roadways are very wide with several travel lanes and high posted speed limits. Such is the case for the Father Hurley Boulevard and Observation Drive, which have nine and eight lanes respectively in some

segments with posted speed limits beyond those recommended in the *Complete Streets Design Guide* based on the street classification. High posted speed limits beyond the recommended target speeds could potentially increase not only the number of motor vehicle collisions happening, but also the severity.

Other significant clusters of crashes occur around or inside the road network of several retail centers and minor roadways. Such is the case for areas near the Neelsville and Milestone shopping centers, the Germantown Town Center, and Germantown Commons and Germantown Plaza shopping centers.

### Public Transportation

Only Montgomery County’s Ride On buses serve Germantown; no Washington Metropolitan Area Transit Authority (WMATA) bus service is provided within the Study Area. The MARC rail service provides limited transit service into and out of the District of Columbia during rush hour.

#### Ride On Bus Service: Existing and Planned

Twelve Ride On bus routes operate within the GEASP Area (Figure 23). The existing Ride On bus routes provide access to many important transit hubs around the Germantown and in other parts of Montgomery County. The current service provides commuters access to Metro stations in Shady Grove (nonstop service), Rockville, and Bethesda, as well as to the Germantown MARC Station. These Metro and train stations provide residents with mobility alternatives to Washington, DC, and Virginia. Ride On routes stopping at Rockville Metro station also allow riders to access MARC and Amtrak trains.

Although Ride On routes do allow access to many areas in and around Montgomery County, limited service might be a restricting factor for current riders and for attracting new ones. Table 22 shows the service frequency for the routes serving Germantown.

*Table 22. Existing Ride On Routes and Service Frequency*

<b>Frequency AM Peak (6:00 AM – 10:00 AM)</b>	<b>Routes</b>	<b>Frequency PM Peak (3:00 PM – 7:00 PM)</b>	<b>Routes</b>
10 minutes or less	100	10 minutes or less	
15 – 20 minutes	55, 61, 70, 74	15 – 20 minutes	55, 100
25 – 30 minutes	90, 97	25 – 30 minutes	70, 90, 97
35 – 40 minutes	73, 75, 83, 98	35 – 40 minutes	61, 73, 74, 75, 83, 98
45 – 50 minutes	79	45 – 50 minutes	79

*Source: Ride On Routes and Schedules, MCDOT.*

Only one route operates with a frequency under 10 minutes during the morning peak period, while a couple others operate within a time frame of 15 to 20 minutes during morning and afternoon peak hours. The vast majority of the Ride On routes operate within a time frame of 25 to 40 minutes during the morning and afternoon peak hours.

Service on the weekends is very limited, especially on Sundays when several routes do not operate. Ride On routes on Saturdays exhibit waiting times of no less than 30 minutes and can even exceed to 50 minutes. The nonstop service route to Shady Grove Metro Station is around 30 minutes on Saturdays and 35 minutes on Sundays. ADA Express and Paratransit services are also limited, with very

few buses provided during off-peak hours and a frequency of no less than 20 minutes during morning and afternoon peak hours.

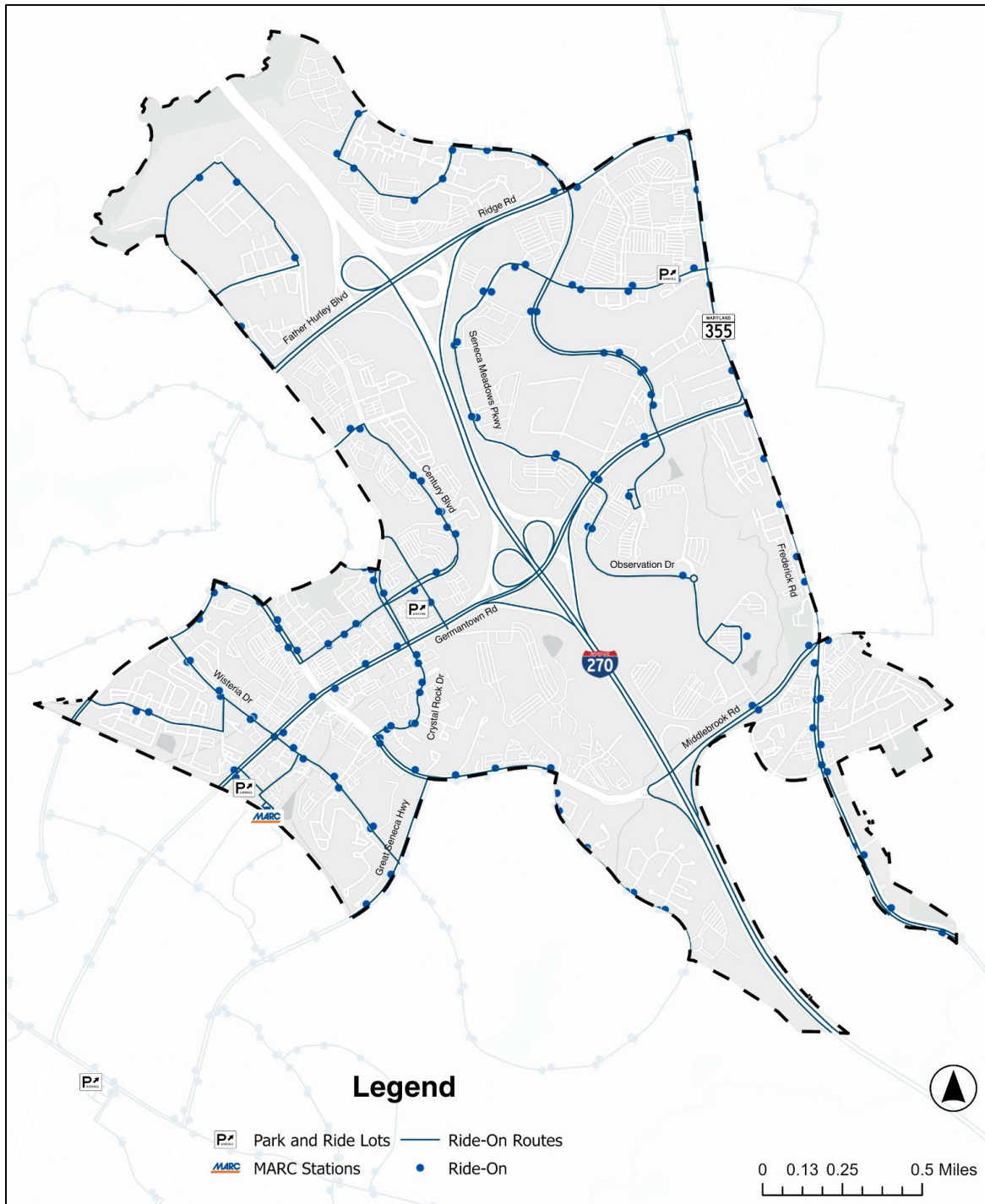


Figure 23. Existing Ride On Routes and Germantown MARC Station

### The Corridor Cities Transitway and Corridor Connectors

The Corridor Cities Transitway (CCT) was intended to be a 15-mile fixed-route transit project from the COMSAT facility near Clarksburg to the Shady Grove Metro Station. Once conceived to reach as far

north as Frederick, the mode of the system—light rail or Bus Rapid Transit (BRT)—was initially left unspecified to provide future flexibility. Later decisions settled on the BRT mode, and stations north of COMSAT were removed from further consideration.

The final CCT was divided into two phases. Phase one was intended to be a nine-mile BRT line operating between the Metropolitan Grove MARC Station and the Shade Grove Metrorail Station. Phase two included Germantown by extending Phase one by six miles and adding four BRT stations: Germantown, Cloverleaf, Dorsey Mill, and COMSAT. In 2019, the state removed all future funding of the CCT from its Consolidated Transportation Plan, killing the project. The Montgomery County Planning Department replaced the CCT with a network of BRT “Corridor Connectors” in the 2022 *Corridor Forward: The I-270 Transit Plan*. The 2009 Plan relied on the completion of the CCT for a successful implementation of the plan. Major job centers in the county all have access to rapid transit, and businesses often seek out such areas when deciding where to locate. The Corridor Connectors will provide some of the functionality of the former CCT, but the Sector Plan Amendment may need new recommendations to provide more robust transit service to the area.

### Pedestrian Network

The Pedestrian Level of Comfort (PLoC) analysis is used to identify locations in the existing walking network that are uncomfortable due to inadequate or incomplete sidewalks and crossings. Uncomfortable pedestrian facilities are usually located alongside roadways that contain narrow sidewalks with no buffers and where there are long-distance crossings (due to the number of lanes), high posted speeds, and long corner radii, or in the absence of sidewalks and crossings. Several major roadways in the GEASP area contain unacceptable and uncomfortable sidewalks or crossings. Some of these major roadways are Frederick Road, Germantown Road, Father Hurley Boulevard, Ridge Road, Middlebrook Road, and Crystal Rock Drive. Most of these roads are High Injury Network (HIN) corridors. A map showing the PLoC in the 2009 Plan area with crashes involving pedestrians is shown in Figure 24.

Pedestrian safety statistics are concerning in the area, as a high number of crashes involve pedestrians. The Germantown area has one of the county’s highest concentrations of pedestrian crashes. From 2015 to 2024, pedestrian crashes have resulted in five fatalities and 34 severe injuries in the 2009 Plan area. Overall, there were over 197 pedestrian crashes registered between those years. The pattern seems to occur specifically in areas where studies show, and pedestrians have indicated, the existence of unacceptable or uncomfortable pedestrian networks. Crashes with pedestrians are also frequently observed around or inside the road network and parking lots of several retail centers.

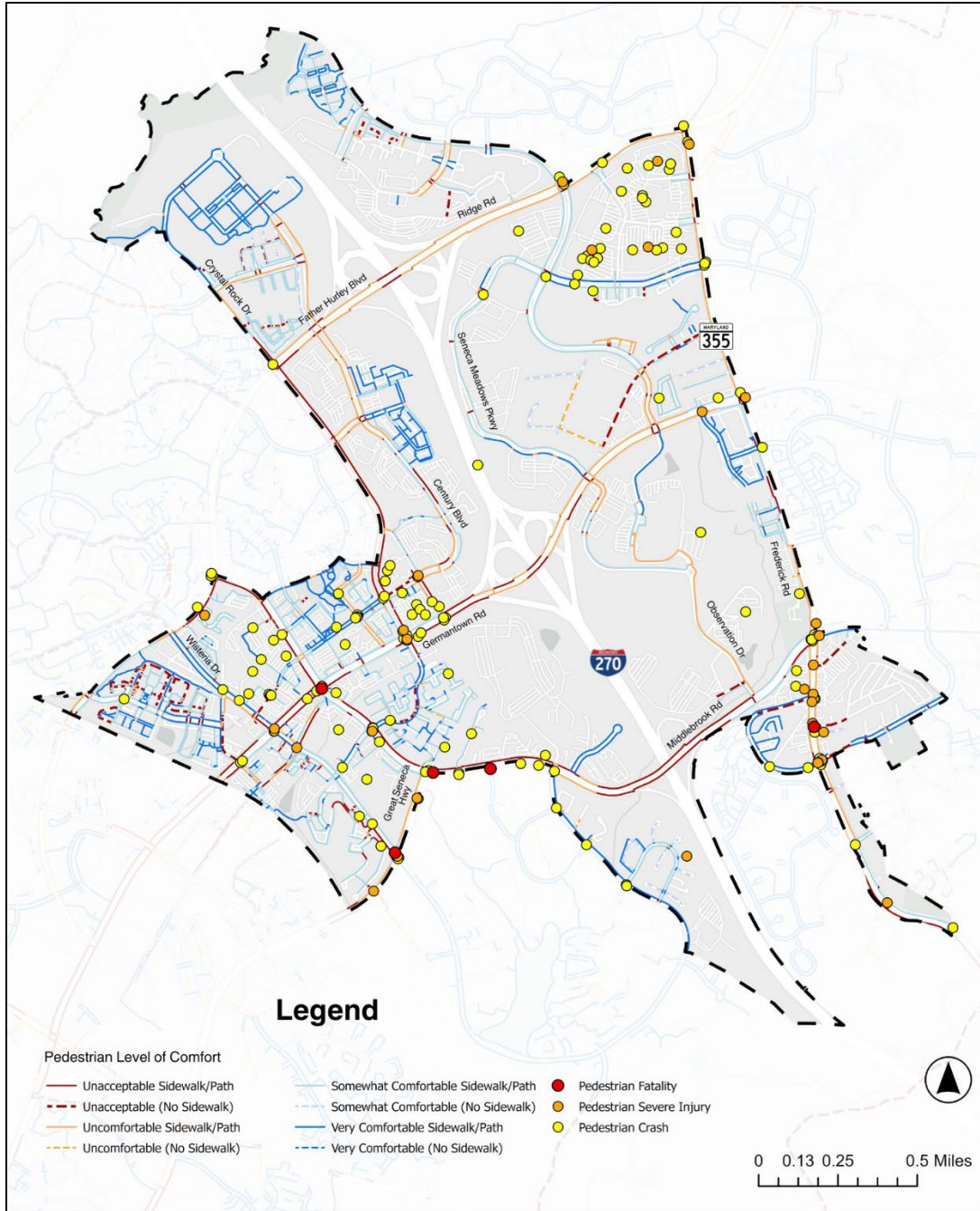


Figure 24. Pedestrian Level of Comfort (PLOC) and Pedestrian Crashes in the 2009 Plan area, January 2015 – November 2024

### Bicycle Network

Bicycle Level of Traffic Stress is an approach that quantifies the amount of stress that bicyclists feel when they ride close to traffic. It assigns a stress level to streets and bikeways based on factors such as traffic speed, number of lanes, frequency of on-street parking turnover, and ease of intersection crossings. When a street or bikeway receives a relatively poor score, it is a sign that a change is needed to make it a place where more people will feel comfortable bicycling. A map showing the bicycle level of stress in the GEASP area with crashes involving bicyclists is shown in Figure 25.

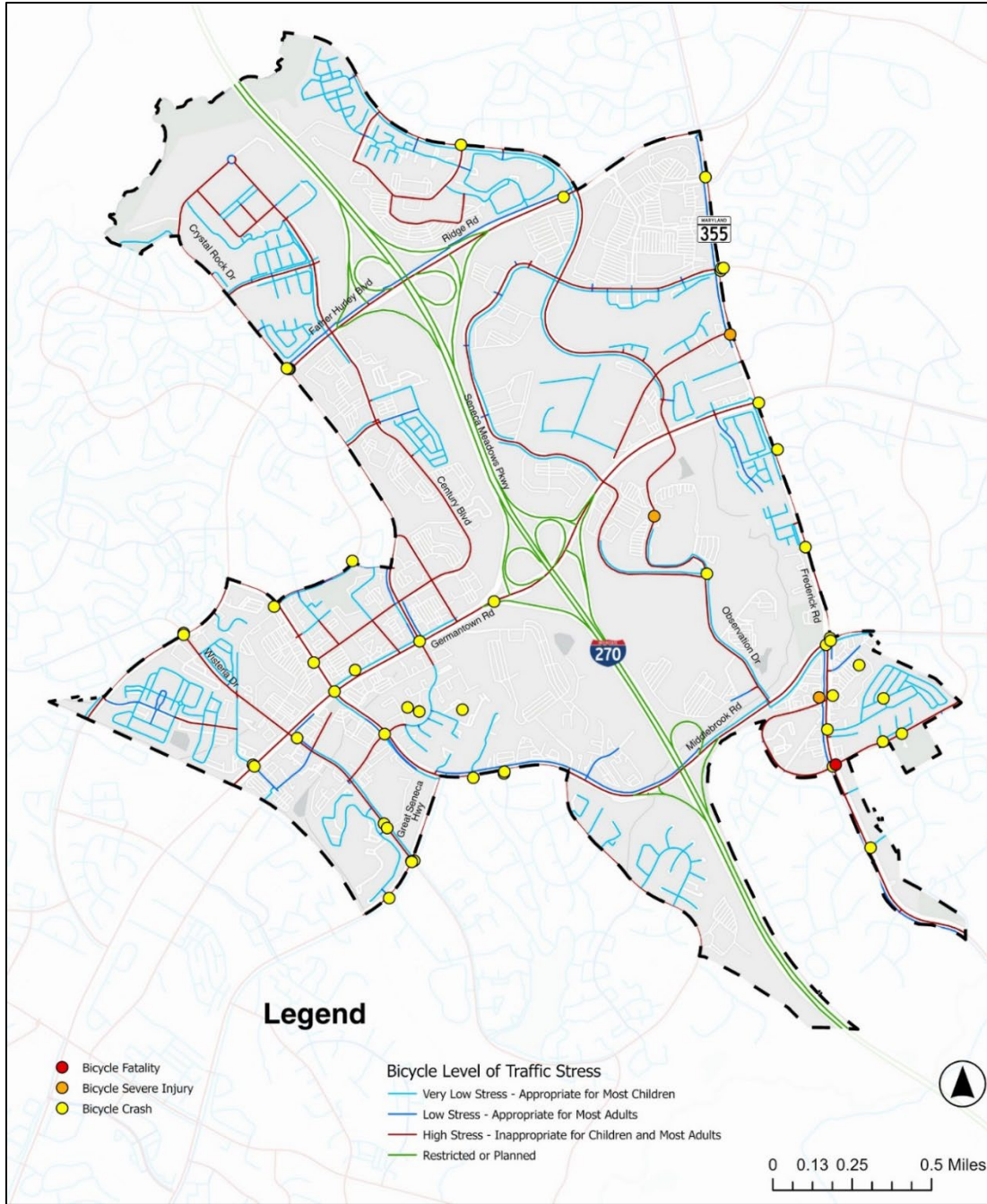


Figure 25. Bicycle Level of Traffic Stress and Bicycle Crashes in the 2009 Plan area, January 2015 – November 2024

Several of the bicycle networks in the 2009 Plan area are high stress, meaning that they are inappropriate for children and most adults. All the major and several minor roads in the area have been identified as having a high level of stress for bicycling. From 2015 to 2024 there were over 54 bicycle crashes in the 2009 Plan area, including one fatality and three severe injuries. Almost all the bicycle crashes are located on high stress roads. Germantown Road and Frederick Road have the highest concentration of bicycle crashes in the area.



## Environment

Characterized by two watersheds, various streams, wetlands, ample forests, and good tree canopy coverage, Germantown has environmental features that attract many Montgomery County citizens to live and play. It is crucial to conserve and maintain these environmental resources to provide long-term benefits for people and nature in the area.

### Watersheds

The *Germantown Employment Area Sector Plan* lies within two major watersheds: Great Seneca Creek and Little Seneca Creek (see Figure 26). Little Seneca Creek and its tributaries are among the area's most critical environmental resources since they drain to Little Seneca Reservoir, which serves as one of the region's emergency drinking water supplies. Accordingly, maintaining its water quality is a primary objective. The water quality of the lake and creeks have deteriorated since 1989. However, the greenbelt surrounding Germantown provides an opportunity to conserve these water bodies.

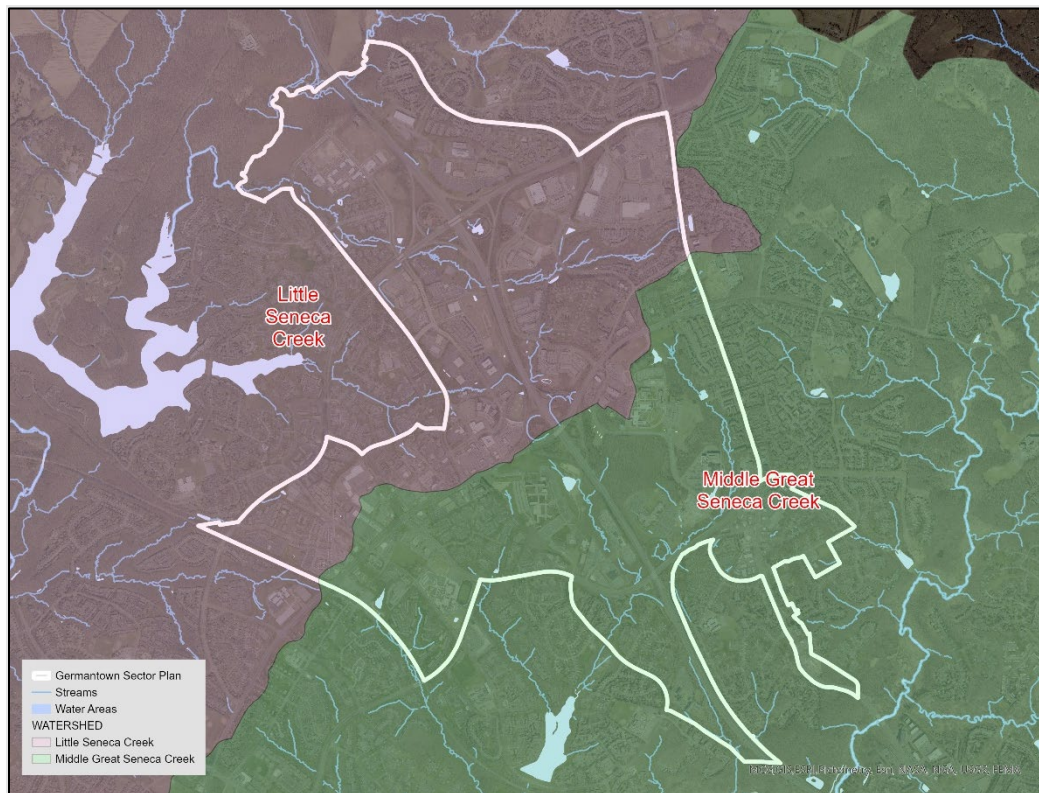


Figure 26. Major watersheds in the 2009 Plan area

### Water Quality

Water quality conditions are monitored as part of the Montgomery County Countywide Stream Protection Strategy (CSPS). Baseline monitoring done in the 1990s indicated good to fair water quality in subwatersheds within the Sector Plan area. The most recent completed round of monitoring—between 2016 and 2021—indicates poor to good conditions. Subsequent monitoring shows a continuing trend of declining water quality. The current data reflects the deterioration of the Little Seneca Creek water quality, which was rated as poor (see Figure 27).

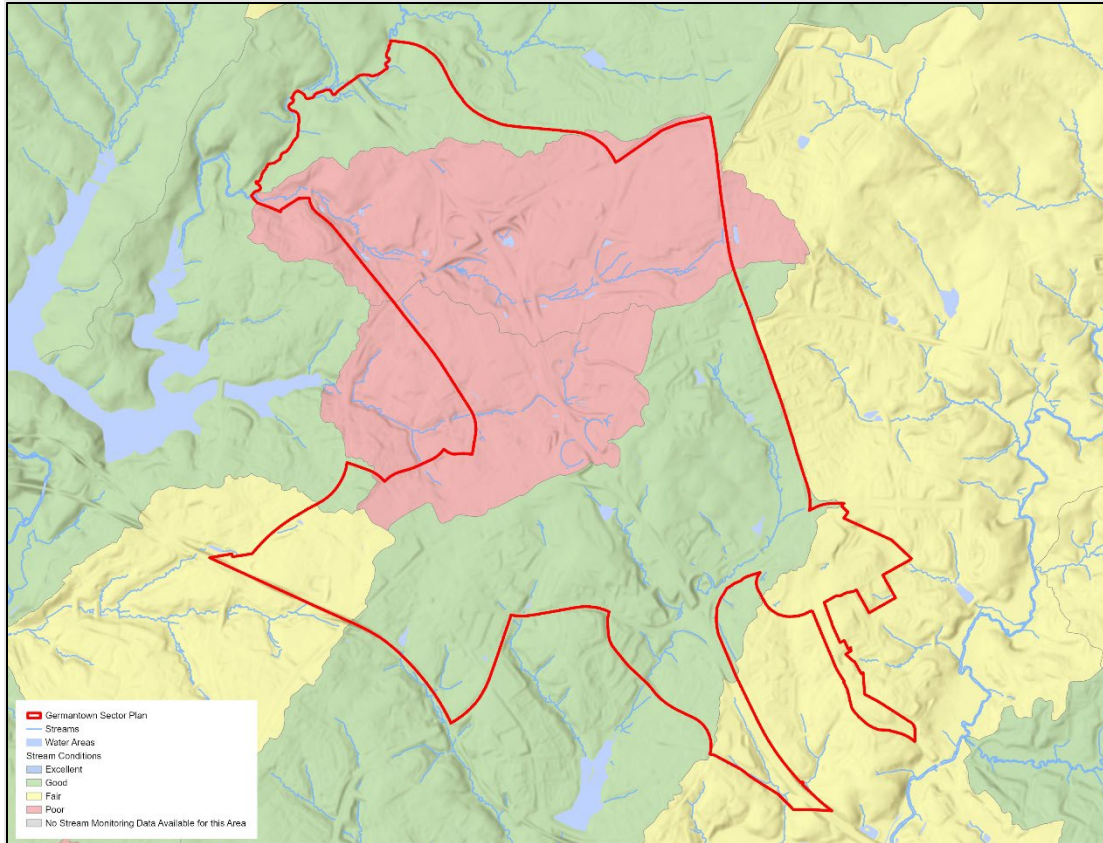


Figure 27. Water quality in the 2009 Plan area. Green areas have good water quality, yellow is fair, and pink indicates poor water quality.

## Wetlands

Wetlands are aquatic environments that provide numerous benefits for people and wildlife, including water quality improvements, flood retention, and carbon sequestration, in addition to providing habitats for fish and wildlife. Wetlands tend to be concentrated in the valley floors of streams in the headwaters and floodplains of Great Seneca and other tributaries along the eastern portion of the Little Seneca watershed. Wetlands account for around four percent of the GEASP area (Figure 28).

Bogs are acidic, low-oxygen wetlands that form soils known as peats. The unique composition of bogs creates a habitat for rare and threatened flora and fauna that have adapted to live in acidic, low-oxygen conditions. Besides their biodiversity values, bogs act as carbon sinks due to their ability to store carbon in their peat layer and vegetation. Bogs help reduce flooding due to their ability to contain runoff. Accordingly, conserving boglands contributes significantly toward mitigating the impacts of climate change and reducing carbon emissions. Bogs also improve water quality by helping keep drinking water cool and clean and filtering out sediments, pollutants, and nutrients. Germantown Bog is considered one of the most important wetlands in the area. The state of Maryland has designated it as a Wetland of special concern.

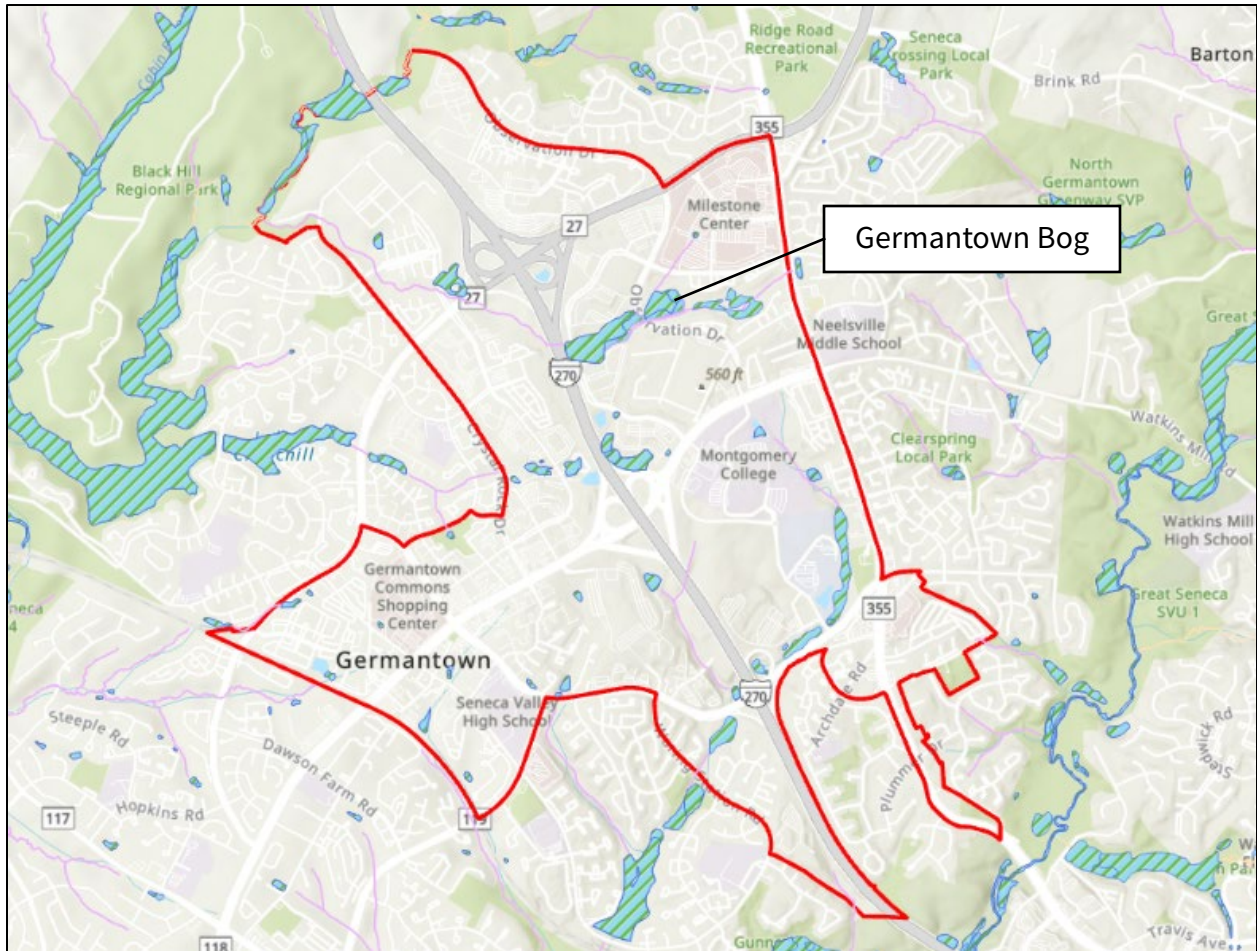


Figure 28. Wetlands and water areas, such as lakes and ponds, in the Study Area

### Impervious Surfaces

The deterioration of the water quality of local streams and tributaries is directly associated with ineffective stormwater management practices, the percentage of impervious cover within the watershed, and the loss of forest cover and wetlands. Impervious cover is any type of human-made surface that does not absorb and filter rainwater. The percentage of imperviousness at which water quality degradation begins varies from 8 to 10 percent. Higher levels of impervious cover are associated with increased pollutants and sedimentation, stream bank erosion, increased water temperatures, and decreased stream bank stability. The impervious surface covers 1,058 acres (approximately 41%) of the 2009 Plan area (see Figure 29).

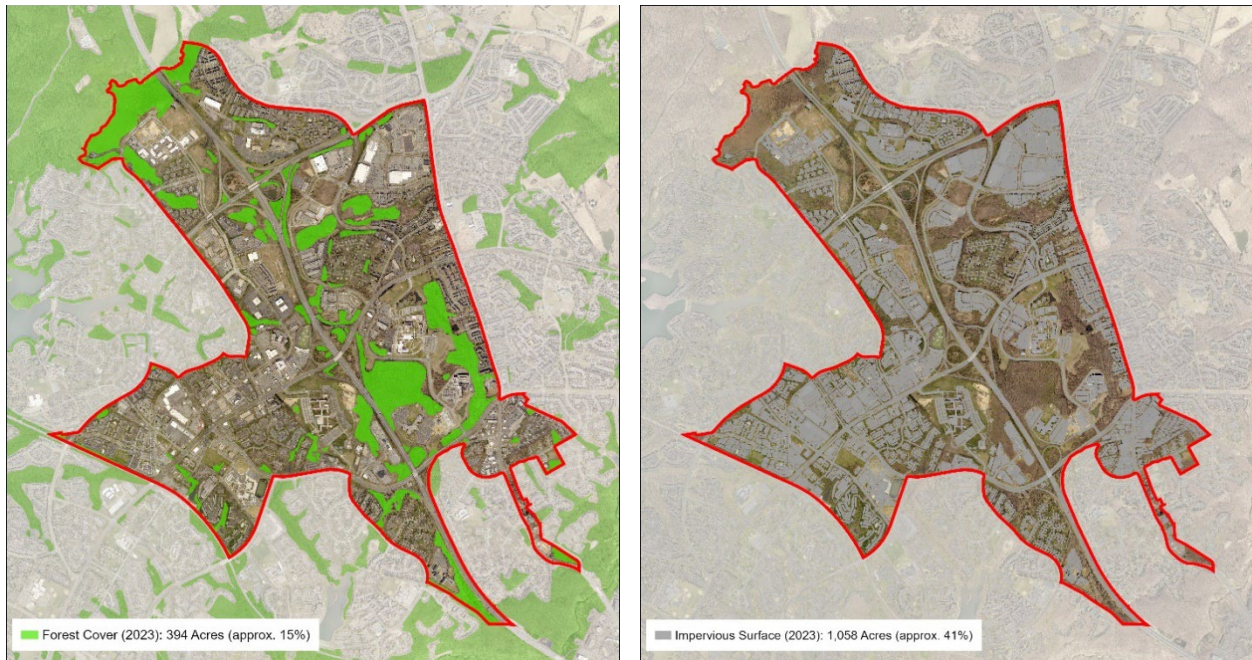


Figure 29. Forest cover (left) and impervious surfaces (right) in 2023

### Forests and Tree Canopy

Most of the forest area has been lost in Germantown due to prior agricultural and development activities. The latest data from 2023 indicates forest cover in the study area to be 398 acres (roughly 15%). Most remaining forests are on steep slopes, flood plains, and along streams. One of the most significant forested areas in the sector plan area is a 25-acre mature forest of oak and beech trees in the 2009 Plan’s North End district. This forest provides various ecosystem services, including habitat, water quality protection, flood retention, carbon sequestration, and air pollution mitigation. Accordingly, the conservation of this area is very important. Around 846 acres (32.5%) of tree canopy exists in the area (see Figure 30). This includes the areas identified as forests above.



Figure 30. Tree canopy within the 2009 Plan area. (Note: tree canopy also includes forested areas.)

Tree canopy is dispersed on private properties, parking lots, and streets. However, the highest tree canopy coverage by land use was found in public street rights-of-way and parking, mainly due to the trees planted within the I-270 interchanges. It should be noted that this is very likely an increase in tree cover in the Germantown area; the 1989 *Germantown Master Plan* noted that extensive farming activities in the area had led to bare fields with mature trees only in the stream valleys, and that the only trees to be found otherwise were generally planted by builders and residents.

### Climate Change Impacts

According to the U.S. Climate Change Vulnerability Index<sup>3</sup>, which uses 184 indicators to cumulatively assess the impacts of health, social and economic factors, the environment, and existing infrastructure on an area, Germantown ranks in the 19th percentile nationally on the overall vulnerability score (higher scores indicate greater vulnerability) (see Figure 31).

<sup>3</sup> Environmental Defense Fund and Texas A&M University, <https://map.climatevulnerabilityindex.org/>



Germantown is also expected to experience major risks from heat. Heat Severity is used to indicate where certain areas are hotter than the average temperature for that area, and where extreme heat conditions are detected. Extreme heat is defined as a long period (2 to 3 days) of high heat and humidity with temperatures above 90 degrees. Extreme heat conditions pose a major threat to health, resulting in fatigue, heat stroke, heat exhaustion, and heat cramps. According to the latest studies, Germantown is expected to experience at least 16 days of extreme heat per year in 30 years. Areas with large amounts of impervious surfaces lead to urban heat islands where the effects of severe heat become even more extreme (Figure 33). The flooding risk in Germantown is also expected to increase over the upcoming 30 years, with 5.2% of the properties expected to be affected.

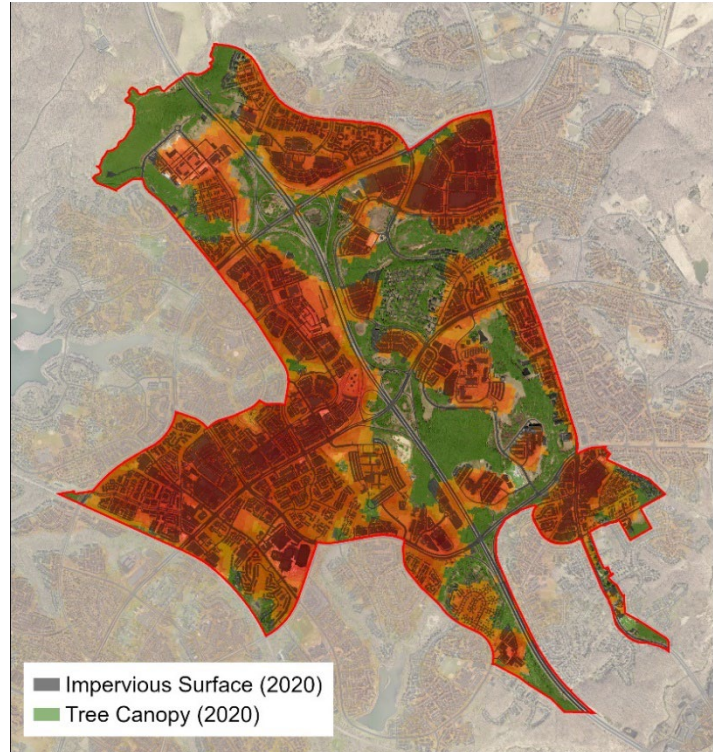


Figure 33. Heat severity in the 2009 Plan area

One strategy used to mitigate the effects of climate change is through the construction of “green buildings” in new developments, such as buildings with higher levels of LEED (Leadership in Energy and Environmental Design) certification. According to the latest data from 2023, Germantown has 20 buildings that are LEED-certified (Figure 34).

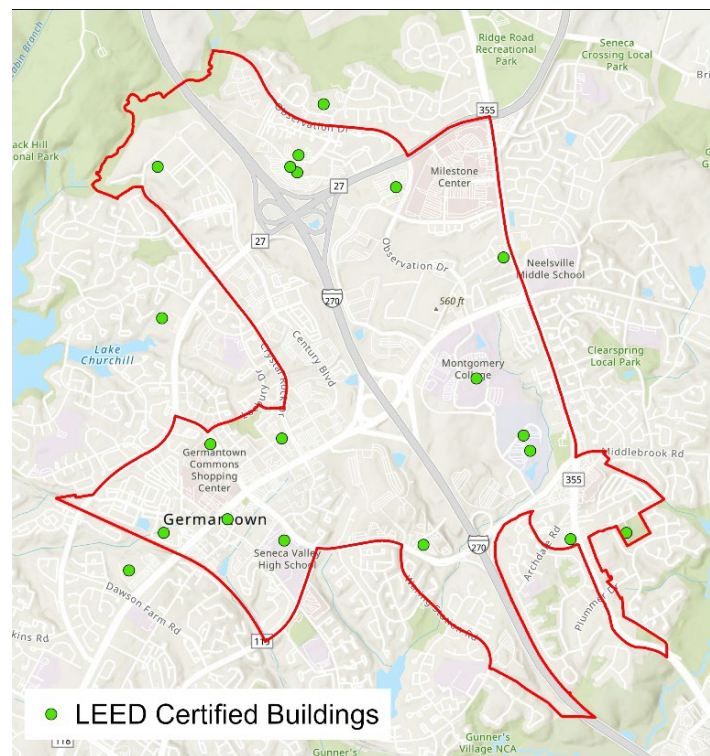


Figure 34. LEED-certified buildings in the 2009 Plan area

# Parks

## Existing Parks

The 2009 Plan boundary contains eight parks, all of them in the Montgomery Parks system. Four parks are completely within the boundary and four are only partially within the boundary (Figure 35).



Figure 35. Parks within and around the 2009 Plan area

Table 23. Parks within and partially within the 2009 Plan area

Parks within the Plan Boundary	Parks Partially within the Plan Boundary
Germantown East Local Park	Little Seneca Greenway SVP
Germantown Town Center Urban Park	Great Seneca SVU 1
Germantown Square Urban Park	North Germantown Greenway SVP
Plumgar Local Park	Black Hill Regional Park



Other nearby parks provide service to the GEASP area as well. When a two-mile service buffer is applied around the 2009 Plan boundary, the total number of parks rises to 53: 46 in the Montgomery Parks System, five City of Gaithersburg Parks, and two parks in the Maryland State Park and Wilderness Management Area system (Figure 36).

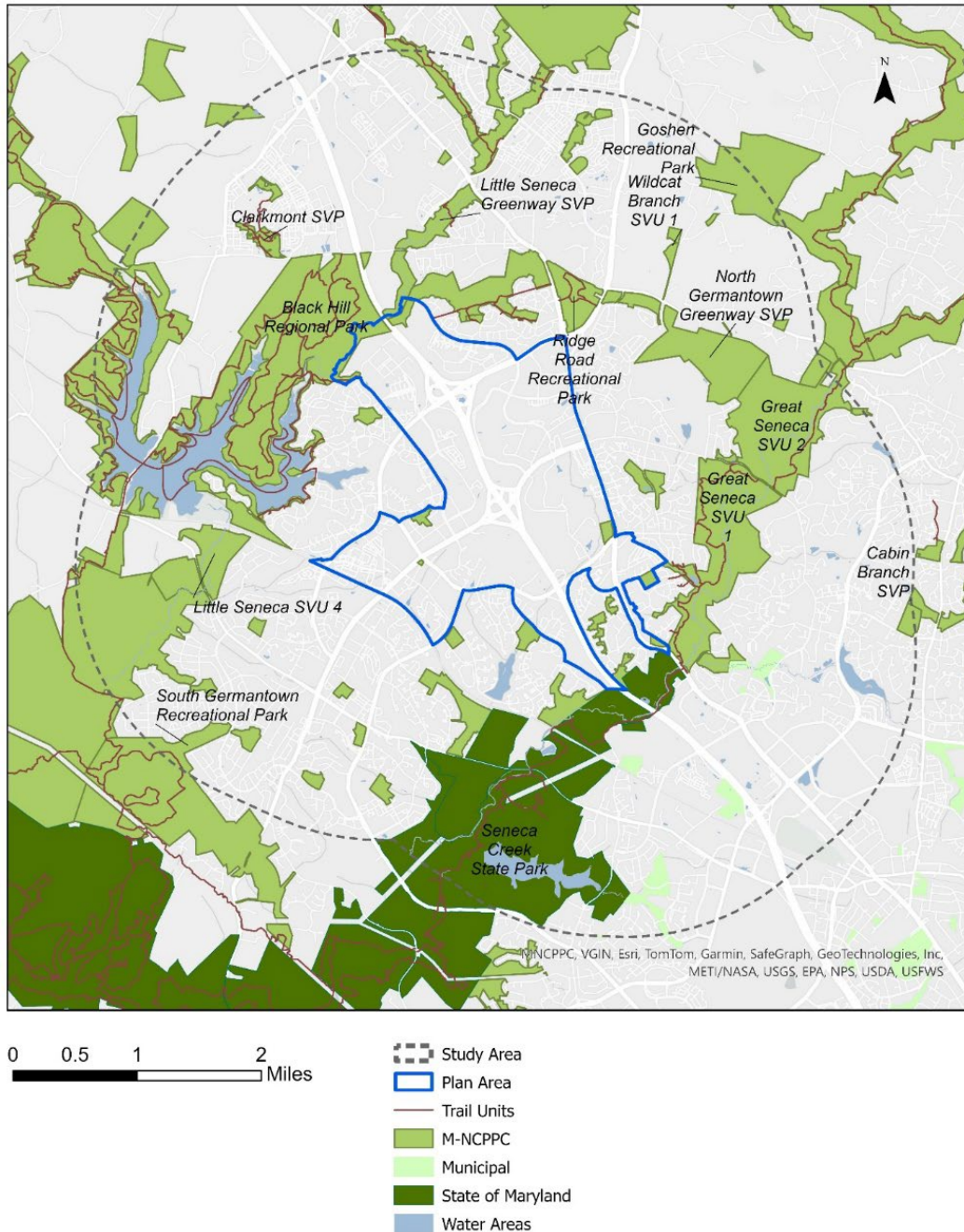


Figure 36: Parks within the two-mile service area

Of the eight parks within the 2009 Plan boundary, the Germantown East Local Park is leased to the Boys & Girls Clubs, and three others are managed for conservation purposes and do not provide opportunities for direct use or visitation.

Only four parks within the Sector Plan boundary are readily available for public use—Germantown Town Center Urban Park, Germantown Square Local Park, Plumgar Local Park, and Black Hill Regional Park. Therefore, most opportunities for physical activity, social connectivity, or experiencing nature in Montgomery Parks exist within the wider two-mile service area.

### Priority Facilities

Priority facilities in Montgomery Parks include playgrounds, athletic fields, courts, picnic shelters, restrooms, community gardens, skate parks, dog parks, and park activity buildings (PAB). Of these priority facility types, only one playground and three basketball courts<sup>4</sup> are present within the Sector Plan boundary, resulting in fewer facilities per person than elsewhere in urban or Corridor Focused Growth areas. The additional parks within the two-mile service area increase the number of priority facilities per person, but levels remain lower than other urban or Corridor Focused Growth areas.

Table 24. Priority M-NCPPC Facilities per Capita (i.e. per 1000 persons)

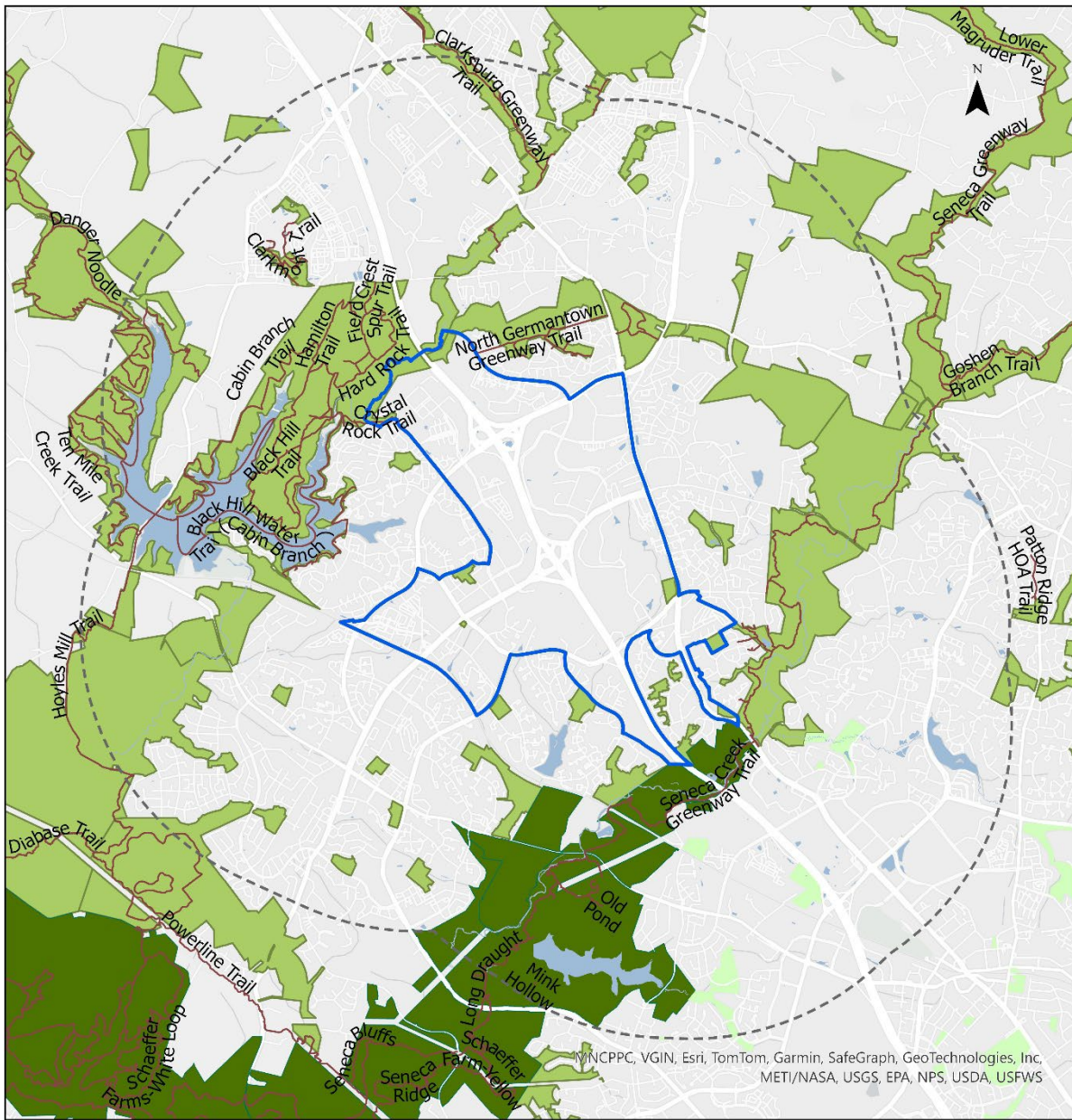
Category	Sector Plan area	2-mile Service area	Rural	Suburban	Urban	Countywide
Playground	<b>0.06</b>	<b>0.14</b>	0.44	0.39	0.28	0.30
Athletic field <sup>5</sup>	<b>0.00</b>	<b>0.16</b>	0.66	0.40	0.25	0.29
Rectangle	<b>0.00</b>	<b>0.10</b>	0.42	0.21	0.12	0.14
Diamond	<b>0.00</b>	<b>0.06</b>	0.40	0.20	0.11	0.14
Softball field	<b>0.00</b>	<b>0.05</b>	0.28	0.17	0.10	0.11
Baseball field	<b>0.00</b>	<b>0.01</b>	0.12	0.03	0.02	0.02
Cricket field	<b>0.00</b>	<b>0.01</b>	0.02	0.01	0.01	0.01
Court	<b>0.23</b>	<b>0.23</b>				
Tennis court	<b>0.00</b>	<b>0.10</b>	0.34	0.42	0.23	0.27
Pickleball court (Dedicated, Shared)	<b>0.00</b>	<b>0.00</b>	0.44	0.18	0.07	0.11
Basketball court	<b>0.23</b>	<b>0.12</b>	0.42	0.24	0.16	0.18
Sand volleyball court	<b>0.00</b>	<b>0.02</b>	0.04	0.02	0.01	0.01
Picnic shelter <sup>6</sup>	<b>0.00</b>	<b>0.16</b>	0.64	0.26	0.07	0.13
<b>Population</b>	17,369	152,444	50,230	194,014	817,780	1,062,040

Trails are measured by mileage, rather than per capita. Within the 2009 Plan boundary, there are no through- or longer trails, and there is less than one mile of walking paths in parks. However, an extensive network of trails is available at parks within the two-mile service area, with over 30 miles of natural surface trails and over 20 miles of hard surface trails (Figure 37).

<sup>4</sup> A fourth basketball court exists at the Boys & Girls Club facility in East Germantown Local Park and may provide some public use.

<sup>5</sup> M-NCPPC fields do not include fields currently not permitted by MNCPPC: 2 rectangles and 1 diamond in Great Seneca SVU1 (under MOU with MCPC); 1 Soccer field in Germantown East Local Park (MOU with Boys & Girls Clubs of Greater Washington). Note that 8 fields in South Germantown Recreational Park and 22 fields in the SoccerPlex are outside but near the 2009 Plan area.

<sup>6</sup> Picnic shelters (EAM) outside of the study area require validation.



0 0.5 1 2 Miles

- Study Area
- Plan Area
- Trail Units
- M-NCPPC
- Municipal
- State of Maryland
- Water Areas

Figure 37: Park trails within the two-mile service area

Within the 2009 Plan boundary, 71% percent of the population is within a 10-minute walk to a public park. Therefore, 30% of the population in the Sector Plan area does not have easy walk access. In

addition, only 32% of residents have 10-minute walk access to playgrounds, and less than 20% of the population has walk access to other priority facilities. The map in Figure 38 shows Experience Improvement Areas, which indicate locations that lack walk access to parks and park facilities for physical activity, contemplation, and social gathering.

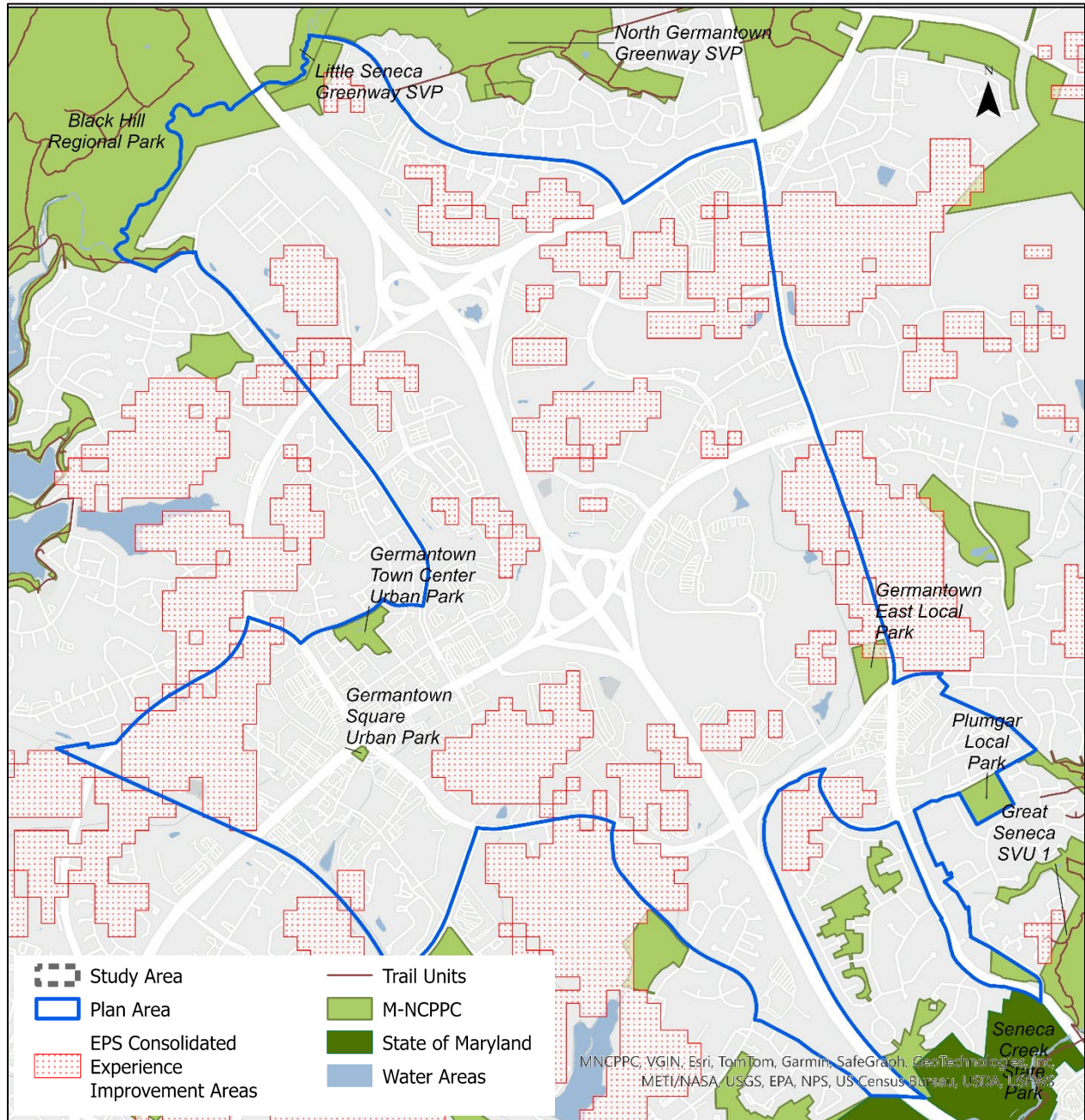


Figure 38. Experience Improvement Areas. Areas in light red indicate locations that lack walk access to parks and park facilities for physical activity, contemplation, and social gathering.

### Park Profiles

The following profiles describe the eight parks within the Sector Plan boundary, as well as the Maryland SoccerPlex, which is a major draw for the area.

#### *Germantown Town Center Urban Park*

- *Existing Conditions:* This 7.25-acre park shares a parking lot with the Germantown Library and is near the BlackRock Center for the Arts. The park primarily offers opportunities to foster social connectivity and to experience nature with walkways, seating areas, and a sculptural element surrounding a naturalized storm water management facility. There are open areas that can be used for physical activity but there are no facilities specifically intended to provide those opportunities.

#### *Germantown Square Urban Park*

- *Existing Conditions:* This 0.77-acre park has open lawn areas, paved walking paths, shaded seating, and a stone retaining wall with integrated seating. A two-phase renovation project is in-process; the first phase removed several deteriorating structures including a gazebo, and the second phase, scheduled to begin in 2025, will include new seating and accessibility improvements.

#### *Plumgar Local Park*

- *Existing Conditions:* This 8.5-acre park is home to the Plum Gar Community Recreation Center operated by the Montgomery County Recreation Department. The park also has basketball courts, a playground, and an unprogrammed athletic field that are used by the community and for programs offered by the Recreation Center. The athletic field previously had a softball diamond and rectangular field overlay that were removed due to the limited on-site parking which could not support the Center and the programmed athletic field use.

#### *Germantown East Local Park*

- *Existing Conditions:* This 8-acre park is leased to the Boys & Girls Clubs of Greater Washington and is the home of their Germantown Branch. Use of the facilities here requires Boys & Girls Club membership, and this location does not function as a public park.

#### *Black Hill Regional Park (partially within Sector Plan boundary)*

- *Existing Conditions:* This is a larger Regional Park just to the northwest of the 2009 Plan area. It contains Little Seneca Lake, a reservoir managed by WSSC, and provides boating and fishing opportunities, a nature center, a dog park, picnic facilities, playgrounds, a community garden, volleyball courts, and miles of natural and hard surface trails. The eastern edge of the park is adjacent to the northern edge of the 2009 Plan boundary with a trailhead providing access to the park from Crystal Rock Drive.

#### *Great Seneca Stream Valley Unit 1 (partially within Sector Plan boundary)*

- *Existing Conditions:* A 4.3-acre portion of this park located between Fredrick Road (MD 355) and Wheatfield Drive is within the 2009 Plan boundary. This piece of parkland is mostly wooded and is managed for conservation purposes.

#### *Little Seneca Greenway Stream Valley Park (partially within Sector Plan boundary)*

- *Existing Conditions:* Approximately 3.5 acres of this park is located at the edge of the 2009 Plan boundary beyond the current northern end of Observation Drive north of Ridge Road. This parkland is wooded within the stream valley buffer and is managed for conservation purposes. The park is also included in the ongoing Clarksburg Gateway Sector Plan area.

#### *North Germantown Greenway Stream Valley Park (partially within Sector Plan boundary)*

- *Existing Conditions:* An 11-acre section of this park is partially within the 2009 Plan boundary near the current northern end of Observation Drive north of Ridge Road. This parkland is wooded within the stream valley buffer and is managed for conservation purposes.

#### *The Maryland SoccerPlex and South Germantown Recreation Park (just outside two-mile service area)*

- *Existing Conditions:* Located southwest of Germantown just outside of Parks' two-mile service area, this 644-acre park is a major draw for residents and visitors. The park contains many amenities including:
  - SoccerPlex with 24 soccer fields, including a stadium and an indoor athletic facility is a public-private partnership.
  - The King Barn Dairy MOOseum is a public-private partnership.
  - Montgomery TennisPlex with indoor tennis and pickleball courts is a public private partnership.
  - Germantown Indoor Swim Center is operated by Montgomery County Department of Recreation.
  - Washington Nationals Miracle Field is a public private partnership.
  - Driving range, mini-golf, and splash pad water park.
  - Cricket, baseball, softball, and rectangular fields.
  - Tennis, basketball, and volleyball courts.
  - Mountain bike park & BMX pump track
  - An archery range, picnic shelters, community garden, and paved and natural surface trails.
- *Prior MP Recommendations:* This park is not within the 2009 Plan Area.

#### Other Public Open Space

Like parks, other forms of public open space in the sector plan boundary include privately-owned public spaces (POPS), county operated sites, and the Seneca Valley High School campus.

#### POPS

There are several POPS within the 2009 Plan boundary, mostly located in and provided by the recent development projects. The most prominent POPS are the trails, seating areas, and playgrounds at the Black Hill development between Crystal Rock Drive and Century Boulevard.

#### County Sites

A small amount of public open space is present around the Upcounty Regional Services Center and the Germantown Library. A larger town commons public open space is situated in front of the BlackRock Center for the Arts (BRCA). It currently exists as an open lawn area, but the BRCA is investigating ways to improve the town commons area as recommended by the 2009 Plan.

#### Seneca Valley High School (SVHS)

Some of the SVHS facilities are available for permitting through the Community Use of Public Facilities (CUPF) program, including the cafeteria, gyms, auditorium, and athletic fields. The track and courts—tennis/pickleball and basketball—may be available for public use as well.

## Parks Summary

As evidenced by the low per capita ratios for the priority facilities and the initial Experience Improvement Area analysis, the GEASP area appears likely to benefit from additional parkland and park facilities, especially if the population and density increase. The 2009 Plan made several recommendations for parks and recreation that remain unfulfilled, including a new urban park near the Upcounty Regional Services Center and a new recreation center east of I-270. Future master plans should reevaluate previous recommendations, especially those that have not been fulfilled, and further investigate the need for additional parkland and additional facilities on existing parkland.

# Community Facilities

## Schools

As shown in Figure 39, the GEASP area is served by nine elementary schools, four middle schools, and two high schools based on MCPS' school service area boundaries for the 2024-2025 school year. Seneca Valley High School is within the 2009 Plan area; there are no MCPS elementary or middle school facilities located within the 2009 Plan area.

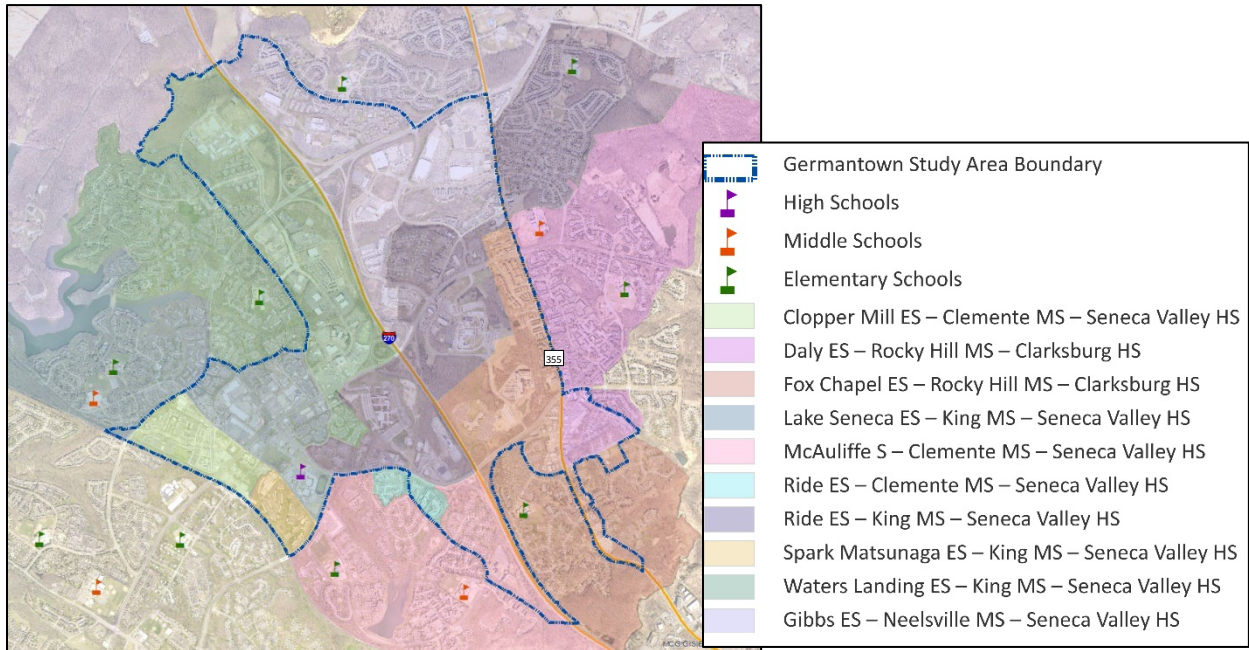
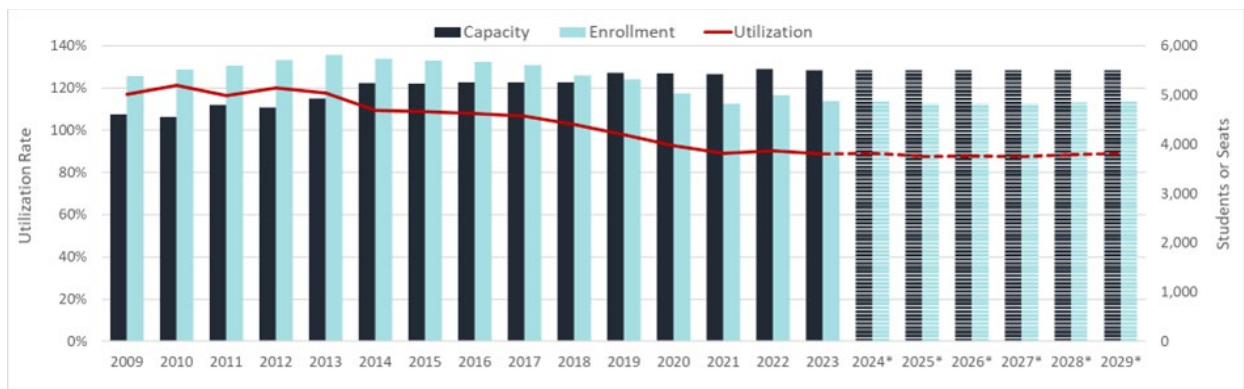


Figure 39. GEASP area school feeder pattern (2024-2025 school year)

## Elementary Schools

The GEASP area elementary schools experienced high levels of overutilization in the past couple decades, but the enrollment peaked in 2013 and has been on an overall decline since. MCPS is projecting the enrollment level to stay stable throughout the next few years, with expectations of having more than 600 surplus seats available across the nine elementary schools in the 2029-2030 school year.

Chart 21. Utilization trend and projections of elementary schools serving the GEASP area

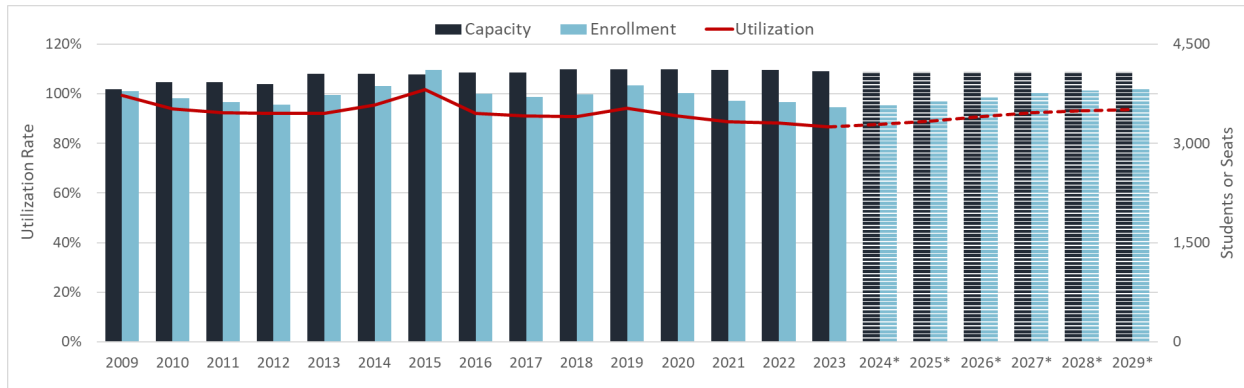




## Middle Schools

The collective capacity available at middle schools serving the 2009 Plan area has been sufficient overall throughout the past 15 years. Projections indicate that there will be more than 200 surplus seats available across the four middle schools in the 2029-2030 school year.

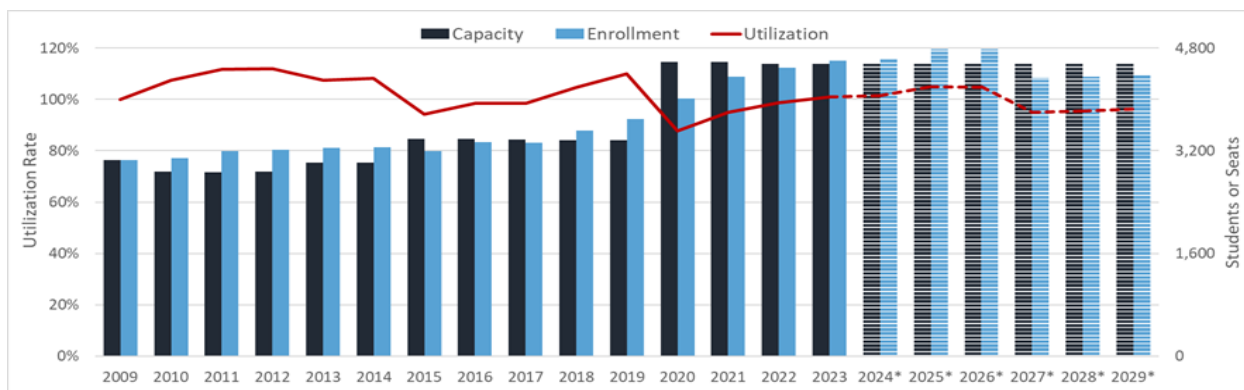
*Chart 22. Utilization trend and projections of middle schools serving the GEASP area*



## High Schools

Enrollment at the high school level has grown steadily since 2015. The Board of Education approved a boundary study scope for the opening of Crown High School and Expansion of Damascus High School that includes both Clarksburg and Seneca Valley, as well as nine other high schools. The projections for the 2027 school year and beyond shown in Chart 23 reflect a hypothetical scenario in which the utilization rate of all eleven high schools identified in the Board of Education’s approved scope become balanced as a result of the boundary change. While the actual results may differ due to several other factors that MCPS considers, the chart shows that there is sufficient capacity across all schools included in the boundary study with only the capacity relief provided by Crown HS (the expansion of Damascus HS has been delayed to beyond 2029).

*Chart 23. Utilization trend and projections of high schools serving the GEASP area*



## Other Community Facilities

### Arts Center

The BlackRock Center for the Arts anchors the town commons area in the Town Center. Located along Century Boulevard and completed in 2002, BlackRock is the prime venue for performing and visual arts in the Upcounty area. In addition to performing arts shows, the Center offers arts education classes and free gallery exhibitions. BlackRock has recently revised their strategic plan and has been engaging the community to get feedback on ideas to reinvigorate the town commons space in front of the Center.

### Library

The Germantown branch of the Montgomery County Public Libraries is next to the BlackRock Center for the Arts on Century Boulevard in the Town Center.

### Public Safety

Germantown Fire Station 29 and Montgomery County Police Department's District 5 Station are co-located west of I-270 on a triangular block bounded by Century Boulevard, Crystal Rock Drive, and Aircraft Drive at the edge of the Town Center district. On the east side of I-270, Montgomery County Fire and Rescue Station 24 is at Boland Farm and Frederick roads.

### Community and Recreation Centers

The GEASP area is served by two community centers operated by the Montgomery County Department of Recreation. The Plum Gar Community Center, at 19561 Scenery Drive, is in the 2009 Plan's Fox Chapel district southeast of Frederick and Middlebrook roads within Plumgar Local Park. The Germantown Community Center and Germantown Outdoor Pool are co-located southwest of the Plan area at 18905 Kingsview Road.

### Montgomery College

The Germantown campus of Montgomery College on the east side of I-270 serves over 6,000 students with a wide range of courses and programs, including signature programs in biotechnology and cybersecurity. Holy Cross Germantown Hospital is part of the Pinkney Innovation Complex for Science and Technology.

### Sidney Kramer Upcounty Regional Services Center

The Upcounty RSC contains many community-focused organizations, including a large Department of Health and Human Services (DHHS) presence. The RSC also has offices for the county's Department of Housing and Community Affairs (DHCA), WorkSource Montgomery, Montgomery County Public Schools (MCPS), the Office of Organizational Development, the Montgomery County Department of Transportation (MCDOT) Transportation Services, and several other organizations, and is home to the Peppertree Children's Center.

## Findings of the Germantown Employment Area Study

This section of the report contains brief summaries of the issues identified in our study as having been the most detrimental to the success of the 2009 Plan.

### A Changing Office Market

A fundamental shift in the office market over the last couple of decades appears to be a large factor that helps explain current conditions. The primary employment industries in Montgomery County are in office buildings. However, there have been significant changes in the office market nation-wide, with more efficient use of existing office space and a reduced demand for new office space. The COVID-19 pandemic amplified this change by dramatically increasing teleworking and further shifting office utilization trends. There has also been a change in where employers want to locate their businesses to better attract employees. The Research and Special Projects Division conducted a market study, included in this report, to better understand the existing commercial real estate market in Germantown and how it has been affected by this shift. On the positive side, we are seeing a continued demand for life sciences development in the GEASP area. Unfortunately, companies in this sector have very different needs for workspace than is provided in a traditional office building design, limiting opportunities for adaptive reuse and calling into question the GEASP's emphasis on office buildings.

### Building Lot Termination Purchase Requirement

Planners are also assessing the specified priority for a minimum level of Building Lot Termination (BLT) credits for projects located within the Germantown Transit Mixed Use (GTMU) overlay zone. These properties are in the Commercial Residential (CR) zone, but the overlay zone requires the purchase of BLTs for projects developed under the Optional Method of development. Any significantly large project would use the Optional Method because the Standard Method of development is limited to 0.5 FAR (floor area ratio). While all Optional Method projects in the CR zone are required to provide public benefits by purchasing BLT easements (or making payments to the Agricultural Land Preservation Fund [ALPF] for any fractional shares of a BLT) for 7.5% of the incentive density above that allowed by the Standard Method, the GTMU overlay zone requires such projects to purchase BLTs based on 50% of the incentive density floor area—nearly seven times the requirement of CR-zoned properties elsewhere in the county, such as in Bethesda or Silver Spring.

The BLT requirement has been little exercised in the overlay zone since it was enacted and may be a factor in limiting interest or ability in property development or realizing greater densities or employment opportunities. (Note that the higher BLT requirement in the GTMU overlay zone results in more benefit points awarded for that benefit category than for regular CR-zoned properties utilizing a much smaller number of BLTs, meaning an applicant would need fewer benefit points from other available public benefit point categories, but it would be difficult to assign a price multiple for these other categories given the large array of choices. However, most public benefit points can be achieved more cheaply than through the purchase of BLTs.) Other 2009 Plan recommendations, such as specific residential and commercial minimums and maximums, may also be contributing to the problem.

### Site-Specific Residential and Commercial Targets

Another component of the 2009 Plan that has raised concerns over the years is the specific percent of residential or commercial uses recommended for individual development sites, especially with regard

to fairly low residential maximums on many properties. Some property owners have expressed interest in developing more housing in Germantown, but master plan conformance prevents them from building as many units as they would like. Given the shift in the office market and the current housing shortage, the sector plan amendment provides an opportunity to reevaluate these recommendations.

### Changes to Transit Recommendations

The 2009 Plan area has also seen major changes in its planned transportation network. The funding and completion of the Corridor Cities Transitway (CCT) was seen as essential to the success of the 2009 Plan. An integral part of regional plans for several decades, the CCT was never funded and was finally dropped from the state's transportation budget in 2019. Montgomery Planning's 2022 *Corridor Forward: The I-270 Transit Plan* ("Corridor Forward") replaced much of the former CCT route with a series of bus rapid transit (BRT) routes, but the routes near Germantown have not been funded or studied in detail and will not provide the same level of service expected from a fixed transit line.

### Unsafe Streets

The Montgomery County Department of Transportation has identified several of the deadliest High Injury Network (HIN) road segments in Germantown. Germantown is crisscrossed by numerous state highways and other major roads that were designed for throughput of vehicular traffic with less concern about the experience of those walking and rolling along the roads. These roads were planned based on the idea that Germantown would become a major employment center, but the changes in the office market are making this increasingly unlikely. As a result, many of the roads are overbuilt. They are unnecessarily wide, making crossings and sidewalks uncomfortable or unsafe, and detracting from good urban form. We have also heard from community members that many of the streets feel unsafe for pedestrians and bicyclists. This report identifies some of the more troublesome roads.

## Conclusion

The Germantown Employment Area Study, now a plan amendment, aimed to evaluate the effectiveness of the 2009 *Germantown Employment Area Sector Plan* in attracting employment opportunities and realizing its recommendations. This report serves to inform where interventions may be needed based on existing conditions and will act as a baseline for evaluating progress once the Plan Amendment is approved and its recommendations are implemented.

While many recommendations from the 2009 Plan remain unrealized, their implementation could significantly improve Germantown in the short term. For instance, establishing an urban service district for community maintenance and placemaking, or a parking district to foster urban development, could enhance the area. The recommendation to renovate the town commons area in front of the BlackRock Center for the Arts and a branding initiative for Germantown are currently being jointly pursued by BlackRock and the Gaithersburg-Germantown Chamber of Commerce, aiming to create a more attractive community gathering space and a distinct Germantown identity.

The Planning team has already been interacting with area residents to understand their lived experience. A summary of what we heard from residents in our public meetings and through our online questionnaire, which included responses from over 300 people, is included in a separate report. Many people told us they really appreciate the quiet, peaceful neighborhoods in Germantown and enjoy the large number of options to meet their basic shopping needs, but residents also feel like Germantown doesn't have a sense of place and lacks a town center that serves as a focal point and gathering place for the community. At the same time, they are dissatisfied with the current restaurant and entertainment options and say that they must leave Germantown for better dining or nightlife. Some people like the car-centric nature of Germantown, but many wish that it were more walkable and bikeable. And while many appreciate the large parks and trails nearby, some have identified a need for more activated park spaces closer to the Town Center.

Continuing to implement the recommendations from the 2009 Plan will address some community concerns and may attract new businesses. However, it is unlikely that the office jobs anticipated in 2009 will materialize due to fundamental shifts in work patterns and preferences. Current zoning, BLT purchase requirements, specific mixes of residential and commercial uses, recommended parking structures, unsafe roads, and the lack of robust public transportation are all factors preventing Germantown from reaching its full potential. With ample space to accommodate thousands of additional dwelling units, developers are eager to build more housing in Germantown but are constrained by market conditions and the 2009 Plan's restrictions. The Plan Amendment offers an opportunity to reevaluate Germantown as a place focused on providing residential units, desirable community amenities, and building Complete Communities.

## Links

- **Project Website**  
[montgomeryplanning.org/germantown-sector-plan-amendment/](http://montgomeryplanning.org/germantown-sector-plan-amendment/)
- **2009 Germantown Employment Area Sector Plan**  
[montgomeryplanning.org/planning/communities/upcounty/germantown/germantown-2009/](http://montgomeryplanning.org/planning/communities/upcounty/germantown/germantown-2009/)

## Appendixes

### Existing Development Capacity by District

#### Assumptions Documentation

All calculations are based on the existing zoning for each parcel.

- Land use codes are from the existing GIS parcel file and are determined based on the Montgomery County Land Use Coding Manual.
- Land use codes 470 (communications), 480 (utilities), and 740 (non-developable private open space) were removed from development capacity analysis.
- Based on industry standards and analysis for master plans in similar plan areas, the following square footages were used to estimate the number of units that could be built from the total possible residential square footage capacity.
  - Single-family detached: 2,800 SF
  - Single-family attached: 2,200 SF
  - Multi-family: 1,250 SF

#### Limitations on Development Mix from 2009 Plan

The 2009 Plan defined seven distinct districts within the study area. Within these districts, the 2009 Plan identified a preferred mix of housing and commercial development on development sites. The following list highlights instances where the preferred mix of development is less than the maximum development potential allowed by zoning. Abbreviations in the list, such as TC-33 and NE-1, refer to development site designations in the 2009 Plan. All development sites with similar limitations are shown in the tables below.

- The residential requirement for TC-33 from the 2009 Plan is a maximum of 300 dwelling units (DU). However, the current zoning could allow up to 402 multi-family units using standard method development and up to 491 multi-family units using optional method development. There is potential for additional dwelling units, but the 2009 Plan caps this potential.
- The commercial requirement for CL-1, CL-2, CL-3, CL-4, CL-5, and CL-6 from the 2009 Plan is a range of 50-60% commercial, but the current zoning allows 62.5% maximum. There is potential for additional commercial development, but the 2009 Plan caps this potential.
- The residential requirements for NE-1 from the 2009 Plan is a maximum of 40% residential, but the current zoning could allow up to 50% residential. There is potential for more dwelling units, but the 2009 Plan prescribes less.
- The residential requirements for NE-6 from the 2009 Plan is a maximum of 20% residential. However, the current zoning could allow up to 50% residential development. There is potential for additional dwelling units, but the 2009 Plan caps this potential.
- The residential requirements for SM-1 from the 2009 Plan is a maximum of 30% residential, but the current zoning could allow up to 37.5% residential. There is potential for more dwelling units, but the 2009 Plan prescribes less.

Town Center District

Town Center District			Existing	Standard Method Total (max units possible)	Optional Method Total (max units possible)
Zone Types	CR, CRT, GR	unchanged		unchanged	
Square Feet	7,555,768	unchanged		unchanged	
Acres	173	unchanged		unchanged	
Gross Floor Area	1,502,837	14,259,080		15,995,710	
SFD Dwelling Units	0	13		0	
SFA Dwelling Units	227	0		16	
Multi-family Dwelling Units	678	5,543		6,934	
<b>Total Dwelling Units</b>	<b>1,979</b>	<b>5,556</b>		<b>6,950</b>	
<b>Total Residential Square Footage</b>	<b>761,120</b>	<b>6,966,285</b>		<b>8,702,915</b>	
Office Square Footage	648,951	N/A		N/A	
Retail Square Footage	341,967	N/A		N/A	
Industrial Square Footage	18,000	N/A		N/A	
<b>Total Commercial Square Footage</b>	<b>1,008,918</b>	<b>7,292,795</b>		<b>7,292,795</b>	

*Town Center District Development Sites with Restrictions in 2009 Plan<sup>7</sup>*

<b>Site</b>	<b>Site Name</b>	<b>Zoning</b>	<b>Residential 2009 Plan</b>	<b>Residential Existing Zoning</b>	<b>Commercial 2009 Plan</b>	<b>Commercial Existing Zoning</b>	<b>2009 Plan Limits Zoning?</b>
TC-9	Bellemead property	CR-2.0 C-0.5 R-1.5 H-180 T	70% minimum	75% maximum	N/A	50% maximum	No
TC-17	Euro-motors	CR-2.0 C-1.5 R-1.5 H-100 T	N/A	1.5 FAR maximum (with 2.0 FAR overall mix)	N/A	1.5 FAR maximum (with 2.0 FAR overall mix)	Yes, overall 1.5 FAR
TC-19	Safeway	CR-2.0 C-1.5 R-1.5 H-100 T	N/A	1.5 FAR maximum (with 2.0 FAR overall mix)	N/A	1.5 FAR maximum (with 2.0 FAR overall mix)	Yes, overall 1.5 FAR
TC-23	German-town Commons Shopping Center	CR-1.0 C-0.75 R-0.5 H-60 T or 100 T	40% maximum	50% maximum	N/A	75% maximum	Yes, residential
TC-24	Upcounty Government Center	CR-1.0 C-0.75 R-0.5 H-100 T	40% maximum	50% maximum	N/A	75% maximum	Yes, residential
TC-28	Sugarloaf Shopping Center	CRT-0.75 C-0.5 R-0.5 H-100 T	N/A	0.5 FAR maximum (with 0.75 FAR overall mix)	N/A	0.5 FAR maximum (with 0.75 FAR overall mix)	Yes, overall 0.6 FAR

<sup>7</sup> Town Center development sites TC-25, 29, and 30 were rezoned in the 2019 *MARC Rail Communities Sector Plan* and are not included in this table.



Town Center West End District

Town Center West End District			Existing	Standard Method Total (max units possible)	Optional Method Total (max units possible)
Zone Types	CR, CRT, GR	unchanged	unchanged		
Square Feet	6,282,147	unchanged	unchanged		
Acres	144	unchanged	unchanged		
Gross Floor Area	1,194,394	8,319,515	9,547,159		
SFD Dwelling Units	0	0	0		
SFA Dwelling Units	366	0	0		
Multi-family Dwelling Units	708	3,983	4,965		
<b>Total Dwelling Units</b>	<b>1,074</b>	<b>3,983</b>	<b>4,965</b>		
<b>Total Residential Square Footage</b>	<b>1,295,237</b>	<b>4,978,346</b>	<b>6,205,991</b>		
Office Square Footage	76,248	N/A	N/A		
Retail Square Footage	393,689	N/A	N/A		
Industrial Square Footage	149,963	N/A	N/A		
<b>Total Commercial Square Footage</b>	<b>619,900</b>	<b>3,341,168</b>	<b>3,341,168</b>		

Town Center West End District Development Sites with Restrictions in 2009 Plan<sup>8</sup>

Site	Site Name	Zoning	Residential 2009 Plan	Residential Existing Zoning	Commercial 2009 Plan	Commercial Existing Zoning	2009 Plan Limits Zoning?
TC-30	Trevion property	CR-1.25 C-0.75 R-0.75 H-100 (& H-75)	1.0 FAR average, 35% maximum, at Wisteria Drive side of site	75% maximum	1.0 FAR average, 65% minimum office, hotel, service retail	75% maximum	Yes, residential (also overall 1.0 FAR)
TC-33	Marten's property	CRT-1.0 C-0.25 R-0.75 H-65 T	300 DU suggested	75% maximum	200,000 SF maximum	25% maximum	Yes, residential (also overall 0.8 FAR)

<sup>8</sup> Town Center West End development sites TC-34 through TC-41 were rezoned in the 2019 *MARC Rail Communities Sector Plan* and are not included in this table.

Gateway District

Gateway District	Existing	Standard Method Total (max units possible)	Optional Method Total (max units possible)
Zone Types	R, RE, PD, IM	unchanged	unchanged
Square Feet	16,565,011	unchanged	unchanged
Acres	380	unchanged	unchanged
Gross Floor Area	4,341,676	10,650,191	11,379,000
SFD Dwelling Units	98	550	80
SFA Dwelling Units	444	952	1748
Multi-family Dwelling Units	1,325	1060	1,293
<b>Total Dwelling Units</b>	<b>1,867</b>	<b>2,561</b>	<b>3,121</b>
<b>Total Residential Square Footage</b>	<b>1,903,620</b>	<b>4,957,801</b>	<b>5,686,610</b>
Office Square Footage	1,534,116	N/A	N/A
Retail Square Footage	88,047	N/A	N/A
Industrial Square Footage	223,903	N/A	N/A
<b>Total Commercial Square Footage</b>	<b>1,846,066</b>	<b>5,692,390</b>	<b>5,692,390</b>

Cloverleaf District

Cloverleaf District	Existing	Standard Method Total (max units possible)	Optional Method Total (max units possible)
Zone Types	CR	unchanged	unchanged
Square Feet	5,606,237	unchanged	unchanged
Acres	129	unchanged	unchanged
Gross Floor Area	1,516,800	12,614,034	13,847,406
SFD Dwelling Units	0	0	0
SFA Dwelling Units	188	0	0
Multi-family Dwelling Units	300	4,485	5,472
<b>Total Dwelling Units</b>	<b>488</b>	<b>4,485</b>	<b>5,472</b>
<b>Total Residential Square Footage</b>	<b>723,894</b>	<b>5,606,237</b>	<b>6,839,610</b>
Office Square Footage	785,728	N/A	N/A
Retail Square Footage	0	N/A	N/A
Industrial Square Footage	223,222	N/A	N/A
<b>Total Commercial Square Footage</b>	<b>1,008,950</b>	<b>7,007,797</b>	<b>7,007,797</b>

*Cloverleaf District Development Sites with Restrictions in 2009 Plan*

Site	Site Name	Zoning	Residential 2009 Plan	Residential Existing Zoning	Commercial 2009 Plan	Commercial Existing Zoning	2009 Plan Limits Zoning?
CL-1	Century Technology Park	CR-2.0 C-1.25 R-1.0 H-145 T	40-50%	50% maximum	50-60%	62.5% maximum	Yes, commercial
CL-2	270 Corporate Center 1	CR-2.0 C-1.25 R-1.0 H-145 T	40-50%	50% maximum	50-60%	62.5% maximum	Yes, commercial
CL-3	270 Corporate Center 2	CR-2.0 C-1.25 R-1.0 H-145 T	40-50%	50% maximum	50-60%	62.5% maximum	Yes, commercial
CL-4	Cloverleaf South 1	CR-2.0 C-1.25 R-1.0 H-145 T	40-50%	50% maximum	50-60%	62.5% maximum	Yes, commercial
CL-5	Cloverleaf South 2	CR-2.0 C-1.25 R-1.0 H-145 T	40-50%	50% maximum	50-60%	62.5% maximum	Yes, commercial
CL-6	First Federal Property	CR-2.0 C-1.25 R-1.0 H-145 T	40-50%	50% maximum	50-60%	62.5% maximum	Yes, commercial

North End District

North End District	Existing Total	Standard Method Total (max units possible)	Optional Method Total (max units possible)
Zone Types	CR, R, IM	unchanged	unchanged
Square Feet	13,123,015	unchanged	unchanged
Acres	301	unchanged	unchanged
Gross Floor Area	2,140,843	13,662,379	15,004,301
SFD Dwelling Units	0	0	0
SFA Dwelling Units	824	0	0
Multi-family Dwelling Units	1,061	4,880	5,953
<b>Total Dwelling Units</b>	<b>1,885</b>	<b>4,880</b>	<b>5,953</b>
<b>Total Residential Square Footage</b>	<b>2,779,954</b>	<b>6,099,647</b>	<b>7,441,570</b>
Office Square Footage	771,500	N/A	N/A
Retail Square Footage	0	N/A	N/A
Industrial Square Footage	209,340	N/A	N/A
<b>Total Commercial Square Footage</b>	<b>980,840</b>	<b>7,562,732</b>	<b>7,562,732</b>

North End District Development Sites with Restrictions in 2009 Plan

Site	Site Name	Zoning	Residential 2009 Plan	Residential Existing Zoning	Commercial 2009 Plan	Commercial Existing Zoning	2009 Plan Limits Zoning?
NE-1	Symmetry/ Totah property	CR-2.0 C- 1.75 R-1.0 H-145 T	40% maximum	50% maximum	60% minimum	87.5% maximum	Yes, residential (also overall 1.0 FAR)
NE-6	Milestone North property	CR-2.0 C- 1.75 R-0.5 H-125 T	20% maximum	50% maximum	N/A	87.5% maximum	Yes, residential (also overall 1.0 FAR)

Seneca Meadows/Milestone District

Seneca Meadows/Milestone District	Existing	Standard Method Total (max units possible)	Optional Method Total (max units possible)
Zone Types	CR, CRT, R, EOF	unchanged	unchanged
Square Feet	16,868,991	unchanged	unchanged
Acres	387	unchanged	unchanged
Gross Floor Area	2,806,708	16,366,426	17,427,431
SFD Dwelling Units	133	197	42
SFA Dwelling Units	144	0	198.8116095
Multi-family Dwelling Units	394	3,850	4,697
<b>Total Dwelling Units</b>	<b>671</b>	<b>4,047</b>	<b>4,937</b>
<b>Total Residential Square Footage</b>	<b>922,062</b>	<b>5,364,729</b>	<b>6,425,734</b>
Office Square Footage	602,421	N/A	N/A
Retail Square Footage	1,091,227	N/A	N/A
Industrial Square Footage	376,994	N/A	N/A
<b>Total Commercial Square Footage</b>	<b>2,070,642</b>	<b>11,001,697</b>	<b>11,001,697</b>

Seneca Meadows/Milestone District Development Sites with Restrictions in 2009 Plan

Site	Site Name	Zoning	Residential 2009 Plan	Residential Existing Zoning	Commercial 2009 Plan	Commercial Existing Zoning	2009 Plan Limits Zoning?
SM-1	Seneca Meadows north of Crystal Rock Tributary	CR-2.0 C- 1.75 R-0.75 H-145 T	30% maximum	37.5% maximum	70% minimum	87.5% maximum	Yes, residential

Montgomery College District

Montgomery College District	Existing	Standard Method Total (max units possible)	Optional Method Total (max units possible)
Zone Types	EOF, R, CRT, LSC	unchanged	unchanged
Square Feet	14,220,541	unchanged	unchanged
Acres	326	unchanged	unchanged
Gross Floor Area	2,383,638	22,114,606	22,184,696
SFD Dwelling Units	0	287	47
SFA Dwelling Units	198	0	304
Multi-family Dwelling Units	524	273	333
<b>Total Dwelling Units</b>	<b>722</b>	<b>560</b>	<b>684</b>
<b>Total Residential Square Footage</b>	<b>1,098,115</b>	<b>1,145,880</b>	<b>1,215,971</b>
Office Square Footage	377,604	N/A	N/A
Retail Square Footage	3,195	N/A	N/A
Industrial Square Footage	143,732	N/A	N/A
<b>Total Commercial Square Footage</b>	<b>524,531</b>	<b>20,968,726</b>	<b>20,968,726</b>

Fox Chapel District

Fox Chapel District	Existing	Standard Method Total (max units possible)	Optional Method Total (max units possible)
Zone Types	CRT, R, RT, NR, RH, GR	unchanged	unchanged
Square Feet	5,026,073	unchanged	unchanged
Acres	115	unchanged	unchanged
Gross Floor Area	646,978	4,038,884	4,310,994
SFD Dwelling Units	206	115	17
SFA Dwelling Units	0	129	280
Multi-family Dwelling Units	386	775	946
<b>Total Dwelling Units</b>	<b>592</b>	<b>1,019</b>	<b>1,243</b>
<b>Total Residential Square Footage</b>	<b>428,515</b>	<b>1,574,394</b>	<b>1,846,504</b>
Office Square Footage	0	N/A	N/A
Retail Square Footage	218,665	N/A	N/A
Industrial Square Footage	146,750	N/A	N/A
<b>Total Commercial Square Footage</b>	<b>365,415</b>	<b>2,464,490</b>	<b>2,464,490</b>

## Senior Housing

There are two existing senior-specific housing options within the GEASP Area, with 251 beds/units in total. Ten other senior-specific housing options are located just outside of the plan boundary: 210 independent living units and 48 assisted living beds/units in group homes.

### Existing Within the Study Area

Plan District	Name	Type	Status	Subsidized	Beds/Units
North End	Tribute at Black Hill (Crystal Rock / Black Hill)	Group Home/ Assisted Living	Existing	No	140
Fox Chapel	Milestone Senior Germantown – Seneca Creek Senior Living	Independent Living	Existing	MPDU*	111

\* The Applicant will coordinate with the Department of Housing and Community Development to determine the program(s) to be offered that will satisfy the requirements of Section 59.3.3.2.C.ii of the Zoning Ordinance.

### Existing Outside the Study Area

Nearest Plan District	Name	Type	Status	Subsidized	Beds/Units
Gateway	Covenant Village	Independent Living	Existing	Yes	89
Cloverleaf	Churchill Senior Living	Independent Living	Existing	Yes	121
Town Center Core	Next Help Place	Group Home/ Assisted Living	Existing	No	4
Town Center West End	Asheir Manor LLC	Group Home/ Assisted Living	Existing	No	8
Town Center West End	George's Assisted Living (M&A's Place)	Group Home/ Assisted Living	Existing	No	7
Seneca Meadows/ Milestone	My Sister's Place	Group Home/ Assisted Living	Existing	No	6
Fox Chapel	Fatima's Assisted Living Services LLP	Group Home/ Assisted Living	Existing	No	8
Fox Chapel	Glorious Care LLP	Group Home/ Assisted Living	Existing	No	5
Fox Chapel	Holy Care Assisted Living LLP	Group Home/ Assisted Living	Existing	No	4
Fox Chapel	A&R Comfort Care LLC	Group Home/ Assisted Living	Existing	No	6

## Commercial Development Pipeline

The following projects are approved commercial development projects that are unbuilt or only partially built.

Name	Number	Approved GFA (SF)	Unbuilt GFA (SF)
Crystal Rock / Black Hill	12012021A	1,432,580	1,302,580
Poplar Grove	120190040	520,000	520,000
Century Technology Campus	12002095B	814,550	745,130

<b>Name</b>	<b>Number</b>	<b>Approved GFA (SF)</b>	<b>Unbuilt GFA (SF)</b>
Waters Village	120220200	29,880	29,880
Milestone Innovation Center	11987271D	1,125,000	470,000
Seneca Meadows Corporate Center	11998004A	1,526,270	286,620
College View Campus	120200170	47,887	44,639
<b>Total</b>		<b>5,496,167</b>	<b>3,398,849</b>

#### Residential Development Pipeline

The following projects are approved residential development projects that are unbuilt or only partially built.

<b>Name</b>	<b>Number</b>	<b>Approved Units</b>	<b>Unbuilt Units</b>
Crystal Rock / Black Hill	12012021A	1,089	594
Poplar Grove	120190040	541	541
Century Technology Campus	12002095B	721	262
College View Campus	120200170	142	142
<b>Total</b>		<b>2,493</b>	<b>1,539</b>

## Street Classification Table

Existing and planned streets in the GEASP Area are summarized below with their respective street typology and master-planned components. The proposed lanes are travel lanes excluding turning, parking, or acceleration lanes.

*Complete Streets Design Guide classifications of all existing and planned streets in the Master Plan of Highways and Transitways*

Street	From	To	Existing Lanes <sup>a</sup>	Planned Lanes	Transit Lanes	ROW (Feet) <sup>b</sup>	Target Speed (mph)
Town Center Boulevards							
Aircraft Dr	Germantown Rd	Century Blvd	4	4	2	100	25
Aircraft Dr	Century Blvd	Crystal Rock Dr	4	4		100	25
Century Blvd	Crystal Rock Dr	Dorsey Mill Rd	4	4	2	136	25
Cloverleaf Center Dr	Century Blvd	Crystal Rock Dr	4	4		100	35
Crystal Rock Dr	Century Blvd	Crystal Rock Trail	4	4		100	35
Crystal Rock Dr	Crystal Rock Trail	Waters Landing Dr/Kinster Dr	2	4		100	35
Crystal Rock Dr	Waters Landing Dr/Kinster Dr	Father Hurley Blvd	2	4		120	35
Crystal Rock Dr	Father Hurley Blvd	Aircraft Dr	4	4		120	35
Crystal Rock Dr	Aircraft Dr	Century Blvd	4	4		120	25
Crystal Rock Dr	Century Blvd	Germantown Rd	4	4	2	120	25
Dorsey Mill Rd	Observation Dr	Milestone Center Dr	2	4	2	150	30
Dorsey Mill Rd	Milestone Center Dr	Century Blvd	N/A	4	2	150	30
Germantown Rd	CSX railroad tracks	Bowman Mill Dr	6	6		150	30
Germantown Rd	Bowman Mill Dr	Middlebrook Rd	6	6	2	150	30
Germantown Rd	Middlebrook Rd	I-270 west side ramps	6	6	2	150	35
Goldenrod Ln	Germantown Rd	Observation Dr	4	4		80	25
Middlebrook Rd	Father Hurley Blvd	Germantown Rd	4	4		120	25
Middlebrook Rd	Germantown Rd	Great Seneca Hwy	4	4		150	30/35
Observation Dr	Dorsey Mill Rd	Boland Farm Rd	4	4	2	150	35
Seneca Meadows Pkwy	Germantown Rd	Seneca Meadows Corporate Park BRT Station	4	4		100	30



Street	From	To	Existing Lanes <sup>a</sup>	Planned Lanes	Transit Lanes	ROW (Feet) <sup>b</sup>	Target Speed (mph)
Seneca Meadows Pkwy	Seneca Meadows Corporate Park BRT Station	Observation Drive	4	4	2	130	30
Shakespeare Blvd	Observation Dr	Frederick Rd	4	4		100	35
Waterford Hills Blvd	Father Hurley Blvd	Waters Rd	4	4		112	25
Wisteria Dr	Father Hurley Blvd	Waters Rd	4	4		112	25
Wisteria Dr	Waters Rd	Germantown Rd	4	4		115	25
Wisteria Dr	Germantown Rd	Crystal Rock Dr	2	4		115	25
Wisteria Dr	Crystal Rock Dr	Great Seneca Hwy	2	4		100	25
<b>Boulevards</b>							
Boland Farm Rd	Frederick Rd	Observation Dr	2	4		80	35
Germantown Rd	I-270 west side ramps	Frederick Rd	5	6	2	150	40
Middlebrook Rd	Great Seneca Hwy	Observation Dr	6	6		150	40
Observation Dr	Little Seneca Creek	Woodcutter Dr /Waters Discovery Ln	N/A	4	2	150	35
Observation Dr	Woodcutter Dr /Waters Discovery Ln	Dorsey Mill Rd	4	4	2	150	35
Observation Dr	Boland Farm Rd	Germantown Rd	4	4	2	150	35
Observation Dr	Germantown Rd	Middlebrook Rd	4	4		80	25
Scenery Dr	Middlebrook Rd	Frederick Rd	2	4		100	35
Waring Station Rd	Middlebrook Rd	Summer Oak Dr	2	4		80	35
<b>Town Center Streets</b>							
Blunt Rd	240' south of Middlebrook Rd	Middlebrook Rd	N/A	2		60	30
Blunt Rd	Frederick Rd	240' south of Middlebrook Rd	2	2		60	30
Bowman Mill Rd	Germantown Rd	Walter Johnson Rd	2	2		60	25
Bowman Mill Rd Extended	Walter Johnson Rd	Great Seneca Hwy	N/A	2		70	25
Century Blvd	Wisteria Dr	Crystal Rock Dr	2	2		70	25
Crystal Rock Dr	Germantown Rd	475' south of Germantown Rd	2	2		80	25
Crystal Rock Dr	Middlebrook Rd	Wisteria Dr	2	2		80	25

Street	From	To	Existing Lanes <sup>a</sup>	Planned Lanes	Transit Lanes	ROW (Feet) <sup>b</sup>	Target Speed (mph)
Crystal Rock Dr	Wisteria Dr	Bowman Mill Rd Extended	N/A	2		80	25
Kinster Dr	Crystal Rock Dr	Century Blvd	2	2		100	25
Locbury Dr	Middlebrook Rd	Wisteria Dr	N/A	2		80	25
Walter Johnson Dr	Middlebrook Rd	500' west of Middlebrook Rd	N/A	2		80	25
Walter Johnson Dr	500' west of Middlebrook Rd	Bowman Mill Rd extended	2	2		80	25
Waters Rd	Wisteria Dr	90' south of Wisteria Dr	2	2		80	25
Waters Rd	90' south of Wisteria Dr	Germantown Rd	2	2		70	25
Waters House Ave	Waterford Hills Blvd	Wisteria Dr	N/A	2		70	25
New Road	Observation Dr	Goldenrod Ln	N/A	2		80	25
New Road	Crystal Rock Dr	Century Blvd	N/A	2		100	35
New Road	Crystal Rock Dr	Century Blvd	N/A	2		70	35
<b>Neighborhood Connectors</b>							
Boland Farm Rd	Observation Dr	Sunnyview Dr	2	2		80	
Cider Barrel Dr	Germantown Rd	600' south of Oxbridge Dr	2	2		70	
Cider Barrel Dr	600' south of Oxbridge Dr	Gunners Dr	N/A	2		70	
Gunners Branch Rd	Frederick Rd at Scenery Dr	Frederick Rd	2	2		80	
Locbury Dr	Rexmore Dr	Middlebrook Rd	2	2		70	25
Oxbridge Dr	Frederick Rd	Cider Barrel Rd	2	2		70	
Rexmore Dr	Locbury Dr	Crystal Rock Dr	2	2		80	25
<b>Area Connectors</b>							
Cider Press Pl	Frederick Rd	Cider Barrel Dr	2	2		70	25
Cider Press Pl	Cider Barrel Dr	Observation Dr	N/A	2		70	25
Crystal Rock Dr	475' south of Germantown Rd	Middlebrook Rd	2	2		80	25
<b>Controlled Major Highways</b>							
Father Hurley Blvd	I-270	Crystal Rock Dr	6	6		150	40
Father Hurley Blvd	Crystal Rock Dr	CSX Tracks	4	4		120	40
Frederick Rd	Great Seneca Creek	Middlebrook Rd	6	6		250	40
Frederick Rd	Middlebrook Rd	Ridge Rd	4	6		250	40
Great Seneca Hwy	Middlebrook Rd	CSX Tracks	4	4		150	30/35
Ridge Rd	I-270	Frederick Rd	6	6		150	40

Street	From	To	Existing Lanes <sup>a</sup>	Planned Lanes	Transit Lanes	ROW (Feet) <sup>b</sup>	Target Speed (mph)
Freeway							
I-270	Little Seneca Creek	Germantown Rd	6	12		300	
I-270	Germantown Rd	Great Seneca Creek	8	12		300	

a The number of existing and planned through lanes for each segment, not including lanes for turning, parking, acceleration, deceleration, or other purposes auxiliary to through travel. Roadways with existing lanes marked “N/A” are master-planned roadways included in the *Master Plan of Highways and Transitways*.

b Rights-of-way requirement are the minimum. These do not include lanes for turning, parking, acceleration, deceleration, or other purposes auxiliary to through travel. Additional rights-of-way may also be needed to accommodate spot master planned and required pedestrian, bicycle, and transit facilities.

High Occupancy Vehicle (HOV) lanes are reserved for transit services and vehicles with multiple occupants during designated time periods to improve mobility, safety, and productivity because of traffic growth. The table below shows the planned HOV lanes in the GEASP Area and includes the entire segment of I-270 that traverses the area.

*Existing High Occupancy Vehicle (HOV) lanes in the Study Area*

Road Name	From	To	Classification	Existing Lanes	Planned Lanes	Master Plan ROW	Existing HOV Lane	Proposed HOV Lanes
I-270	Little Seneca Creek	Middlebrook Road	Freeway with HOV Lanes	6D	12D	300	1 NB	2
I-270	Middlebrook Road	Great Seneca Creek	Freeway with HOV Lanes	8D	12D	300	1 NB	2