

Colocation White Paper

Montgomery County Planning Department

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I. INTRODUCTION

The history of colocation in Montgomery County dates back many decades, albeit with a range of interpretations and practices. A common example is evidenced in school and parks adjacencies. The purpose of this White Paper is to address possible expanded opportunities and challenges for colocation, building on a series of preliminary steps that the County has initiated to broaden the colocation planning process.

Colocation Needs and Drivers

Increasing scarcity of available land, recognition of finite municipal finances, and evolving public policies regarding community planning are coalescing to recast traditional models of service delivery and asset management. Colocation ranks among strategies to deal with these conditions, characterized by a range of drivers that are propelling its role as an integral element of cross-agency municipal planning. Examples include:

- A lack (and high cost) of undeveloped land
- Aged and obsolete facilities
- Demographic changes impacting service needs
- Added amenities / reduction in duplication of services
- Desire to enhance user one-stop access / community identity
- Capital and operational cost savings
- Experience with mixed-use and higher density development
- Smart growth initiatives
- Inclusionary demographic and economic profiles
- Environmental objectives
- Advancing principles of long-term asset management and reuse
- Institutional (agency) interest, knowledge and experience

Project Background

This White Paper is an outgrowth of a number of factors specific to Montgomery County government dating back over a decade:

- In 2003, a county-wide review identified 54 strategic plans authored by 11 departments and 14 long range facility plans sponsored by eight departments (excluded Montgomery County Public Schools).
- In 2010, the County Executive created a Cross Agency Resource Sharing Committee (CARS) to provide a forum for coordination among Montgomery County agencies to develop resource sharing strategies targeting operational efficiencies, reduced costs and improved quality of services.

- In 2011, a county planning effort reviewed whether a new public school could be located on prior dedicated park land. It was at that time that a Maryland National Capital Park and Planning Commission (M-NCPPC) / Montgomery County Public Schools (MCPS) Joint Working Group was established to discuss the facility site selection processes. One of the Working Group recommendations in 2012 was to undertake more formal public facilities colocation studies, part of which included inventorying publicly owned land and identifying opportunities for colocation. During this time, consideration was also given to proposing that the County prepare a broader “Functional Master Plan for Colocation of Public Facilities”, which was later scaled back to start with a more simply titled “Public Facilities Colocation Study”.
- In 2013 / 2014, a M-NCPPC Development Suitability Tool analysis of environmentally and man-made constrained land suggested that Montgomery County has only 15 percent of its land available for development.
- In 2014, M-NCPPC commissioned a Colocation White Paper as a preliminary aspect of preparing for further study. Implicit in this was a County goal is to use publicly owned land for broad based community needs.
- In May 2014, the Montgomery County Council approved the County’s FY15 operating budget including M-NCPPC proposed funding for a formal “Public Facilities Colocation Study”, with the charge to “examine ways the public can benefit from colocation as a way to more efficiently and cost effectively provide facilities such as parks, schools, community health centers, libraries or other public amenities or services”.

Limiting Conditions

The focus of the White Paper is limited to defining the colocation term(s), outlining principles and issues, documenting case studies, and correlating findings with what might apply to Montgomery County. While some Montgomery County stakeholder outreach was essential, its breadth was purposely limited to very preliminary, non-formal discussions. Research for the White Paper did not involve any type of review of agency strategic plans, nor for that matter the presumption of understanding any of the planning practices of any Montgomery County department. The White Paper is not meant to be definitive or comprehensive regarding Montgomery County specifics, recognizing that at some future time, multiple stakeholder engagements would be part of the much larger task of actually creating a colocation policy and plan.

Methodology

Bolan Smart and M-NCPPC were in constant collaboration throughout the research and preparation of this White Paper. In addition to conducting a broad regional and national survey of colocation practices, the research including meeting with representatives of MCPS, Montgomery County Department of Parks (Parks), and the Montgomery County Department of General Services (DGS). Each of these representatives was acquainted with both CARS and the Joint Working Group. Assisting Bolan Smart, the architectural and planning firm Cunningham Quill has considered zoning, building codes and construction cost issues, as well as prepared two colocation illustrations depicting denser and a less dense applications of colocation.

II. DEFINITIONS

Colocation (or co-location) often means different things to different entities. There is no universal application: many facility managers and planners are not even familiar with the term. There are no widely published authorities (or acclaimed experts) on colocation. There is, however, a general understanding among public facilities managers that colocation in real estate terms is defined as follows:

“the locating of two or more organizations of public interest sharing some significant aspect of a physical space on a regular basis”

In application, colocation can include some level of shared building functions and services, benefiting both organizations (cost effectiveness and capacity) and user groups (one-stop convenience and community-based identity). It can be limited to widely differentiated missions benefiting from shared land, planning efforts and building efficiencies, to involving a high degree of service platform integration.

From a municipal services perspective, the traditional application of colocation focuses on public agencies. M-NCPPC has also asked that the White Paper include more non-traditional applications of colocation, meaning the inclusion of more broadly defined uses of public interest (i.e. affordable housing, non-profits, and other direct community benefits). While it is simple enough to embrace such an all-inclusive and visionary definition of colocation, it comes with the caveat regarding imposing non-mission objectives on municipal agency resources. In short, the definition of colocation, and the expectations placed on it, need to be balanced with what is practical for municipal departmental groups to absorb.

Other terms which are sometimes interchangeable with colocation, but which are also defined terms of themselves, with additional characteristics not limited to colocation, include:

Adjacencies. Public uses that are located next to each other in some way but do not share physical space.

Joint-Use / Shared-Use. Similar to colocation but more narrowly defined as the sharing of space. Joint-use refers to two or more entities sharing spaces like multi-purpose rooms, common entries, food service facilities, administrative space, open / play areas, and parking.

Mixed-Use. A term typically applied to private sector real estate developments that comprise a combination of land uses whose functions are physically and functionally integrated in some limited manner. There are many precedents (and lessons) for mixed-use, including examples incorporating direct public uses and indirect public interest uses.

Public Private Partnerships (P3s). Like with mixed-use, public private partnerships have many precedents and applications. While a private role may be part of a colocation project (i.e. as a component use, as part of a land swap, or part of leveraging funding), the White Paper focus is on collaboration amongst municipal service providers, for which the tools and lessons of P3s are rendered ancillary.

III. PRINCIPLES AND ISSUES

The research into colocation issues both locally and beyond can be summarized with the following primary observations:

- Agency **mission**-related standards and criteria are sacrosanct, with the ability to be updated / revisited based on modern and future conditions.
- **Physical** / co-design requirements are critical for both functionality and sustainability, but compared with institutional issues, are relatively easy to formulate and agree upon. Not surprising, well located sites with strong physical attributes offer the most cross agency benefits.
- **Planning process** and **implementation** considerations are more complicated, but in the scheme of things, manageable if there is high-level leadership, down-the-line expertise and cooperation. On the budget front, the possibility of accelerating funding priorities to move forward the provision / replacement of agency facility needs in the interest of colocation stands as a particularly strong leverage point to gain agency traction.
- Opportunities for **enhanced service delivery** (user convenience) from one-stop locations, complemented by more amenities and community / neighborhood-based identity enhancements, can be compelling.
- The **community voice** factor usually makes or breaks the planning vision, with success found most where single interest advocacies are integrated into more collective perspectives. (Note that community input is assumed at the project level, and apart from the engagement of the organized municipal political structure, does not need to be a direct party to the formulation of a master colocation policy or planning regime.)

Mission / Service Delivery

The feasibility of colocation begins and ends with the uncompromised ability to deliver the agency specific services. There may be tradeoffs in terms of single use preferences, but the end result cannot undercut the mission fundamentals and service delivery functions of the agency. Of particular importance is maintaining individual stakeholder identity.

Not surprisingly, a finding of the White Paper research is that the very process of engaging in agency facility co-planning can help identify operational similarities and possibilities to “relax” some fixed assumptions regarding mission service delivery. The simple exercise of agencies getting together to contemplate “what ifs” can breakdown not only preconceived notions about other agencies, but those internal to one’s own organization. Moreover, collaboration helps establish and reinforce institutional and personal relationships, critical elements in breaking down barriers and moving dialogue forward.

Physical Parameters

There are many physical variables influencing organizations’ approaches to facility design, and which can apply differently depending on case-by-case colocation scenarios. Some of the agency-specific requirements may be more malleable than others, with examples of the most stringent standards including safeguarding school security issues, operational

parameters for public safety providers, and what constitutes community open space / park uses. National, state and local standards regarding land and building mission defined requirements for these types of uses can be quite specific (especially for schools and public safety organizations). Though the evidence from case studies suggests such standards can be flexible, a common starting point for understanding various agency requirements is to distinguish between what represent minimum absolutes from other agency goals and possible “single use” facility norms. Once agencies mission delivery and operational coordination issues are more or less settled, however, coming to terms with design issues (i.e. placement of entries, common and shared-use spaces) can be comparatively straightforward. See the Colocation Compatibility Matrix section (pages 8-11) for representative correlations of facility potentials for shared elements, with implications that may or may not apply in specific situations in Montgomery County.

Though the focus of the White Paper has been on municipal agencies, the variations of colocation that can include other jurisdictional government entities, non-profits and other public interest uses usually pose different implications for project design. The need to provide for separate ownership and / or funding underwriting provisions means that the line between defined uses and possible shared uses must be clear and severable. To borrow a learning from the volume of experience with mixed-use development in the private sector, each use must be able to stand on its own in the face of some change in the posture of the other uses.

Costs and Savings

Capital costs may be reduced primarily through the efficient use of land and construction economies, while operating costs may be reduced primarily through shared support spaces, building systems, and parking. Projects have to make economic sense, but not entirely based on traditionally defined agency budgets. To the extent that more uses can be accommodated on a finite land area, the benefits to the community may outweigh the premium costs associated with employing structured parking and making more use of vertical building components. Investing in more intense improvements of open space can be considerably more costly in terms of both initial construction and ongoing maintenance and operations, with the payback being better (and more convenient) provision of other municipal services.

During the investigation into this White Paper it became clear that while there has been some quantification of comparative costs contrasting single use and colocation facility construction and operations, the body of carefully documented evidence is limited. In terms of generalities, there may be cost savings for example of 5 percent to 10 percent in the primary areas of development planning (including consolidated community outreach), some shared base building shell components, and through consolidated contracting. Greater proportional capital cost savings may be achieved through reduced square footage needs, shared site infrastructure (including parking), and potentially quite significantly, the creative use of site characteristics and topography not otherwise justified by a single use.

Opportunities for realizing operational savings are most noted in having less space to care for, scale in such things as cleaning services, and efficiencies in utility consumption (including interesting ways to store and distribute excess heat across different building uses and times of operation).

The downsides to possible cost impacts can include the need to dedicate more institutional resources to coordination, mitigating for directly conflicting uses (i.e. sound barriers), and conforming to multi agency development and operational standards (including different labor costs) that might not otherwise apply to a single user. In sum, while colocation may (and often should) on some levels provide a range of cost savings compared with standalone facilities, there are also extra costs usually associated with the added density and intensity of uses usually implicit to the justification for colocation.

Table 1
Possible Capital and Operating Cost Savings From Colocation

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

Operational Elements

As with physical design considerations, the day-to-day operating requirements of given agencies have varying degrees of flexibility related to colocation. The nature of public access and security fundamentals are the primary differentiating operational elements, with the practical aspects of accommodating agency staff needs and facility management being more readily shared elements. Memorandum of Understandings (MOUs) controlling who

does what, how items are funded, how shared space should be scheduled to avoid conflicts, and so forth are obvious prerequisites to having successful colocation projects, requiring substantial investment in agencies upfront time and documentation. As part of the shared platform of operational considerations, it is critical to recognize and reinforce what needs to be retained as under agency-specific control, with the school children security and instructional mandates being a foremost example.

Implementation

To first acknowledge the institutional hurdles to colocation, there can be many. In general, the more independent agencies are from either each other, or most importantly, are not part of a common legislative and funding hierarchy, the greater the challenges. Stratified and independent board structures, legal mandates revenue sources, labor contracts, special interest community advocacy groups, etc. all can contribute to institutional resistance or constraints. Even without such “formal” distinctions, the inertia of traditional approaches to service delivery may not be readily open to serious consideration of colocation.

Based on the research conducted for this White Paper, the majority of the colocation efforts observed to date have evolved from indigenous or internal municipal initiatives, with little reference to external or common practices elsewhere. Though there are many paths that municipalities have taken, there are a few norms that appear either universal or typical to each effort:

- a) The starting point is a pressing physical need or driver
- b) There is a give and a take for all impacted organizations (balanced tradeoffs and risk taking)
- c) There is strong executive level leadership, commitment and accountability
- d) There is a platform for promoting staff level interagency relationships
- e) There is a funnel point for CIP / integrated funding decisions
- f) Agencies see an opportunity for accelerated / expedited planning, funding and execution
- g) There is clear lead capable of implementation (predominant user or central agency provider)
- h) There is community / neighborhood level support

Complementing and advancing the prospects for colocation, but not always evident or needed, is the existence of a defined municipal colocation policy (legislated or administered), some process or mandate to encourage interagency coordination of relevant aspects of their respective strategic plans, and the existence or creation of defined task groups or other central / co-agency administrative service.

Risks and Life-Cycle Implications

Colocation imposes risks on all its component uses that are different than if the same uses were standalone. Colocation projects are inherently more complicated than single use ventures in most every respect. There is the basic upfront risk that a co-planning effort fails, for a myriad of reasons, or takes too long to fulfill the immediate needs of the user. There is the construction risk of extra cost needed to accommodate multiple agency standards, especially regarding solving unforeseen cost escalations. Then there is the risk that the operational dynamics simply do not work out as hoped, with less flexibility to remedy a situation that might not even arise were a facility functioning independently.

While the above types of risks can more or less be evaluated and managed during project inception through the first years of operation, the potentially greater risks lie in the out years, when any number of unknowns about mission service delivery needs and practices may take hold. Adapting to changing agency requirements will undoubtedly impact facility demands at various intervals within say a 40-year assumed life span of the initial construction, and are not likely to coincide directly with the timing of possible change desired by other shared users.

Despite the reality of preparing for, or perhaps not over-committing to unknown future conditions, the opportunities presented by colocation may actually be beneficial for individual agencies. There can be built-in advantage if the subject colocation elements are conceived from the beginning to be adaptable to future change, allowing for user groups to grow or contract within the context of an existing facility. In this regard, the commitment to the economic sustainability of a given project over time means focusing more on creating generic, flexible spaces than on catering to moment-in-time concepts of single use functionality. Such flexibility in designing physical spaces can also carry over to how agency budgets are viewed, in effect reducing the future need for big capital expenditures due to anticipating the ability for facilities to be adapted pending unknown future needs and conditions. Interest in putting upfront investment in infrastructure and building shells that can be expanded upon and easily repurposed has been gaining traction in recent years, and can be an important tool in helping mitigate for the risk of longer term changes in user demands.

Colocation Compatibility Matrix

The matrix (Table 2) on the following page illustrates a range of possible compatibilities for user stakeholder groups (vertical axis) with a variety of colocation conditions and parameters (horizontal access).

Table 2 - Possible Compatibility of Stakeholders by Category

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

N = No (not compatible)

M = Mixed (possibly compatible) Y = Yes (generally compatible)

A more detailed breakdown of compatibilities for user types by functional area can help highlight specific colocation opportunities and possible conflicts. While the provided example (see Table 3) of possible colocation opportunities features schools, a similar matrix of possible compatibilities can be developed for any stakeholder user group. Refining this tool by impacted stakeholder would be essential as a preliminary understanding when contemplating any specific possible colocation project.

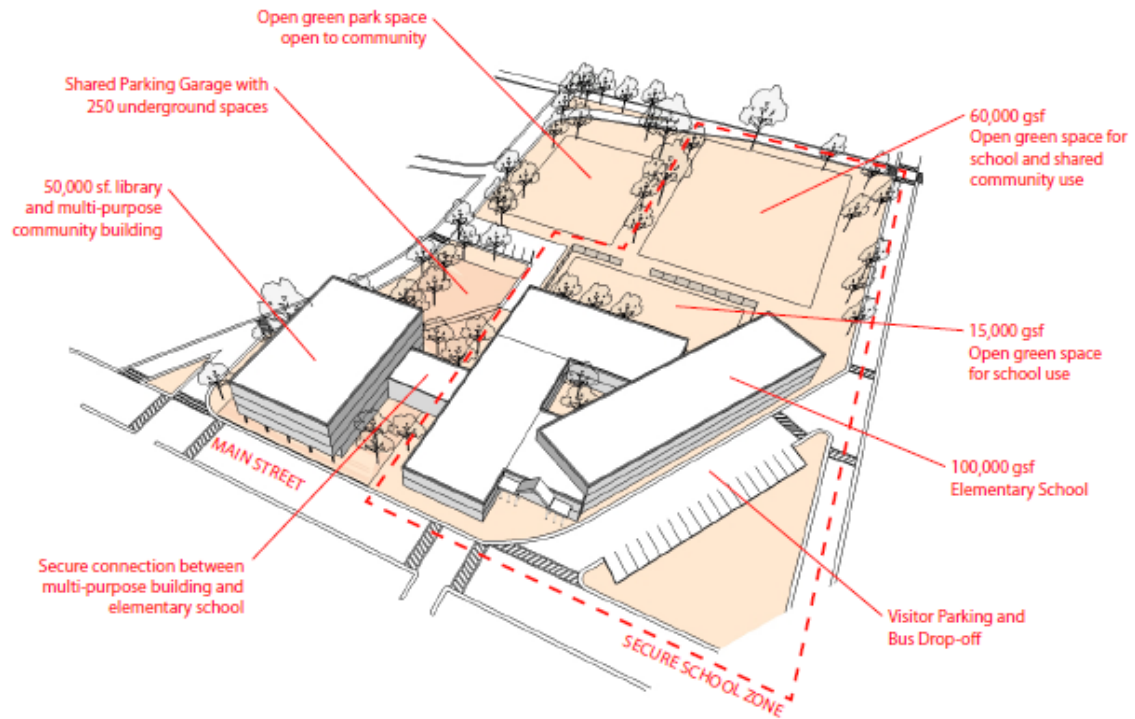
Table 3
Sample Possible Compatibilities for Specific Use by Function
Schools Example

FUNCTION	JOINT-USE	POSSIBLE / RESTRICTED	SINGLE USE
Core (classes, halls)			<i>X</i>
Access		<i>X</i>	
Indoor Recreation		<i>X</i>	
Outdoor Recreation	<i>X</i>		
Library / Media		<i>X</i>	
Cafeteria		<i>X</i>	
Health / Soc Services	<i>X</i>		
Multi-Purpose	<i>X</i>		
Parking		<i>X</i>	

Colocation Illustration

For illustration purposes a hypothetical scenario representing a possible colocation is provided. This illustration comprises a five acre site, perhaps typical to a highly built up or older area where there is virtually no land available for new or expanded public facilities. Since the only way to accommodate more intense use of such a site is through some form of added density, the provided illustration economizes on land allocations by use (for example with an elementary school site significantly smaller than MCPS mandated standards), adds vertical layers of similar or complementary uses, introduces below grade shared parking (admittedly at extra cost), and incorporates other shared elements.

Exhibit 1
Illustrative 5-Acre Colocation Site
Elementary School, Multi-Purpose / Library Facility and Park



IV. CASE STUDIES

Case studies provide existing examples of colocation practices. From a widely cast regional, national and international research effort, ten illustrative case studies were selected for detailed profiles, representing a cross section of facilities, processes and mixed-use examples. While most colocation examples are unique to the special circumstances defining their respective situations, and thus not readily replicable (one-off opportunities, different legal parameters, financing requirements, etc.), the White Paper attempts to identify salient points that may be applicable to, or differentiated with, Montgomery County.

Facilities

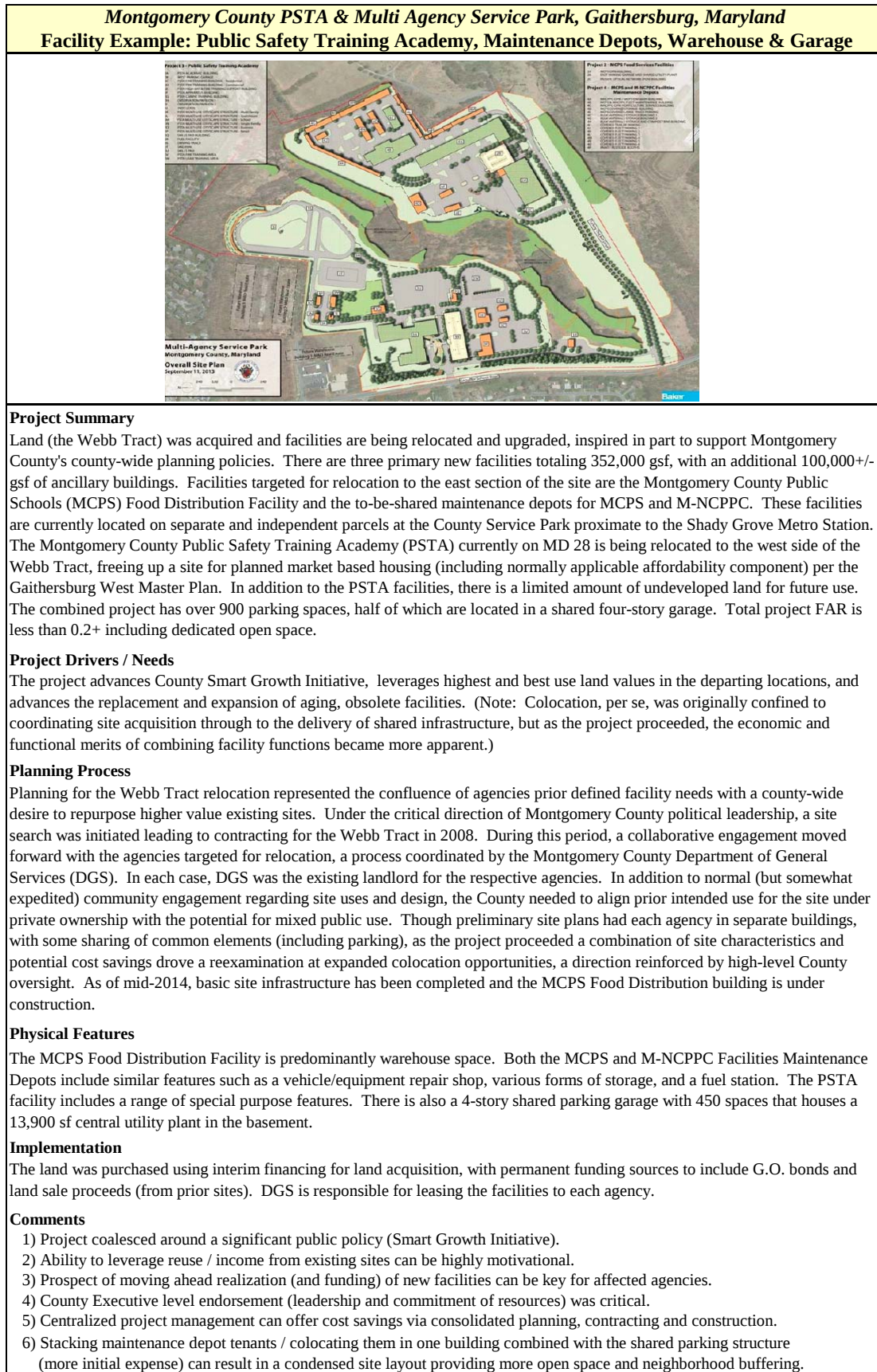
1. *PSTA and Multi Agency Services Park* (Webb Tract): Story of relocating aging industrial facilities from smart growth areas in Montgomery County. New facilities accommodate user growth needs, have shared site infrastructure (i.e. storm water run-off) and two of the four users are colocated in one building.
2. *Deanwood Community Center & Library*: A 60,000 sf facility that includes an early care and educational center, public library, senior center, gym, multi-purpose rooms, recording studio and a recreational pool located adjacent to the Ron Brown Middle School (now closed) and a 5.8 acre park in the District of Columbia. Facility design incorporates a “Main Street” for integration of facility uses.
3. *Sharon Public Safety Facility*: Two connected buildings housing police and fire station facilities in Sharon, Massachusetts. The buildings are connected by a common wall and are able to share some facilities reducing the overall building size requirements by 10 percent.
4. *Saddlebrook Joint-Use Facility*: Combines an elementary school, community center and library in one building in Omaha, Nebraska.
5. *Cardel Place*: A 195,000 square foot LEED Gold regional recreational facility in Calgary Alberta that includes a fitness center, gymnasium, ice rinks, multi-purpose space, pools, library and more.

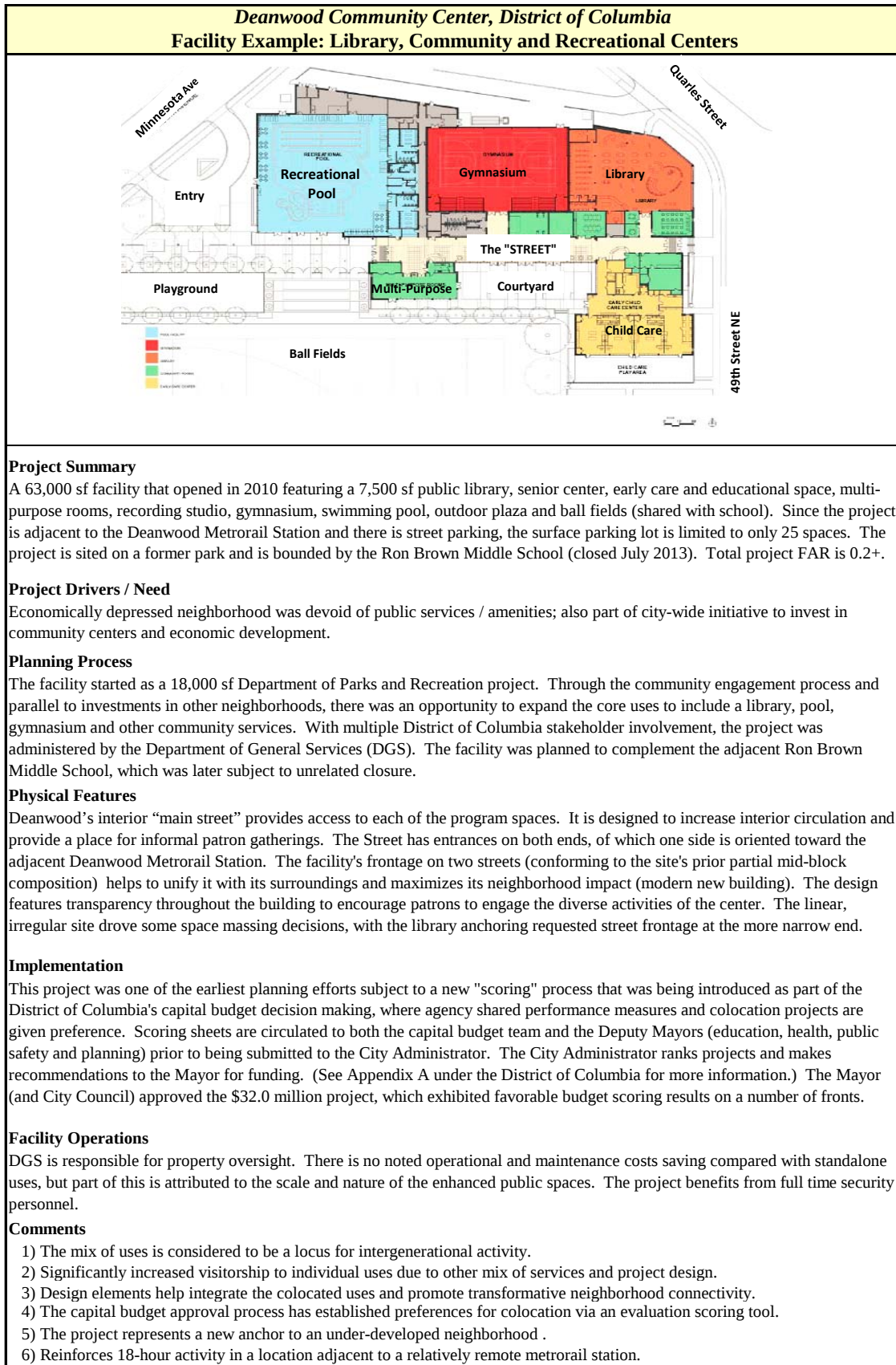
Process

6. *Loudoun County Formalized Colocation Policy*: A strong (and simple) colocation process story, with physical results.
7. *Prince George’s County Parks - School Colocation Policy*: One case study, with four approaches to school construction and colocated facilities.
8. *North Central Shared-Use Facility*: Extensive community engagement and drawn out visioning / planning process (2008-2014) that resulted in the design of a diverse mix of service providers (school, library, multi-purpose space, police) in Regina, Saskatchewan.

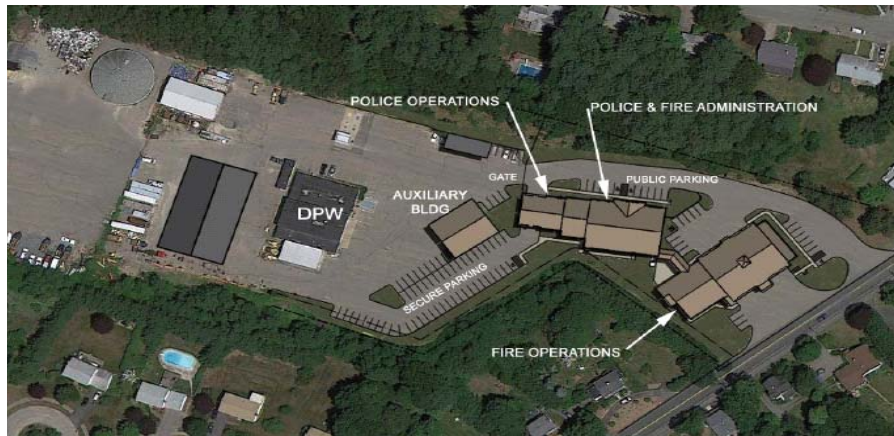
Mixed-Use

9. *The Station at Potomac Yards*: A fire station colocated with public housing in Alexandria, Virginia.
10. *Arlington Mills*: Affordable housing built on top of a county parking garage (long term lease) that is adjacent to a community center with retail in Arlington, Virginia.





Sharon Public Safety Facility, Sharon, Massachusetts
Facility Example: Police and Fire Stations



Project Summary

A planned 34,500+/- sf facility that combines the town's fire (15,800+ sf) and police station (8,970 sf) so that all emergency services are centralized on an existing Department of Public Works site in Sharon, MA, a 20,000 person suburb of Boston. The combined facility saves approximately 10.0 percent of the alternative independent buildings' size due to shared components. The police station facility is being constructed first (2016 anticipated delivery), allowing the existing police station on the site to remain in operation until the new facility is completed. Once the existing police station is vacated, the fire station and facility connecting corridor will be constructed in the former police station location fronting the street. The entire site is 9.5 acres, of which an estimated three acres is allocated to the planned collocated police and fire facilities. This equates to a 0.2+ FAR.

Project Drivers / Need

Aging facilities and lack of funding (leveraged cost savings from col locating on the same site, reduced building footprint and on-going shared operating costs).

Planning Process

An original feasibility study was conducted in 2003 because the existing facilities were aging and in substandard condition. Primarily due to town funding priorities, it was not until 2013 when another feasibility study was undertaken that the project gained traction. This time the study was to determine the most viable site for the new facility. Three sites were identified and the S. Main Street site where the Police and Department of Public Works department have existing facilities was selected over nearby community gardens and ball fields. A referendum for funding the new facility was approved in May 2014. The project is in final design development pending building committee approval.

Physical Features

Two buildings connected by a common corridor with some shared administrative facilities that include a public lobby, training room, conference rooms and mechanical, electrical, plumbing and fire systems. Shared facilities are expected to reduce maintenance requirements. The site's varied topography was a primary driver for the attached, two building design. In addition, to accommodate all the uses on the site, an existing storm water retention pond is being filled and replaced with underground storage tanks plus off-site measures to help control water run off. Safe street access for both departments was achieved with the fire department having the primary street frontage. Space between the fire departments turn out gear and large bays is used as a three-story training tower.

Implementation

A City referendum was passed in May 2014 that confirmed the expanded debt capacity needed to bond finance the \$25.5 million project.

Comments

- 1) Site selected was the least controversial (similar existing use) but is encumbered with liabilities (storm water issues).
- 2) Leveraged shared facility cost savings - capital and projected operational - to finally move this project forward.
- 3) Town benefited from having architects / technical expertise on the building committee.
- 4) Each beneficiary / stakeholder needs to carry equal risk.
- 5) The collocated site uses combining two related departments (public safety) enhanced referendum approval prospects.

Saddlebrook Joint-Use Facility, Omaha, Nebraska
Facility Example: Elementary School, Library & Community Center



Project Summary

Saddlebrook Joint Facility opened in the fall of 2009 in a suburban neighborhood approximately 12 miles northwest of downtown Omaha. The facility is a collaborative effort between the Omaha Public Schools (Schools), Omaha Public Library (Library) and City of Omaha Parks and Recreation Department (Parks) to create a community-based, multi-generational public-use facility. One of its explicit purposes is to be a convenient, one-stop facility. The elementary school is 67,000 sf (accommodates up to 700 students), the library comprises 11,900 sf (originally wanted 20,000 sf and is the first new library in Omaha in over 20 years), the community center has 24,000 sf, 8,100 sf of which is shared space, for a total of 111,000 sf. There are 213 shared surface parking spaces. Situated on 9.5 acres, the project FAR is 0.2+.

Project Drivers / Need

Both the Omaha Schools and Library needed new facilities.

Planning Process

Omaha Parks contributed the property, part of a larger parcel of dedicated open space programmed for an undefined future use. Both the Schools and the Library were looking to build new facilities and did not plan them to be colocated. The City Mayor intervened and sponsored a combined facility requiring collaboration between all the stakeholders. Thereafter, the project involved a time consuming community engagement process including numerous surveys and public meetings before the design process began. The community-based design process helped integrate the facility with the adjoining neighborhood and adjacent retained park.

Physical Features

The facility features a commons area, a singular circulatory front door that is at the center of the building, which functions as the main entrance for all facility users. This area can be expanded to include a stage area that opens up to the gymnasium and the cafeteria rooms, offering a highly flexible assembly area. Students benefit from enhanced building amenities such as two gyms, an indoor running track and the shared public / school library. The children's library shelves have restricted public access during the school day. Additional security measures include electronic ID badges for teachers and staff as well as 50 cameras and guard personnel. Due to the increased scale and sophistication of the combined project uses, more substantial sustainable design elements were able to be included (green roof, rain garden filters, etc.), with central monitoring.

Implementation

A city funded project that economized implementation costs by housings all three uses under one roof on existing park land.

Facility Operations

A three party stakeholder MOU defines partnership authorities and responsibilities that is based on the allocation of square footage and hours of operation. (See Appendix A for more information.)

Comments

- 1) Although the stakeholders were originally pursuing independent facilities, strong leadership at the City level resulted in a shared vision for colocated uses (on a relatively unencumbered / future use park site).
- 2) All entities agreed on a common code of conduct for facility patrons, including developing a crisis management plan.
- 3) Combining the three uses under one roof was less expensive than constructing several independent buildings.
- 4) Extra effort was made regarding specific design elements that satisfied secure ingress and egress to all uses.
- 5) Consolidated design, construction and operational management elevated integration of environmental features.
- 6) Combined community uses in a prominent facility enhanced neighborhood identity and intermixing.

Cardel Place, Calgary, Alberta
Facility Example: Recreation and Community Center



Project Summary

A 195,000 sf LEED Gold regional recreational facility that includes a fitness center, three gymnasiums, two ice rinks, pools, library multi-purpose space, dedicated community association space and more. Part of a larger site to house two schools: the completed Catholic Notre Dame High School and a planned public middle school. City owned and financed project opened in 2004 and is managed and operated by an independent non-profit (Nose Creek Sports and Recreation Association is responsible for project operations and financial sustainability). Project was designed to serve 156,000 existing residents (up to 185,000 residents anticipated in final community build-out but is currently operating beyond the originally anticipated trade area) in the County Hills Village neighborhood located in north Calgary. Project has 613 parking spaces divided into two lots serving two different entrances. Plans are under development for a possible 100,000 sf expansion.

Project Drivers / Need

New planned community services / amenities (part of larger Cardel Master Plan).

Planning Process

Dating back to the 1990s, Calgary wanted a new model to provide regional recreational facilities via a process by which the City acquired land, built the facilities and then turned it over to a non-profit partner via a 25-year arms-length lease. Cardel Place was one of three such facilities. The City established a working committee / founding partners comprised of representatives from the City, Community Organizations and two school boards (public and catholic) with decision making authority to lead the process. A needs assessment was conducted to determine what actual amenities were needed at Cardel Place. The two primary City parameters comprised limiting the size of the facility to 195,000 sf and capping the construction budget at \$25.0 million. The City contracted with Nose Creek to help design and build the facility and subsequently they were awarded the operating lease.

Physical Features

Project design required every component to have multiple uses. There were three primary design categories - wet activities, ice and fitness space, each with its own community design focus group. Shared resources include project infrastructure (built with capacity for future expansion), development costs, operating costs, parking, cafeteria, etc.. The current design of the spaces do not allow for a lot of patron interfacing. One of the two entrances gets more heavily used and congested than the other entrance. Planned expansion would be designed to function with more interplay / "cross-shopping" between uses. A possible addition would include an interior courtyard space designed for a range of gathering functions (i.e. including weddings).

Implementation

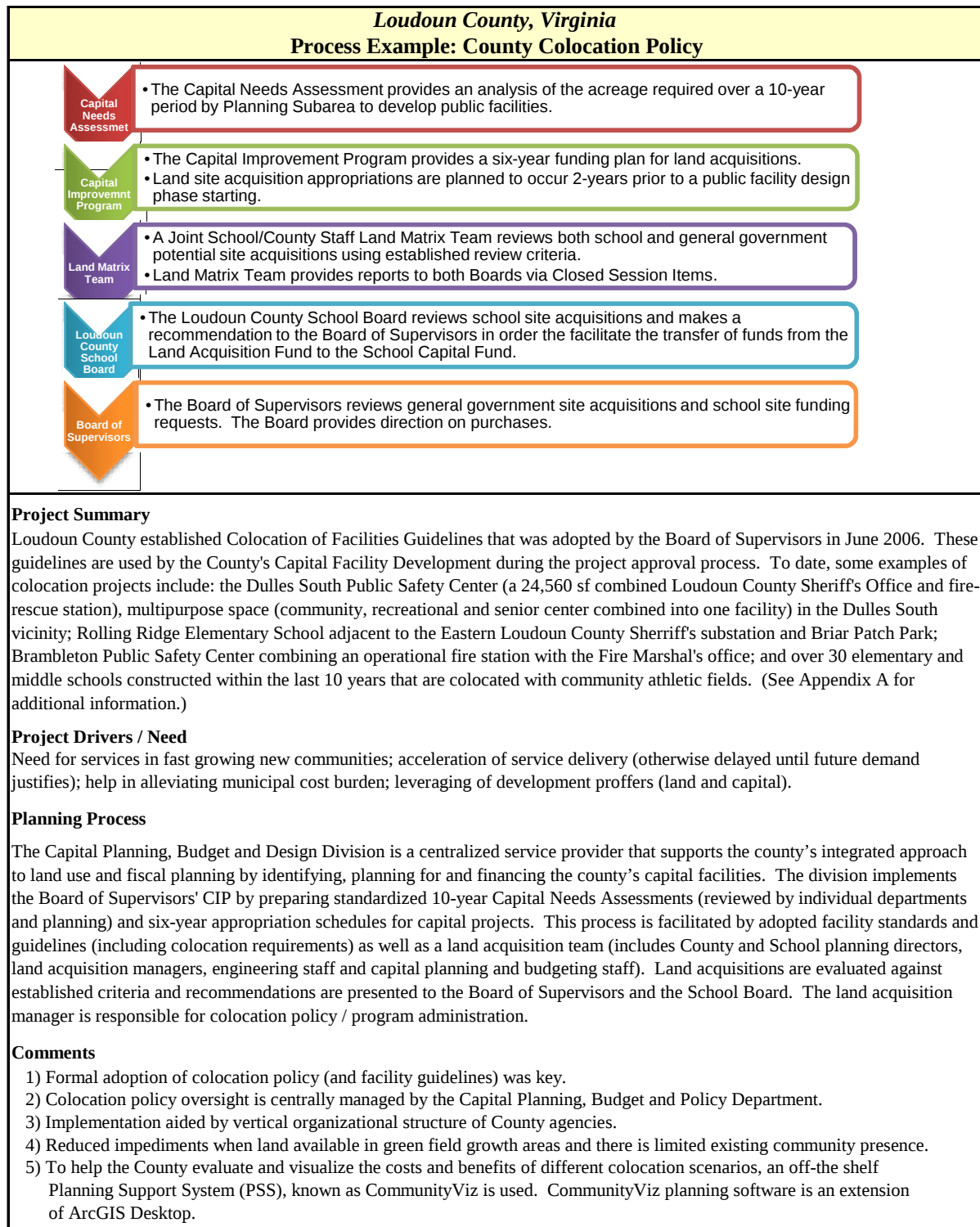
City capital budget was \$25.0 million (2002), which covered all development costs. A variety of operating agreements between users accounts for shared common space and life cycle replacement reserves, including the library (which has a separate license of occupancy and is directly funded by the City). The overall project has generated an annual operating profit. Nose Creek Sports and Recreation is asking the City for \$22.5 million for their planned expansion out of a \$65.0 million capital campaign budget.

Facility Operations

There are some issues with warmer weather to properly balance the buildings cooling systems, especially during times of heavy patronage that may cause excess heat to build up. In addition, sometimes it is challenging to condition the ice rinks since they abut the gymnasiums.

Comments

- 1) Conceived of as a colocation site as part of a City-wide initiative for delivering community recreational services.
- 2) Realized more substantial community recreational services / amenity based via a single centralized facility.
- 3) Project operations are not reliant upon municipal support (community managed and financially self-sustaining).
- 4) Fitness center is the biggest revenue generator.
- 5) Small pool originally installed for reasons of economy. Larger pool being contemplated in expansion.
- 6) Project is 10 years old and the original "box" oriented design of the amenities is being programmed differently in the expansion space to promote more integration and connectivity between uses.
- 7) Organized local community associations was a big factor throughout the planning process and continued operations.



Prince George's County, Maryland
Process Example: County Community Park-School Program



Project Summary

In the late 1990s, the Prince George's County Government, the Board of Education (BOE), and M-NCPPC adopted the Community Park-School Centers concept as an opportunity to address public school (non-high school) construction needs and to revitalize and enhance outdated recreational facilities. The program objective is to provide larger, more comprehensive and timely facilities than would be possible in a standalone school building. Four prototype facilities were established as benchmarks / guidelines for program implementation. To date, each prototype has been used and approximately eight projects have been completed. School locations and needs are the primary program driver; community center location and needs are secondary.

Project Drivers / Need

Many factors culminated in the need to address County school deficiencies with heightened urgency; providing communities with needed public services in the most cost effective and timely manner.

Physical Parameters

The stakeholders developed four potential prototype candidates for concept implementation as follows:

- Prototype 1: existing school / new gymnasium - minimal indoor recreation component added to a school
- Prototype 2: new school / existing community center - adding a new school to an existing community center
- Prototype 3: new school / new community center - ground up construction of both new facilities
- Prototype 4: existing school / new community center - adding a new community center to an existing school

Planning Process

At the direction of the County Executive, the program was established by a joint working group comprising representatives from M-NCPPC (Parks) and BOE. Once the program was adopted, this project team examined potential sites for implementation and several projects were recommended to be approved via the County's capital improvement project (CIP) process. The first two projects implemented included the Samuel P Massie / Suitland Community Park School Center (prototype 3) and Perrywood / Kettering Community Park-School Center / Perrywood Elementary School (prototype 2). At least six other Park-School concepts have been completed with more waiting approval. For each individual project, the stakeholder representing the dominant use takes the lead in implementation.

Implementation

BOE project capital costs savings were derived by subtracting the school portion of a Park-School Center estimated project cost from the estimated project cost of a standalone facility. At the time of program conception, cost savings were estimated to range between four percent and 26.0 percent of total project costs. For each project implementation, there was an approved Project Description Form (PDF) that was part of the approved County Budget. The BOE accounted for the costs for school portion and the M-NCPPC accounted for funding the park.

Facility Operations

A financial analysis of operational costs savings was also conducted based on the users' square footage allocation of the shared portions of the facility. An "umbrella" three-party agreement was ratified that involves items such as who cleans and maintains the facility, who schedules shared-use space, who administers programs, how safety and security is maintained, etc. Utilities are separately metered for the school and recreational components. Each project typically has addendum operating agreements to determine exact allocations, etc. It is standard procedure for each independent project to establish in advance a Joint Use Board which is composed of appointed stakeholder representatives to address issues and discrepancies.

Comments

- 1) Program conception was in response to urgent factors both internal and external to the County.
- 2) The County needed to petition the State of Maryland to revise a law limiting school construction to BOE owned land.
- 3) Cost savings are achieved by using a single construction contractor.
- 4) Prototype benchmarks provide structure that facilitates program implementation.
- 5) Program implementation required significant lead time (five to 10 years).

North Central Shared-Use Facility, Regina, Saskatchewan
Process Example: High School, Recreation, Offices



Project Summary

A new school / multi-use facility planned for the inner-city neighborhood of North Central, Regina (capital city of Saskatchewan). The project includes high school (and related age group) education, arts, recreation and office facilities along with a library and day care function (also partly high school / social service needs related). The planned project got held up with 2008 - 2012 budget issues, but is now back on track. The original building was 200,000 sf but was scaled back to approximately 105,200 sf when a health care use dropped out. The current space allocation / use break downs are as follows: 75,500 sf for the school portion, 23,400 sf for other municipal services (i.e. police, social services, employment training, civic administration) and 6,300 sf for the library. There are 150 parking spaces in two lots with dedicated spaces allocated for school staff, library staff, city and police staff, students and the public. Situated on approximately five acres (unused athletic fields donated by City and existing school), the project FAR equates to 0.5.

Project Drivers / Need

Community needed basic education and social services in conjunction with economic development.

Physical Parameters

The project is designed to integrate uses through mixed shared community learning spaces that bring together social service organizations and learning programs. The high school related learning spaces are distributed throughout the entire facility.

Planning Process

Project planning started in 2003 but gathered momentum in 2006 when the regional health care organization, Primary Health Care (PHC), took an interest. PHC initiated a colocation study to address facility needs for the School Board, the Province / City of Regina and the Health Region. Various stakeholders subsequently commissioned a design for a shared services project with integrated programming. Thereafter, the City funded continued design development to advance the vision. It was challenging for the project design to keep pace with the evolving needs of the user groups. Advanced planning was dealt a major setback when anticipated funding sources fell through for the major health care component. Remaining project stakeholders waited for about a year, stalling the project in hope that funding could be secured for the health care component. The design phase for the subsequently recast project is now nearing final approval.

Implementation

Total funding for the project is currently budgeted at \$42.2 million, with 73.5 percent related to the school (Regina Public Schools and Saskatchewan Ministry of Education), 20.9 percent from the City of Regina, and 5.7 percent from Regina Public Library. Each stakeholder is committed to funding their portion of the project.

Comments

- 1) Good stakeholder collaboration (no single partner drove the process) but the least responsive group slowed progress.
- 2) Change in stakeholder representatives resulted in project downtime.
- 3) Struggles with ownership structure due to independent organization of each stakeholder.
- 4) Project was ambitiously planned, encountered a major stakeholder withdrawal, but the concept persevered.
- 5) Multiple sources of project stakeholder funding not reliable.
- 6) Long project gestation period resulted in: a) changing lead stakeholder; b) multiple project designs (designed prior to funding commitments; c) exposing project to external factors (i.e. economic recession).

The Station at Potomac Yards, Alexandria, Virginia
Mixed-Use: Affordable Housing and Fire Station



Project Summary

A five-story 107,300 sf building that was completed in late 2009. The building comprises a 24,800 sf fire station and 1,500 sf of retail on the ground floor with 44 affordable and 20 workforce housing units on the upper four floors (81,000 sf). The project includes 142 parking spaces in an underground garage (20 for fire, 109 controlled access for residents which equates to 1.7 spaces per unit, five for visitors and eight for retail). Situated on a 37,600 sf parcel, the project has a 2.8+ FAR.

Project Drivers / Need

Emergency services delivery system was needed to serve the planned Potomac Yards Master Plan residential community (and nearby Del Ray Fire Station, which is 85 years old). The City was seeking opportunities to enhance the supply of affordable housing.

Planning Process

Began in 2006 with developer submission of the first concept plan for residential neighborhoods of the Potomac Yards Master Plan. In addition to standard development review procedures, there is an Inter-Department Review Team (IDR, which includes Planning & Zoning, Fire, Department of General Services representatives). IDR agreed on a developer proffered site to build the first new fire station in Alexandria in over 30 years. The IDR team wanted more than a fire station so they proposed that the developer include an affordable housing component. In March 2007, the Alexandria Housing Development Corporation, a nonprofit housing entity was designated by the City to develop, finance, own, operate and manage the residential portion of the project.

Physical Features

- 1) Bonus density for the affordable units and retail components were approved in addition to the maximum number of residential units already allowed in Potomac Yards.
- 2) Due to potential vibration and noise of the fire station use, a floating ceiling was added to the project. The architect located a residential terrace above the fire station as an added buffer layer.

Implementation

Total project costs equated to \$31.0+ million. Potomac Yard Development LLC dedicated the land and \$12.6 million almost equally split between the fire station and the affordable housing components; \$1.0 million from City; \$10.4 million low income housing tax credits; and \$7.1 million VHDA loan (housing and retail component).

Facility Operations

Upon completion of construction, condominium ownership of the fire station was conveyed to the City and the housing/retail and associated parking was conveyed to AHDC. AHDC is required to maintain affordable rental housing units in perpetuity. Select operating costs are allocated based on square feet (75.0 percent allocated to housing) and 50 / 50 for shared space (i.e. skin of building, room, public restrooms, community room, etc.).

Comments

- 1) Multi-Disciplinary IDR Team is well established as part of the City's planning process.
- 2) Land proffered with no encumbrances as part of a large scale private development.
- 3) Multiple funding sources; master (Potomac Yard) developer contributions helped make housing component feasible.
- 4) Some cost savings but building was designed in a manner that is expensive to operate (complicated systems).
- 5) Affordable housing project needs to be aggressively managed so as to not compromise other project stakeholders.
- 6) After completed, view was that more density / height could have been added to the project.
- 7) Over-built the parking garage and are now leasing some spaces to local daytime employees (not funded by tax credits).

Arlington Mill Community Center, Arlington, Virginia
Mixed-Use Example: Affordable Housing, Community Center, Retail



Project Summary

The Arlington Mill Community Center is a five-story 64,000 sf facility located adjacent to the Arlington Mill Residences, a four-story 131,000+ sf facility with 122 affordable housing units located at a major intersection on Columbia Pike. The community center, which opened in late 2013, comprises a full sized gymnasium, fitness room, basketball courts, game room, multi-purpose rooms, early childhood center, Community Outreach Center, a small amount of retail space, and an outdoor plaza. A two-story underground parking garage with 140 spaces (shared use with the residences) forms a platform dug into the rising terrain under the adjoining apartment building. The residential building, which opened in early 2014, is the result of a partnership between Arlington County and Arlington Partnership for Affordable Housing (APAH), providing 122 affordable housing units. Arlington County provided APAH with a reduced rate long-term lease to build residences above the underground parking garage. APAH was able to build more affordable units due to development costs savings in infrastructure, land and parking. (Over 3,000 people applied for apartments when APAH opened the waiting list.) The entire project is situated on 1.9 acres, equating to a 2.3+ FAR (2.5 FAR for the residential component and 2.1 FAR for the community center). The site is adjacent to Four Mile Run Park.

Project Drivers / Need

Opportunistic County land purchase (i.e. available site adjacent to a park with public transportation) in the late 1990s for the purpose of providing community services in a targeted revitalization area.

Planning Process

The County purchased the property (a former grocery store) in 1996. After an initial community engagement planning process, issuance of an RFP, and project award, 2008 approved development plans included a mixed-use public private partnership to build a community center, plaza and housing (market and affordable). It was reported that the County's original development partner was unable to get financing for the market rate residential project component during the recessionary 2008-2009 timeframe, so the deal never moved forward. Thereafter, the County decided to build the project in two phases so that it could deliver the public component (County funded), independent of the residential use. The County issued another RFP for a residential developer targeting at least 61 affordable units for the housing component. The residential project was awarded to APAH, a non-profit affordable housing developer that works exclusively in Arlington, to build, manage and maintain what became an all affordable housing residential component.

Physical Features

The final design of the community center evolved as a joint effort with the community, engaged over a 6+ months outreach. The building needed to be open, inviting and transparent. Under the new two phase plan, the County increased the size of the community center from a three-story 40,000 sf facility to a five-story 64,000 sf facility. APAH designed the four-story residential building to be independently operated above the County owned garage.

Implementation

The community center's development costs were approximately \$35.0 million, funded from a combination of bonds and previously approved closeout funds. Residential component is subject to a long-term ground lease to APAH. The County maintains the ground level spaces and operates the garage.

Comments

- 1) Mixed-use project that took over 10 years to deliver but end product optimized County use objectives.
- 2) Housing costs subsidized by County's reduced rate long-term lease providing land, infrastructure and parking.
- 3) Project comprises two separately designed buildings and used two construction contractors resulting in complications requiring multi-party collaboration, design issue resolution, cost increases and bifurcated bldg deliveries.
- 4) Project would have benefited from more attention to mixed-use project interface points during the design process.
- 5) Project was originally less dense; passage of time saw increased interest and market confidence in more intense use.

V. MONTGOMERY COUNTY CONTEXT

Though just scratching the surface regarding Montgomery County's colocation history, the White Paper has made the following general observations:

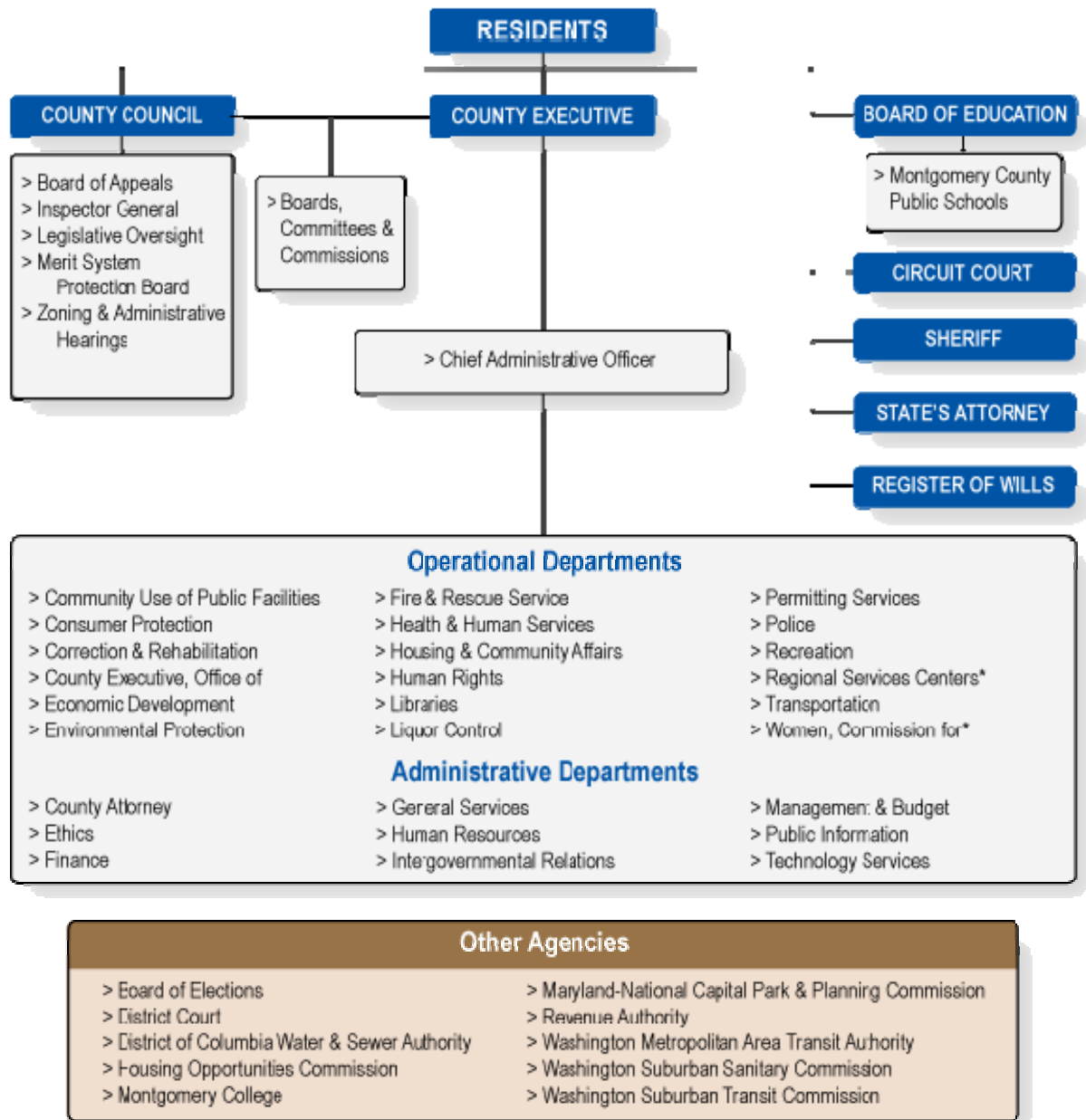
- Montgomery County has a substantial track record of exploring the possibilities for colocation and some exemplary projects. From an institutional standpoint – combining leadership, staff experience and motivation – the county is very ripe to pursue the contemplated Public Facilities Colocation Study.
- There seems to be a well established appreciation across multiple agencies about the need to consider possibilities for colocation. Material cost savings are anticipated, as well as opportunities to leverage land resources and the County budget process (ability to move projects forward).
- Notwithstanding varying degrees of municipal departmental autonomies and traditions, based on a preliminary overview, there appears to be no critical legal framework or business practice barriers to colocation in Montgomery County.

Stakeholders and Governance

Colocation is all about collaboration amongst municipal agencies / stakeholders. The primary County stakeholders considered directly as part of this White Paper included M-NCPPC, MCPS, Parks and DGS. Additional stakeholders in Montgomery County include, but are not limited to: Recreation, Police, Fire, Libraries, Health and Human Services, Housing Opportunity Commission, Montgomery County Department of Economic Development, Department of Transportation, Washington Metropolitan Area Transit Authority, Washington Sewer and Sanitary Commission, and other non-County government related entities or non-profit organizations.

In addition to the natural adherence (and responsibility) for different departments and service providers to uphold their respective unique mission interests, municipal organizations in Montgomery County have a variety of independent decision-making authority and revenue sources. MCPS for example is governed by its own elected Board of Education, which appoints a superintendent and establishes school system policies as well as is responsible to State of Maryland mandates. M-NCPPC comprises a County Council-approved Planning Board and answers in other ways to the County Council. While most funding approvals flow through the County Council, this is not all inclusive (i.e. MCPS receives some funds directly from the State, and Parks has some non-County allocated funding sources), contributing to some degree of decentralized oversight of agency direction. Such distinctions permeate through many departmental planning, decision-making and administrative functions. Additionally, most of the stakeholders use their own legal advisor. While forms of quasi independence across multi-agencies are not necessarily contrary to achieving colocation potentials, they need to be understood and respected in conjunction with any co-planning efforts.

Exhibit 2 Montgomery County Organizational Chart



Business / Legal Framework

There are a wide range of laws and administrative procedures impacting the day-to-day operations of municipal functions in Montgomery County, some of which may directly impact the realization of specific colocation opportunities. Though far from being an exhaustive list, some examples include:

- Colocation projects may be impacted by use restrictions upon disposition (i.e. federal funds, water conservation funds and deed restrictions if donated). For example, a park acquired with Program Open Space funds needs to be replaced should that park be repurposed for another municipal use.
- MCPS cannot dispose of property without going through an involved process, and often retains former school site ownership reversion rights, factors which can complicate long term reinvestment for alternative use.
- If a municipal project is bond financed, only 5 percent to 10 percent of the space can be used / occupied by the private sector.
- There is the realm of quasi-public agencies with some special purpose policies such as the Parking Lot Districts and the Housing Opportunity Commission.

Zoning and Building Code Issues

M-NCPPC asked that the White Paper conduct a preliminary assessment of illustrative zoning and building code issues as they may pertain to colocation. The primary potential issues related to code standards include possible limits or stipulations on the mix of agency functions and other uses, facility massing and site placements, access requirements, and possible building construction types.

Zoning Code

At a hypothetical level, since publicly owned sites in Montgomery County are not subject to zoning designations, there are few restrictions. In practice, however, there is the usual neighborhood presumption continuing existing uses, and if changes are contemplated, that the facilities' impact are respective of the surrounding development context. Of the 70+ land use codes as of the most recent Montgomery County Zoning rewrite (2014), there are many use and density flexible designations that could apply to most colocation concepts. The likelihood, however, of such zones being adjacent to or otherwise pre-aligned with potential colocation target sites is limited.

Clearly, some of the greatest challenges loom when a colocation candidate site has a long history of functioning largely as open space. Similarly, the prospect of introducing multiple uses employing relatively high density building formats, perhaps including a parking garage, can introduce all kinds of questions about consistency with neighboring uses (for example in one-family lot R-40+ zones). A further example of challenged neighborhood adjacencies could include the placement of a broadly defined mix of uses in a designated industrial or agricultural zone.

As for parking, while shared parking has become an accepted concept, the current Montgomery County code can only provide proxies regarding principles for shared parking, or even most basic parking load requirements, and is not directly suited to determining the actual case-by-case parking needs of a given (and usually unique) colocation project. Traffic impacts can present parallel challenges, also needing to be approached on a case-by-case basis.

Cognizant of the above conditions, Montgomery County has available an alternative approvals process for handling public institutional projects called “Mandatory Referral Review”. Public projects that use Mandatory Referral Review can be exempted from use, density and building massing restrictions mandated by zoning. Per the Montgomery County Department of Parks and Planning Uniforms Standards *“Mandatory Referral Review requires that the Planning Board review and approve the proposed location, character, grade and extent of any road, park, public way or ground, public (including federal) building or structure, or public utility (whether publicly or privately owned) prior to the project being located, constructed or authorized.”*

In terms of colocation, Mandatory Referral Review allows flexibility at the same time as taking into consideration of the overall compatibility of the project with surrounding neighborhood. Its application, however, is limited to public use components. If a subject project incorporates either by ownership transfer or outleasing private entities (including public-private partnerships), the private uses are required to meet the standards of the existing zoning.

Building Code

The International Building Code, as adopted and applicable to Montgomery County, is generally sufficiently flexible to accommodate most colocation project scenarios, especially with regards to Assembly (A) and Educational (E) occupancies. This said, the detailed design, engineering and construction of certain colocation projects may need special attention given to fire wall separation and egress constraints, sound and vibration isolations systems, and in some cases a higher standard of base building construction than might otherwise have been considered.

Montgomery County Colocation Initiatives

Though the history of colocation in Montgomery County dates back many decades, examples of recent County initiatives dates back to 2003 when the Office of Legislative Oversight (OLO) undertook an analysis of 54 strategic plans (authored by 11 departments) and 14 long range facility plans sponsored by 8 departments (excluded MCPS). Among the relevant findings of the OLO study was a lack of coordination between County long-term facilities planning practices and the land use master plan process.

In 2010, the County Executive created the Cross Agency Resource Sharing Committee (CARS) to provide a forum for coordinating among Montgomery County agencies to develop resource sharing strategies to achieve operational efficiencies, reduce costs and improve the quality of services. Member stakeholders comprised WSSC, HOC, DGS, Parks, Planning, MCPS and Montgomery College. CARS initially met quarterly, shared information and data base material. While not all of the discussed ideas and principles advanced, some concepts moved forward, such as efforts to standardize real estate procedures across multiple agencies. Over time, participation in CARS dissipated to a degree, sustaining itself largely based on case-by-case interest at the agency / project / staff level.

In 2011, the Education Committee and Planning, Housing and Economic Development Committee met to discuss school site selection processes and specifically those that involve park sites. These two committees convened a M-NCPPC / MCPS Joint Working Group (consisted of staff from Parks, Planning, MCPS, Council and Executive Branch, and Planning Board Commissioner Marye Wells-Harley). Administration of the meetings alternated between MCPS and Parks. The Joint Working Group met approximately half a dozen times between mid-2011 and 2012, and subsequently on as needed basis.

The primary results of the Joint Working Group's efforts, reported per a June 2012 memorandum to its convening agencies, comprise:

- Agreement that the site selection process needed more checks and balances.
- More stakeholder involvement was required.
- A recommendation was made to the two governing boards that a Public Facilities Colocation Study be undertaken.

With respect to colocation, the recommendations of the Working Group are now moving forward with the 2014 undertaking of this White Paper study to help facilitate the scope of work for the recently budgeted Public Facilities Colocation Study. In addition, M-NCPPC has made significant progress using its Development Suitability GIS Mapping Tool to identifying county owned land suitable for future development and possible collocation site candidates.

On a day-to-day administrative level, Montgomery County established years back an Interagency Coordinating Board for Community Use of Public Facilities, a formal department charged with coordinating access to schools and other public facilities, including fee schedules, use regulations and conditions.

Projects

Montgomery County has been successful in moving forward with numerous colocation projects. Examples include:

Existing Projects (not including numerous existing multi agency buildings)

- Kingsview Middle School adjacent to the Germantown Recreation Center (shared gymnasium), outdoor pool and ball fields.
- Southlawn fire maintenance and police facility (Department of Liquor Control relocation).
- Rockville Town Square (example of mixed-use / public / private partnership where the County is a fee owner as the county library component that has other private outleased uses.

Under Design / Construction

- PSTA & Multi Agency Service Park / Webb Tract (plus additional phases).
- Silver Spring Library adjacent to senior housing.
- Silver Spring Progress Place (homeless shelter) to colocate in parking lot adjacent to Fire Station #1 (fire station has 4 floors of office space above the station of which one is vacant).
- M-NCPPC Wheaton Headquarters – trying to accommodate the needs of multiple office users (Parks, Permitting, EPA, Regional Service Center, Park Police, etc.).
- Wheaton Library and Community Recreation Center.

Future

- Montgomery Aquatic Center (White Flint – possible public / private partnership for parking and redevelopment of surface lots).
- Numerous community recreation and aquatic centers.
- Large reuse sites at the former Montgomery County Service Center / Jeremiah Park and at Life Science Center West.
- Residential development proposal issued for East County Regional Service Center and Sidney Kramer Upcounty Regional Service Center.
- MCPS facility requirements (Northwest Cluster Elementary School, Upcounty Elementary School Holding Facility, another Clarksburg Elementary School) with continued Parks colocation opportunities as well as other facilities.

VI. MONTGOMERY COUNTY COLOCATION STUDY CONSIDERATIONS

In May 2014, the Montgomery County Council approved a Public Facilities Colocation Study work plan budget for FY15 as a precursor to preparing a Functional Master Plan for the Colocation of Public Facilities. As a preliminary step supporting this initiative, this White Paper has attempted to outline various approaches, issues and background factors possibly pertinent to Montgomery County. While the White Paper is not positioned to make any specific recommendations concerning the substantive elements of any forthcoming Public Facilities Colocation Study, it has been charged with identifying possible action areas for further investigation along with suggesting what might be reasonable next steps.

Example Issues and Opportunities for Further Consideration

Policy and Planning

1. Establishing a multi-organizational colocation policy, with formalized goals, planning procedures and decision making steps, possibly endorsed under County Code.
2. Establishing formal means to coordinate agency planning functions, with colocation checklist / milestones as part of the process before internal finalization of organization strategic direction.
3. Reinforcing flexibility / encouragement of direct inter-agency engagement, with the benefit of not having to add redundant or otherwise cumbersome centralized bureaucratic procedures.
4. Respecting case-by-case needs and situations that are likely to drive specific project opportunities. This may mute a possible macro management overlay to specify facility goals or targets for years hence, which based on the White Paper research, might be counterproductive.
5. Dissecting County and State laws as they may pose legal constraints to colocation options. The preliminary research for the White Paper suggests that, with noted exceptions, legal issues are not likely to be major constraints.
6. Review of business level laws and practices, with the goal of allowing for as much flexibility as possible for the County regarding the broad discipline of “asset management” (i.e. property ownership, financing, outleasing, revenue sharing, cost allocation, etc.).
7. Encouragement of a revisit / update of agency specific facility planning metrics (State and local as appropriate).
8. Ensuring that zoning and building code requirements do not overwhelm colocation goals and options. While not necessarily onerous under the newly updated Montgomery County Zoning Code, zoning code conformity (and related planning regulatory provisions) pertaining to colocation objectives need special attention, focusing on possible issues of density, building massing and other project use impacts. (On an initial look, building code considerations appear to be of limited problematic concern related to colocation opportunities.)

9. Evaluation / leveraging of how influences on the development process such as zoning-related incentives, community benefits contributions, and the county tax code, might advance the broader definition of colocation objectives.
10. Exploration of colocation prospects for inter-jurisdictional liaison (Montgomery County independent cities, regional service agencies, State of Maryland, U.S. Government).
11. Outreach and promotion of colocation potential to non-profits, private educational entities, health providers, faith based groups and the like entities.
12. Promoting a holistic approach to the engagement of community interests. (The White Paper research into colocation efforts repeatedly encountered that established single mission community interest groups - sometimes seemingly in concert with municipal agency positions - most inhibited thinking about colocation opportunities.)
13. Leveraging the Montgomery County commitment to forward thinking. In other words, trial balloon ideas about transformative vision involving colocation, not just with respect to brick and mortar, but regarding the broader integration of community interaction – i.e. children interacting routinely with seniors.
14. More interagency lunches and dinners (relationship building)?

Operational Elements

1. Establishing an administrative focal point – a clearinghouse of sorts linked to the CIP approval process – potentially a critical management tool for coordinating agency strategic planning and budget analysis. (Based on the White Paper research a colocation clearinghouse / oversight would seem best placed close to County Executive office coordination functions.)
2. As for asset management, attention to the details of interagency facility management are likely to prove cost effective. Are there direct (annual cost) economies from centralized facilities management to be gained, as well as indirect service delivery cost and facility life cycle cost factors to be rationalized?
3. On a practical level, differing agency employment and contract procurement practices can have significant impacts on cross-agency interest in collaboration. Addressing possible differences may point to default preferences, including third party solutions.
4. Though it is the nature of many colocation projects to be unique, basically one-off creatures, interagency collaboration could benefit from a review of standard procedures to facilitate simple, familiar and equitable cross-agency agreements (i.e. MOU templates, methods for determining agency rents and allocation of operating costs, procedures for addressing facility life cycle events, and other management tools).
5. At the institutional level, there is likely to be benefit from dedicating resources to staff training and employee retention related to colocation expertise.

Funding

1. Consideration of mandating (and standardizing) some form of cost benefit analysis that compares project specific single use facility options with colocation alternatives.
2. The cost effectiveness of colocation may or may not be immediately evident at the agency level. In the big picture, there may be reason to not only encourage policy level objectives regarding colocation, but at a more fundamental level, it may be realistic / honest to back up the policy claims with implementation aids such as a “special conditions” colocation fund dedicated to address agency cost offsets (i.e. paying for structured parking not out of agency operating budgets).
3. Highlighting colocation efforts in the process of employing budget / project prioritization scoring techniques may assist decision making, with criteria for offsetting traditional budget performance measures with aggregated multi agency / county-wide merit factors.
4. The implementation of colocation efforts is likely to be impacted by how dedicated agency revenue sources may influence the budgeting process, suggesting a need to analyze (and possibly reset) how independent revenue sources factor into the colocation equation.
5. Agency specific strategic plans, and related budgeting, do not generally correlate between agencies. In an ever chronic funding short municipal finance environment, colocation needs to be sensitive to the challenge of aligning funding timelines.
6. Consideration of possible financial incentives for organizations to see quantifiable benefit from embracing non-traditional planning and budgeting practices. The concept of a discretionary colocation general fund might make for a means to offset agency budgetary impacts from colocation.

Possible Next Steps

1. Review of White Paper by existing Joint Working Group
2. Adaptation of the Joint Working Group into an expanded multi agency Colocation Task Force (at the direction of the Executive Branch)
3. Task Force charge to oversee the Public Facilities Colocation Study
4. Public Facilities Colocation Study work plan: (to execute Fall 2014 to Summer 2015)
 - a) inventory of various stakeholders’ strategic plans
 - b) further apply the GIS Development Suitability Database Tool to identify key sites for colocation
 - c) engage County agency stakeholders
 - d) profile in detail possible weak links in implementing colocation
 - e) preparation of Colocation Policy Guidelines to be approved by MC Council
 - f) finalize policy proposal for Council consideration by Fall 2015

APPENDIX A

Regional Profiles

Howard County
City of Alexandria
Arlington County
Fairfax County
District of Columbia

National and International Examples

Case Study Supplemental Documentation

REGIONAL PROFILES

This appendix contains additional noteworthy colocation projects. Colocation themes described include colocation processes (at the review level and capital project evaluation level), types of compatible uses including affordable housing, public-private partnerships, replacement facilities, facility modernizations and / or expansions to accommodate new colocated uses, environmental objectives and more.

Excluding Montgomery County, ten local jurisdictions were contacted for possible colocation practices. Research also was undertaken to identify national and international colocation projects. Specifically, in Maryland, other jurisdictions contacted with limited applicable colocation project examples include the City of Baltimore, Anne Arundel and Frederick counties. Prince George's County colocation initiatives are identified in the case study example included in the report. Three Howard County projects are described herein. Representative jurisdictions in Virginia include the City of Alexandria, Arlington County and Fairfax County.

Colocation projects are organized and presented by jurisdiction beginning with Maryland, then Virginia, the District of Columbia followed by other national and international examples. Within each jurisdiction, projects are categorized as school related, municipal or mixed-use projects, and are broken down into existing or planned facilities.

Howard County, Maryland

Howard County's colocation policy focuses on service and convenience oriented facilities via efficient colocated municipal facilities. At the core of their colocated facilities is the successfully pairing of the Department of Parks and Recreation, Health, Police and sometimes Aging (Glenwood and Laurel examples below).

Existing Municipal Facilities

1. The Gary J. Arthur Community Center at Glenwood (GCC) – Located within the Western Regional Park, GCC serves the growing population in the western part of the county. The Glenwood library is adjacent to the community center, with a farmers' market on the property. An elementary and a middle school are located on an adjacent property to the south.
2. The North Laurel Community Center – Colocated facilities include a fitness room, commercial kitchen, double gymnasium, pre-school classrooms, multi-purpose rooms, senior activity room and more.
3. The Howard County MultiService Center – Multiple human service oriented agencies provide one-stop human services in the North Laurel and Savage areas.

City of Alexandria, Virginia

Alexandria's standard development review process is augmented by an Inter-Department Review Team (IDR). One of the objectives of the multi-disciplinary IDR is to advance the City's goals to provide adequate public facilities and community services. In addition to The Station at Potomac Yards case study, two representative existing public facility school colocation projects comprise:

Existing School Related Facilities

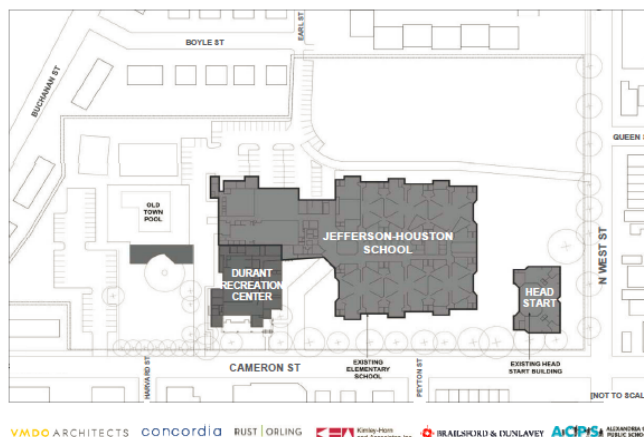
1. Mount Vernon Community School and Recreation Center – An entire triangular city block bounded by Commonwealth, Mt. Vernon and E. Uhler Avenues. The collocated facilities include:
 - a. Mount Vernon Community School – a multi-level elementary school for grades K-5 accommodating 765+ students;
 - b. Mount Vernon Recreation Center – equipped with a gymnasium, pottery / arts studio, photography studio, game room, meeting rooms, computer labs and a fitness / dance studio;
 - c. Colesanto Park – tennis court and ball fields;
 - d. Del Ray Artisans (DRA) Gallery at the Nicholas A. Colesanto Center – the DRA supports community based art activities, events and organizations;
 - e. Campagna Center - a child care and day care center; and
 - f. James M. Duncan Branch Library.

In addition, Alexandria Social Services and the Department of Human Services have offices across Mt. Vernon Avenue.

2. Jefferson-Houston Elementary School & Durant Recreation Center & Outdoor Swimming Pool – A new multi-story elementary school was built on the existing 10-acre site replacing an existing 83,385 square foot school. The new school was built around the existing buildings, shared parking and adjacent recreational facilities. It opened in September 2014 (see site plans below).

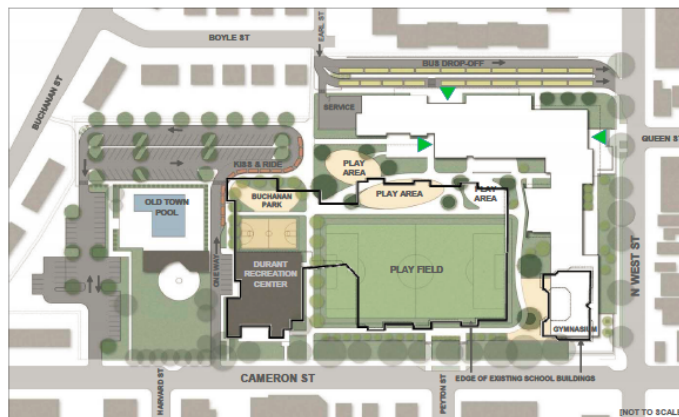
Existing Facilities

DESIGN PROCESS UPDATE: EXISTING SITE PLAN



New School Illustration

DESIGN PROCESS UPDATE:
COMMUNITY SITE PLAN SELECTION – MARCH 26



New School Features

DESIGN PROCESS UPDATE:
COMMUNITY SITE PLAN SELECTION – MARCH 26



Arlington County, Virginia

Arlington County's history with colocation of public facilities has been successful with both school related projects as well as mixed-use developments, the latter of which are typically part of large land assemblages. Examples include:

Existing School Related Facilities

1. Thomas Jefferson Middle School and Community Center – This facility was designed and is operated as a joint-use facility that connects the school with the community center. The community center offers a fitness center, volleyball, badminton, game room, open art studios, tennis courts and outdoor ball fields that include baseball, basketball and soccer.

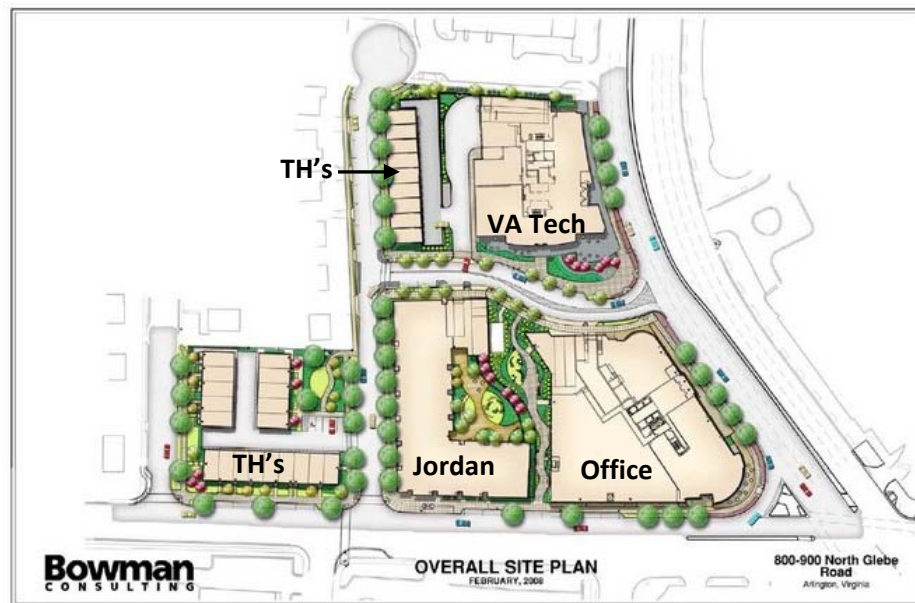
2. Arlington Mill High School, Career Center, Beauty Center and Columbia Pike Branch Library – All four county programs are colocated in one facility adjacent to Arlington County’s Environmental Health Bureau and Fenwick Center (health clinic) and the Patrick Hayes Elementary School (with shared parking).

Existing Mixed-Use Projects

1. The Jordan / 800 N. Glebe Office Building / Virginia Tech Research Center / Townhouses – This is a 4.8 acre mixed-use development totaling over 600,000 square feet of residential, office, R&D and retail space within three blocks of the Ballston Metrorail station. Total project floor area ratio equates to 2.9. Components comprise:
 - a. The Jordan, a new 90 unit four-story affordable apartment complex, replaced 28 older affordable units. The project was built on top of a shared 3-story 500+ space underground parking garage;
 - b. a 10-story 300,000+ square foot Class A office building anchored by Accenture;
 - c. a 7-story 144,000 square foot Virginia Tech Research Center;
 - d. two townhouse parcels planned for 28 units; and,
 - e. a public garden / walkway.

The developer of the commercial space swapped land parcels with AHC (the non-profit owner of the affordable housing), during the planning process enabling AHC to build more than triple the number of new affordable homes and facilitated community support for the entire mixed-use project.

Site Plan Project



View of Office Building with Residential and VA Tech in Background



Fairfax County, Virginia

The concept of colocation is also not new to Fairfax County, but the implementation of colocation projects is still more in the planning and conceptual stages than compared to Montgomery County. Colocation efforts are beginning to emerge in Tysons Corner redevelopment projects (see Fire Station #29), Fair Oaks as well as potential opportunities in Reston Town Center.

Existing School Related Facilities

1. South County Secondary School – This project represented a public-private partnership (PPP) to build a \$64.0 million school in Lorton, Virginia. Fairfax County Public Schools (FCPS) solicited proposals for a PPP to provide a new school on a portion of the former prison site being transferred from the federal government. The developer submitted a proposal that called for monetizing certain unused parcels adjacent to the school site included in this transfer. Through this process, in addition to building the new school, the developer built residential and recreational developments on adjacent parcels. As a result of this expanded development project, the developer was able to lower the overall net cost of the school project to FCPS and accelerate the delivery of the school without taking any funds out of the school system's capital improvement plan until they were originally programmed.

Existing Municipal Facilities

1. Fair Oaks Public Safety Center – Includes a recently renovated facility that houses the Fire and Rescue Company #421 and District Police Department in one building with shared fitness and joint-use space.

Planned Municipal Facilities

1. Fire Station #29 – Represents a developer proffer to build a new fire station on the ground level of a high rise residential building in Tysons Corner.

2. Government Center Public Safety Facility – Plans have been approved for a \$142 million 274,000 square foot police and fire center proximate to the county’s government center complex at Government Center Parkway and Monument Drive.

District of Columbia

The District of Columbia has established a capital budget approval process that relies on scoring sheets to help rank projects. Colocation of facilities is one of the evaluation criteria on the scoring sheets as illustrated below.

Sample DC Capital Budget Process Sample Scoring Sheet

Evaluation Criteria for Proposed FY 2015 - FY 2020 Capital Projects				
Agency	Total Cost	Project Alignment with Evaluation Criteria		
Project		How supportive is the proposed project on each scale shown?	Notes	Score
Meets Mayoral Policy Priorities				
<i>One City Action Plan/Economic Development Strategy</i>		Does this project address key action item(s)?	(max 25 points)	
		Please Identify Which Action(s)		
<i>Comprehensive Plan Actions</i>		Does this project address a Comprehensive Plan action item?	(max 15 points)	
		Please Identify Which Action(s)		
<i>Sustainable DC Goals</i>		Does this project address a Vision for a Sustainable DC goal?	(max 10 points)	
		Please Identify Which Goal(s)		
Subtotal	0.00	of 50		
Leverages City Investments				
<i>Small Area Plan Implementation</i>		Does this project implement a Small Area Plan action item?	(max 7 points)	
		Please Identify Which Plan(s) and Action(s)		
<i>Co-Location / Coordinates External Public or Private Funds</i>		Does this project leverage outside resources or involve co-location with other agencies?	(max 8 points)	
<i>Project Readiness</i>		provide more detail below	(max 9 points)	
<i>Project Urgency</i>		mandates or compliance with federal regulations, e.g. mandates and consent decrees?	(max 6 points)	
		Please Choose: Not Urgent = 2, Somewhat Urgent =4, Very Urgent=6		
Subtotal	0.00	of 30		
Advances Fiscal Stability				
<i>"Fix-It First"</i>		Does this project extend the life of an existing District asset?	(max 5 points)	
<i>Impact on Operating Budget</i>		Does the project have an impact on the operating budget?	(max 5 points)	
		Please quantify below		
<i>Revenue Generation</i>		Will this project generate future revenue?	(max 5 points)	
		Please provide estimates of revenue generated		
<i>Job Creation</i>		Will this project create temporary and/or permanent jobs?	(max 5 points)	
		Please provide estimates of jobs created		
Subtotal	0.00	of 20		
Overall Score:	0.00	of 100		

* If the project adds costs to the operating budget, then score 1; if no impact, then score 3; if savings then score 5

Description:

Justification:

Highlights of some successful and planned colocation projects in the District of Columbia comprise:

Existing School Related Facilities

1. Savoy Elementary School – Alfred Kier Savoy Elementary School is a PK3–5 Arts Education Institution that was modernized to include a complete renovation of an existing 3-story, 58,000 square foot school plus the addition of a new gymnasium, library/media center, multi-purpose room/cafe/teria, administrative offices, and a new playground.

2. James F. Oyster Bilingual Elementary School – A public-private partnership used for a mixed-use development that covered the cost of a new school through disposition of public land for private development financed with a public bond issuance paid down through a project dedicated Payment in Lieu of Taxes (PILOT). Specifically, the project comprises the replacement of a 70 year old elementary school with a new 47,814 square foot school above a 12,000 square foot underground garage and adjacent 211-unit (219,844 square feet) apartment building. The size of the exterior play areas was reduced to approximately 9,000 square feet but with underground parking, the site's efficiency increased. The school site is situated on 34,413 square feet and has a 1.4 FAR while the residential site is slightly larger with 38,768 square feet and a 5.7 FAR (1.68 acres accommodating 267,658 square feet total equating to a 3.7 FAR). This was a nine year process beginning in 1993 ending in 2001 with the opening of a new school.
3. Walker Jones Elementary School, Library and Recreation Center – The Walker-Jones Educational Campus (WJEC) and Scott Montgomery Elementary School (ES) were consolidated on a new Walker Jones site in 2010. The WJEC includes a 100,000 square foot K-8 school; a 20,000 square foot community recreation center; a 5,000 square foot library and new athletic fields and playgrounds. The new facility has capacity to accommodate 850 students, and it was also one of the first LEED-certified green school buildings in the District.
4. Stoddert Elementary School and Recreation Center – In 2009, an existing 18,000 square foot school with a capacity for 300 children (pre-K to 5th grades) was expanded by about 46,000 square feet to include recreational facilities. The addition includes classrooms, a publicly accessible gym and multiple purpose rooms. Grounds work comprises a new entry plaza, new trees, a 40-car parking lot; reconstruction of the existing softball and soccer fields, a refurbished playground and a new tot lot.

Existing Municipal Facilities

1. Consolidated Forensic Laboratory (CFL) – The CFL in the District of Columbia merges the physical environs of three city public safety agencies—public health, the chief medical examiner, and forensics labs. Colocation in the 351,000 square foot, six-story facility allows the city to upgrade all three agencies in a cost effective manner while improving the science, efficiency, and integrity of the work performed. The efficiency extends to the building systems, with the CFL achieving LEED Platinum.

Planned Municipal Facilities

1. DC Central Library / MLK Library – Plans are in the works to renovate this historic Mies Van der Rohe designed library. One of the project goals is to transform the library from monofunctional to multifunctional space. One of the more controversial aspects of the plan is the fact that it may turn the building into mixed private-public space. There are optional portions of the proposed plan for private space, most likely for housing, that would be built above the “squat” Mies structure.
2. West End Library and Fire Station – Through an RFP process that began in 2009, the District awarded a developer the right to rebuild the neighborhood library and fire station. Original plans for the current site of the library would create a 20,765 square foot ground floor library with a 10-story residence above (approximately 153 market-rate residential units on the 2nd through 10th floors), and 9,000 square feet of ground floor retail. Plans for the fire station site include a replacement fire station on the ground floor and mezzanine with 52 affordable residential units on the 2nd through 4th floors.

Existing Mixed-Use Developments

1. Waterfront Station – Located adjacent to the Waterfront Metrorail station, this is a seven building project totaling approximately 2.0 million square feet. In the first of four phases which delivered in 2010, the District of Columbia consolidated some of their administrative offices (Department of Consumer and Regulatory Affairs, Office of Planning, Tax and Revenue, etc.) into leased space at Waterfront Station. The District occupies two buildings totaling 500,000 square feet reinforcing economic development of this area and helping anchor a mixed-use project, which also include 80,000 square feet of neighborhood retail including a Safeway, CVS and restaurants. Other phases include the recently completed 500+ unit Sky House apartments and additional residential and office buildings.

NATIONAL AND INTERNATIONAL EXAMPLES

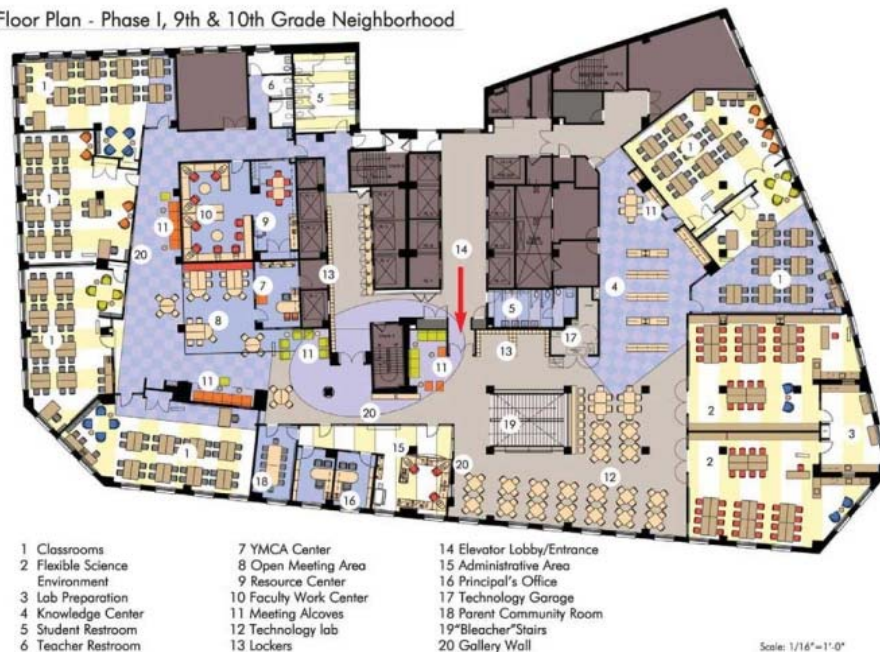
Of the ten case examples presented in the report, six were within the Washington region and four were other nation project examples. Some additional national and international colocation examples are presented below.

Existing School Related Facilities

1. Millennium High School, New York City, New York – Millennium High School occupies three floors in the middle of an office building on Broad Street in New York City. Completed in 2003, the project delivered in record time and for a small fraction of what most new schools cost. The plan is developed without corridors, partly to assist with natural light infiltration.

Millennium High Representative Floor Plan

13th Floor Plan - Phase I, 9th & 10th Grade Neighborhood



2. Education Construction Fund (ECF); New York City Department of Education – Numerous public-private partnerships are used for vertical mixed-use developments that feature new school facilities as one of the project’s components. The ECF was created by the New York State Legislature in 1967 that is administered by the New York City Department of Education. The ECF builds combined occupancy structures on City-owned land conveyed to the Fund by New York City. The school facility portion of the mixed-use project is financed via the issuance of tax exempt bonds with a term of up to forty years. ECF uses ground rents, lease payments and / or tax equivalency payments from the non-school portion of the projects to finance construction of its school facilities. Future revenues from the non-school portion(s) of the development are used to pay the debt service of the school facility. ECF issued tax exempt bonds are backed by the credit of the City of New York. Since its inception, the ECF has funded the construction of 18,000 school seats, 4,500 housing units and 1.2 million square feet of office space in New York City. Of a total of 14 projects, 11 schools combined the school with housing uses while another three projects colocated the school with commercial space.
3. Rosa Parks School and Community Campus at New Columbia; Portland, Oregon – This project represents a public-private partnership that colocated a civic facility that has shared / joint-use of facilities within the school building. Specifically, a new 66,383 square foot facility housing a 45,147 square foot 575 student capacity K-5th grade school and a Boys & Girls Club with 11,071 square feet in addition to 10,645 square feet of shared space that was completed in 2006. This project was part of revitalization of the Community Campus at New Columbia in Portland, Oregon which included the adjacent City owned University Park Community Center (houses the full-sized gymnasium) situated on approximately 12 acres.
4. St John’s Community Center, JJ Pickle Elementary School, a Library, and City Admin offices (HHS, Parks and Police); Austin, Texas – Opened in 2002, the St. John’s Community Center is collaborated with the City of Austin and the Austin Independent School District. The center houses the Austin Parks and Recreation Department, the Austin Police Department, the Austin Public Library, Health and Human Services, three joint use conference rooms, as well as the J.J. Pickle Elementary School. The City had to purchase privately owned single family homes adjacent to the City Park (some via eminent domain) to assemble a large enough site for these colocated facilities.
5. Richmond Green Joint Use School Project; Richmond Hill, Ontario – This new secondary school and public library is a joint building complex situated in a major community park. The three-story, 150,000 square foot school and the 12,000 square foot public library are provided with separate and distinct entrances, however the library has been designed to service both the community and the student population of the school.

Planned School Related Facilities

1. Alton High School, Community Centre and Public Library; Burlington, Ontario – This is a planned shared-use facility. Facility components include: a) four competition-sized double gyms as part of the 53,886 square foot Alton Community Centre; b) a three-story 147,069 square foot high school with a 200-seat auditorium; and, c) a shared 11,840 square-foot integrated library which will be used by the public and the high school. Directly across the street is the Norton Community Park, which will have two lit artificial turf sports fields, a water feature, an outdoor multi-use sports court, a playground, a skate park, an open air pavilion and washrooms.

Existing Municipal Facilities

1. Ada County Courthouse and Administrative Building; Boise, Idaho – Ada County needed to provide more municipal services to keep pace with population growth. Due to limited financial resources, Ada County relied on a public-private partnership to deliver a 300,000+ square foot courthouse and administrative complex that was the center of a larger private sector commercial mixed-use development.
2. County Communications Center (CCC); Johnson County, Kansas – This 48,000 square foot building houses the Emergency Communications Center, the sheriff's communications dispatch unit and the Olathe Police Department's emergency communications operations. It also serves as a backup emergency operations center for the county's Department of Emergency Management and Homeland Security and provides secure space for the county's information technology disaster recovery systems. An Interlocal Cooperation Agreement between Johnson County and the City of Olathe established an Executive Committee comprised of the chief executives of the three agencies for the purpose of developing facility policies and interagency operating procedures. The County owns the building and is responsible for its maintenance and operating costs. The CCC was also designed to provide essential equipment needed for communications interoperability between local government agencies and with agencies in the greater Kansas City region.
3. Children's Theater and Charlotte Mecklenburg Library; Charlotte, North Carolina – The Children's Theatre of Charlotte moved into the new 102,000 square foot *ImaginOn: The Joe & Joan Martin Center* in October, 2005. The theater has two state-of-the-art theatre spaces (one with 570 seats, the other with 250 seats), a dedicated library space for youth 11 and under, four multi-use classrooms, a teen-only library, a multimedia production studio and an interactive exhibit space. The collaboration between the theatre and the Charlotte Mecklenburg Library allows *ImaginOn* to bring stories to life by combining theatre, literature and programming for young people under one roof. The library repeatedly gets recognized as one of the nation's best children's libraries.

Children's Theater and Charlotte Mecklenburg Library Street View



4. LaSalle Town Hall, Library, Fire and EMS; Ontario, Canada – A new town hall and library was constructed adjacent to a separate fire and EMS building and a new police station that are all located on a new municipal campus. Making buildings “en masse” resulted in financial savings.
5. London / Stoney Creek Library, YMCA and Recreation Center; Ontario, Canada – London built a new YMCA with a library and recreation-community center a couple of years ago called Stoney Creek. The concept is not new, and has been done in several other cities (i.e. Vaughan, Ontario and Middlesex Centre) with appropriate local variations as to content, design, funding, etc.
6. Merseyside Fire Station and Community Center; Liverpool, United Kingdom – Merseyside Fire District built a new fire station that incorporated a traditional fire station with a community center. They were able to fund the new station and ongoing services through a number of private partnerships and donations.
7. Colocated Rural Public Libraries; Australia – In Queenstown, Australia, the government service delivery model is usually delivered through rural transaction centers (RTCs) that typically includes a facility that offers banking, insurance and sometimes post office services. They often include meeting rooms. Queenstown has added seven libraries colocated within these RTC’s. In addition, partnering a library with a tourist information center has proved successful. Community benefits include greater access to internet services, improved access by extending opening hours, increased usage / patronage, etc.

Planned Municipal Facilities

1. City of Asbury Library, Police, City Hall, Police and Fire, Iowa – As part of the City’s Strategic Planning initiatives in 2011, the City Council prioritized the design of a new municipal building to locate the library, city hall and police station at a central location. The three acres site for this building is adjacent to Asbury Park and the Village Cooperative.

CASE STUDY SUPPLEMENTAL DOCUMENTATION

Loudoun County, Virginia

A number of colocation projects were referenced in the Loudoun County case study. Existing county documentation on their colocation initiatives are presented below.

Capital Facility Development Colocation of Facilities Guidelines

Staff recommendations for facility types appropriate for co-location are linked directly to facility types that require significant acreage for their development. It is logical that other public facility uses could be colocated on these large acreage sites. To that end these guidelines recommend co-locating other public facilities on park and school sites to achieve the Revised General Plans stated policy goal for colocation of public facilities to provide multi-purpose community facilities to Loudoun County's citizens.

Colocation with Parks, Recreation and Community Services Facilities

Community Park (35-acre site) with 3 ball fields

MH Residence
Youth Shelter

District Park (75-acre site) with 9 ball fields

Sheriff Substation
Fire & Rescue Station

Regional Park (200-acre site) with 19 ball fields

Library
General Government Office Park
Senior Center
Teen Center
Recreational Center
Youth Shelter
Drop-off Recycling Center

Other Opportunities for County Colocation

Park & Ride Lot – Drop-off Recycling Center-Vehicle Maintenance Facility
Human Service Campus-Adolescent Facilities-Transitional Facilities
Fire & Rescue Station-Storage Facilities-Hazardous Materials Drop-off Center

Colocation with School Facilities

Elementary School

ES/MS/HS School
Community Park
Library
Senior Center
Sheriff Substation

Middle School

ES/MS/HS School
District Park
Recreation Center
Teen Center
Sheriff Substation

High School

ES/MS/HS School
Regional Park
Recreation Center
Teen Center
Sheriff Substation

In conclusion these guidelines for colocating facilities, if approved, would assist staff in capital and land planning to ensure opportunities for colocation is included in the Capital Needs Assessment and Capital Improvement Program.

Land Acquisition Planning, Funding and Acquisition Process

The acquisition of public facility sites is linked to the Board of Supervisors and Loudoun County School Board's capital needs planning and budgeting processes. The basis for land site planning begins with the Board of Supervisors adopted Capital Facility Standards which assist in defining the base land acreage required for various public facility types.

Capital Facility Standards

The County's Capital Facility Standards (CFS) are adopted by the Board of Supervisors to guide the development of new capital facilities by establishing "triggers" that determine the need for, and initiate the process to plan and develop, new facilities. The CFS use population forecasts, demographic trends, and geographic considerations to identify the number, size, general location and type of facilities that will provide desired levels of service to the residents of the County.

- **Type** - The CFS determine the types of capital facilities the County would like to develop in quantities that are driven by demographic and geographic factors.
- **Triggers** - The CFS are based on specific demographic factors (total population, age cohorts, per capita, etc.) or geographic factors that provide the County identifiable triggers to develop new public facilities.
- **Acreage** – Each facility standard provides an approximate acreage required to develop that type of facility on a stand-alone site. The approved acreage is provided on an "up to" basis, meaning the facility can be developed on a site of "up to" the approved standard acreage, within reason. The acreage estimate provides adequate useable space for required site features such as setbacks, landscape buffers, surface parking, storm water management, drain fields, etc.
- **Size** – The CFS provide for a typical square footage for each type of facility. The size standards help the County develop cost estimates for capital projects in the CIP.
- **General Location** – The CFS are used to determine the need for new facilities based upon population growth in specific geographical areas of the County, known as the County's Planning Subareas.

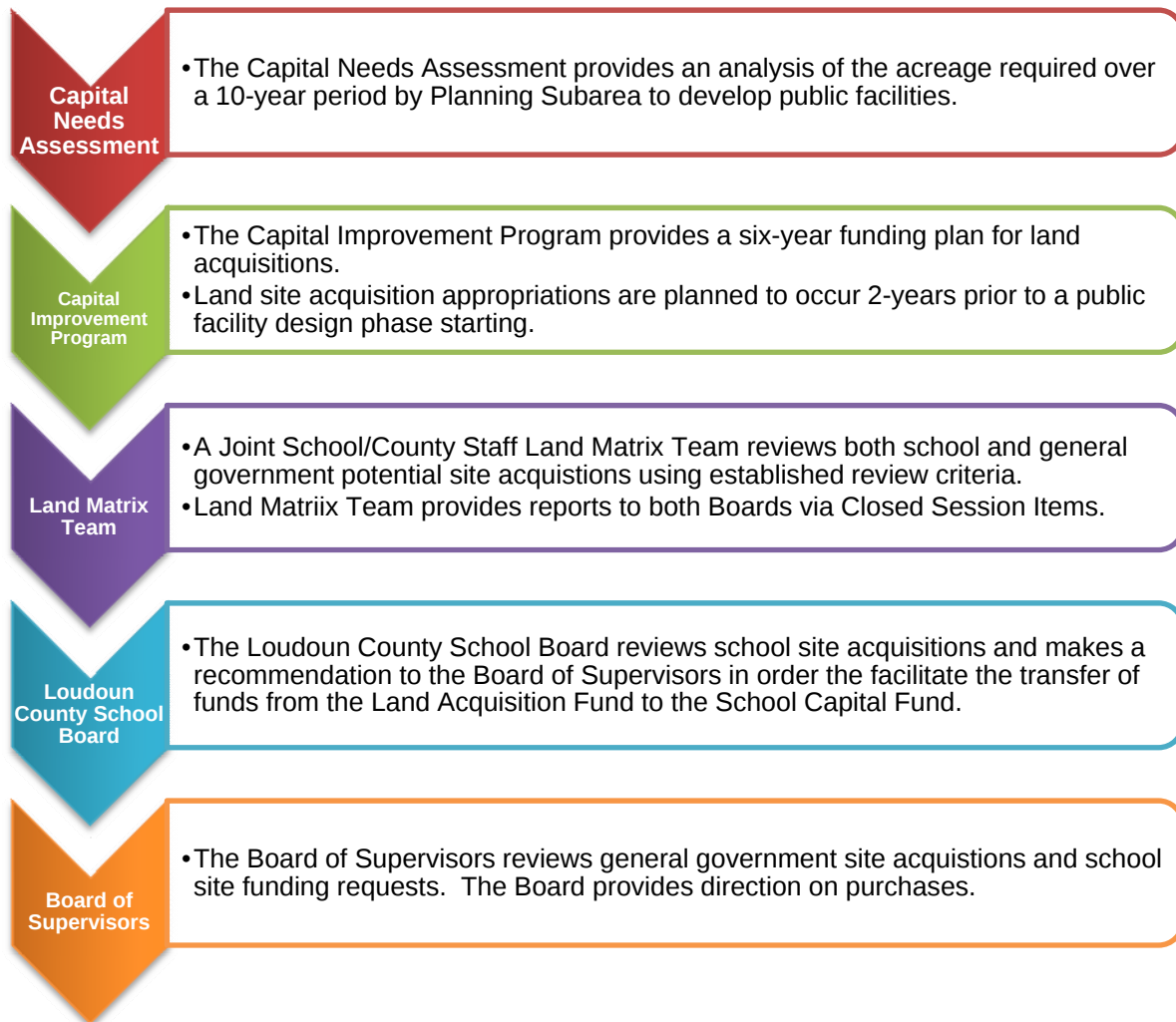
The basis for setting Capital Facility Standards is found in the County's Revised General Plan, which provides, "The County will determine the need for new public facilities and will identify suitable sites based on the Revised General Plan, appropriate area plans, land use, and growth policies" (Revised General Plan, Chapter 3, General Public Facilities Policy 2). The Revised General Plan places an emphasis on the development of agency service plans and the adoption of capital facility standards as the mechanism to guide the County's capital facility development.

Once approved by the Board of Supervisors, the Capital Facility Standards are used to develop the County's Capital Needs Assessment and Capital Improvement Programs.

The County's Capital Needs Assessment (10-year Plan) and Capital Improvement Program (6-year Budget) plan and fund the types of capital facilities the County/Schools will develop. The plan and budget account for the land site acquisitions required to achieve the County's/School's Capital Improvements goals. All land acquisition funding is appropriated in the Board of Supervisors Land Acquisition Fund in the Capital Improvement Program. When a school site acquisition occurs the Loudoun County School Board makes a recommendation to the Board of Supervisors for final approval to transfer school land acquisition funds to the School Capital Fund for an acquisition.

Land Matrix Team

A County/School staff team serves as a Land Matrix Team to review all planned County/School land site acquisitions. The team members include the County/School Planning Directors, County/School Land Acquisition Managers, County/School Engineering staffs, County/School Capital Planning and Budget staffs. The team utilizes an established Evaluation Criteria for Acquiring Real Property to evaluate potential land sites and to develop its recommendation to the Board of Supervisors and the Loudoun County School Board. The team develops Closed Session Items for Board's review, consideration and final direction on all land site acquisitions.



The following documents provide the established procedures and review criteria utilized by the Land Matrix Team to develop its recommendations to the Loudoun County Board of Supervisors and Loudoun County School Board.

1. Loudoun County Public Schools Capital Facilities Planning Guidelines – March 2010
2. Parcel Evaluation Data Sheet
3. Evaluation Criteria for Acquiring Real Property
4. Colocation of Public Facilities Guidelines - June 2008
5. Public Use Sites – Usable Land Criteria
6. Land Planning for School Sites – July 2008

TABLE 2 (7-1-10 Effective Date)
ADOPTED CAPITAL FACILITY STANDARDS (FY 11)

Capital Facility/ Apparatus	Building S.F.	Up To #Acres	ADOPTED Standard
Fire Station	13,000	5	1: 25,000 population
Fire Station - West	13,000	5	1:10,000 population
1500-gpm Engine	n/a	n/a	1:10,000 population
1500-gpm Engine-West	n/a	n/a	1:10,000 population
ALS Ambulance	n/a	n/a	1:10,000 population
ALS Ambulance-West	n/a	n/a	1:10,000 population
Ladder Truck	n/a	n/a	1:25,000 population
Heavy Rescue Squad	n/a	n/a	1:50,000 population
Tanker -West	n/a	n/a	1:10,000 population
Brush Truck-West	n/a	n/a	1:10,000 population
Sheriff Substation	18,000	5	1: 75,000 population
Animal Shelter	18,000	5	0.079 sf per capita
Juvenile Probation Residence	8,800	2	1: 250,000 population
Recreation Center	83,000	15	1: 75,000 population
Regional Park	10,000	200	1:75,000 population
District Park	5,000	75	1:25,000 population
Community Park	n/a	30	1:10,000 population
Teen Center	20,000	5	1:10,000 population aged 12-14 years old
Senior Center	15,000	5	1:10,000 population aged 55+ years
Respite Center	4,000	2	1:15,000 population aged 55+ years
Trails	n/a	n/a	1 mile:1,000 population
Community Center	10,000	6	1:42,000 population
Library	Up to 40,000	7	0.6 sf per capita
Juvenile Detention Cntr	40,000	6	1:Countywide
Youth Shelter	8,000	2	1:140,000 population
Juvenile Assessment Cntr	4,000	2	1: up to 500,000 population
Adolescent Transitional Independent Living Residence	8,000	2	1:250,000 population
Emergency Homeless Shelter	9,000	2	1:250,000 population

TABLE 2 - Continued
ADOPTED CAPITAL FACILITY STANDARDS (FY 11)

Capital Facility	Building S.F.	Up To #Acres	ADOPTED Standard
Health Clinic	10,050	n/a located in a general government facility	0.5 sf:28,000 population
ID Residential Facility	3,400	0.5	1 Home: 26,875 population
MH Residential Facility	3,400	0.25	1 Home: 18,325 population
General Gov't Support Facilities	n/a	n/a	3 sf per capita
Recycling Drop-Off Centers	3,000 sf container pad, 6,050 sf parking/access area	0.25	1:40,000 residents per planning subarea, with one within 5 miles of every resident, with preference to co-locate with other Public Facilities
Special Waste Drop-Off Centers	600 sf pavilion, 1,600 sf container pad, 6,050 sf parking/access area	1	2 Centers: County
Park & Ride Lots	200 –700 spaces	4-13	1 space:90 residents
Bus Maintenance Facility	28,000	10	1 Facility:247,500 population
Transit Buses	n/a	n/a	1 bus per 4,950 population

Public School Capital Facility Standard(s):

Capital Facility	Building S.F.	Up To # Acres	ADOPTED Standard
Elementary School – 1 Story	66,743	20	750 pupils
Elementary School – 1 Story	84,142	20	800 pupils
Elementary School – 1 Story	90,100	20	875 pupils
Elementary School – 2 Story	102,141	20	875 pupils
Middle School – 1 Story	160,048	35	1,184 pupils
Middle School – 1 Story	168,780	35	1,350 pupils
Middle School – 2 Story	177,740	35	1,350 pupils
High School – 2 Story	227,835	75	1,350 pupils
High School – 2 Story	251,915	75	1,600 pupils
High School – 2 Story	279,426	75	1,800 pupils

Saddlebrook Partnership Authorities and Responsibilities Agreement (sample page)

Saddlebrook Facility School-Library-Rec Center 4/18/2007 Description of Space			OMAHA PUBLIC SCHOOLS							PARKS, RECREATION AND PUBLIC PROPERTY							OMAHA PUBLIC LIBRARY																	
			Assigned Program Space			Space Care		Schedule Authority	Primary User	Other Users/Conditions/Times	Assigned Program Space			Space Care		Schedule Authority	Primary User	Other Users/Conditions/Times	Assigned Program Space			Space Care		Schedule Authority	Primary User	Other Users/Conditions/Times								
			Assignability	Total	Responsibility	Partner(s) paying for Cust.	Partner(s) paying for Maint.	Quantity	Area	A.S.F.	Assignability	Total	Responsibility	Partner(s) paying for Cust.	Partner(s) paying for Maint.	Quantity	Area	A.S.F.	Assignability	Total	Responsibility	Partner(s) paying for Cust.	Partner(s) paying for Maint.	Quantity	Area	A.S.F.	Assignability	Total	Responsibility	Partner(s) paying for Cust.	Partner(s) paying for Maint.	Quantity	Area	A.S.F.
			Quantity	Area	A.S.F.	Partner(s) paying for Cust.	Partner(s) paying for Maint.	Quantity	Area	A.S.F.	Partner(s) paying for Cust.	Partner(s) paying for Maint.	Quantity	Area	A.S.F.	Partner(s) paying for Cust.	Partner(s) paying for Maint.	Quantity	Area	A.S.F.	Partner(s) paying for Cust.	Partner(s) paying for Maint.	Quantity	Area	A.S.F.	Partner(s) paying for Cust.	Partner(s) paying for Maint.	Quantity	Area	A.S.F.	Partner(s) paying for Cust.	Partner(s) paying for Maint.	Quantity	Area
Student Design Capacity			700 Students																															
Academic Spaces:			25667							0							0																	
1. Classrooms																																		
	Pre-Kindergarten	C160	1	1482	1482	100% OPS	100% OPS; Damage during other partner usage to be paid for that party	OPS	OPS	Use by PRPP or Library on occasion by permission only				100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only			100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only											
	Toilet	C161	1			100% OPS	100% OPS; Damage during other partner usage to be paid for that party	OPS	OPS	Use by PRPP or Library on occasion by permission only				100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only			100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only											
	Storage	C157	1			100% OPS	100% OPS	OPS	OPS	OPS only																								
	Heat Pump Rooms	C159	1			100% OPS	100% OPS	OPS	OPS	OPS only																								
	Kindergarten	C140, C144, C147, C152, C155	5	1477	7385	100% OPS	100% OPS; Damage during other partner usage to be paid for that party	OPS	OPS	Use by PRPP or Library on occasion by permission only				100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only			100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only											
	Toilet	C141, C145, C148, C154, C156	5			100% OPS	100% OPS; Damage during other partner usage to be paid for that party	OPS	OPS	Use by PRPP or Library on occasion by permission only				100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only			100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only											
	Storage	C142, C149, C153	3			100% OPS	100% OPS	OPS	OPS	OPS only																								
	Heat Pump Rooms	C143, C146, C150, C151, C158	5			100% OPS	100% OPS	OPS	OPS	OPS only																								
	Grades 1 thru 4	C005, C008, C009, C022, C031, C032, C035, C036, C103, C105, C106, C108, C112, C113, C116, C117	16	848	13568	100% OPS	100% OPS; Damage during other partner usage to be paid for that party	OPS	OPS	Use by PRPP or Library on occasion by permission only				100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only			100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only											
	Heat Pump Rooms	C007, C010, C021, C024, C033, C034, C037, C104, C106, C107, C110, C111, C114, C115, C118	5			100% OPS	100% OPS	OPS	OPS	OPS only																								
	Bubble Classroom	C124	1			100% OPS	100% OPS; Damage during other partner usage to be paid for that party	OPS	OPS	Use by PRPP or Library on occasion by permission only				100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only			100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only											
	Heat Pump Room	C125	16			100% OPS	100% OPS	OPS	OPS	OPS only																								
	Restroom Entry	C126	1			100% OPS	100% OPS; Damage during other partner usage to be paid for that party	OPS	OPS	Use by PRPP or Library on occasion by permission only				100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only			100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only											
	Boy's Toilet Room	C127				100% OPS	100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only				100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only			100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only											
	Girl's Toilet Room	C128				100% OPS	100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only				100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only			100% OPS; Damage during other partner usage to be paid for that party			Use by PRPP or Library on occasion by permission only											

APPENDIX B

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Organizations and Websites

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