

## Section 2: Context

### 2.0 Summary

During the February AGP status report discussions, members of the Planning Board and the County Council requested a review of the amount of future development that can be expected in each policy area and the transportation infrastructure planned to support that development. This section provides that context.

#### 2.1 Estimates of Future Growth

Estimates of future growth inform decision-making by identifying where significant additional development is expected to occur. Additionally, we can also identify where future growth is expected to be modest.

For the purposes of this exercise, there are several possible measures of future growth that could be used. These include: estimates of master plan buildout (also known as “holding capacity”), development scenarios for the year 2050 used in the Transportation Policy Report II process, and the Metropolitan Washington Council of Governments Round 6.3 forecasts for 2030.

Staff recommends against using existing estimates of master plan buildout. The buildout estimates that are currently available are outdated and the residential buildout estimates are undergoing a year-long comprehensive review that will be complete in early 2004. Staff is also not recommending that the TPR II 2050 figures be used because they represent a scenario of a possible future land use but are not a market-driven forecast.

Staff therefore believes that the MWCOG Round 6.3 forecast is the best alternative. These forecasts are staff’s most accurate estimate of future development over the next several decades. The forecasts are market-driven and reflect master plan constraints. On the housing side, the 2030 forecasts begin to approach master plan buildout, but on the jobs side, there is still significant additional capacity beyond 2030 for additional growth. Of course, changes in master plans will change the forecasts.

The 2030 forecasts are unconstrained by the Annual Growth Policy’s staging ceilings. This allows them to be used as an estimate of the pace of development if the AGP were not in place.

##### 2.1.1 Summary of Growth Trends

Between 2003 and 2030, Montgomery County is forecast to add approximately 84,500 households and 140,000 jobs. Of these, 92 percent of the households (78,000) and 99 percent of the jobs (139,000) will be in areas of the County for which the AGP sets staging ceilings. A significant fraction of these will be in the cities of Rockville and Gaithersburg.

*Summary of Montgomery County Growth 2003-2030*

<b>Area</b>	<b>Household Growth 2003-2030</b>	<b>Job Growth 2003-2030</b>
Areas with AGP Staging Ceilings	78,000	139,000
County Policy Areas	62,928	93,938
Municipal Policy Areas	15,090	45,101
Gaithersburg	8,390	14,355
Rockville	6,701	30,746
All of Montgomery County	84,468	140,000

*Growth by Policy Area*

Table 2.1 and Map 2.1 show forecast growth in households and jobs by policy area. Tables 2.2.1 and 2.2.2 show the policy areas ranked by household growth (absolute and percentage); tables 2.3.1 and 2.3.2 by job growth. Household growth between 2003 and 2030 ranges from 558 in Cloverly to 10,615 in Clarksburg. Job growth between 2003 and 2030 ranges from 16 jobs in Glenmont to 30,746 in Rockville. There are 29 policy areas.

2.1.2 Household Growth

There are fifteen policy areas that are forecast to grow by at least 3,000 housing units over the 2003-2030 period, and eight for which 2,000 to 2,999 are forecast. Eleven policy areas are forecast to grow by 1,000 and 1,999 households, and three by less than 1,000 units. Clarksburg, Rockville, and Gaithersburg will add the most households, followed by Silver Spring CBD, Germantown West, White Flint, and R&D Village, which is forecast to grow by 3,350 households. The three policy areas expected to grow by less than 1,000 units are Damascus, Montgomery Village/Airpark, and Cloverly.

On a percentage basis, households in eight policy areas are expected to grow by more than 50 percent, five between 25 percent and 50 percent, nine between 10 and 25 percent, and seven by less than 10 percent. Policy areas that are forecast to grow by more than 50 percent are Twinbrook, Clarksburg, Shady Grove, Germantown Town Center, White Flint, Glenmont, R & D Village, and Wheaton CBD. Policy areas that are forecast to grow by less than 10 percent are Cloverly, Aspen Hill, Fairland/White Oak, Bethesda/Chevy Chase, Kensington/Wheaton, Silver Spring/Takoma Park, and Montgomery Village/Airpark.

2.1.3 Job Growth

There are eleven policy areas that are forecast to add more than 5,000 jobs over the 2003-2030 period. These are: Rockville City, Gaithersburg City, R & D Village, Clarksburg, Germantown East, Fairland/White Oak, North Bethesda, Silver Spring CBD, Bethesda CBD, Germantown West, and Derwood. There are also eleven policy areas that are forecasts to add less than 1,000 jobs over the forecast period. These are Twinbrook, Potomac, Shady Grove, Wheaton CBD, Aspen Hill, Olney, North Potomac, Cloverly, Damascus, Grosvenor, and Glenmont.

On a percentage basis, jobs in three policy areas are expected to grow by more than 50 percent, three between 25 percent and 50 percent, ten between 10 and 25 percent, and thirteen by less than 10 percent. Policy areas that are forecast to grow by more than 50 percent are Clarksburg, Germantown Town Center, and Germantown East. Policy areas that are forecast to grow by less than 10 percent are Montgomery Village/Airpark, Twinbrook, Bethesda/Chevy Chase, Cloverly, Kensington/Wheaton, Potomac, Silver Spring/Takoma Park, Olney, Wheaton CBD, Aspen Hill, Grosvenor, Damascus, and Glenmont.

#### 2.1.4 High and Low Growth Areas

Staff thought it might be a useful exercise to identify the policy areas that will grow the fastest between now and 2030 and those that will grow the slowest, both in terms of jobs and housing, and both in absolute terms and in percentage terms.

For high growth, staff looked at policy areas that ranked in the top 10 of 29 policy areas in terms of growth, both absolute and percentage. To identify slow growth areas, staff looked at policy areas that rank in the bottom 10 of 29 policy areas. Table 2.4 shows the policy areas that rank in the bottom third in terms of growth, and Table 2.5 shows the policy areas that rank in the top third in terms of growth.

Cloverly and Olney are the two policy areas that appear on all four slow growth lists. Aspen Hill, Damascus, Glenmont, Potomac, and Silver Spring/Takoma Park appears on three slow growth lists. Grosvenor and Wheaton CBD appear on both of the jobs slow growth lists, but do not appear on the housing slow growth list. Montgomery Village/Airpark and North Bethesda are on both housing slow growth lists but do not appear on the jobs slow growth list. Kensington/Wheaton and North Potomac appear twice, once each on the jobs and housing slow growth list.

No policy area appears on all four high growth lists, but several appear on three. These are: Clarksburg, Gaithersburg City, Fairland/White Oak, Germantown West, R&D Village, and Rockville City. Policy areas that appear twice are: Bethesda CBD, Germantown East, Silver Spring CBD and White Flint.

## 2.2 Accommodating Future Growth

Map 2.2 shows how much of the 2030 forecast can be accommodated by the current AGP's staging ceilings. Within these areas, staging ceilings are not a significant limit on future growth.

Policy areas where the current AGP ceilings can accommodate the 2030 housing forecast include all of the policy areas inside the Beltway, all three Kensington/Wheaton policy areas, Derwood, North Potomac, and Germantown East. Aspen Hill is included on the map because its pipeline accommodates the 2030 forecast, even though the area is in moratorium for new residential approvals. The Potomac policy area should be on this list as the AGP text stipulates that Potomac's staging ceiling should be set at the zoned

holding capacity. Staff will be making recommendations concerning Potomac's ceilings in the transportation section of this report.

Policy areas where the current AGP ceilings can accommodate the 2030 jobs forecast include Friendship heights, Potomac, Silver Spring/Takoma Park, Grosvenor, all three Kensington/Wheaton policy areas, Aspen Hill, Olney, R&D Village, North Potomac, Damascus and all three Germantown policy areas. The list also includes Shady Grove but this area's new sector plan may be a departure from current plans.

Map 2.3 shows policy areas where existing development is less than 10 percent from the 2030 forecast. In these areas, forecast growth is very small compared to development that has already taken place.

On the housing side, the policy areas that are within 10 percent of the 2030 forecast include Bethesda-Chevy Chase, Silver Spring/Takoma Park, Kensington/Wheaton, Fairland/White Oak, Cloverly, Aspen Hill, and Montgomery Village/Airpark.

On the jobs side, the policy areas that are within 10 percent of the 2030 forecast include Bethesda-Chevy Chase, Silver Spring/Takoma Park, Kensington/Wheaton, Glenmont, Wheaton CBD, Olney, Cloverly, Aspen Hill, Potomac, Twinbrook, Damascus, and Montgomery Village/Airpark.

### **2.3 Transportation Infrastructure**

Staff has compiled lists of planned transportation infrastructure (the "Master Plan of Highways") by policy area. Table 2.6 shows road widenings, Table 2.7 shows new roadways, Table 2.8 shows interchanges, Table 2.9 transit lines, and Table 2.10 shows planned transit stations. There is some \$5.7 billion of master-planned roadways beyond the current capital program.

### **2.4 Additional Information and Analysis**

In Section 3: Testing the Adequacy of Transportation Facilities, the 2030 forecast and the list of planned, unbuilt infrastructure is used as the basis for an alternative method for allocating development capacity as well as potential method for calculating a transportation facilities payment. A "transportation facilities payment" is a payment for development in areas where transportation infrastructure is inadequate.