



February 14, 2003

Memorandum

To: Montgomery County Planning Board

From: Karl Moritz, Research Manager, 301-495-1312

Re: Report on the Annual Growth Policy Focus Groups

Summary

The Department of Park and Planning held two focus groups to collect outside input for the comprehensive review of the Annual Growth Policy. This memorandum reviews how the focus groups were conducted and contains the transcripts of the both focus group sessions.

The two focus groups addressed two topics: “housing and neighborhoods” and “jobs/economic development.” The “housing and neighborhoods” group addressed how the AGP regulates the production of market rate and affordable housing as well as the impact of residential development on existing neighborhoods. The “jobs/economic development” group looked at how the AGP is regulating commercial development.

The focus groups were held on the evening of January 28 in the Montgomery County Department of Park and Planning’s Montgomery Regional Office. The “jobs/economic development” focus group was held from 5 to 7 pm and the “housing and neighborhoods” focus group was held from 7:30 to 9:30 pm.

The list of invitees was based upon recommendations from staff from the Department of Park and Planning, the County Executive, the County Council and Montgomery County Public Schools. There were also several volunteers. There were roughly 15 invitees per focus group, which is slightly above the optimum, but we were trying to represent a diversity of viewpoints: citizens, non-profit agencies, and for-profit developers. In addition, invitees to one focus group were welcome at the other focus group. In addition to Park and planning staff, staff from the County Executive, County Council, Montgomery County Public Schools, and the City of Rockville. A list of non-staff attendees is attached.

About Focus Groups

A paper, *User-Friendly Handbook for Mixed Method Evaluations*, published by the National Science Foundation, contains a chapter by Colleen Mahoney on “Common Qualitative Methods,” that briefly describes the how focus groups function and when they are appropriate. An excerpt from Ms. Mahoney’s paper is quoted below.

Focus groups are similar to individual interviews except that they “capitalize on the interaction of the group to generate data and insights that would be unlikely to emerge without the interaction found in a group. The technique inherently allows observation of group dynamics, discussion, and firsthand insights into the respondents’ behaviors, attitudes, language, etc.”

“Focus groups are a gathering of 8 to 12 people who share some characteristics relevant to the evaluation. Originally used as a market research tool to investigate the appeal of various products, the focus group technique has been adopted by other fields, such as education, as a tool for data gathering on a given topic. Focus groups conducted by experts take place in a focus group facility that includes recording apparatus (audio and/or visual) and an attached room with a one-way mirror for observation. There is an official recorder who may or may not be in the room. [In marketing,] Participants are paid and provided with refreshments. As the focus group technique has been adopted by fields outside of marketing, some of these features, such as payment or refreshment, have been eliminated.”

For the AGP, the focus groups consisted of participants who have varying degrees of familiarity with the Annual Growth Policy and the particular topic they will address. The two main objectives of the focus groups was to identify issues that need to be addressed by amending the AGP, and to identify ideas for how this might be done.

For each focus group, a set of questions was developed in advance and circulated to participants. The purpose of the questions was to help focus the discussion, but it was not expected that each group would address every question. The session began with introductions and staff gave a short presentation on the topic. The balance of the session was a free-flowing discussion, moderated by staff to keep the discussion moving and on track. Toward the end of the session, each participant was invited to raise any issue that they believed had not been addressed.

Sessions were recorded by taking notes that were projected on-screen so that the focus group could see the notes as they were being taken. Notes have been emailed to participants in advance of their inclusion in this report.

Appropriateness of the Focus Group Method for the AGP Study

Focus groups are an appropriate method for gathering input for the AGP study for several reasons. The focus group setting is designed to take advantage of the participants’ unique experience, expertise and intelligence to evaluate an existing product, policy or

program. The focus group goes further, however, by using the group dynamic to generate new ideas and possible areas of consensus for how the product or policy should be changed. This will be particularly useful for the AGP study because two of the major challenges are: identifying which aspects of the AGP need to be fixed, and determining which of the possible alternatives should be analyzed in detail.

A benefit to the focus group approach is that one can select participants who are sufficiently familiar with the AGP to have already begun to think about how it could be improved, but who still represent a variety of viewpoints. Focus groups allow for a more extended discussion than a public hearing or a survey, allowing participants to refine or elaborate their positions during the course of the session.

The AGP is a specific set of regulations for a specific activity: staging the growth called for in master plans by determining whether there are adequate public facilities available to support proposed development. This means that there are important growth issues that are not addressed by the AGP and these include the amount, type and location of planned development. Understandably, a free-ranging discussion of growth in Montgomery County will move beyond the AGP to the General Plan, master plans, etc. However, as evidenced by its name, a focus group allows participants to “focus” on issues that the AGP can address, which provisions of the AGP are not working and how they might be changed for the better.

Less important to this study are techniques (such as surveys or hearings) that help determine how many people share a similar viewpoint. In this context, a good idea may be one that only one person has thought of. Once the ideas are refined, public hearing can help determine if the idea is a popular one.

Focus Group Topics

The two focus groups were generally organized under the headings of “housing and neighborhoods” and “jobs/economic development.” Although there are issues common to both housing and jobs, there are also several issues that are unique. For example, only housing impacts school adequacy. Additionally, there is a whole subset of the AGP concerned with AGP exceptions for economic development purposes.

- **Housing and Neighborhoods:** This focus group discussed how the AGP stages residential development in the County. The two main aspects of this issue: how the AGP stages market rate development, and how the AGP treats affordable housing. Questions posed in advance for the focus group included:
 - Market rate housing
 - In general, is there a need for the pace of residential development to increase, decrease, or stay about the same? Is the pipeline of approved residential development too large? too small? lacking a desired type of housing?

- Now that most of the County’s planned housing has been already been built or approved, should the AGP’s treatment of proposed housing be changed?
 - Over the past decade the County has added, then removed, provisions to the AGP that allow the approval of market-rate housing in (transportation) moratorium areas. These have added to the stock of approved projects but deepened deficits in several policy areas. Are there circumstances where the need for market rate housing outweighs APF concerns? Are they different for transportation and schools?
 - Should the provisions governing the expiration of approved but unbuilt residential subdivisions be changed?
 - Should the AGP treat “infill” residential development” differently? If so, why? If so, how should it be defined and what is the policy rationale?
 - Particularly around Metro stations, what are realistic expectations for roadway congestion in existing neighborhoods? To what extent should infill development be delayed until facilities are adequate?
 - Does the AGP require roadway improvements that are undesirable for other reasons, such as intersections that are difficult to cross? Should there be greater limits on what types of improvements can be proposed to meet APF conditions? If a developer proposes an intersection widening that the community opposes, what should happen?
 - Does the AGP’s combination of staging ceilings and intersection congestion tests meet the concerns of neighborhoods at the local level? If not, what is being missed?
 - In general, is the AGP school test working? Are the results valid, and is the process fair?
 - The AGP’s school test averages enrollment and capacity by cluster, which means that the impact of new development on a nearby school may be minimized. Should the AGP’s school test be more local?
 - Under what conditions should developers be permitted to provide needed school facilities? Should it be a pro-rata dollar contribution toward facilities, or should they be required to provide the facility itself?
 - Are there facilities for which the AGP does not test that are of particular concern to the neighbors of proposed development?
- Affordable Housing:

- Does the AGP create specific barriers to affordable housing projects, or do AGP provisions add to the cost of home construction? If so, does the MPDU ordinance and the AGP’s Special Ceiling Allocation for Affordable Housing adequately balance those effects?
 - Are there circumstances under which the Special Ceiling Allocation allows housing to be approved when it should not? Are there circumstances where a “buy-out” provision would be preferable?
 - Areas that are deeply in moratorium for an extended period are limited in the number of Special Ceiling Allocation approvals. Should that limit be changed?
 - Should the AGP expand its preferential treatment of affordable housing, perhaps by reserving capacity now available for market rate housing?
 - The AGP allows development to be approved if an area is in moratorium for housing, but not for schools. Should this be changed?
- **Jobs/Economic Development:** This focus group discussed how the AGP stages non-residential development in the County. The issue involves the how the AGP addresses economic development goals, particularly those instances where a highly-valued employer desires to build or expand in an area that has transportation adequacy issues. Some suggested topics for discussion were:
 - In general, is there a need for the pace of non-residential development to increase, decrease, or stay about the same? Is the pipeline of approved non-residential development too large? too small? lacking a desired type of commercial development?
 - Does the AGP provide enough flexibility for owners of non-residential approvals to amend their development to meet changing market conditions?
 - Is there a general conflict between AGP requirements and economic development goals, or are the problems confined to a few instances? Are most developers of commercial projects able to meet AGP requirements, or does the AGP make Montgomery County significantly less competitive?
 - Over the past decade there have been a variety of special provisions that allow the approval of commercial development in moratorium areas. These have ranged from broad provisions that were not used (“Partial-Cost Developer Participation”) to broad provisions that were used (“Pay-and-Go”) to very specific provisions that have been used or not (“Special Provision for Corporate Support and Headquarters Facilities,” “Special Provision for Day Care and Certain Hospital Facilities”). A year ago, the

Council enacted a more general special provision for “Strategic Economic Development Projects.” Does the AGP need these special provisions, and if so, what is the best approach?

- Should the AGP treat “infill” residential development” differently? If so, why? If so, how should it be defined and what is the policy rationale?
- Particularly around Metro stations, what are realistic expectations for roadway congestion in existing job/population centers? To what extent should infill development be delayed until facilities are adequate?

Notes from the Focus Group Discussions

Notes from the focus group discussions follow. They are as close to verbatim as possible, and staff made every effort to capture the both the substance and the tenor of the discussion. To improve readability, we have group the comments into issue categories. In a very few cases we moved comments so that they would be included with other comments on the same issue.

Staff was tempted to summarize conclusions from the focus groups but decided to let them speak for themselves. Part of the benefit of the focus groups was to allow the Planning Board access to unfiltered statements from a variety of perspectives.

AGP Jobs and Economic Development Focus Group Notes

Issue: Is the AGP doing the job it was intended to do?

- Comment: The AGP was intended to act as a brake on development and it is serving that function. It is an indicator of needed facilities not working, but needed facilities are being built.
- Comment: Was not intended as a brake. Was intended to alert public sector to its obligations to provide infrastructure, which the public sector has not done. It was always assumed that it was the government's responsibility to provide infrastructure.
- Comment: Government has not made the tough decisions. What is essentially wrong with the existing system is that it acts as brake but does not provide the infrastructure. The necessary balance between pace of development and provision of infrastructure is not fully addressed.

Issue: Complexity of the Annual Growth Policy

- Comment: The transportation model is a "black box." Only a few staff people understand it. It needs to be simplified.
- Comment: A complicated process incurs legal fees.
- Comment: Complications add time and expense – barrier to business decisions.

Issue: Coordination with other County policies, specifically economic development

- Comment: AGP isn't coordinated with economic development policy.
- Comment: Montgomery County is competitive in business and needs to remain so to attract new business.
- Question: Why would a commercial developer not come to Montgomery County because of the AGP?
- Comment: They might want to be on the ground within two years, but getting around the moratorium is a long process – too long for some.
- Comment: Agree there's a disconnect between economic development policy and the AGP but unemployment has been near 2% for over a decade. That's full employment/overemployment. People and businesses are coming to Montgomery County, not being kept away. We have low unemployment and our labor force is insufficient to meet demand.
- Comment: Business may go elsewhere because public facilities – roads and schools – are overused, not because AGP too restrictive.

Issue: AGP and Exceptions

- Comment: AGP does reflect County's economic development policies; does respond to realities. One of the ways is through the exceptions: i.e., for Metro station policy areas, strategic economic development projects. When problems are

identified – when a project everyone agrees is good for the County runs up against the AGP, exceptions are proposed.

- Comment: Only those who really want to be here will go through the process to get the exception.

Issue: AGP and Innovation

- Comment: Clear from AGP document that it discourages innovation. Commuter choice was invented in Montgomery County. That’s an example of the kind of thing that can be paired with infrastructure improvements to address congestion.

Issue: AGP’s Restrictiveness

- Comment: AGP is too restrictive, especially on transportation.
- Comment: If too restrictive how do we explain congestion?
- Comment: Planned infrastructure never built.
- Comment: Much of the congestion is due to increase in population and increase in cars, as well as changes in behavior.
- Comment: Some of that is due to new development, some if it is not.

Issue: The AGP and the Provision of New Infrastructure

- Comment: How can the AGP try to “force” the provision of infrastructure?
- Comment: Term limits for County Council if they do not fulfill the master plan and fund infrastructure.

Issue: AGP Perspective

- Comment: AGP looks at policy areas but there’s no county-wide perspective on process. Get more of a role for county wide perspectives – increase County Executive’s role?

Issue: What if no AGP?

- Comment: Like Houston (no zoning).
- Comment: Houston addresses lack of zoning with easements.
- Comment: Get rid of staging ceilings and the “black box.” But individual developments should still be tested for transportation impacts.
- Comment: Without AGP development could be staged in master plans, such as Bethesda CBD Sector Plan.
- Comment: Without AGP would pace of development increase, thereby increasing traffic? Look at Northern Virginia – they don’t have an APFO but they do not build roads either.

Issue: Role of the AGP

- Comment: The AGP is now a regulatory document. Should change it to a planning document; that is, would still calculate staging ceilings, but deficits wouldn't result in moratorium, just be a guide to where government should provide infrastructure.
- Comment: AGP staging ceiling methodology works at identifying deficits in transportation service; it's the moratoriums that are problematic.
- Comment: It's the government's obligation to provide infrastructure. Assess everyone their fair share to pay for it. The idea that new development should pay for roads – private sector cannot pay and government will not.
- Comment: "AGP" is a misnomer because it is not a "policy," it is a set of rules and regulations. Its purpose is to test for the adequacy of public facilities and to act as a brake when facilities are inadequate. It is to tell what development has been approved and what infrastructure is needed to support that development. But exceptions changed it – politically easy to support those who want development but politically difficult to build infrastructure. But that's not the AGP's fault. The AGP is doing what it was supposed to do, but we're failing to build infrastructure.

Issue: AGP and Exceptions

- Comment: Current exceptions in the AGP are really pretty narrow. Not many loopholes left.
- Comment: Disagree. Suggest that of the number of houses built, almost as many approved under exceptions as under standard. AGP study should look at that.

Issue: The AGP and the Provision of New Infrastructure

- Comment: Is there a document that describes what infrastructure is needed? Have not seen it – master plans, master plan of highways? There needs to be more than that.
- Comment: We do plan longer term, and have the Capital Improvements Program at the state and local level – but infrastructure needed does not necessarily get into the mix – stalls.
- Comment: The AGP could be a simple document if we implemented our plans and built the infrastructure. It isn't that there aren't public resources for transportation; rather, it's been a political decision not to spend the money – 69% of CIP funds not spent. GO report in February to Council.
- Comment: It's always true that it's difficult to spend public money. But it's also true that there's not enough, compared to what's needed. Real question: How to make the system work to get the amount of money needed to balance land use and transportation?
- Comment: Transportation demand management makes a major difference. But our road network was built for 450,000 people and we have 900,000. We need transportation demand management but we also need roads.
- Comment: We have to be cognizant that there are competing needs. Need to look at funding structure.

Issue: Developer Payments Toward Transportation Improvements

- Comment: If a developer pays into a transportation fund, the money should be spent in the same area, not go into general fund.
- Comment: Pay and go? Bad solution. From developers' view, the amount of the obligation has made it too expensive and cumbersome. County should look at its tax base, raise general taxes, and build roads.

Issue: What the AGP Takes Into Account (Transportation)

- Comment: A weakness of the AGP is that it is unresponsive to structural changes; that is, there are more cars per household, people are driving more, etc.
- Comment: AGP takes those changes into account but the AGP doesn't regulate cars per household, it regulates new development approvals.
- Comment: A change that could be made is to rebalance the mismatch between jobs and housing between east and west county. Give more benefit to jobs in eastern part and not penalize jobs there. Address jobs/housing balance.
- Comment: Staging ceiling increases in Fairland/White Oak recently did go to jobs.
- Comment: Jobs/housing balance is a canard – the Transportation Policy Report studied this issue. Over the next 50 years, improving the jobs/housing balanced improved congestion by 2%. One of the problems is economic scale – there's never going to be 1:1 match (between County jobs and County workers) because of differing job skills. As a policy, the jobs/housing balance has limitations, which have been documented.
- Comment: Don't know if staff's recommendation will be radical or not – but overcrowding is the result of changing demographics, not new development. Two income families mean two workers on the road at rush hour, etc. It is the government's responsibility to recognize this trend and provide capacity.

Issue: The Role of Government in Paying for New Infrastructure

- Comment: When the development impact tax was amended, a councilmember stated that government should pay more for infrastructure.
- Comment: When the County requires the developer to pay for infrastructure, should there be a County match? Can't require future Councils to spend money but can say that developer will not pay until government has put its share of the money up.

Issue: Montgomery County's Role in the Region/Congestion from Regional Traffic

- Comment: We need to accept that not just new development causing congestion.
- Comment: There's the problem of externally-generated traffic – how to deal with it? We cannot erect a barrier.

- Comment: It's the government's responsibility to measure and address congestion from through traffic. We cannot change the location of the County; we're part of a regional economy and 40% of our workforce works at jobs outside the County. We are not the center of our universe and we need to recognize that.
- Comment: The direction that we need to be moving in for the future is toward ways to address these problems regionally. We are much more interdependent than our government structures reflect. Have a regional authority to regulate growth? Yes...we cannot think in County terms any more. The AGP is reactive to growth in other counties, but we also need to be proactive.
- Comment: Sympathetic to regionalism but it is more complicated than that. Montgomery County has 60% of its workforce working at jobs within the County – that's extraordinary. Although we have to worry about competition from other counties for housing, etc., we are the core – we have the critical mass of jobs to be the center of our universe.
- Comment: Washington, DC is the center; the role of the Federal government is huge. We would be nothing without the Federal presence in DC.
- Comment: But Montgomery County is the focus of lot of activity north of the river.

Issue: Affordable Housing/Workforce Housing

- Comment: Do you provide housing for the people needed to fill jobs, or do you provide the jobs needed by the people living here? Rather than add housing we could shift jobs to parts of the County where there's housing and to other counties and to DC.
- Comment: The Hispanic population is now largest minority in the country. Where do they work?
- Comment: Both in the Eastern County and outside it. Cannot stereotype – there are Hispanic workers at all kinds of jobs, from high tech to low tech, high and low paid.
- Comment: The AGP and other policies do not recognize this shift.
- Comment: We have both an affordable housing problem and a problem attracting businesses that need labor (because of a lack of workers). Should we shift to giving pass to jobs that provide affordable housing?
- Comment: The locations with the best transit service are the least affordable. Lots of people can't afford to live near Metro.
- Comment: The AGP has an exception for affordable housing – but if we create more jobs in the Eastern County we will need more housing, not necessarily “affordable housing.” The Route 29 corridor has been in moratorium for ten+ years. That's failure.

Issue: The AGP as a “Planning Tool”

- Comment: If there were no AGP, growth would not run rampant; the pace of growth is limited by zoning, the market. If turned into planning tool may work better.

- Comment: The role of the AGP is to implement the APFO; if the AGP becomes a planning tool, not a regulation, how is the APFO to be implemented?
- Comment: Converting the AGP to a planning tool would shift citizen pressure from developers to government. There is no way that development community can pay for infrastructure. The government has been given a free pass.
- Comment: AGP is just a way to implement the APFO; it isn't even the only way Montgomery County has implemented its APFO. Perhaps the real issue is the APFO, not the AGP.

Issue: How other counties manage growth?

- Comment: No other county in the state has anything as complex as the Annual Growth Policy. There are many other techniques, such as the Charles County method. Some have pay-and-go.
- Comment: What is the best example in the state?
- Comment: Howard County has a good model.
- Comment: Compared to other counties, Montgomery County's approach is considered more complex: is this related to Policy Area Transportation Review or Local Area Transportation Review?
- Comment: Most localities with an APFO have something like Local Area Transportation Review. Policy Area Transportation Review is unique to Montgomery County.

Issue: Regional Comparisons

- Comment: Would be useful to compare congestion in Montgomery County to that in Fairfax County.
- Comment: Can research be done to compare Fairfax and Loudon with Montgomery?
- Comment: Can compare Montgomery County and Fairfax County using Texas Transportation Institute method.
- Comment: But Fairfax chose to grow how they did – they wanted growth. They spend a lot of money to attract growth. Montgomery spends less to attract growth.

Issue: Utility of Policy Area Transportation Review

- Comment: What if we do away with staging ceilings just have local area review? The staging ceiling is a valid planning tool but the infrastructure burden should not put on developers' back. Should not be used punitively. We are falling down on building infrastructure.
- Comment: If it is true that Montgomery County has not built roads to keep up with growth – Montgomery is maturing, more urbanized, like DC, and DC has not built roads.
- Comment: But DC has lost population.

- Comment: On a historical note, the original conception was that the AGP would only have policy area transportation review. But it was recognized that there had to be a test for the transportation impact of individual development projects. Hence Local Area Transportation Review.
- Comment: If you only have Local Area Transportation Review, you will encourage development to move farther out. The least congested intersections will always be in the rural areas.
- Comment: Staging ceiling gives advance notice of numbers for the next year – local area review has some uncertainty, too. Staging ceiling is a simple test but answer can be no.
- Comment: Staging ceiling is based on false assumptions because you pass through many policy areas during a journey.
- Comment: That’s not really true – staging ceilings are set to account for traffic starting, ending, and through a policy area...so-called “upstream-downstream” effects. Part of the complexity in the model is because it accounts for this.
- Comment: Could policy area ceilings be replaced with a countywide system; just focus on the pace of growth.
- Comment: There has to be some sort of allocation system.
- Comment: One of key questions is: where does growth go? The answer is that demand drives that.
- Comment: Pass-through traffic leads to disconnect – but the model takes account of through trips.
- Comment: County should be looked at as a whole for CIP purposes, but the problems are at a smaller scale. Planners identify choke points, but money is not being put toward fixing them
- Comment: Are the policy areas (as now defined) practical; do they make sense?
- Comment: TPR looked at corridors as a meaningful geography.
- Comment: The system is complex because it is a multi-layer process. But complexity is not really the issue. The issue is what doesn’t work: areas stay in moratorium too long. No one can tell you when there will be capacity.
- Comment: It is complex for the average citizen and it doesn’t work...but what is complex and what doesn’t work are the exceptions. We would be better off with moratoriums that have teeth.

Issue: Responsibility for Building the Roads

- Comment: The system used to be dynamic – the AGP identified the problems and the CIP fixed them. But it isn’t working because they aren’t building roads now.
- Comment: Who is “they?” Who is not building roads?
- Comment: The County is not effectively requesting funds from the state. There is a failure of leadership at the local and at the state level. It does not relate to the test of adequacy; by any test infrastructure is inadequate; except that the test expects infrastructure to be provided, and it has not been.

Issue: Future of County Growth

- Comment: What is the future of the County? Small infill projects? Perhaps save mitigation for large projects – don't necessarily need staging ceilings to do that.
- Comment: AGP is not in sync with the type of development that the County is seeking, especially in Metro areas.
- Comment: Is congestion detrimental to quality of life? Yes, but if it's so bad, why are some many people still coming here? *[Editor's note: There was debate about the pace of growth in Montgomery County compared to the rest of the state. According to the U.S. Census, Montgomery County added the largest number of new people of any county in the state between 1990 and 2000. The percentage growth rate rank was tenth in the state.]*
- Comment: The population growth is from immigration.

Issue: Managing Growth in a Maturing County

- Comment: How do we react as a maturing county: there are not too many areas left for greenfield development.
- Comment: Without some exceptions, particularly at Metro stations, we are not going to get smart growth. APFOs are anti-smart growth because the smartest projects are located in areas with the greatest congestion.
- Comment: Infill development typically means dealing with smaller parcels on a smaller scale. Greenfield development typically means a big enough project to produce some money for infrastructure – small projects can make a contribution but government has to take responsibility for implementing transportation solutions.
- Comment: Hold politicians accountable – term limits!
- Comment: Does the County study this issue: what does it mean that 60% of County residents also work here?
- Comment: We do study the issue. Recently County crossed a threshold – we now have more jobs in the County than workers to fill those jobs. Therefore we are importing labor.
- Comment: But not building the infrastructure to bring the workers to their jobs.
- Comment: We need a new form of regional organization that recognizes the needs for moving around the region. County-municipality relationships also regional.

Issue: Extent of Possible Changes to the AGP

- Comment: Do not think that County Council is looking for tinkering – think that they want to see a clean slate with new radical ideas. The new Council and the County Executive are committed to transportation.
- Comment: Is it realistic to expect a whole new policy this year?
- Comment: This is the year for the “Policy Element.”
- Comment: The November deadline is artificial. If the Council wants to continue after November, it can. A new policy needs to be done right.

- Comment: The AGP should encourage innovation – not just adding infrastructure, but making infrastructure and transportation work better. The AGP focuses on the “build” option. The AGP is far too simplified. For example, if a development supports public transportation it should get through transportation test.
- Comment: When an area does not have capacity, there is a public responsibility to identify a solution that should be put before the Council. The onus should then be on the Council to implement it. If there is a controlling time frame it should not be more than 3 years – there is not enough pressure on elected officials to provide infrastructure. Cannot have a moratorium ad infinitum.

AGP Housing and Neighborhoods Focus Group Notes

Issue: Measuring Effect of Growth on Neighborhoods

- Comment: We do not look carefully enough at how housing – especially market rate housing – affects neighborhoods.
- Comment: For market rate housing: do we allow a sufficient quantity, is it being impeded by the AGP?
- Comment: We are looking at the right things, but not in the right way. It is good that we look at school adequacy, for example, but we need to change the way we look at schools.

Issue: Contribution of Growth Toward Overuse of Facilities

- Comment: There is a disconnect, a distortion, related to schools and roads. The population has changed, but not because of the AGP. There aren't fewer cars because of the AGP. The issue is: how to get money for infrastructure.
- Comment: The AGP was never intended to regulate amount of development, but rather timing of development. The measure of effectiveness should be whether facilities in line with development at any one point.

Issue: Metro Station Development

- Comment: Is the Alternative Review Procedure appropriate? Does the AGP make a sensible tradeoff between congestion and concentrating growth at transit stations, or should there be more regulation of congestion around Metro?
- Comment: The Shady Grove Sector Plan is now being prepared. People who live there want additional public facilities. They could accept more housing – but with “urban” facilities: walkable streets, public amenities, libraries, civic space etc. This is an important issue that is often raised in the public meetings; if Shady Grove is to be an urban node, we need to take account of this. It is not necessarily just a school and roads issue.

Issue: The APFO and Production of Market Rate and Affordable Housing

- Comment: Is the market pace of housing being met? No. We are not providing housing to keep pace with the growth in population. This results in market pressures on affordable housing.
- Comment: Concerns about affordable housing – neighborhood opposition to it – has more to do with design issues, neighborhood compatibility, than APFO issues.
- Comment: Limiting housing around Metro is the opposite of what should be done, should increase housing at Metro. Should encourage Metro development and Metro use, but there's a lot of existing single family housing around it. Need also to look at effect of timing: can approval be sped up?
- Comment: In Friendship Heights and Bethesda, we know we should be promoting Metro ridership but there are modal split issues – for every new units there are 0.7

- 1.5 additional trips per rush hour. Even the most Metro accessible development add some automobile trips. The planned additional housing units will add hundreds of cars into areas where there is no opportunity for road improvements. Cannot add lanes or improve signalization. Adjacent communities will be choked
- LATR guidelines make it very hard to limit development. It's not just local development: people drive through Metro areas to get to other areas.
- Comment: County has basic choices – where will housing go? No more Clarksburgs – unless the agricultural preserve is opened to development. There is insufficient land for housing – need to maximize investment in Metro and urbanizing areas. It is a challenge to fit many housing units into these areas.
- Comment: From TPR we know that there are Metro station areas where road improvements can be made, not all are like Friendship Heights and Bethesda CBD.
- Comment: Thousands of housing units already approved in Clarksburg: single family detached, townhouses, etc. But Clarksburg is a long way from being mobilized.
- Comment: In general, families will not be living in high-rise buildings near Metro. For example, the Metropolitan in Bethesda generates very few school children.

Issue: Role of the AGP and Master Plans

- Comment: AGP has so much importance placed on it – but often these issues really go back to the master plan – areas are planned for substantial housing and then the AGP is looked at to stop it. If the housing is not appropriate, it shouldn't be in the master plan. The master plan is where the big decisions should be made.
- Comment: That's true for transportation too. Land use and transportation gets out of balance.
- Comment: Master plans didn't anticipate the new procedures for Metro areas. Don't think that we can ignore the amount of congestion in these areas.
- Comment: The County does spend a lot of time and attention on the Master Planning process. Generally takes 3 years to complete it. But when developers try to follow it is difficult, and the government drops the ball on infrastructure.
- Comment: Master plan is not iron-clad – amendments further needs of development community. These are not always thought out.

Issue: The School Test

- Comment: There is a disconnect between the AGP definition of capacity and reality. Cannot see a relationship between actual capacity and the AGP – all schools are not adequate; rather, all are overcrowded.
- Comment: Cannot explain the AGP test to new parents about “borrowed capacity” – it defies common sense.
- Comment: How can capacity be adequate when there are portables?
- Comment: The purpose of the AGP test for schools is to determine if more development can be accommodated. If a school is at 100% capacity, it doesn't

automatically mean that more development cannot be accommodated. But the AGP criteria have become de facto planning criteria. That is, we wait until demand exceeds capacity before new infrastructure is put in place.

- Comment: The problem with the school test is not really a problem with the test; it is a problem of a lack of funding.
- Comment: There is a problem with looking at each cluster and each level individually: it allows overcrowding. Piecemeal developments are looked at one at a time and full impact of overall development is not taken into account.
- Comment: Individual subdivisions are not tested; rather, schools are tested once a year. The result of the annual test is that schools are considered adequate or not for the full year. The current AGP contains the phrase “The Planning Board must find that schools are adequate” during the fiscal year.
- Comment: Ask middle/high school parents in the Eastern County – there is a disconnect – in core facilities, too. The AGP is regarded as test to be fudged rather than met. We understand development community concerns, but there is chronic crowding. The relaxed standard is a charade. The Eastern County has been shut down for traffic for some time but the schools are still crowded.
- Comment: Downcounty (especially) there has been shift in population – more people with more children moving in. This has no relationship with AGP, because its not occurring because of new development.
- Comment: Elected officials need to build the infrastructure identified in master plan. The AGP does not do that.
- Comment: People think that we have a policy in place that is doing something about public facilities adequacy – but we don’t. Term limits.
- Comment: We cannot build schools fast enough to keep pace with present rate of home building.
- Comment: The cause of school crowding not just new housing. Existing housing plays a role too. The AGP schools test is “all or nothing” unlike roads. Possibility of change to graduated system.
- Comment: In some areas of County – Upcounty – development of new housing causing schools problems. Moratoriums are intended as a last resort – but the AGP test should be a realistic summary of whether or not cluster has capacity.
- Comment: There should be pressure upon County Council to hold developers more accountable for school capacity – development community would then lobby for change.
- Comment: The County’s growth rate is now half of that at the end of the 80s – but problems remain. Plans not being implemented. The process is in place but leaders not doing anything. Pressure should be on elected officials.
- Comment: If we shut growth down to zero, we still will have cars on road and crowded schools.
- Comment: Shutting down housing will impede job growth and without thriving economy there will be no tax revenue to fund improvements.
- Comment: A good portion of increased school enrollment is demographic shift. Nothing being done about that issue – new development being asked to solve the whole problem, but there is not enough new development left to solve it. The 3,500 new homes per year will not solve it.

- Comment: The Countywide PTA is not anti-building or anti-development. The point is that school capacity has not kept pace with the growth of enrollment. Planning is not working.
- Comment: the planning is working; the implementation is the problem.
- Comment: Test was devised to survive a legal challenge. There is probably a painful amount of leeway from the school community's point of view. We need new revenue sources.
- Comment: If the school test cannot be tightened, then it should be done away with. Right now we have a complicated policy that does not make sense.
- Comment: Montgomery County applies its school test differently than many other counties – most of them use their APFO as a way of calculating how much money a developer will pay toward schools. Here there is no way to pay your way out of the moratorium.
- Comment: Schools tests has become increasingly irrelevant – is it worth the trouble it takes to administer? Master plans should be developed that are realistic, and implemented.

Issue: The Transportation Test

- Comment: We cannot solve the transportation problem by not building houses. People will still come here for jobs – so we will still have the traffic, along with increased travel times, more congestion, as people have to move farther out.
- Comment: Implementation is a critical issue. Although the Fairland area has been in moratorium new subdivisions appear to have been built. Policy does not appear to be working for either side.

Issue: Existing Neighborhoods and New Development

- Comment: The AGP should not benefit developers but should protect citizens. Currently it does not look at existing communities, or traffic at weekends etc. Needs to be more balanced.
- Comment: Development side might disagree.
- Comment: The AGP does not look at existing communities. If focus is to provide adequate public facilities – for new and existing – then we need to look at the entire impact from both new and existing and figure out how to meet those needs.
- Comment: No one really happy with present policies.
- Comment: It's disingenuous to talk of the impact of turnover without talking about impact of new development. New housing within County facilitates turnover of neighborhoods as current residents move from existing housing to new development.
- Comment: We need to provide a range of housing choices for people to age in place.
- Comment: The Superintendent of Schools acknowledges that population shifts as well as new development leads to crowded schools. It's a political problem – governments are supposed to provided infrastructure – not new development.

- Comment: The AGP sends an indirect message that the overuse of facilities is acceptable. The word “adequate” is a problem.

Issue: The AGP School Test

- Comment: There are two different capacity numbers out there. The AGP uses a standard classroom capacity number whereas MCPS uses program capacity for planning, which is significantly lower. The two different numbers create a disconnect between the AGP and school community.
- Comment: Points once again towards irrelevance of AGP.
- Comment: The shift from 110% to 100% was intended to try to address that issue. But “program capacity” is not a fixed number and AGP needs fixed numbers. Using program capacity would mean AGP issues would interfere with program policy decisions.
- Comment: Concerning a switch to MCPS program capacity – surely County does not want to close down clusters, but we need something that is understandable to community.
- Comment: There are two aspects to this: a test that reflects reality, and having the appropriate outcomes.
- Comment: Issues of state school funding mechanism – raising funds locally could lead to losing funds from the state.

Issue: Special Ceiling Allocation for Affordable Housing

- Comment: In Fairland, we support it, but the limit on the total amount is important, because approvals over the ceiling aggravate the transportation problem; also apartments have high mobility rates and without balance from single family homes, schools have a high turnover.
- Comment: Community is not concerned with stopping development per se, but in getting sufficient facilities. But there is a perception that the housing was not diversified.

Issue: Policy Area Transportation Review (Staging Ceilings)

- Comment: In the other focus group, the issue was raised: do staging ceilings have relevance, or should they be dropped? One idea: staging ceilings have value for government – but does not work as a regulatory tool – because they don’t provide sufficient pressure on the government to get out of moratorium. Local Area Transportation Review is still useful, but staging ceiling past its usefulness.
- Comment: A lot of people affected by schools and transportation issues think that LATR guidelines are worthless in gauging impact of future development. LATR doesn’t measure weekend activity; i.e., traffic impact of retail development, or post 6 PM traffic. Intersections that have been reviewed have been found to be narrower than those in the trip models...etc.

- Comment: It is true that staff asked to amend guidelines, but staff study showed weekend impact was no worse than peak hour – guidelines now require looking at 3 hour evening period: 4 – 7pm.
- Comment: The LATR methodology is not appropriate to measure gridlock. Raised during TPR but deferred because more appropriate to AGP.

Issue: Role of the AGP/CIP/Master Plans

- Comment: There is frustration with AGP, LATR, schools, policy areas, but there can be opposition to adding zoning capacity in master plans. When a master plan or sector plan is being debated, and a central question is whether we can accommodate more development in an area, we need a mechanism to assure citizens that facilities are going to be adequate. The present system gives people some opportunity to argue for increased facilities. Without the AGP or something like it, you will have increased opposition to increasing development capacity in master plans.
- Comment: The APFO provides false hope at the moment. In the 1970s, the procedure was to identify future growth issues so that government could address them in the CIP. But the system was used by the government to avoid its responsibilities because it is tough to find money. Issue of infrastructure financing a "three legged stool." That's the real issue. Policy will not solve our problems. Provides elected officials with cover...and enough exceptions to placate developers.
- Comment: Government should build more capacity than immediately needed in order to accommodate growth, but funding process makes that difficult. The State requires facilities to be over capacity before they grant money.
- Comment: But there is a six year CIP – infrastructure does not have to be built ahead of time but should be phased in.
- Comment: We should look for ways to merge AGP more closely with County CIP, in order to exert more pressure for funding.
- Comment: The growth policy measures our progress towards some future – but does not identify what that future might be. The AGP assumes that master plans work.
- Comment: There is a vicious cycle of jobs-housing-funding, but where is the discussion of what is a sustainable level, and when do we stop adding housing, adding jobs? What is the end-state? The long-range view?
- Comment: The County does pay attention to AGP when CIP decision-making is taking place. The AGP identifies the most likely new road projects and informs the CIP by determining how much capacity they will create. The Council uses the knowledge of the effects of growth provided by the AGP; the AGP helps understand the implications of growth.
- Comment: The Council uses the AGP when considering the CIP? Is it working?
- Comment: Last year, the vast majority of major school projects were to move schools out of moratorium; that is also true on the roads side. Road projects are selected to address moratoriums.

- Comment: It is a question of scarce resources. When there is limited money, you have to look for the worst problems and solve those first. The AGP does that. The Council does use the information generated for the AGP and asks for more.

Issue: Final Comments

- Comment: It is easy to slip into “way we always do things” – but now we need to take a fresh look.
- Comment: We should look at the freeway issue – impact of freeway congestion – need to come up with meaningful way to take freeways into account. (Editor’s note: freeways, such the Beltway and I-270, are tested separately from local roads and have a less-stringent standard to meet. This method was adopted because it was felt that it better accounted for the fact that much of freeway traffic has origins and destinations outside the County.)
- Comment: Policy should be readable and inclusive. The basis for TTLOS etc. needs to be explained and put in there.
- Comment: There are unintended consequences of spending money to provide facilities to support new growth. For example, the downcounty school modernization schedule has suffered. The first priority is to provide enough space; addressing the quality of space comes next. It isn’t the classrooms that are crowded, but core capacity is crowded.
- Comment: The core experience very important – just being able to move in halls.
- Comment: Education happens in the classrooms, and those aren’t overcrowded.
- Comment: Concerning the schools tests use of adjacent cluster capacity: the system is inequitable because clusters in the center of the County have more adjacent clusters. For example, the Walter Johnson cluster has seven adjacent clusters...no matter how bad things get, there will always be adjacent capacity.
- Comment: The Montgomery County Civic Federation will be sponsoring meetings on this subject. Ike Leggett will participate.
- Comment: Please remember the importance of providing amenities and making our communities walkable. Making an area a more enjoyable place to be, a more walkable place, can partially balance concerns about traffic, even schools. It mitigates the traffic impact if you can walk to neighborhood facilities.

Invitees to the Housing and Neighborhoods Focus Group

First Name	Last Name	Representing	Attended?
John	Carman	RCI	Attended both groups.
Julie	Davis	Citizens Coord. Ctee on Friendship Heights	Yes.
Jane	de Winter	Water Johnson Cluster PTAs	Yes
Steve	Elemendorf	Linowes and Blocher	Attended both groups.
Chuck	Ellison	Miller and Smith Homes	Attended both groups.
Gigi	Godwin	PTA	Yes. Liaison on CIP
Natalie	Goldberg	Individual/Grosvenor area	Yes.
Marty	Jacobs	PTA	Yes. Liaison on CIP.
Lembit	Jogi	Housing Opportunity Commission	Yes.
Pamela	Lindstrom	Individual/Shady Grove area	Yes.
Doug	Lohmeyer	Housing Opportunity Commission	Yes.
Marian	Medeles-Ellison	WFHM	Yes.
Scott	Minton	Housing Opportunity Commission	Yes.
Raquel	Montenegro	MNCBIA	Attended both groups.
Rich	Parsons	Montgomery Co. Chamber of Commerce	Attended both groups.
Nanci	Porten James	Porten Homes	Attended both groups.
Malcom	Rivkin	Rivkin Associates	Yes.
Steve	Robins	Lerch, Early and Brewer Chtd	Attended both groups.
Stuart	Rochester	Eastern Montgomery County	Yes.
Alan	Schwartz	PTA	Yes. Liaison on CIP.
Ray	Sobrino	Porten Homes	Yes.
Rick	Sullivan, Jr.	Classic Community Corporation	Yes.
Bonnie E.	Thomson	Victory Housing Inc	Was unable to attend.
Mark	Viani	Linowes and Blocher	Attended both groups.

Invitees to the Jobs and Economic Development Focus Group

First Name	Last Name	Company Name	Notes
Edward H.	Asher	The Chevy Chase Land Co.	Yes.
Arlene	Begelman	Western Montgomery County Citizens Advisory Board	Yes.
Perry	Berman	Berman Associates	Yes
Paul	Chod	Minkoff Development Corporation	Was unable to attend.
Tim	Dugan	Shulman Rogers Gandal, Pordy & Ecker, P.A	Yes.
Nanci	Porten James	Porten Homes	Attended both groups.
Francine	Meyer	Allied Civic Association	Yes.
Richard N.	Parsons	Montgomery Chamber of Commerce	Yes.
Scott	Reilly	Montgomery County Executive	Yes.
Malcolm	Rivkin	Rivkin Associates Inc	Yes.
Steve	Robins	Lerch, Early and Brewer Chtd	Attended both groups.
Stan	Schiff	Montgomery County Civic Federation	Yes.
Meredith	Weisel	Greater Washington Assn of Realtors	Yes.
Dan	Wilhelm	Greater Colesville Civic Association/MCCF	Yes.
Chuck	Ellison	Miller and Smith Homes	Attended both groups.
Steve	Elemendorf	Linowes and Blocher	Attended both groups.
Raquel	Montenegro	MNCBIA	Attended both groups.
Rich	Parsons	Montgomery Co. Chamber of Commerce	Attended both groups.
Mark	Viani	Linowes and Blocher	Attended both groups.