June 2012

growing smarter

2012-2016 Subdivision Staging Policy

appendix 1

Pace and Pattern of Development

closer communities

reducing traffic

connected neighborhoods

staging growth

Montgomery County Planning Department
The Maryland-National Capital Park and Planning Commission

MontgomeryPlanning.org

2012 Subdivision Staging Policy

Contents

Background

Since 1973 Montgomery County has conducted the exercise of evaluating whether County public facilities are adequate to meet the needs induced by increases in its population and employment base. The County's subdivision Staging Policy, (formerly, the Growth Policy) governs the timing and conduct of this analysis. In 2009, there was extended discussion of the need for the subdivision staging policy provide an extended analysis of the County's pace and pattern of growth.

This initial pace and pattern study presents a framework for understanding development patterns as the County enters a new period in which the demand for of new housing and commercial space will be met primarily through the redevelopment of existing properties. This is a transition from the traditional regime of green field development that formerly characterized County's growth.

The analysis examines the assumptions of the County's 2030 demographic forecast. Then, its attempts to determine the amount of land needed to accommodate the projected growth. It identifies where gaps exists between the projected growth and the availability of land needed to accommodate it. The lack of vacant land for a specific category of use acts as an indicator of the types of redevelopment pressures the County will face.

The following information is provided:

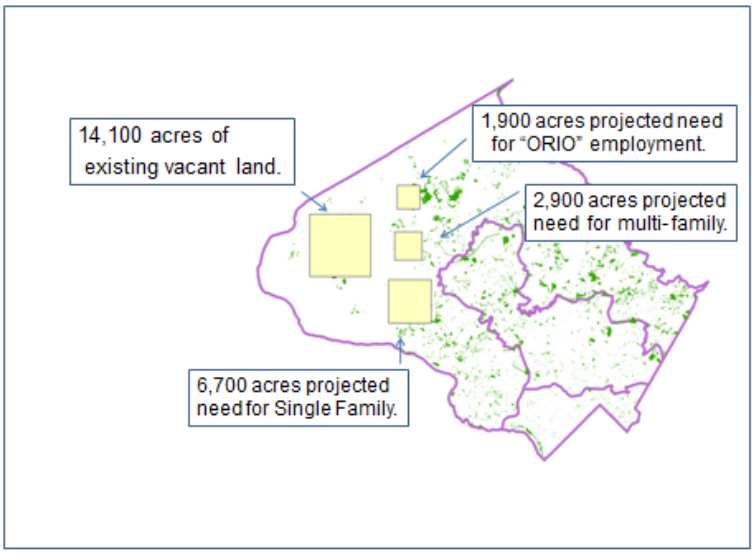
- Projections of acres land needed across the housing and job categories used in the County forecast
- Comparisons of the projected need for land by category to the amount of available vacant land
- Indicators of historical changes in the densities at which County land is developed (i.e., change in Floor Area Ratio)
- Historical trends in sub-County rates of land development
- Explanation of Small Area Forecast methodology and components
- Review of the County pipeline of approved but "un-built" development
- Small Area Forecast Results: 2010-2030

Implications of Declining Vacant Land

There has been a rapid decline in the availability of the vacant land that fueled Montgomery County's development in the 1970s, 80s, and 90s. Only 4.8 percent of the County land remains vacant.

Based on the County's regional forecast of housing and jobs, the County will need to accommodate an additional 9,600 acres of residential development and 1,913 acres of commercial development over the next 20 years.

Figure 1
Existing Vacant Land Compared to Land Needed to Accommodate Projected New Development



During the 1980s, the planning literature was characterized by debates over whether newly emerging suburbs or older central cities were winning a competition for new infrastructure investments. This completion was played out as developers chose between newer suburbs and older central cities as the primary choices for new retail, office, and high income residential developments.[1]

Currently, there is even a wider variety of location options for developers to choose from. First ring suburbs like Montgomery County find themselves in competition with reemerging central cities, younger inner suburbs within the same metro areas, as well with fast growing newly emerging "exurbs" that emerged along the urban region's outer fringe. A suburb's ability to compete with newer emerging exurban locations is a primary factor that determine how well the suburb will age. In the worst cases, older suburbs can face economic decline characterized by increased joblessness and a self-reinforcing cycle of deteriorating infrastructure. In the best cases, thoughtful policies lead to the ability to attract new investment and to maintain a healthy economic base.[2]

As the amount of vacant land in the Montgomery County declines, redevelopment of existing properties becomes increasing crucial as a source for new investment dollars. Comparing the County forecast to the existing profile of vacant land will help policy makers anticipant the types of redevelopment pressures that the County will face. This will also help us better understand the impact County growth controls will have on County residents' quality of life in the face of new development.

Approximately 14,100 acres of vacant land remain in the County. (The available acres reduced even further when small, undevelopable parcels are excluded.) We can use the current zoning to develop and indicator for the acres of vacant land currently available for commercial and residential use.

Under the current zoning, the projected need for acres of single-family is in balance the existing amount of vacant land zoned for single-family use. However, there is a surplus of vacant land zoned for retail and industrial/research uses when compared to future projected need. Correspondingly, there is a shortage of vacant land zoned for office and multifamily use.

Figure 2
Montgomery County Planning Department Geographic Area Teams

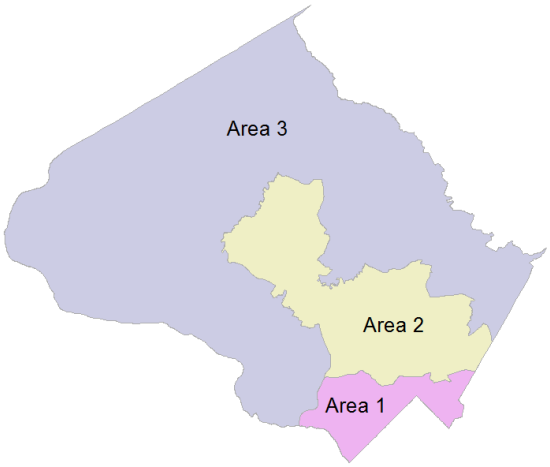
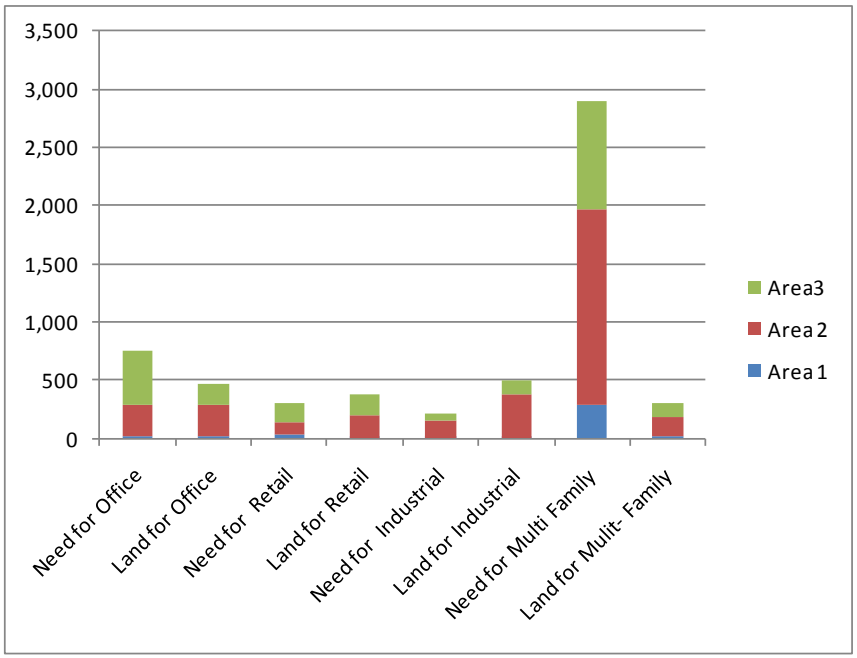
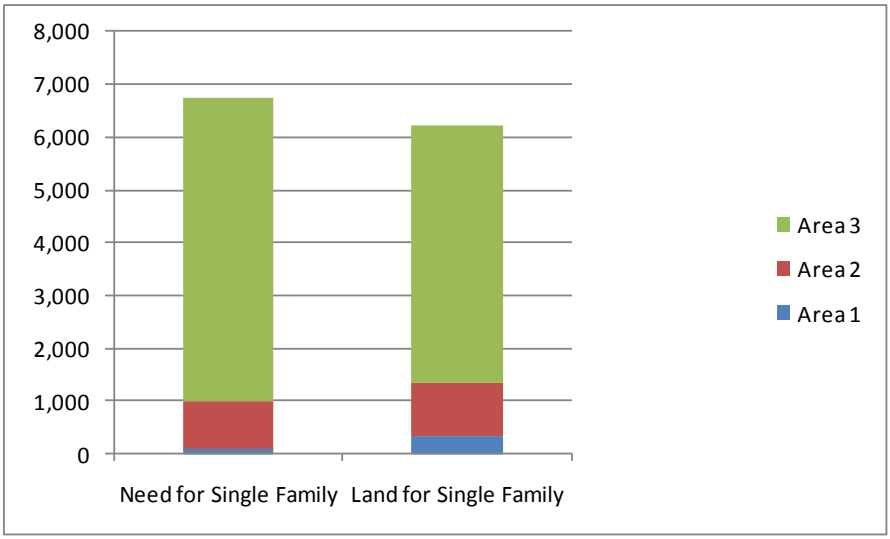


Figure 3
Projected Need for Acres of Land Compared to Amount of Vacant Land Currently Zoned for Commercial Use



	Need for Office	Land for Office	Need for Retail	Land for Retail	Need for Industrial	Land for Industrial	Need for Multi Family	Land for Mulit-	Need for Other	Land for Other
Area 1	18	10.9	32	7.9	1	5.1	286	23	55	55.5
Area 2	268	281.3	111	192.6	155	367.6	1,687	167	337	280.5
Area3	462	179.7	154	170.8	52	125.4	925	108	268	412.5
	748	471.9	297	371.3	207	498.1	2,898	298	660	748.6

Figure 4
Projected Need for Acres of Land Compared to Amount of Vacant Land Currently Zoned for Single-family



	Need for Single Family	Land for Single Family
Area 1	93	334.8
Area 2	892	1,022.2
Area 3	5,747	4,846.9
County	6,732	6,203.9

Methodology for Projecting Future Land Use Needs

How do we determine the amount of land needed to accommodate future growth?
The forecast uses employment categories (Office, Retail, Industrial, Other, i.e. ORIO categories) that match those used in the Washington Metro Area Council of Government's regional transportation model. Within this framework, a conversion factor is used to translate the number of projected jobs within each category to the gross square footages needed to accommodate the projected employment.

	Office	Retail	Industrial	Other
New Jobs	116,860	15,907	12,868	21,365
Multiplier	225	400	450	500
Required GSF	26,293,500	6,362,800	5,790,600	10,682,500

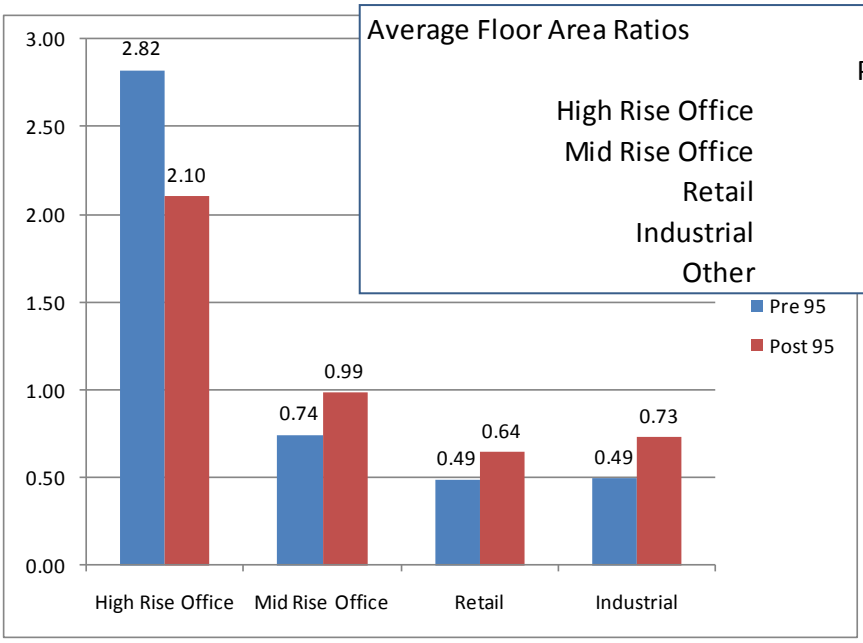
This approach provides an estimate of the total gross square footage of built space needed to accommodate all future jobs.

However, the acres of land needed to accomodate this new development depends on how intensely land is developed. For example, 3,000 office jobs could be located in a two story office park or in a 10-story mid-rise office building. The gross square footage of built space would be the same in each case. However, the building footprint of the high rise would be 1/5th the size of the office park. Obviously,

the amount of land needed to contained new employment decreases as one assumes that land is developed at higher densities.

How densely do we build?
Floor Area Ratio (FAR) is the ratio of building gross square footage to the size of the parcel on which the building sits. An increase in FAR is an indicator of building more intensely on available land.

Since 1995, as the supply of vacant land has shrunk, developers have built more intensely on the remaining land.



Average Floor Area Ratios

	Pre 95	Post 95
High Rise Office	2.82	2.10
Mid Rise Office	0.74	0.99
Retail	0.49	0.64
Industrial	0.49	0.73
Other	0.37	0.39

Note: The apparent increase since 1995 in FAR for highrise office buildings is due to the large number of office buildings that were built inside the Beltway before 1995. After 1995, a larger number of office developments occurred along the I-270 corridor and outside of the Beltway. These post-1995 buildings provided much more on site space for parking and other amenities. For the purposes of this analysis, the more intense pre-1995 FAR is used.

A different approach is used to estimate how densely we build residential units. The existing average number of dwelling units per acre was used to determine current residential densities.

	Single Family Avg Dwelling Units per Acre	Multi- Family Avg Dwelling Units per Acre
Area 1	4.6	43.5
Area 2	4.9	22.1
Area 3	1.8	13.8
County	2.9	23.4

Projections for the amount of commercial land needed for new development were derived by dividing the gross building area measure by the assumed post-1995 FAR. Projects for the amount of residential

land needed for new development were derived by multiplying the units projected in the COG forecast by the current measures for residential dwelling unit per acre.

Forecast Methodology and Results

Montgomery County's forecast of jobs, households, and population provides a framework for conducting the analysis of pace and pattern of growth. The forecast is completed in two stages. The first stage provides a Countywide measure for employment, population, and households. The second stage allocates the Countywide numbers to smaller neighborhood-like units of geography within the County.

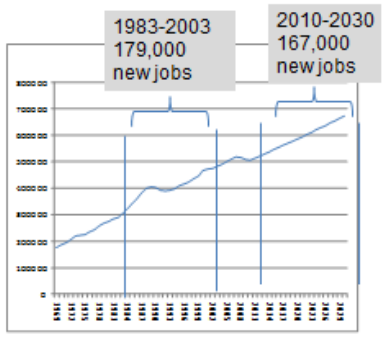
Stage 1: County level

The first stage determines the overall amount of population and job growth likely to occur in the County. During the first stage, demographic and economic models are used that consider the amount of growth likely to occur based on the County's current economic and demographic structure. The effort develops projections that that are relatively independent of any specific County master planning exercises.

The region's forecast of housing, jobs, and population is a collaborative effort between the Metropolitan Washington Council of Governments (MWCOG) and local jurisdictions. MWCOG calibrates a regional econometric model that provides an estimate of overall growth in the Washington metro region. At the same time that MWCOG is preparing its economic projects, each member jurisdiction prepares its own projections of local growth, independently of MWCOG. The jurisdictions then meet with MWCOG to ensure that sum of the jurisdictional totals are within three percent of the MWCOG control total. Montgomery County's participation in this process ensures that the County forecast fits within a framework that considers both regional and national economic trends.

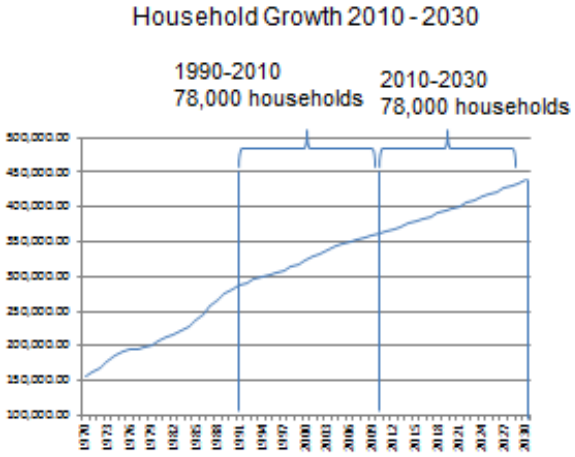
Montgomery County projects over 75,000 new households and over 160,000 new jobs by year 2030. Both the jobs and housing forecast are consistent with previous 30-year trends that capture both the booms and busts of the previous periods. The demographic projections capture the dynamics of county-level births, deaths, net migration, and household formation rates. The employment model is a trend line projection based on current Bureau of Economic Analysis county employment estimates.

- The projected 2030 employment represents a 33% increase over 2010
- Parallels the period between 1983 and 2003 in which the region gained 179,000 jobs.
- Similar growth rates occurred between 1992 and 2007



	Office	Retail	Industrial	Other
Area 1	21.9%	17.7%	1.7%	9.5%
Area 2	46.4%	17.0%	29.8%	27.3%
Area 3	123.6%	19.0%	28.0%	14.6%
County	47.2%	17.5%	27.2%	17.8%

- The projected 2030 household growth represents a 21.5% increase over 2010
- Parallels 1990 to 2010 when County gained 78,000 households.
- Decrease from 1980 - 2000 when County gained 116,000 households.

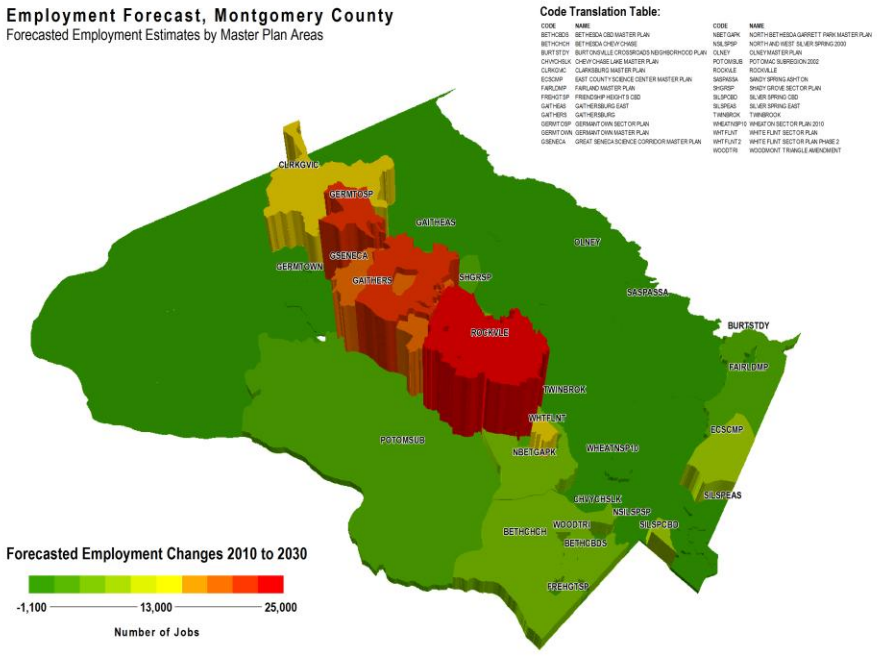


Percent increase in households: 2010- 2030

Single family	Multi-family	total households
1.1%	54.9%	17.5%
4.0%	59.5%	24.1%
10.7%	69.4%	20.2%
6.1%	53.7%	21.5%

Stage 2: Small Area Allocation

The second stage in the forecast process attempts to identify the places within the County where new growth will occur. The jobs and households projected in Stage 1 are allocated within the County based on historical small area growth rates.



The geographic areas with the fastest growth rates received a larger share of the County's overall projected growth. This allocation occurs until the zoned capacity of the target areas is reached. Historical growth rates are adjusted by three factors.

- The Development Pipeline

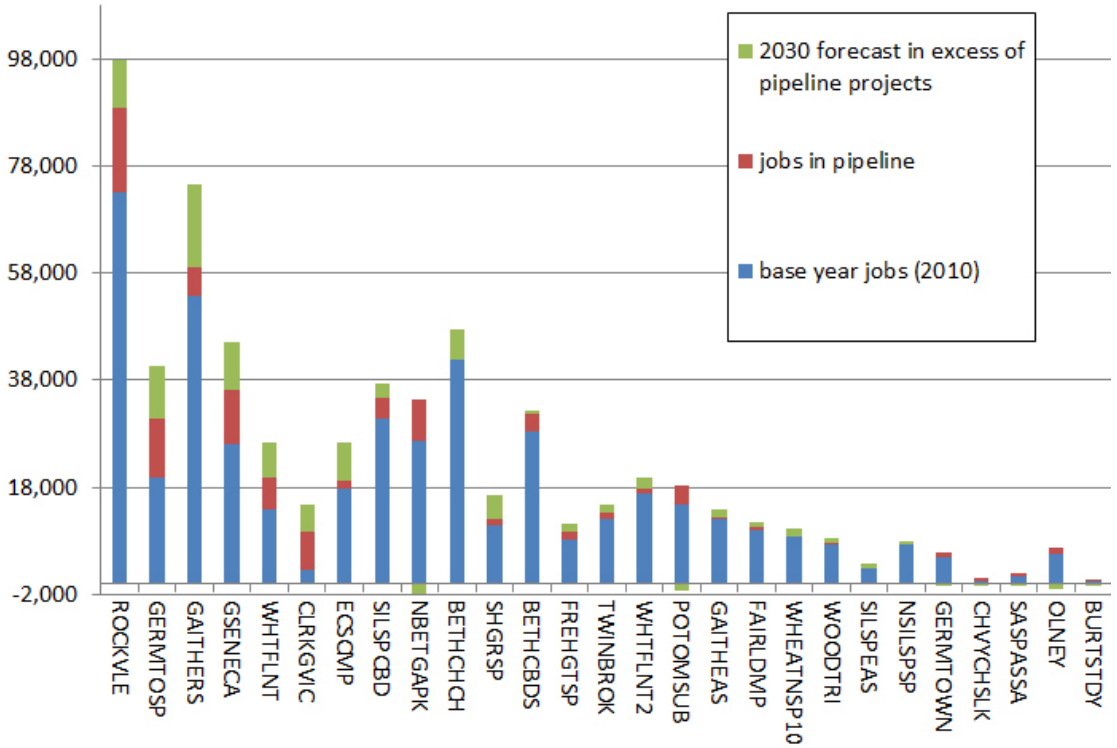
  The development pipeline consists of the land development applications that have been approved by the planning department, but remain unbuilt. Development pipeline projects are assumed to be completed within the first five years of the forecast period.

- Current Master Plans

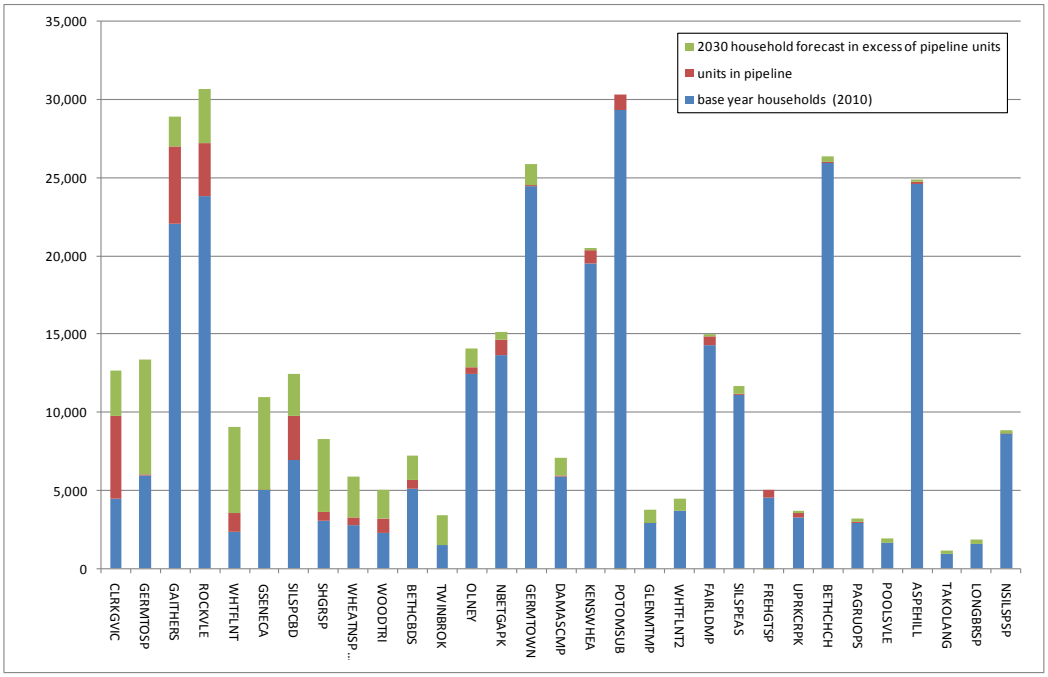
  Forecasters conduct a survey of high profile projects that are deemed likely to occur as the result of federal expansions or as components of newly approved master plans. The Great Seneca Science Center Master Plan, the White Flint Sector Plan, the Wheaton Sector Plan, and the White Oak Science Gateway Master Plan (currently underway) are the recent plans whose buildout assumptions have been embedded in the 8.1 forecast.

- The Constrained Long Range Transportation Plan

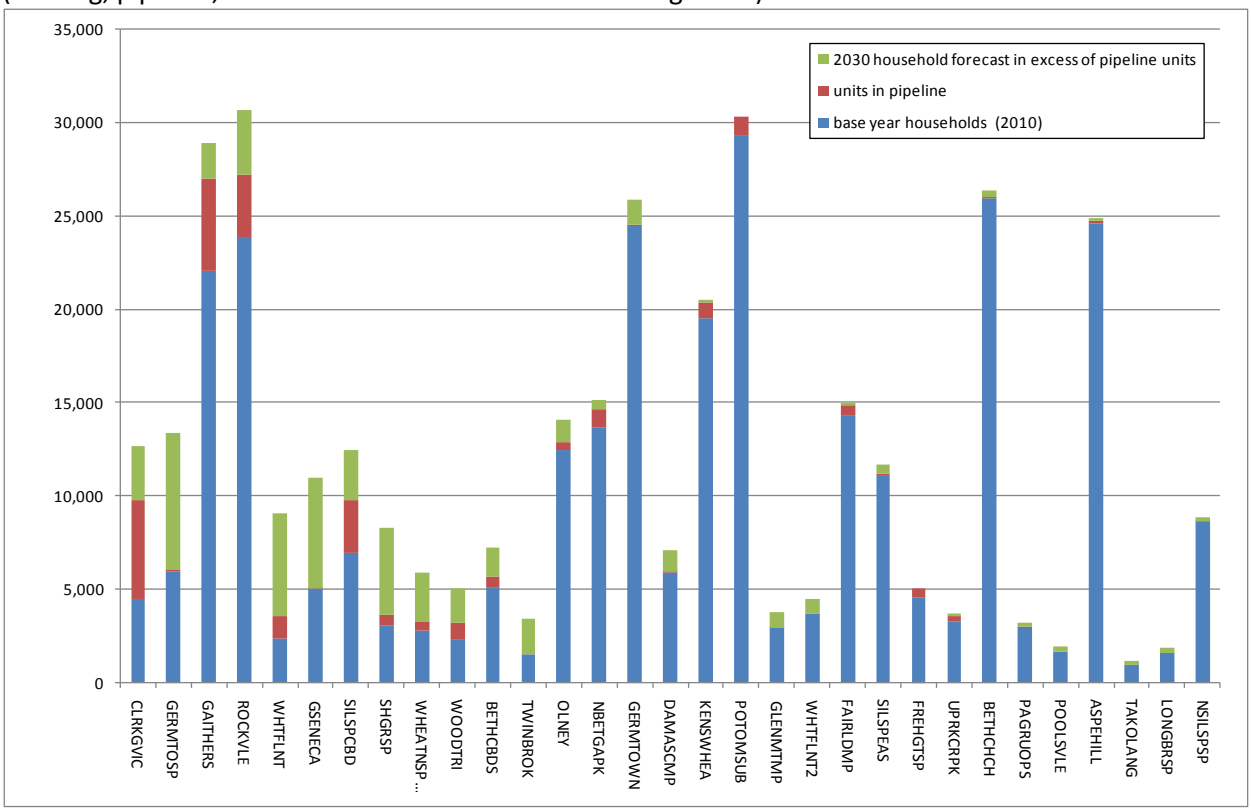
  Sites adjacent to the proposed transportation network are developed under an accelerated timeframe.



2030 Jobs Forecast by Master Plan Area
(existing, pipeline, and additional forecasted employment growth)



2030 Household Forecast by Master Plan Area (units)
(existing, pipeline, and additional forecasted household growth)



The results of the Round 8.1 Forecast and selected inputs are available in the following tables.

Table 1A: Round 8.1 Employment Forecast by Policy Area
Table 1B: Round 8.1 Household Forecast by Policy Area
Table 2A: Ten-Year Historical Growth Rates (Commercial Gross Square Footage)
Table 2B: Ten-Year Historical Growth Rates (Units)
Table 2C: CountywideTen-Year Historical Growth Rates (Units)
Table 3A: Historical Pipeline of Development
Table 3B: Current Pipeline of Development

Table 1A: Round 8.1 Employment Forecast by Policy Area

JOBS FORECAST (2010 to 2040)
Montgomery County, Maryland
by Policy Area and land use type

	2010					2030				
AREA	**office**	**retail**	**industrial**	**other**	**total**	**office**	**retail**	**industrial**	**other**	**total**
Aspen Hill	1,231	2,734	0	3,245	7,210	1,299	2,777	0	3,263	7,339
Bethesda CBD	29,407	4,554	134	1,626	35,721	33,949	5,049	135	1,751	40,884
Bethesda/Chevy Chase	4,450	1,074	378	38,099	44,001	5,216	1,500	391	42,963	50,070
Clarksburg	1,052	64	687	737	2,540	11,733	776	1,534	846	14,889
Cloverly	73	351	38	1,151	1,613	73	352	38	1,155	1,618
Damascus	289	1,519	28	837	2,673	295	1,537	28	849	2,709
Derwood	6,831	2,140	7,120	901	16,992	8,583	2,700	8,848	895	21,026
Fairland/White Oak	12,766	5,717	2,681	10,414	31,578	20,412	6,072	3,495	15,727	45,706
Friendship Heights	6,535	1,369	26	330	8,260	9,367	1,533	26	454	11,380
Gaithersburg City	18,019	16,689	12,479	7,854	55,041	34,014	19,411	14,659	9,538	77,622
Germantown East	5,642	2,697	307	1,312	9,958	12,740	3,144	843	2,888	19,615
Germantown Town Center	1,982	1,897	277	672	4,828	7,242	2,182	377	1,485	11,286
Germantown West	5,532	1,128	958	2,512	10,130	10,130	1,510	1,237	2,971	15,848
Glenmont	9	605	0	63	677	9	618	0	72	699
Grosvenor	376	22	0	97	495	376	22	0	97	495
Kensington/Wheaton	3,703	2,247	1,201	9,235	16,386	3,827	2,264	1,217	9,304	16,612
Montgomery Village/Airpark	1,682	2,542	4,892	2,537	11,653	2,380	2,578	5,577	2,557	13,092
North Bethesda	33,736	2,687	2,954	3,486	42,863	40,923	3,189	3,064	3,862	51,038
North Potomac	68	300	0	1,192	1,560	146	382	0	1,216	1,744
Olney	1,508	989	13	3,049	5,559	1,572	1,021	13	3,105	5,711
Potomac	1,417	4,639	32	6,325	12,413	2,845	5,497	32	6,526	14,900
R&D Village	16,203	751	507	2,806	20,267	24,568	1,240	4,482	6,371	36,661
Rockville City	38,086	6,471	4,010	7,656	56,223	53,874	6,610	4,021	9,828	74,333
Rockville Town Center	7,733	1,576	1,132	761	11,202	11,674	1,881	1,135	1,621	16,311
Rural East	889	1,064	1,208	2,443	5,604	1,385	1,500	1,294	2,515	6,694
Rural West	486	1,128	448	1,127	3,189	488	1,142	449	1,130	3,209
Shady Grove Metro Station	209	1,002	661	657	2,529	3,142	994	1,312	630	6,078
Silver Spring CBD	24,208	4,731	829	1,278	31,046	29,290	6,031	850	1,717	37,888
Silver Spring/Takoma Park	2,961	3,202	2,443	7,476	16,082	4,758	3,513	2,482	6,687	17,440
Twinbrook	11,845	4,260	1,115	646	17,866	15,522	4,407	1,362	831	22,122
Wheaton CBD	2,641	5,523	388	278	8,830	3,537	6,060	395	373	10,365
White Flint	8,538	5,598	539	472	15,147	18,498	8,689	948	765	28,900
TOTAL	**250,107**	**91,270**	**47,485**	**121,274**	**510,136**	**373,867**	**106,181**	**60,244**	**143,992**	**684,284**

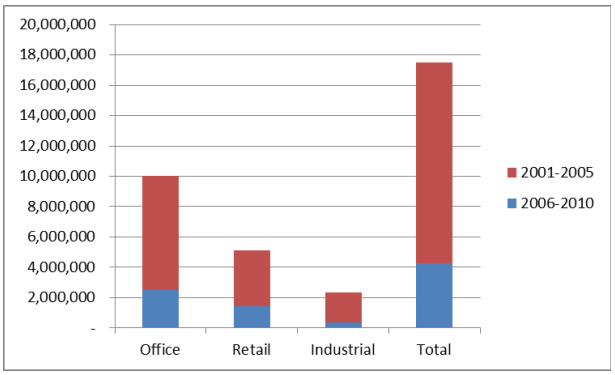
Table 1B: Round 8.1 Household Forecast by Policy Area

HOUSEHOLD FORECAST (2010 to 2040)
Montgomery County, Maryland
by Policy Area and type

	2010			2030		
AREA	**single-family**	**multifamily**	**total**	**single-family**	**multifamily**	**total**
Aspen Hill	14,576	10,123	24,699	14,769	10,169	24,938
Bethesda CBD	716	6,480	7,196	730	11,495	12,225
Bethesda/Chevy Chase	24,440	4,073	28,513	24,669	4,193	28,862
Clarksburg	4,100	91	4,191	9,934	2,609	12,543
Cloverly	5,312	0	5,312	5,421	0	5,421
Damascus	3,479	313	3,792	3,803	1,133	4,936
Derwood	4,891	676	5,567	4,983	676	5,659
Fairland/White Oak	17,912	10,092	28,004	18,724	10,092	28,816
Friendship Heights	2	3,910	3,912	102	4,310	4,412
Gaithersburg City	11,092	11,702	22,794	12,560	18,578	31,138
Germantown East	5,780	2,396	8,176	5,738	4,291	10,029
Germantown Town Center	337	730	1,067	339	2,940	3,279
Germantown West	14,473	6,663	21,136	15,052	10,747	25,799
Glenmont	616	551	1,167	827	1,251	2,078
Grosvenor	458	3,648	4,106	570	4,090	4,660
Kensington/Wheaton	28,371	4,687	33,058	29,460	4,687	34,147
Montgomery Village/Airpark	14,548	3,972	18,520	14,710	3,972	18,682
North Bethesda	8,035	6,040	14,075	8,094	6,888	14,982
North Potomac	8,816	80	8,896	9,201	1,080	10,281
Olney	10,513	942	11,455	11,273	1,812	13,085
Potomac	15,811	1,575	17,386	16,034	1,970	18,004
R&D Village	827	2,789	3,616	833	6,089	6,922
Rockville City	13,426	8,074	21,500	13,463	9,777	23,240
Rockville Town Center	539	2,296	2,835	539	3,677	4,216
Rural East	10,954	172	11,126	11,920	172	12,092
Rural West	7,060	0	7,060	7,744	0	7,744
Shady Grove Metro Station	61	138	199	453	3,505	3,958
Silver Spring CBD	57	6,879	6,936	67	12,382	12,449
Silver Spring/Takoma Park	14,490	14,319	28,809	14,569	15,721	30,290
Twinbrook	864	64	928	864	5,044	5,908
Wheaton CBD	1,092	1,519	2,611	1,144	4,635	5,779
White Flint	31	2,339	2,370	31	9,581	9,612
TOTAL	**243,679**	**117,333**	**361,012**	**258,620**	**177,566**	**436,186**

Table 2A: Ten-Year Historical Growth Rates
(places with highest 10-year historical growth rates [gfa])

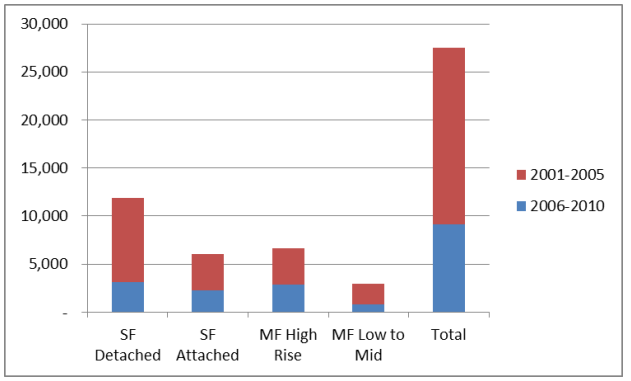
Planning Place	*GFA, 2001-2005*	*GFA, 2006-2010*	*% change*
Gaithersburg and Vicinity	2,935,369	416,341	-85.8%
Rockville	2,546,027	1,200,684	-52.8%
Bethesda	1,980,221	896,679	-54.7%
Germantown	1,537,819	219,438	-85.7%
Silver Spring	1,350,174	236,350	-82.5%
Agriculture East 2	818,284	121,382	-85.2%
North Bethesda	811,097	230,720	-71.6%
North Potomac	758,316	50,847	-93.3%
Clarksburg	282,573	38,655	-86.3%
Fairland	280,666	229,583	-18.2%
Total	13,300,546	3,640,679	-72.6%



Countywide GFA

Table 2: Ten Year Historical Growth Rates
(places with highest 10-year historical growth rates [units])

Planning Place	*Units, 2001-2005*	*Units, 2006-2010*	*% change*
Rockville	3,673	624	-83.0%
Germantown	2,583	54	-97.9%
Gaithersburg and Vicinity	2,113	809	-61.7%
Clarksburg	1,996	1,757	-12.0%
Fairland	1,333	189	-85.8%
Bethesda	1,103	742	-32.7%
Agriculture East 1	614	128	-79.2%
Silver Spring	473	1,116	135.9%
Aspen Hill	471	276	-41.4%
Damascus	369	93	-74.8%
Total	14,728	5,788	-60.7%



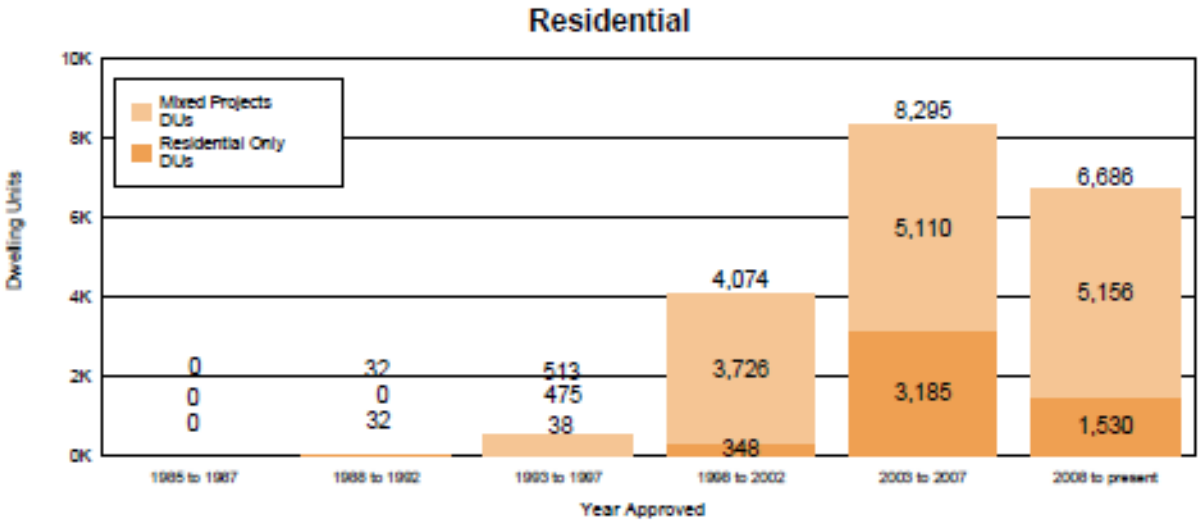
Countywide Units

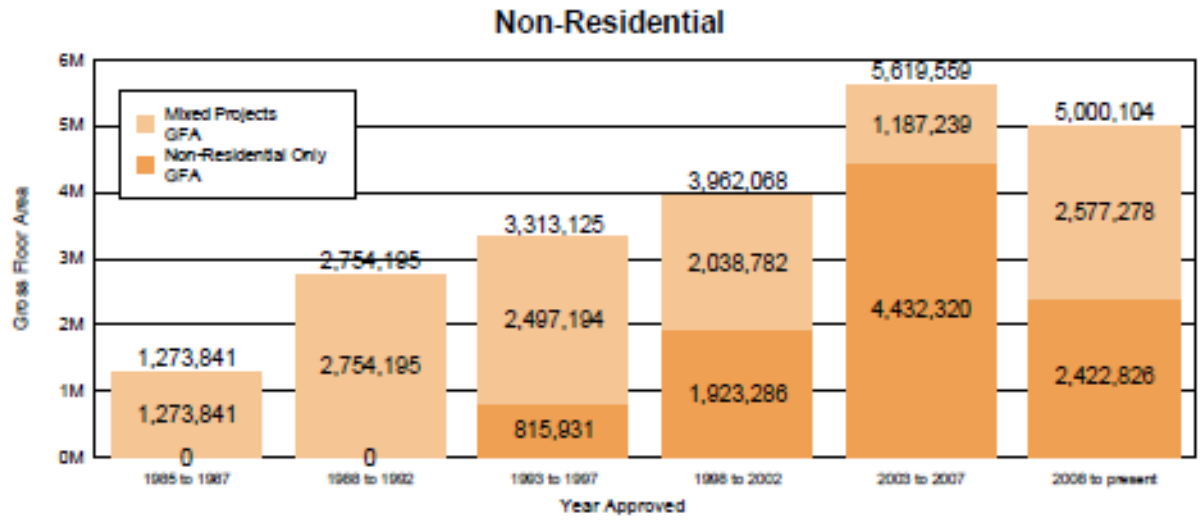
Table 2C: Countywide Ten-Year Historical Growth Rates

Planning Place	GFA, 2001-2005	Growth Rate, 01-05	GFA, 2006-2010	Growth Rate, 06-10	Units, 2001-2005	Growth Rate, 01-05	Units, 2006-2010	Growth Rate, 06-10
Agriculture East 1	35,520	20.5%	-	0.0%	614	11.8%	128	2.2%
Agriculture East 2	818,284	12.1%	121,382	1.6%	202	3.3%	57	0.9%
Agriculture West 1	-	0.0%	-	0.0%	101	6.0%	75	4.2%
Agriculture West 2	-	-	-	-	-	0.0%	-	0.0%
Ashton-Sandy Spring	16,000	4.8%	-	0.0%	281	19.4%	81	4.7%
Aspen Hill	-	0.0%	-	0.0%	471	2.1%	276	1.2%
Barnesville	-	0.0%	-	0.0%	-	0.0%	1	1.7%
Bethesda	1,980,221	14.4%	896,679	5.7%	1,103	3.0%	742	2.0%
Brookeville	-	0.0%	-	0.0%	4	9.3%	2	4.3%
Burtonsville	9,600	0.8%	-	0.0%	206	7.8%	21	0.7%
Chevy Chase View	-	-	6,114	-	7	2.4%	18	5.9%
Clarksburg	282,573	32.4%	38,655	3.3%	1,996	209.2%	1,757	59.6%
Cloverly	49,400	34.2%	2,856	1.5%	171	3.6%	48	1.0%
Colesville	14,000	6.6%	3,285	1.4%	129	2.6%	42	0.8%
Damascus	-	0.0%	3,078	0.6%	369	8.0%	93	1.9%
Darnestown	-	0.0%	23,113	21.9%	144	6.9%	53	2.4%
Derwood	-	0.0%	4,100	0.4%	-	0.0%	1	0.1%
Fairland	280,666	6.5%	229,583	5.0%	1,333	12.7%	189	1.6%
Forest Glen	-	0.0%	-	0.0%	120	4.5%	5	0.2%
Four Corners	-	0.0%	-	0.0%	8	0.3%	1	0.0%
Gaithersburg and Vicinity	2,935,369	15.6%	416,341	1.9%	2,113	9.2%	809	3.2%
Garrett Park	-	-	-	-	7	2.0%	9	2.5%
Germantown	1,537,819	29.9%	219,438	3.3%	2,583	10.2%	54	0.2%
Glenmont	60,000	39.3%	-	0.0%	47	1.0%	31	0.6%
Hillandale	-	0.0%	55,116	12.5%	5	0.3%	4	0.3%
Kemp Mill	-	0.0%	-	0.0%	14	0.3%	6	0.1%
Kensington	4,527	0.4%	75,000	5.9%	7	0.9%	6	0.8%
Layhill	-	0.0%	-	0.0%	49	2.7%	31	1.6%
Laytonsville	-	0.0%	-	0.0%	3	2.6%	10	8.5%
Montgomery Village	72,598	6.5%	12,900	1.1%	7	0.1%	-	0.0%
North Bethesda	811,097	4.3%	230,720	1.2%	171	0.9%	1,190	6.4%
North Potomac	758,316	413.7%	50,847	5.4%	336	4.3%	51	0.6%
Olney	36,996	4.0%	-	0.0%	303	2.7%	104	0.9%
Poolesville	18,280	10.3%	-	0.0%	5	0.3%	21	1.3%
Potomac	-	0.0%	238,849	8.3%	309	2.0%	657	4.1%
Redland	49,900	5.6%	-	0.0%	105	1.9%	1	0.0%
Rockville	2,546,027	14.9%	1,200,684	6.1%	3,673	18.6%	624	2.7%
Silver Spring	1,350,174	10.0%	236,350	1.6%	473	1.7%	1,116	3.9%
South Kensington	-	0.0%	-	0.0%	91	2.9%	49	1.5%
Spencerville	-	0.0%	-	0.0%	46	9.3%	3	0.6%
Takoma Park	-	0.0%	146,620	14.7%	27	0.4%	113	1.6%
Travilah	-	0.0%	-	0.0%	235	6.8%	188	5.1%
Washington Grove	-	0.0%	-	0.0%	10	4.4%	1	0.4%
Wheaton	66,305	1.9%	65,635	1.9%	248	1.4%	343	1.9%
White Oak	139,950	10.8%	-	0.0%	316	4.8%	109	1.6%
County	13,873,622	11.7%	4,277,345	3.2%	18,442	5.5%	9,120	2.6%

Table 3A: Historical Pipeline of Development

The Montgomery Planning Department tracks the residential and non-residential development Pipeline for Montgomery County (Rockville and Gaithersburg included). The Pipeline is a quarterly inventory of development projects that have been approved by the Planning Board but not completely built. This inventory covers unbuilt dwellings units and unbuilt nonresidential building gross square footage.





	# of Plans	Residential Unbuilt DUs	Mixed Unbuilt DUs	NonResidental Unbuilt GFA	Mixed Unbuilt GFA
1985 to 1987	3	0	0	1,273,841	0
1988 to 1992	8	32	0	2,754,195	0
1993 to 1997	25	38	475	2,497,194	815,931
1998 to 2002	52	348	3,726	2,038,782	1,923,286
2003 to 2007	169	3,185	5,110	1,187,239	4,432,320
2008 to present	117	1,530	5,156	2,577,278	2,422,826
Total	**374**	**5,133**	**14,487**	**12,328,529**	**9,594,363**

Mixed developments contain residential DUs and non-residential GFA
* does not include Rockville or Gaithersburg Pipeline data
Source: Montgomery County Planning, Research and Technology Center

Table 3B: Current Pipeline of Development

Montgomery County Development Pipeline

March 2012

Policy Area	Projects	Approved Dwelling Units	Unbuilt Dwelling Units	Unbuilt Single Family Dwellings	Unbuilt Mult-Family Dwellings	Approved Gross Floor Area	Unbuilt Gross Floor Area	Unbuilt Office Jobs	Unbuilt Retail Jobs	Unbuilt Industrial Jobs	Unbuilt Other Jobs
Aspen Hill	10	136	117	65	52	150,625	49,432	0	73	0	10
Bethesda Chevy Chase	16	41	26	26	0	458,372	221,363	508	268	0	0
BethesdaCBD	15	1,541	1,510	5	1,505	2,009,959	1,119,781	4,996	277	0	0
Clarksburg	19	8,622	5,291	4,109	1,182	2,750,223	2,750,220	0	6,810	0	53
Cloverly	10	55	50	50	0	95,102	95,101	13	0	0	10
Damascus	11	127	54	54	0	33,130	33,130	0	0	0	5
Derwood	4	404	395	218	177	383,929	344,227	1,317	0	33	0
Fairland/White Oak	32	565	488	390	98	2,447,993	641,454	1,850	38	337	5
Friendship Heights	1	500	500	200	300	810,000	295,743	1,314	0	0	0
Gaithersburg City	35	5,795	5,173	806	4,367	3,530,936	3,458,628	11,811	1,210	0	0
Germantown East	5	24	22	22	0	2,522,670	1,236,008	4,080	539	0	0
Germantown West	10	35	25	25	0	2,478,602	1,946,584	7,488	0	0	5
Glenmont	2	6	5	5	0	14,966	14,965	10	0	0	5
Great Seneca	1	0	0	0	0	12,700	12,700	51	0	0	0
Grosvenor	1	112	82	82	0	0	0	0	0	0	0
Kensington/Wheaton	22	1,024	655	655	0	117,794	59,734	24	0	40	20
Montgomery Village/Airpark	4	55	51	51	0	24,868	24,867	0	62	0	0
North Bethesda	14	3,277	2,862	5	2,857	7,247,220	3,812,908	12,768	2,038	0	5
North Potomac	8	86	78	78	0	63,800	63,800	160	0	0	5
Olney	23	712	620	306	314	1,068,932	651,262	0	20	0	1,126
Potomac	27	1,156	799	67	732	2,864,721	1,119,336	1,893	1,375	0	193
R&D Village	9	793	33	33	0	6,403,348	3,349,610	9,923	0	0	0
Rockville City	39	4,793	4,793	37	4,756	3,906,702	3,704,127	11,342	1,751	0	5
Rural East	52	579	400	400	0	921,544	714,973	253	511	260	39
Rural West	45	295	173	173	0	37,557	37,556	11	5	0	59
Shady Grove	2	198	198	81	117	0	0	0	0	0	0
SilverSpring_CBD	17	3,374	3,138	0	3,138	2,746,920	1,077,935	3,404	433	0	0
Silver Spring/Takoma Park	6	103	36	4	32	59,911	59,911	232	5	0	0
Twinbrook	2	0	0	0	0	1,318,692	776,557	3,451	0	0	220
Wheaton CBD	4	772	772	27	745	59,500	36,521	0	91	0	0
White Flint	2	1,533	1,220	0	1,220	1,459,537	1,377,214	5,102	573	0	0
Project Totals	**448**	**36,713**	**29,566**	**7,974**	**21,592**	**46,000,253**	**29,085,647**	**82,001**	**16,079**	**670**	**1,765**

Source: Montgomery County Planning, Research and Technology Division

Source: Cities of Rockville and Gaithersburg have their own planning functions, Rockville's data provided on March 2012, Gathersburg's data provided on January 2012.

Mandatory Referral data is not included

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June 2012

growing smarter

2012-2016 Subdivision Staging Policy

appendix 1

Pace and Pattern of Development

Scan or go to montgomeryplanning.org/growsmart to learn more and tell us what you think.

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