

A Guide For
Citizens,
Planners, and
Government
Officials

The Master Planning Process

Montgomery County
Maryland

September 1997

*The Montgomery County Department of Park and Planning
8787 Georgia Avenue Silver Spring Maryland 20910-3760*

Additional information regarding the community planning process can be obtained from the Park and Planning Department's Community-Based Planning Division (301-495-4555), which is located at 8787 Georgia Avenue in Silver Spring. Spanish and Vietnamese translation and explanation are available upon request.

Información adicional referente al proceso de planificación de la comunidad se puede obtener en la División de Planificación de la Comunidad del Departamento de Parques y Planificación (301-495-4555) localizado en 8787 Georgia Avenue, en Silver Spring. Traducciones y explicaciones en español y en "vietnamense" están disponibles con previo aviso.

Để biết thêm tin tức về thủ tục chính trang đô- thị có thể hỏi tại Sở Park and Planning Department, Community-Based Planning số điện thoại 301-495-4555 tọa lạc tại 8787 Georgia Avenue, Silver Spring. Sẽ được dịch và giải thích bằng tiếng Việt nếu bạn đòi hỏi .

Introduction

This Guide was developed for those planners, residents, and government officials who regularly participate in the planning process and it also provides a general overview of master planning for those who may be new to the dynamics of planning in Montgomery County. We hope that it serves as a useful reference tool.

During the past three decades, Montgomery County has developed a fine tuned master planning program. We have continually sought to refine and improve upon both the process and the final product of our master planning efforts.

The community master plan program is a direct result of the Park and Planning Department's most recent effort to comprehensively evaluate and streamline the County's master planning activities. Under community master planning, many of the steps of the traditional planning process will remain the same, but there will also be significant changes in the way that we do business. We believe that our efforts to streamline the planning process, to improve our communication with citizens, and to strengthen the relationship between planning and implementation activities, will reap large dividends. Most importantly, we expect to significantly reduce the time needed to prepare master plans (from an average of 4.5 to slightly more than 2.5 years) while remaining in conformance with existing laws and ordinance and still maintaining our long-standing commitment to the quality-of-life and economic vitality of Montgomery County.

More than 15 different focus groups, consisting of planners, County staff, citizen activists, developers, and Council staff provided input to our master plan evaluation efforts over a two-year period. Planning staff researched other master planning processes and sought to balance the need for technical efficiency with the community's desire for ongoing discussion and participation. Finally, extensive dialogue with members of the Planning Board and the County Council helped shape many of the proposals contained in this Guide.

Table of Contents

	A Brief Introduction to the Community Master Plan Process	1
1	What is The Purpose of This Guide?.....	2
2	What is the General Plan?	2
3	What are Master Plans, Sector Plans, and Functional Master Plans?.....	2
4	How are Today's Community Plans Different from Earlier Master Plans and Sector Plans?	4
5	What are the Seven Montgomery County Community-Based Planning Areas? What is the Typical Composition of a Community-Based Team?.....	6
6	How is a Master Plan Prepared and Adopted? ...	9
7	How Does the Preparation Time for These Newer Master Plans Compare With the Time Needed to Develop Earlier Master Plans?.....	13
8	Is Each Plan Developed Using the Same Exact Planning Process?	16
9	What Type of Data Collection Efforts Do the Planning Teams Engage In?.....	17
10	In What Ways Do Planners Gather Information From Members of the Community?.....	18
11	What Role Does the Purpose and Outreach Strategy Report Play in the Planning Process? ..	19
12	What Is the Role and Composition of the Master Plan Advisory Group (MPAG)? How Is it Different from Citizen Advisory Committees (CACs)?.....	20
13	What Types of Efforts are Made to Recruit Those Who Typically Do Not Participate in the Master Planning Process to Serve on the MPAG?	22
14	What Steps are Taken to Ensure that MPAG Meetings are Focused, Yet Still Foster Two-Way Communication?.....	23

15	What is the Role and Composition of the Technical Working Group (TWG)?.....	24
16	What is The Relationship Between the MPAG and the TWG?.....	25
17	What is the Role of Planning Staff in Working with Both the MPAG and the TWG?..	26
18	How do Planners Gather Input From Those Citizens Who Do Not Serve on the MPAG?	27
19	How Can Citizens or Other Agencies Let the Planning Board Know That They Disagree With the Staff Recommendations? ...	27
20	Does a New Master Plan Supersede All of The Recommendations of a Previously Approved Master Plan?.....	29
21	What Type of Format Does a Master Plan Have?	29
22	What Role Does the Community-Based Planning Team Play in the Planning Area Once the Master Plan is Approved?	30
23	What is the Annual Master Plan Status Report and What Role Does it Play in the Planning Process?	31
24	What is a Minor Master Plan Amendment? What Types of Issues Would Qualify for a Minor Master Plan Amendment?.....	32

The Master Planning Process

Montgomery County
Maryland

A Brief Introduction to the Community Master Plan Process

During the past three decades, Montgomery County's master plan process has provided a solid foundation for the development of a vibrant, diverse community of 800,000 residents. While proud of its efforts to date, the Montgomery County Park and Planning Department of the Maryland-National Capital Park and Planning Commission (commonly known as "the Park and Planning Department"), also recognizes that vital communities grow and change. As Montgomery County evolves, its master plan process must also adapt in anticipation of the changing needs and desires of the community. In 1994, a comprehensive evaluation of the master plan process was initiated to determine whether revisions were appropriate to reduce the time needed to prepare master plans. In particular, the Department was interested in exploring issues related to enhancing citizen involvement, streamlining of the process, and improving the linkages between planning and implementation.

As a result of this comprehensive evaluation effort, the Park and Planning Department, Planning Board, and County Council developed a new master plan process, known as community master planning. This process builds upon the principles established in the General Plan and earlier generations of master plans.

A hallmark of this new process is that each planning area of the County will be assigned its own permanent multi-disciplinary planning team, which will regularly collect data and citizen input from the community. In addition to developing master plans, team members will serve as ongoing liaisons to the community for major development proposals and planning-related implementation issues.

1 What is The Purpose of This Guide?

The purpose of this Guide is to serve as a reference tool for those planners, residents, government officials, and potential developers, who will work with the new community master planning process. This guide answers three major questions:

- What are the main steps of Montgomery County's community master planning process?
- How does the community master planning process work?
- How does it differ from past master planning efforts in Montgomery County?

2 What is the General Plan?

The General Plan, originally adopted in 1964 and most recently updated in 1993, indicates in broad terms those areas suitable for residential purposes, business or industry, agriculture, open space, transportation, recreation, and community facilities. The General Plan is based on a "wedges and corridors" concept, which calls for development to be concentrated along the major corridors of growth radiating out from the District of Columbia on major transportation spines. In Montgomery County, this includes the I-270 Corridor and the I-95 Corridor, most of which lies in Prince George's County. The wedges are the spaces between the corridors, for which the General Plan proposes predominantly low density residential and rural-type development, with the exception of certain satellite towns such as Damascus and Olney. For more detailed information on the General Plan, refer to *The General Plan (... On Wedges and Corridors) for the Physical Development of the Maryland-Washington Regional District*, and the 1993 *General Plan Refinement of Goals and Objectives* which are available at the Park and Planning Department's Information Counter.

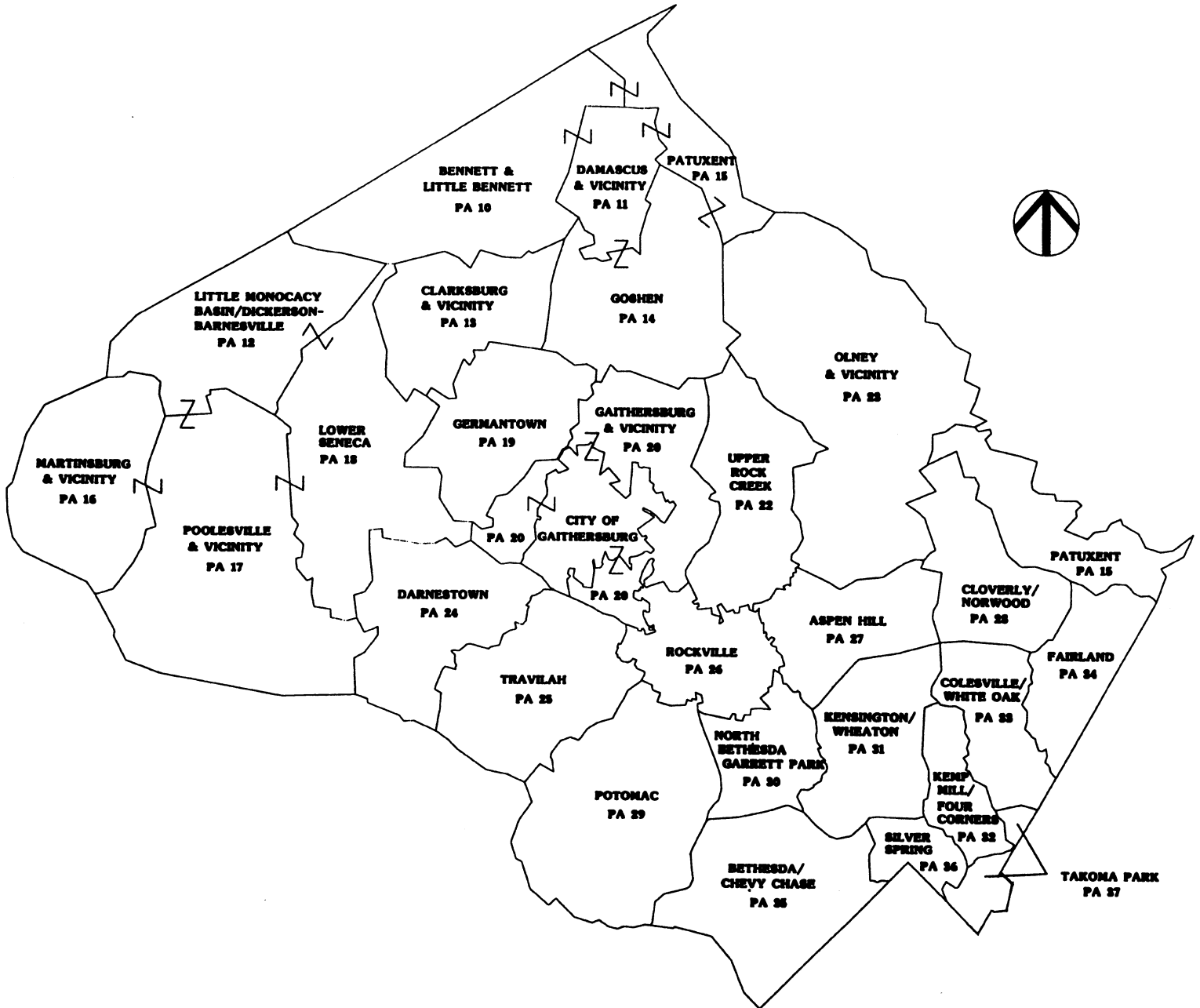
3 What are Master Plans, Sector Plans, and Functional Master Plans?

Three main types of plans are currently prepared in Montgomery County: Master Plans, Sector Plans, and Functional Plans. The community Master Plan process described in this guide is generally applied to all three types of plans.

- **Master Plans** are comprehensive plans for the future development of generally one or more planning areas within the County. The County is divided into 27 planning areas, whose boundaries were legislatively determined by the Montgomery County Council (see Figure 1).

Montgomery County's 27 Planning Areas

Fig 1



Master plans are more detailed and contain more specific land use recommendations than the General Plan, but build upon its broad land use framework. Master plans typically include a statement of planning policies, goals and objectives, and a description of the planning area. Master plans generally address such community concerns as housing, storm water management, historic preservation, and pedestrian and trail systems, as well as such environmental factors as air, water and noise pollution, and preservation of agricultural lands. Plans also include maps outlining recommended land uses, zoning, transportation facilities (mass transit, roads, and other facilities), and recommended general locations for such public facilities as schools, parks, libraries, and fire and police stations.

- **Sector Plans** are even more detailed than master plans, and typically focus on well-defined, smaller areas such as central business districts (CBDs) or areas in the immediate vicinity of a mass transit station. Sector plans generally address the same types of issues as local area master plans. Because many sector plans have flexible zoning regulations, the design guidelines in sector plans play a particularly critical role in determining the development character of these communities.
- **Functional Plans** cover such overarching functions as circulation systems (highways, mass transit, airports, bikeways), parks and recreation, and environmental systems (watershed protection, agricultural preservation) and such public services as fire and police stations and libraries. Most of these functional plans are developed by the County Executive

Master plans, sector plans, and functional master plans and amendments produced by the Department of Park and Planning follow identical procedures for preparation and adoption. All master plans, sector plans and some functional plans are prepared by the Planning Board in cooperation with appropriate agencies and in consultation with the County Executive and citizens; approved, after a public hearing, by the County Council; and adopted by the Maryland-National Capital Park and Planning Commission. Adopted master plans, sector plans, and functional master plans are all incorporated as amendments to the General Plan and are designed to implement the spirit and intent of the General Plan.

4 How are Today's Community Plans Different from Earlier Master Plans and Sector Plans?

Today's master plans cover many of the same issues and generally have the same planning area boundaries as earlier plans. They are more focused than earlier plans, however, and thus take less time to complete and are shorter in length. Community master plans are notable for the following qualities:

- **Community master plans build upon the foundations of earlier plans.** These plans build upon the foundation laid by earlier master plans, rather than completely replacing them. Community master plans only seek to revise the visions for an area if it has undergone substantial change or if new issues or policies have arisen that significantly impact the previously established vision for the community.
- **Community master plans are more focused.** Unlike earlier master plans, which focused on a standard set of issues with emphasis on the development of a vision for the entire area, community master plans only focus on a select number of critical concerns and opportunities that impact the community.
- **Community master plans are more oriented toward quality-of-life issues.** Because most of the County is near full build-out, community master plans do not re-examine all land uses and zoning designations throughout an area. Instead, these plans focus on a wide range of land use and regulatory issues related to community character, community building, revitalization, and economic competitiveness as part of their effort to address land use and zoning concerns.
- **Community master plans have shorter time frames.** Earlier generation master plans focus on full build-out of a community and have a 20- to 30-year time horizon. Community master plans are more oriented to the near and mid-term and have a 10- to 15-year outlook.
- **Community master plans are more implementation oriented.** A set of short-term actions and strategies needed generally over a series of 5-year periods to implement plan visions and recommendations are included in each community master plan.
- **Community master plans place greater emphasis on the resources and strategies needed to make plan recommendations a reality.** In developing recommendations for an area, community master plans give greater recognition to the increasingly tight public budgets, diverse constituencies, and the need for intergovernmental coordination within Montgomery County. Because of this orientation, these plans place greater emphasis on resources and the fiscal implications of plan recommendations and strategies.
- **Community master plans are developed by multi-disciplinary planning teams permanently assigned to the planning area.** Community master plans are developed by planners who work with the local geographic area on a daily basis. These community-based planning teams engage in ongoing data collection, community involvement, planning activities, assistance with review of local development projects, and eventual coordination of planning implementation issues once the community master plans are completed.

- **Community master plans are developed with advisory input from a diverse set of stakeholders.** Although drafted by Park and Planning Department staff, and eventually approved by the Planning Board and the County Council, the new plans are influenced by a wide range of input from a variety of sources. Emphasis is placed on obtaining a wide range of perspectives from a diverse set of participants. In the past, Citizen Advisory Committee (CAC) members have had a strong voice in the preparation of master plans, but input from other government agencies and citizens-at-large was often not available until the Planning Board or County Council public hearings.
- **Community master plan recommendations are monitored on a regular basis.** In order to keep abreast of the status of master plan recommendations, the community master plan process calls for the development of Annual Master Plan Status Reports, which document the progress made in achieving to each master plan's recommendations. This Report is reviewed by the Planning Board and the County Council (see Question #23).

5 What are The Seven Montgomery County Community-Based Planning Areas? What is The Typical Composition of a Community-Based Team?

The seven community-based planning areas each has its own team of planners. Community-based teams are composed of a Team Leader, and multi-disciplinary team members to provide land use, zoning, and design expertise.

Community-based team members are permanently assigned to the area they serve. Team offices are located at 8787 Georgia Avenue in Silver Spring. The seven community planning areas are delineated in Figure 2 and can be summarized as follows:

Silver Spring Community

- Silver Spring CBD
- North Silver Spring
- West Silver Spring
- East Silver Spring
- Takoma Park
- Four Corners

Greater Bethesda Community

- Bethesda CBD
- Bethesda/Chevy Chase
- Friendship Heights
- North Bethesda
- Garrett Park

Georgia Avenue Community

- Wheaton
- Kensington
- Forest Glen
- Aspen Hill
- Glenmont
- Olney
- Upper Rock Creek

Eastern Montgomery County Community

- Cloverly
- Fairland
- White Oak
- Kemp Mill
- Sandy Spring/Ashton

Greater Potomac Community

- Potomac
- Travilah
- North Potomac
- Darnestown

I-270 Corridor Community

- Rockville*
- Gaithersburg *
- Shady Grove
- Germantown
- Clarksburg
- Washington Grove*

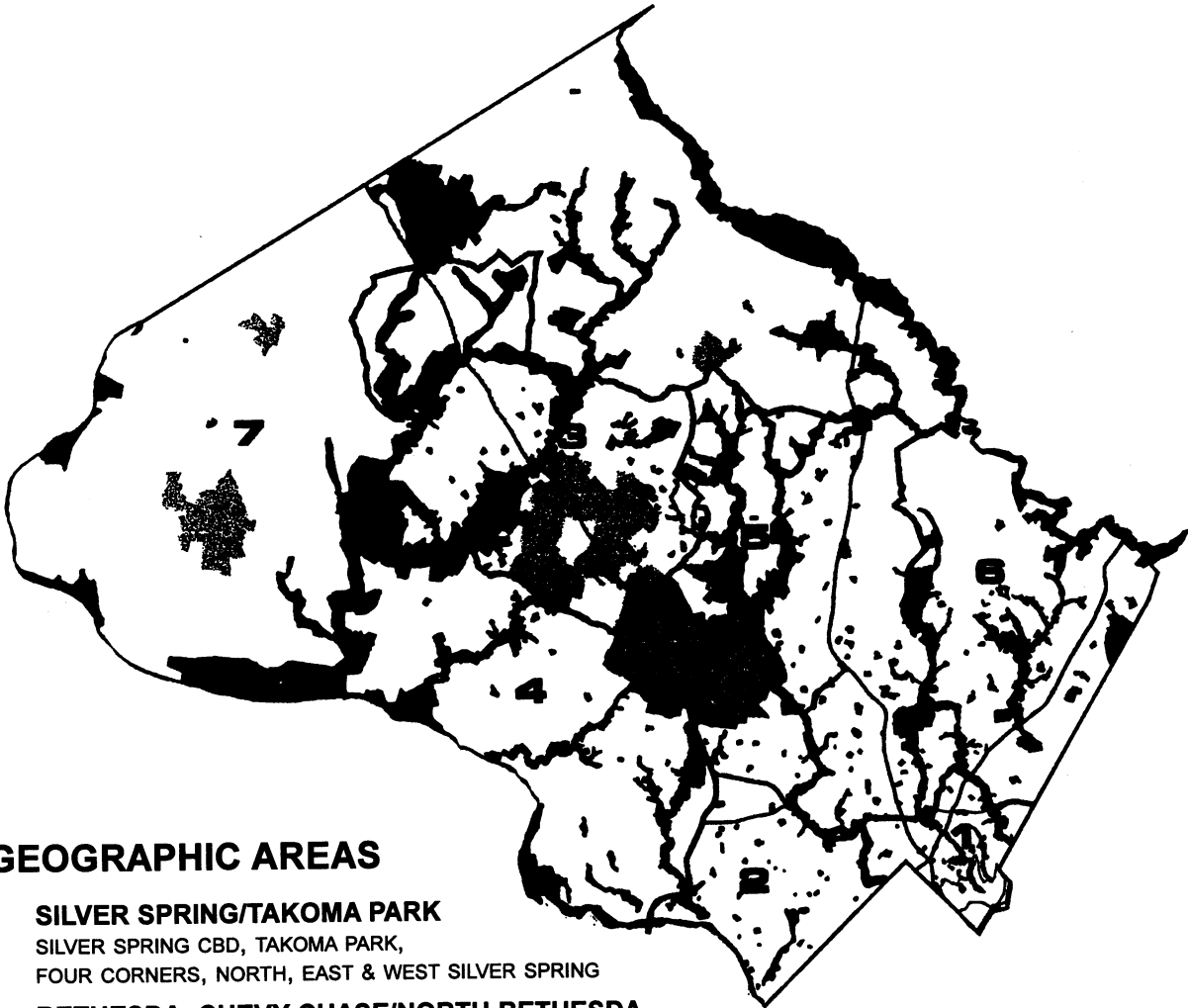
Rural Communities

- Poolesville*
- Damascus
- Boyds
- Laytonsville*
- Barnesville*
- Brookeville*

* These municipalities have their own planning and zoning authority; they are listed for coordination purposes.

Montgomery County's Seven New Community-Based Planning Areas

Fig. 2



GEOGRAPHIC AREAS

- 1 SILVER SPRING/TAKOMA PARK**
SILVER SPRING CBD, TAKOMA PARK,
FOUR CORNERS, NORTH, EAST & WEST SILVER SPRING
- 2 BETHESDA, CHEVY CHASE/NORTH BETHESDA**
BETHESDA CBD, FRIENDSHIP HEIGHTS CBD,
NORTH BETHESDA, CHEVY CHASE
- 3 I-270 CORRIDOR**
ROCKVILLE, SHADY GROVE, GERMANTOWN GAITHERSBURG, CLARKSBURG
- 4 POTOMAC**
DARNESTOWN, TRAVILAH, POTOMAC, CABIN JOHN
- 5 GEORGIA AVENUE**
FOREST GLEN, GLENMONT, ASPEN HILL, WHEATON CBD, OLNEY,
UPPER ROCK CREEK, KENSINGTON
- 6 EASTERN COUNTY**
WHITE OAK, CLOVERLY, FAIRLAND, SANDY SPRING, KEMP MILL
- 7 RURAL**
AGRICULTURAL RESERVE, POOLESVILLE, DAMASCUS, BOYDS

MUNICIPALITIES
WITH PLANNING AND ZONING



6 How is a Master Plan Prepared and Adopted?

Community master plans are developed through a number of steps, with opportunities for citizens and staff from other government agencies to express their views at various stages. The phases of the plan development process are summarized briefly in Figure 3 and described in more detail below and in Figure 4:

- **Phase 1: Undertake Detailed Data Collection, Technical Analyses, Map Preparation, and Community Information Gathering.** The first six months of any master planning effort is dedicated to detailed data collection, technical analysis, and map preparation for a community. Some data collection and mapping activities are part of the ongoing data analyses regularly undertaken by community-based teams. There are other specific types of design, environmental, zoning, park, and transportation studies, however, that are only undertaken immediately prior to the preparation of a master plan. Examples of the types of analyses undertaken during the six month period can be found in Question #9. Such analyses not only consider current conditions, but also address changes over time, thus allowing planners to have a better understanding of the evolution of key issues in the area

In addition to gathering such technical data, community-based planners also try to gather opinions from as many members of the community as possible, with a special emphasis on broadening outreach efforts to traditionally under represented groups. Planners have a wide array of tools available for this community information gathering process, including: surveys, focus groups, workshop, and meetings with identified community leaders and established community groups (e.g., PTAs, service clubs, religious organizations, and chambers of commerce). Community-based planners may also engage in a select number of one-on-one interviews with major property owners, small business owners, historic preservation or environmental advocates, and civic association leaders. The community information gathering effort helps planners to understand the diversity of issues and perspectives in the community and can also provide opportunities for the identification of potential new master plan advisory group members.

No master plan advisory group is formed during this phase of the work effort. However, two or three informal community meetings or a public forum may be held during this phase to report on the preliminary findings of the data collection effort and to discuss methodologies and the rationale for gathering certain types of information.

- **Phase 2: Draft Purpose and Outreach Strategy Report and Form Master Plan Advisory Group, if deemed necessary.** After approximately six months of detailed data collection, technical analysis, and map preparation, community-based planners draft a 10-15 page Purpose and

Outreach Strategy Report, which is divided into two sections:

- ✓ **The Purpose Report** examines the changes that have taken place since the last master plan and explains why a new master plan update or amendment is needed. It also discusses the key issues or themes that the new plan will focus on and establishes a year-long work program and planning agenda for planners, citizens, and technical advisors involved in the planning effort.
- ✓ **The Outreach Strategy** outlines a game plan for community and inter-governmental agency involvement in the master planning process. Since each community is different, each Outreach Strategy delineates a unique set of opportunities and strategies for involvement. The Outreach Strategy also identifies ways to involve those segments of the community (such as minorities, working parents, and small business owners) that have found it difficult to participate in the planning process.

A preliminary draft of the Purpose and Outreach Strategy Report is presented to the Planning Board with particular emphasis on the Proposed Outreach Strategy. The Planning Board will then determine if a Master Plan Advisory Group (MPAG, see Question #12) is appropriate for the community. If deemed appropriate, staff will set up a Master Plan Advisory Group. Generally, two months are needed to form such a group since correspondence, advertising and scheduling activities and Planning Board approvals are required before the group can meet. During this period, staff also finalizes the detailed data collection and technical analyses necessary for the master plan. If an MPAG is not deemed necessary, then alternative outreach efforts will be utilized.

- **Phase 3: Finalize the Purpose and Outreach Strategy Report; Present it to the Planning Board for their Approval.** One of the first tasks of the MPAG is to review and comment upon the preliminary draft Purpose and Outreach Strategy Report prepared by staff. To ensure that this phase of the planning effort is managed efficiently, a maximum of 60 days is allocated for the MPAG review. During this review period, community-based planners also consult and gather informal feedback from other governmental agencies and citizens regarding the planning issues and proposed outreach strategies.

Upon receiving the MPAG's commentary, staff finalizes the Report, striving to be responsive to the concerns of citizens and other agencies, and presents the final Report to the Planning Board at a public worksession. During this presentation, staff informs the Board of any contrasting perspectives that may exist so that Board members are made aware early in the review process.

Once the Planning Board has reviewed and approved the Purpose and Outreach Strategy Report, staff forms an intergovernmental technical work-

ing group (TWG), composed of technical staff representatives from different Montgomery County and/or State or regional agencies.

- **Phase 4: Identify Alternative Actions and Draft Master Plan Recommendations.** After the Purpose and Outreach Strategy Report is approved, the most intensive phase of the master plan work effort begins. Community-based planners meet frequently with the MPAG, the TWG, and the community-at-large (using the community outreach program devised earlier) to gather input and develop alternative actions and recommendations for the master plan. MPAG and TWG members are also encouraged, whenever possible, to attend community involvement events and activities (i.e., charettes, workshops, and other forums) so that they can share insights developed through their committee work and hear community comment and concerns.

At the end of this period, planning staff provide MPAG and TWG members with a draft set of staff recommended actions and alternatives, as appropriate.

- **Phase 5: Finalize the Staff Draft Plan.** Approximately two to three months are allocated for the MPAG, the TWG, and the community-at-large to review and comment upon the draft staff recommendations for the master plan area. During this period, staff may sponsor joint MPAG/TWG meetings, community workshops or surveys, or develop topical issue papers so that the discussion of complex recommendations is complete and balanced.

Once they have received broad-based feedback from the MPAG, TWG, and the community, planners revise the Staff Draft Plan and prepare it for a final presentation to the Planning Board. Areas of disagreement with the MPAG, the community-at-large, or the TWG may be presented to the Planning Board in different ways. In some cases, “box inserts” are used; in other cases, separate memos by planners or committee members may be more appropriate.

- **Phase 6: Hold Planning Board Public Hearing and Worksessions.** The Planning Board holds both a Public Hearing and one or more worksessions on the plan:

Public Hearing: After the Staff Draft Plan is submitted, it is reviewed by the Planning Board and may be revised or approved as the Planning Board’s Public Hearing (Preliminary) Draft Plan. The Planning Board frequently accepts the Staff Draft as the Public Hearing (Preliminary) Draft Plan. By law, the Planning Board must hold a public hearing before publishing this document as the Planning Board’s (Final) Draft Plan, which is forwarded to the County Council. The public hearing must be advertised in a newspaper of general circulation, not less than 30 days or more than 60 days before the public hearing date. Copies of the Public Hearing (Preliminary) Draft Plan are sent to the County Executive, to all municipalities, and are made available to the public. Anyone may testify either orally or in writing.

Planning Board Worksessions: After the close of the record of the public hearing, the Planning Board holds open work sessions to review the testimony and to determine whether to make any revisions before publishing the Planning Board (Final) Draft Plan. Testimony is typically not taken at these worksessions because the opportunity for public input was provided by the public hearing. At the Planning Board's discretion, however, members of the MPAG and the TWG may be asked to respond to public testimony or Planning Board questions.

- **Phase 7: The County Executive and County Council Review the Planning Board (Final) Draft Plan.** Once the Planning Board finalizes its Draft Plan, it is transmitted to the County Council and to the County Executive. Within 60 days from the receipt of the Plan, the County Executive is mandated to draft and send a fiscal impact analysis with any comments and recommendation regarding the Plan to the County Council.
- **Phase 8: County Council Hearing, Worksessions, and Approval:** Once the fiscal impact and Executive comment are received, the County Council establishes a public hearing date and advertises that public hearing at least 30 days before the hearing. A public hearing is not required if the County Council intends to adopt the Plan as submitted by the Planning Board, without amendment. This is a rare occurrence. Anyone may testify at the public hearing either orally or in writing. MPAG members are strongly encouraged to submit testimony.

At the close of record of the public hearing, the County Council holds open worksessions to determine if amendments to the Plan submitted are warranted. The County Council has 180 days to approve, modify, or disapprove the Plan. The County Council may extend this time limit by a vote of two thirds of those present and voting. Failure to act within the time limit or an extended time limit results in the Plan being adopted as submitted.

- **Phase 9: The Planning Commission Adopts the Master Plan.** Within 60 days of County Council action, the approved Master Plan must be forwarded to the Maryland-National Capital Park and Planning Commission for formal adoption. The approved and adopted Master Plan is certified by the Commission and incorporated as an amendment to the General Plan. It is published and made available to the public.
- **Phase 10: Planners Monitor Master Plan Recommendations.** Once the master plan is approved and adopted, community-based planners continue to work in the master plan area, assuming a formal role as planning coordinators, working on issues related to the implementation of master plan recommendations. In addition to working with citizens to monitor master plan implementation issues on a regular basis, community-based planners also engage in a variety of implementation-related planning and regulatory activities.

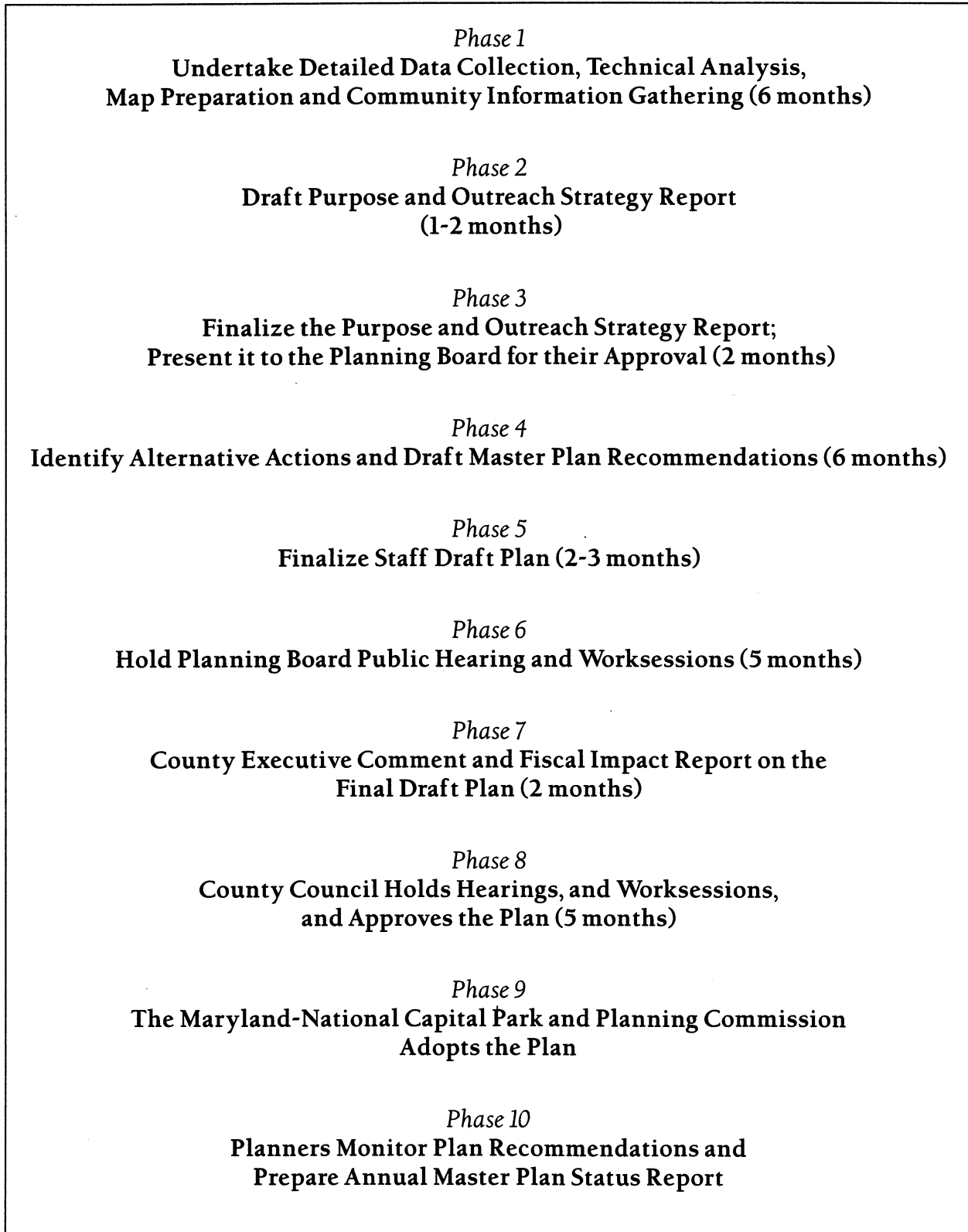
7 How Does the Preparation Time for These Newer Master Plans Compare With the Time Needed to Develop Earlier Master Plans?

The new master plan process is projected to take slightly more than 2.5 years to complete, compared to an average of 4.5 years for earlier plans. This two-year time saving will result from the following:

- **Concentrated Data Collection Prior to MPAG Formation:** Planners concentrate prerequisite detailed data collection, technical analysis, and base map preparation into a six-month research period, which precedes the formation of an MPAG. MPAGs are formed when at least 80% of the background studies and base data have been prepared.
- **Ongoing Data Collection and Community Feedback:** With community-based planning, planners regularly conduct data analyses for their areas and canvas community members' for their perspectives on issues and concerns even before a master plan is underway. Although ongoing analysis and the use of new community involvement techniques (such as surveys and focus groups) are time-consuming, it is expected that they will save time over the previous process, which included months of CAC meetings to prepare an Issues Report.
- **More Concentrated Staff Resources:** More staff is concentrated on fewer plans during the early phases of plan preparation to ensure that detailed data collection and technical analyses are thorough and timely.
- **Fewer Plans At Any Given Time:** No more than three to four new community master plans are underway in a year, which will allow the Department to more efficiently distribute its staff and technical resources among projects.
- **More Focused Plans Addressing Fewer Issues:** By focusing only on a select number of key land use and regulatory concerns and opportunities within the master plan area, less time is needed for data collection, analyses, and the development of recommendations.
- **A More Efficient and Effective MPAG Process:** MPAGs concentrate their efforts during a shorter period of time (approximately 11-12 months prior to the Staff Draft Plan as opposed to 30 months for the earlier generation of plans). This more concentrated period of MPAG activity helps prevent the redundancies, revisiting of old issues and staff and citizen burnout which have occurred in the past. Training of MPAG chairpersons in effective meeting facilitation, firm agenda setting, and pre-announced, set master plan deadlines also help move the process along more quickly at this juncture, while still allowing for ample citizen comment and input.

Overview of the Ten Phases of Community Master Plan Development

Fig. 3



Planning Board submits, and County Council approves:

Annual Work Program

Park and Planning staff initiates community participation and prepares:

Purpose and Outreach Report

Park and Planning staff reviews Outreach Strategy Report with Planning Board and then prepares:

Staff Draft Plan

Planning Board reviews Staff Draft and, with modification as necessary, approves plan as suitable for public hearing.

Public Hearing (Preliminary) Draft Plan

Planning board reviews public hearing testimony, receives County Executive comments at Board worksessions, and adjusts Public Hearing Draft to become:

Planning Board (Final) Draft Plan

County Executive reviews Planning Board Draft and forwards fiscal impact analysis and comments to County Council.

Planning Board (Final) Draft Plan Transmitted to County Council

County Council holds public hearing and worksessions and approves, disapproves, or amends Planning Board Draft, which is forwarded to M-NCPPC to become:

Approved and Adopted Master Plan

Planning Board and County Council review implementation of Master Plan with the:

Annual Master Plan Status Report

- **New Dispute Resolution Policies:** A new internal policy to only undertake dispute resolution and negotiations within reason, but leaving the most controversial issues for the Planning Board and the County Council to resolve, shortens the early phases of the master planning process substantially.
- **Streamlined Planning Board Reviews:** Improved staff presentations of the issues and concerns within each master plan and the new, ongoing familiarity with planning areas made available by the community-based planning process, enable the Planning Board to save time when reviewing plans.

8 Is Each Plan Developed Using the Same Exact Planning Process?

No, not necessarily. The process outlined above is a model for the master planning process and will be adhered to in most cases. However, the process recognizes that each community is different and, from time to time, steps may need to be added, deleted, or modified. Such modifications to the master planning process are reviewed and approved by the Planning Board during the Purpose Report and Outreach Strategy phase of the planning effort. Those portions of the planning process that are mandated by law—such as Planning Board hearings, Executive review periods, and County Council public hearings—would not be subject to modification.

9 What Type of Data Collection Efforts Do the Planning Teams Engage In?

The data and analyses will vary depending on the specific community issues and concerns. Types of data collection and planning analyses that are often undertaken during the early phases of a master planning process might include:

Community and Land Use Analyses

- Inventory of current land uses
- Assessment of land supply available for new construction or redevelopment
- Determination of potential growth in office, retail and residential uses
- Capacity of public utilities
- Development capacity allowed by existing zoning and land use regulations
- Assessment of zoning, land use and related public policies or regulations that have been influential in the area

Design and Historic Preservation Studies

- Identification of visual assets and liabilities and of community character
- Streetscape and open space analyses
- Survey of typical building form, materials, setbacks, and other zoning standards
- Analyses of pedestrian and bicycle circulation patterns
- Inventories of historic structures

Economic and Market Analyses

- Analyses of employment and space potential
- Market studies/competitive analyses
- Retail space and demand forecasts
- Identification of potential economic development opportunities

Community Facilities Analyses

- Inventories and supply-and-demand analyses of such community facilities as: parks, libraries, fire stations, police stations, community medical facilities, etc.

Transportation Analyses

- Traffic origin and destination studies
- Surveys and forecasts of traffic volumes and travel times (current & future)
- Analyses of transportation capacities (at key intersections/road segments)
- Analyses of current conditions in relation to Annual Growth Policy requirements
- Analyses of parking supply and demand
- Assessments of transit ridership and future growth potential

Environmental Analyses

- Assessment of stream quality and aquatic habitat (in conjunction with MCDEP)
- Assessment of natural resources: wetlands, forest cover (in cooperation with MDNR and MDE)
- Identification of sensitive areas: stream buffers, floodplains, steep slopes, habitats or rare, threatened and endangered species
- Analysis of land suitability: geology, soils, topography
- Assessment of water and sewer service issues (in cooperation with WSSC and MCDEP)
- Assessment of air quality, noise and solid waste

Housing and Residential Analyses

- Housing supply and demand analyses
- Demographic analyses
- Assessment of affordable housing stock

10 In What Ways Do Planners Gather Information From Members of the Community?

One of the tasks of the community-based planning team is to remain in regular contact with the residents and employers of their respective community area. The new master planning process also calls for extensive and varied input from a wide range of citizens during the development of master plans.

Whether designing an ongoing community information gathering effort or an Outreach Strategy for a master plan, planners have a variety of tools that can be used to assist with the community information gathering process. The type of data gathering will depend on the nature of the issues under study, sampling parameters, scheduling, and budget constraints.

- **Surveys:** Surveys posing a series of questions related to community concerns, issues, and opportunities can be distributed by planning staff to a random selection of residents or businesses, or to a demographic subgroup (such as senior citizens or residents who live in multi-family dwelling unit). Surveys come in a variety of formats, including phone surveys, mail-in forms, newspaper surveys, or individual interviews.
- **Focus Groups:** Focus groups are small in size and generally include 8-12 people either randomly selected from the community or selected as representative of key groups/concerns within an area. Participants spend between one and two hours in a roundtable discussion that follows a set agenda with specific planning questions. The discussion is facilitated by a neutral, third-party person who keeps group members focused and ensures that comments are accurately recorded.
- **Design Charettes:** Charettes usually take place over a one- to three-day period. A group of technical and design experts are brought together in one place to creatively brainstorm about solutions to a planning problem over a short, intense period of time. Generally, community members are provided with opportunities throughout the course of the charette to provide their input and feedback on the design work in progress.
- **Planning or Community Workshops:** Workshops are similar to design charettes but involve fewer planning professionals and more lay people; they generally last up to two days. A group of community members come together to work intensively over a short time period to identify key community concerns, issues, opportunities and/or solutions to a set of problems. Larger groups are often broken down into smaller working groups of three to eight people so that everyone has an opportunity to participate and to discuss the issues of greatest interest to them. Often, participants in workshops will be able to make use of working maps, aerial photos, three-dimensional models of the community, slides, or other such audiovisuals to assist them with their work efforts.

- **Meetings With Established Community Groups:** Presentations to established community groups, followed by question-and-answer sessions or workshop-style activities can be a very useful way for planners and the community to get to know one another better. Organizations that often participate in such discussions include civic or neighborhood associations, PTA groups, business and service clubs, chambers of commerce, special interest groups (such as sports clubs, environmental activists, or civic organizations), and religious organizations.
- **Individual Interviews:** Individual interviews with identified community leaders and major property owners are also useful. In addition to providing valuable insights, these individuals can help planners to broaden their network of contacts within the community.
- **Use of Electronic Communications:** Within budget constraints, the Park and Planning Department will enhance on-line community involvement. Today's planners can already establish electronic bulletin boards and other forms of interactive computer communications in order to assure a two-way flow of information about master plans that are underway. Rapid advances in electronic telecommunication will open up communication even further for those who are home-bound or unable to attend evening and weekend events.

11 What Role Does the Purpose and Outreach Strategy Report Play in the Planning Process?

The Purpose and Outreach Strategy Report is a brief, 10-20 page report, prepared early in the planning process, which outlines the key issues and reasons for undertaking a master plan amendment and recommends a community involvement strategy that can be used throughout the master plan process.

Part I of this document, the **Purpose Report** is designed to accomplish four main tasks:

- **Examination** of the changes that have taken place since the last master plan was developed or amended.
- **Explanation** of the rationale for why a new master plan update/amendment is needed and notes whether the past plan's vision needs to be modified or reaffirmed.
- **Discussion** of the key themes or issues on which the new plan amendment will focus.
- **Establishment** of a year-long agenda, time line, and work program for planning staff, the MPAG, and the TWG.

The identification of key themes and issues and the establishment of a work program are particularly critical elements of the Purpose Report because these determine the overall scope and time-line for the master planning process. Planners use their professional judgement to identify the most important or pressing issues that have arisen throughout the six-month period of data collection and analyses and ongoing community information-gathering activities.

Part II of the Purpose and Outreach Strategy Report is the **Outreach Strategy**, which combines one or more community participation modules into a coordinated and customized plan for community involvement. The modules selected depend on the nature of the community, the issues to be studied, and time and budget constraints of the Department. The Outreach Strategy does the following:

- **Identifies** the community involvement modules that will be used.
- **Describes** how each participation module will be used.
- **Identifies** those particular community sub-groups that will be targeted for participation (e.g., general audience meeting, teenagers, and/or business interests).
- **Identifies** strategies for advertising events and recruiting participants, noting in particular special efforts that will be taken to involve those who typically have not participated in the past.
- **Notes** special budgeting or resource issues that may be associated with a specific module.

One of the first tasks of the newly-formed MPAG is to review and comment on the preliminary draft Purpose and Outreach Strategy Report. MPAG members are expected to complete their review of the Report and suggest comments to planning staff within 60 days of its completion. After making final revisions to the draft Report, planners forward it to the Planning Board, which holds a public meeting to discuss the Report. The Planning Board has the final say with regards to the proposed outreach strategy and the key themes to be explored by the master plan.

12 What Is the Role and Composition of the Master Plan Advisory Group (MPAG)? How Is it Different from Citizen Advisory Committees (CACs)?

The Master Plan Advisory Group, which is composed of approximately 8-10 residents and business people from the community under study, has two primary roles:

- **To advise** staff, the Planning Board, and the County Council on broad strategies, land use policies, and plan recommendations.
- **To provide** staff with community outreach assistance.

MPAGs members meet regularly to discuss broad planning policy issues and strategies but do not engage in detailed, word-by-word editing of master plans.

Some of the main differences between MPAGs and their predecessors, the Citizen Advisory Committees (CACs), are noted below:

- **MPAG Formation Follows Data Collection and Analysis:** In the past, citizen advisory groups were formed well before much of the necessary data collection and analyses for a master plan were underway. The new planning process seeks to avoid the frustration that often mounted as citizens waited for data and information to become available. Under the new master planning process, 80% of the necessary data and analyses is completed before the MPAG is formed.
- **Some MPAG Members Are Pro-actively Recruited:** Every effort is made to ensure that MPAG membership is balanced and representative of the community as a whole. This means that, in some cases, planning staff must pro-actively recruit from those groups who do not traditionally participate in the master plan process.
- **MPAGs Have Fewer, But More Focused Meetings:** MPAGs meet monthly to help prepare and review a community master plan. CACs often met more than 30 times during master plan preparation. Although the number of meetings is fewer, each meeting is very focused in order to accomplish the necessary work. The primary period for intense MPAG activity is 11 to 12 months in duration (compared to 2.5-3.5 years for master plans created under the traditional planning process).
- **MPAG Meetings Are Structured to Foster Two-Way Communication:** In order to foster dialogue, most meetings will rely on brainstorming sessions and facilitation techniques. Educational and background materials can be provided to MPAG members, but should not take up the bulk of meeting time (see Question #14).
- **In Addition to the MPAGs, Others Also Provide Input to Planners and the Board:** MPAGs are important advisors to planning staff along with Technical Working Groups (TWGs) composed of specialists from other government agencies and the public-at-large, whose input is regularly sought by the new planning process. It is hoped that the MPAG will play an important role in clarifying some of the input provided by the community-at-large and that whenever possible, MPAG members will attend community-wide information gathering events and be available for occasional joint MPAG-TWG worksessions.
- **Planners Limit the Amount of Time Spent On Consensus-Building Among Divergent Factions of MPAGs and the Community:** In the past, planners tried to work with CACs until all controversial issues in the master planning process were resolved. Today, planners strive to resolve as many issues as possible within the time limitations of the master planning process. The Planning Board has mandated that when conflict is clearly unresolvable after reasonable attempts at negotiation and consensus-building have been made, the outstanding issues should be resolved by the

Planning Board and County Council. Planners will present a fair and comprehensive overview of the opposing viewpoints, accompanied by alternatives and staff-recommended solutions, to the Planning Board and allow the necessary decisions to be made by the appointed officials.

- **MPAG Members Have Opportunities to Express their Disagreement:** Different types of opportunities are available for MPAG members to express their disagreement to the Planning Board. Possible methods include: “box inserts” in the text of the Draft Plan, roundtable discussions with the Planning Board, and MPAG member position papers.
- **MPAG Members Remain Involved Throughout Plan Making Process:** MPAG members can remain involved in the master planning process throughout the County Council review of the Plan.
- **MPAGs May Not Be Formed In Some Cases:** Some master plan efforts may not require an MPAG. Such a decision would be made by the Planning Board during work program and Purpose and Outreach Strategy Report deliberations.

13 What Types of Efforts are Made to Recruit Those Who Typically Do Not Participate in the Master Planning Process to Serve on the MPAG?

Planners are encouraged to use creative and pro-active strategies to recruit those who do not traditionally participate in the planning process to serve on the MPAG. Some of the techniques available to staff include:

- **Networking With Community Leaders:** Planners can rely on respected community leaders—such as school principals, religious leaders, business group leaders, County Council and Planning Board members, citizen association presidents, local newspaper editors, civic organization activists, and Government Center directors—to recommend potential members, who might not volunteer on their own to serve on an MPAG. Direct outreach to these individuals as well as the people who they, in turn, may recommend, may produce some new faces on the local MPAGs.
- **Undertaking Targeted Advertising:** Greater effort will be made to undertake targeted advertising for specific types of MPAG members. For example, in an area where the needs of senior citizens are a growing concern, targeted recruitment notices might be sent to senior centers, retirement homes or assisted living facilities.
- **Forming Advertising Partnerships:** Planners may also form partnerships with other public sector agencies or private entities, which provide opportunities for low-cost, but widespread advertising of available MPAG

positions to be filled. Similarly, supermarkets, banks, religious organizations, radio stations, and other community institutions might agree to include two or three lines of text, recruiting for master plan MPAG members in their advertising flyers, monthly statements, or weekly bulletins as a service to the community.

- **Making Community Presentations:** At the beginning of the planning process, planners may make presentations to neighborhood associations, library groups, PTA groups, and other potential sources of MPAG members as a means of encouraging more community dialogue about and interest in MPAGs.
- **Maintaining an Updated Directory of Minority Organizations:** The Park and Planning Department maintains an updated directory of organizations representing minorities and women, two groups who can often be under represented on MPAGs. The availability of contacts, addresses and phone numbers for these groups facilitates planners' jobs considerably.
- **Creating a User-Friendly MPAG Environment:** One rationale for encouraging fewer and more focused MPAG meetings as part of the new master planning process was the need to create a citizen participation process that is more responsive to the busy lives of Montgomery County residents. It is hoped that more people will be able and willing to serve on MPAGs if they know that their time commitment will be limited to no more than 18 months (versus three to five years for the traditional process) and if they can be assured that their meeting time is well spent.
- **Providing Additional Training for MPAG Members:** Some MPAG members may be new to the Montgomery County land use planning process. Staff will provide assistance in terms of planning jargon and techniques as needed.

14 What Steps are Taken to Ensure that MPAG Meetings are Focused, Yet Still Foster Two-Way Communication?

Focused MPAG meetings and a firm, pre-set agenda are critical if the master planning process is to be streamlined to a reasonable 2.5-year time line. The Park and Planning Department is also committed, however, to giving citizens ample opportunities to provide their thoughts and input into the planning effort, which can be time-consuming.

Some elements of the MPAG process recommended to promote focused, interactive meetings are discussed below:

- **Design a Work Program and Schedule:** As part of the draft Purpose and

Outreach Strategy Report prepared at the beginning of the master planning process, an MPAG work program and meeting schedule is publicly announced and reviewed by the Planning Board. This work program provides each MPAG meeting with a topical focus and allows planning staff and MPAG members to anticipate upcoming issues and to plan for them. Every effort is made to stick to this schedule throughout the planning process.

- **Hold Focused, Decision-Oriented Meetings:** The length and setting of each meeting varies depending upon what the group is trying to achieve. The goal of the new streamlined, community master planning process is to have highly focused meetings, with specific outcomes from each meeting. Each meeting is structured with one or several specific topic in mind. The goal or proposed outcome of the meeting is clearly stated at the top of each agenda, and all of the meeting activities are designed to help the group ultimately reach that goal. At the end of the meeting, time is allocated to ensure that the group has achieved what it intended and to review the meeting. Group members also briefly discuss the upcoming meeting, providing ideas about how the issues might be discussed and resolved.
- **Use Interactive Meeting Formats:** In order to keep meetings interesting and productive, planning staff will work with the MPAG chairperson to use a variety of problem-solving tools. For example, MPAGs break into smaller working groups during one or more meetings to tackle specific issues. Group brainstorming sessions, mapping exercises, computerized design simulations, or working field trips may be possible on other occasions. While some oral staff reports are necessary, every effort is made to keep these to a minimum so that as much meeting time as possible can be dedicated to community dialogue rather than technical presentations.

15 What is the Role and Composition of the Technical Working Group (TWG)?

Many master plans are prepared with the assistance of a Technical Working Group or TWG, composed of one or two representatives from each of the implementing agencies that are most affected by or have the most involvement in the issues addressed by the new plan. The composition of a TWG depends on the planning issues being addressed. Some typical participants include:

- Montgomery County Department of Environmental Protection (MCDEP)
- Montgomery County Department of Housing and Community Development (DHCD)
- Montgomery County Department of Permitting Services (MCDPS)
- Montgomery County Department of Public Works & Transportation (MCPWT)

- Montgomery County Office for Economic Development (OED)
- Montgomery County Public School (MCPS)
- Montgomery County Department of Recreation
- Washington Metropolitan Area Transit Authority (WMATA)
- Washington Suburban Sanitary Commission (WSSC)
- State and regional agencies and adjacent jurisdictions and municipalities

The role of the TWG is to identify, review, and comment on master planning issues and solutions related to the implementation activities of the different agencies serving on the TWG. The TWG's recommendations do not supersede those of staff or the MPAG, although every effort is made to be responsive to the concerns and recommendations offered by the agencies who ultimately provide community services or build facilities within the area.

The establishment of a TWG gives formal recognition to an interagency consultation process that has been underway for a number of years now. Because planners and citizens are not involved in policy implementation issues on a day-to-day basis, it is critical that they have technical input from other agencies early in the planning process so that long and short term recommendations are realistic, feasible, and within the technical and fiscal capabilities of Montgomery County's government agencies. Similarly, it is important to provide day-to-day implementors with greater awareness of community concerns and long-range planning goals. It is also hoped that earlier and more active involvement in the planning process will provide other agencies with a greater sense of ownership of the objectives and recommendations that emerge from the master planning process. By involving members of other government agencies in pro-active, joint problem-solving activities early in the process, the community ends up with a master plan that has better chances of being implemented.

Each draft Purpose and Outreach Strategy Report indicates the type of TWG that would be formed for the planning area. The report also establishes a logical meeting time frame and schedule for the technical working group. Generally, some form of TWG involvement is sought during the data analyses phase, the delineation of draft recommendations phase, and the final recommendations phase of the master planning process.

16 What is The Relationship Between the MPAG and the TWG?

Both the MPAG and the TWG are advisory to planning staff and the Planning Board. However, the TWG primarily helps identify implementation issues and develop solutions, while the MPAG provides community perspectives, visions, and priorities to the planning process. TWGs may become very involved in the technical details of a planning solution whereas MPAGs tend to focus on broader policy issues and community strategies.

17 What is the Role of Planning Staff in Working with Both the MPAG and the TWG?

The following guidelines summarize the roles and responsibilities of community planners during the master plan process:

- Planners work for the Planning Board, not the MPAG or the TWG.
- Planners are responsible for drafting and finalizing the Purpose and Outreach Strategy Report for a master plan, responding as much as possible to MPAG and TWG input. Final direction for the planning process and issues is determined by the Planning Board, which can accept, reject, or modify the Purpose and Outreach Strategy Report.
- Planners serve as liaisons between the MPAG and the TWG and between these two bodies and the Planning Board. They have a responsibility to convey the expressed needs and concerns of these different groups to one another and to the Planning Board, even if planners do not professionally agree with those opinions.
- Planners will solicit as much input as possible from these two advisory groups. Wherever possible, providing, whenever possible, opportunities for two-way discussion and group dialogue.
- Planners are glad to help broaden citizen understanding of the intricacies of planning policy and regulations in Montgomery County outside of the schedule of regular MPAG meeting times. Planners also provide MPAG with written background materials as needed.
- Planners are available to provide citizens and MPAG members with additional technical data and analyses that may be requested as long as they are relevant to the master plan and can be prepared within the constraints of the pre-established master plan and MPAG work program publicly announced during the Planning Board review of the Purpose and Outreach Strategy Report. If the MPAG or TWG identify an urgent need for additional studies and background analyses, which would substantially delay the work program, then planners will seek the Planning Board's approval to extend or modify the work program's time frame.
- Planners use their professional judgement when balancing regional concerns with the needs and interests of local residents, the MPAG, government agencies, and the community-at-large. Their role in the process is to listen carefully to community and other agency concerns, collect and analyze relevant data, synthesize all of the information available to them, and then make recommendations, which in their best professional judgement, respond to the overall needs of the community.
- Whenever possible, planners seek to develop consensus and solutions to

problems where multiple community perspectives exist. However, in the interest of streamlining the planning process and making the process more efficient for all, planners have also been directed by the Planning Board to not spend excessive amounts of time negotiating controversial issues. If reaching a consensus at the staff level is clearly not possible within a reasonable period of time, then such items are taken directly to the Planning Board for resolution in the Staff Draft Plan.

18 How Do Planners Gather Input From Those Citizens Who Do Not Serve on the MPAG?

For each planning area, staff develops a menu of community involvement strategies that provides for varied types of participation, ranging from individual to large group interactions. In addition to the MPAGs, which are formed for most plans, possible community involvement strategies include electronic town meetings, cable TV programs, community forums, design charettes, focus groups, community surveys, and information-gathering sessions with organizations.

Flexibility is the key to the design of each community involvement program. Each program is geared toward the unique issues, character, and participation style of the local community.

It should be noted that these community-involvement activities supplement rather than replace MPAGs. MPAG members are always encouraged to attend these outreach efforts and to review and comment on the public information gathered through community workshops and surveys. The Planning Board and the County Council also expect MPAG members to serve as conduits for community input and rely on them to share the perspectives of their neighbors and colleagues with the planning staff.

19 How Can Citizens or Other Agencies Let the Planning Board Know That They Disagree With the Staff Recommendations?

Citizens, staff members of other agencies, or MPAG members who disagree with the staff recommendations have a variety of avenues available for expressing their concerns to the Planning Board and/or the County Council. Possible approaches include:

- **Individual Letters or Memoranda to the Planning Board:** Citizens, MPAG members, and staff from other agencies, are always welcome to address their concerns or disagreement with staff recommendations to the Planning Board in writing. Such letters are kept on file by the Planning

Board staff and are made available to all five Planning Board members as well as the planners who are working on the master plan. Such written commentary is considered to be part of the written record and carries as much weight as verbal testimony at Planning Board public hearings.

- **Oral Testimony Before the Planning Board:** Citizens have opportunities to present their concerns verbally to the Planning Board at all public hearings and during some master plan worksessions.
- **Master Plan “Box Inserts”:** Some recent draft master plans (particularly those in Eastern Montgomery County) have included “box inserts” within the text, which express CAC perspectives with staff recommendations and offer up an alternative recommendation for the Planning Board to consider. When this approach is used, each MPAG box is inserted immediately following the staff recommendation. To be truly effective, box inserts require that a majority of the MPAG members can agree on the wording and desirability of an alternative recommendation. Box inserts are removed from the draft plan when the document is forwarded to the County Council.
- **MPAG Memorandum to the Planning Board:** Rather than incorporate their points of disagreement directly into the draft master plan, MPAGs may opt to draft a separate memo to the Planning Board, outlining their concerns, areas of disagreement, and recommended alternatives. This memorandum should be drafted by the MPAG’s designated recorder and should be a reflection of the opinions of a majority of the MPAG members. On some occasions, separate minority opinion reports have also been created. With such memos, the Planning Board will be particularly interested in knowing how strong and widespread the opposing sentiments are. Do all of the MPAG members or just a few oppose staff’s recommendation. Are MPAG members strongly concerned or is there merely a difference of subtle interpretations with regard to a few issues?
- **MPAG Roundtable Discussion with Planning Board:** When their schedule permits it, the Planning Board, on occasion, holds public roundtable discussions with the members of an MPAG or TWG to discuss areas of agreement or disagreement with the draft master plan. Such discussions provide an opportunity for two-way discussion with Planning Board members

In all cases, people expressing their opinion should take care to clarify for the Planning Board when they are speaking on their own behalf and when their opinion is offered on behalf of a larger group or organization. MPAG members, in particular, should take care not to present their own opinions as those of the MPAG. The MPAG chairperson is the only person authorized to speak for the group as a whole.

Like planning staff, the Planning Board and the County Council seek to carefully balance many issues and perspectives when making decisions on master

plan recommendations. Ultimately, they make choices, which they feel best address the community's needs.

20 Does a New Master Plan Supersede All of The Recommendations of a Previously Approved Master Plan?

No, not necessarily. The scope of each new plan varies considerably from one community to the next. In one case, a new master plan may completely supersede its predecessor; in other cases, only select portions of the previous master plan are replaced. Usually, the new master plan builds upon, rather than replaces, existing master plan recommendations. Because some new community master plans only focus on a limited number of issues, the Purpose and Outreach Strategy Report plays a critical role in highlighting exactly which portions of the standing master plan will be replaced or superseded by the new plan and which will remain as ongoing standards and policies for the community.

During the final production of the master plan document, every effort is made by staff to clearly communicate the relationships between the old and the new master plans. For example, a simple, cover memo may be attached to the front of all plans, explaining which components of the plan remain in effect, and which have been replaced by new master plan recommendations. Alternatively, the two planning documents (old and new modifications) may be merged into one new plan, which retains and builds upon many of the visions and recommendations of the earlier generation plan.

21 What Type of Format Does a Master Plan Have?

In order to provide the Department's customers with quick and easy access to key master plan visions, information, and recommendations, while still providing specialized access to more technical data, the following master plan formatting guidelines are recommended:

- **Package master plans into three main documents:**
 - ✓ A three- to five-page executive summary or master plan poster;
 - ✓ A 50- to 100-page core planning document that provides an overview of the area's current conditions; a brief summary of the visions and goals for the area; a summary of the key issues faced by the community; a bulleted listing of master plan recommendations (including maps and illustrations); and a list of short-, medium-, and long-term actions needed to make the recommendations a reality.

- ✓ A technical appendix that consists of individual topical briefing papers that are clearly referenced in the master plan and which form part of a master plan's official record. Briefing papers can be stored in a loose-leaf binder format that enables the public to easily access only the detailed information that they truly desire.
- **Include an index** and reference the existence of a standardized glossary of planning and regulatory definitions (e.g., TDRs, MPDUs, and AGP) in all master plans.

22 What Role Does the Community-Based Planning Team Play in the Planning Area Once the Master Plan is Approved?

To ensure better coordination of public policy issues and operational tasks, the Planning Board is committed to establishing the long-term presence of planners within each of the seven identified Montgomery County community based planning areas. Community-based planners will monitor, coordinate, and help facilitate implementation activities recommended by each area's master plan. This commitment complements three other missions important to the Planning Board—Master plan development; land use regulation; and parks development, maintenance and operations.

As part of their ongoing planning activities, planners will:

- **Monitor** Capital Improvement Program (CIP) activities (this includes reviewing CIP schedules, recommending projects to be included in future CIPs, and advocating community interests).
- **Coordinate** ongoing planning efforts that build upon the recommendations of the master plan (supervising design or environmental studies, coordinating multi-agency working group efforts on special topics).
- **Participate** in the review of major new developments or redevelopment projects that have a substantial impact on the community. Planners ensure that the goals and objectives of the master plan are adhered to by implementing master plan recommendations and guidelines and by resolving policy conflicts during regulatory review.
- **Facilitate** inter-governmental planning efforts by serving as a third-party neutral agency for bringing together multiple public agencies and/or non-profit/private bodies that share concerns about the same area or issue.

- **Track** and comment on changes in legislation, policy changes, land use regulations, zoning, subdivisions, or mandatory referrals that may have an impact on the community.
- **Prepare** minor master plan amendments to address specific needs within a community.
- **Ensure** that projects are compatible with a community's needs and goals during County and State mandatory referrals and reviews of federal facilities.
- **Communicate** with members of the community, providing community members with up-to-date information on planning issues and data, and regularly canvassing to maintain a good understanding of community concerns and objectives.
- **Refer** to the Planning Board, any land-use, zoning, subdivision, design, park an planning actions needed to implement master plans.

23 What is the Annual Master Plan Status Report and What Role Does it Play in the Planning Process?

The Annual Master Plan Status Report is prepared once a year by planning staff and is presented to the Planning Board and the County Council for their review and comment. This report provides a brief overview of the positive steps that have been taken over the past year to implement master plan recommendations. It highlights those areas, where there has been a lack of progress or where significant community concerns still remain, and highlights those high-priority, short-term measures still needed.

The findings from this Report help the Planning Board and the community-based planning teams develop future work programs to address the outstanding master planning concerns within their respective communities. By monitoring the actual implementation of master plan recommendations, planning staff and the community can have a better understanding of why recommendations are not always implemented (e.g., they are unrealistic, conditions have changed, there is inadequate funding, plan recommendations conflict with agency policies, or agencies are unaware of their mandates). Once the impediments to implementation are identified, the necessary steps can be taken to make master plans more implementable.

24 What is a Minor Master Plan Amendment? What Types of Issues Would Qualify for a Minor Master Plan Amendment?

To ensure that the community master planning process is more responsive to changing community conditions, a minor master plan amendment process has been created. Such a process would allow for plans to be modified before a major master plan update is undertaken and would also provide for occasional clarifications of previously adopted master plan recommendations. The County Council and the Planning Board have agreed on the following broad parameters for a minor master plan amendment process:

- The integrity and principles of an adopted master plan must not be diminished by minor amendments to the plan.
- Minor master plan amendments should address only a limited number of issues, which serve to enhance the spirit and intent of the master plan.
- Minor master plan amendments should not be used as vehicles to debate previously decided issues.
- Initiation of minor master plan amendments will be guided by trigger mechanisms in adopted master plans.
- The scope of minor master plan amendments and the process used to develop them should recognize that there are limited staff resources and time available for community involvement efforts associated with such amendments.
- An MPAG will not be appointed for a minor master plan amendment, but a variety of focused community involvement techniques will be used to inform the public and encourage discussion.
- Minor Master Plan Amendments will follow a condensed time frame within the legislative requirements of the master plan adoption process.
- Requests for minor master plan amendments will be reviewed by the Planning Board and County Council during Bi-Annual Report deliberations in the Fall of each year.

**The Master Planning Process
in Montgomery County,
Maryland**

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