

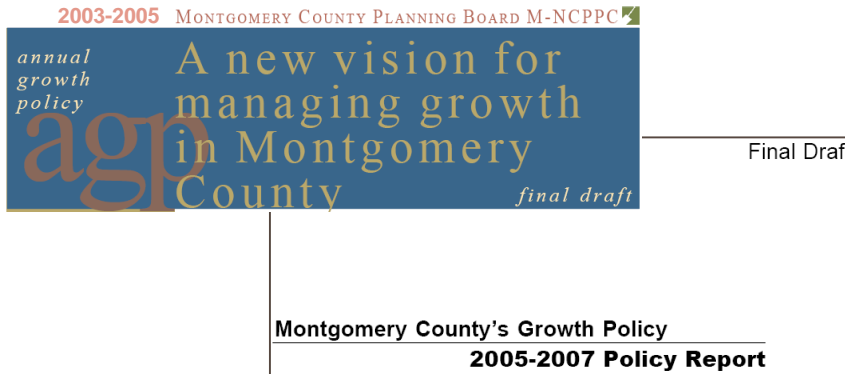
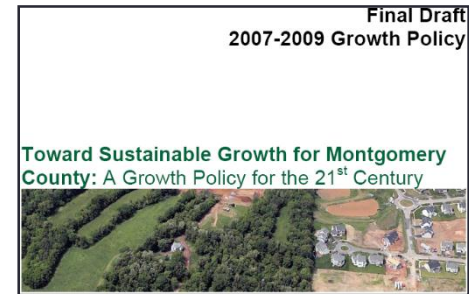


2016 SUBDIVISION STAGING POLICY

Overview Presentation
October 19, 2015

Today's Topics:

- Overview of the Subdivision Staging Policy (SSP)
 - Transportation
 - Schools
 - Infrastructure funding
- Schedule and Public Participation



Several initiatives currently underway:

Forum on Growth & Infrastructure held on March 7, 2015.

Council-directed transportation research.

Cross-agency work group on school design options.

Collaboration with MCPS on student generation rates.



What have we been hearing?

How can we better forecast what might happen in the future?

How can we best address school crowding and traffic congestion?

How can we fund our infrastructure needs most cost-effectively?

How can new development help to pay for or provide improvements?





INFRASTRUCTURE & GROWTH
are we keeping pace?
FROM THE GRAFFITI WALL

Participants Of The Infrastructure Forum Were Asked To Respond To The Following Questions:

1. Listening to the common concerns raised in the morning session – what are the most urgent priorities that need to be addressed?
2. Did you hear any ideas in the panel presentations that would help guide solutions to these concerns?
3. Do you have any other ideas that you believe will help the County address the main concerns mentioned this morning and, if so, how would you prioritize these actions?

Feedback From Participants: (Highlighted Text Represents Most Popular Ideas)

Mini master plans for school sites like Alexandria.

Likes smaller sites = smaller footprints.

Smaller footprints for Bethesda/Rockville urbanized areas. Due to not enough land in urban areas.

People need to be open to new options on schools in the future.

Stop one solution for all problems.

Subdivision Staging Policy (aka Growth Policy until 2010) is...

Adopted every 4 years by the County Council. Policy includes criteria and guidance for the administration of the Adequate Public Facility Ordinance (APFO).

The purpose of the APFO is to coordinate the timing of development with the provision of public facilities – such as roads, transit and schools.

The next Subdivision Staging Policy will be adopted in 2016.



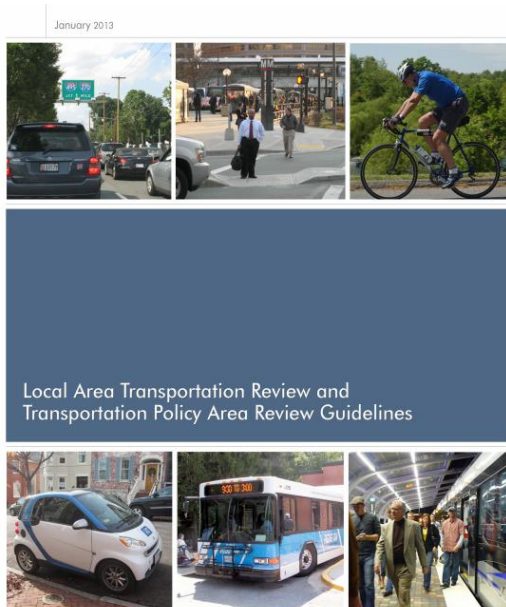
We mainly test the adequacy of the **transportation** network (roads and transit) and **schools**.

Current tools used to measure transportation adequacy:

- **Transportation Policy Area Review (TPAR)**
- **Local Area Transportation Review (LATR)**

Current tool to measure school adequacy:

- **Annual School Test**



January 2013

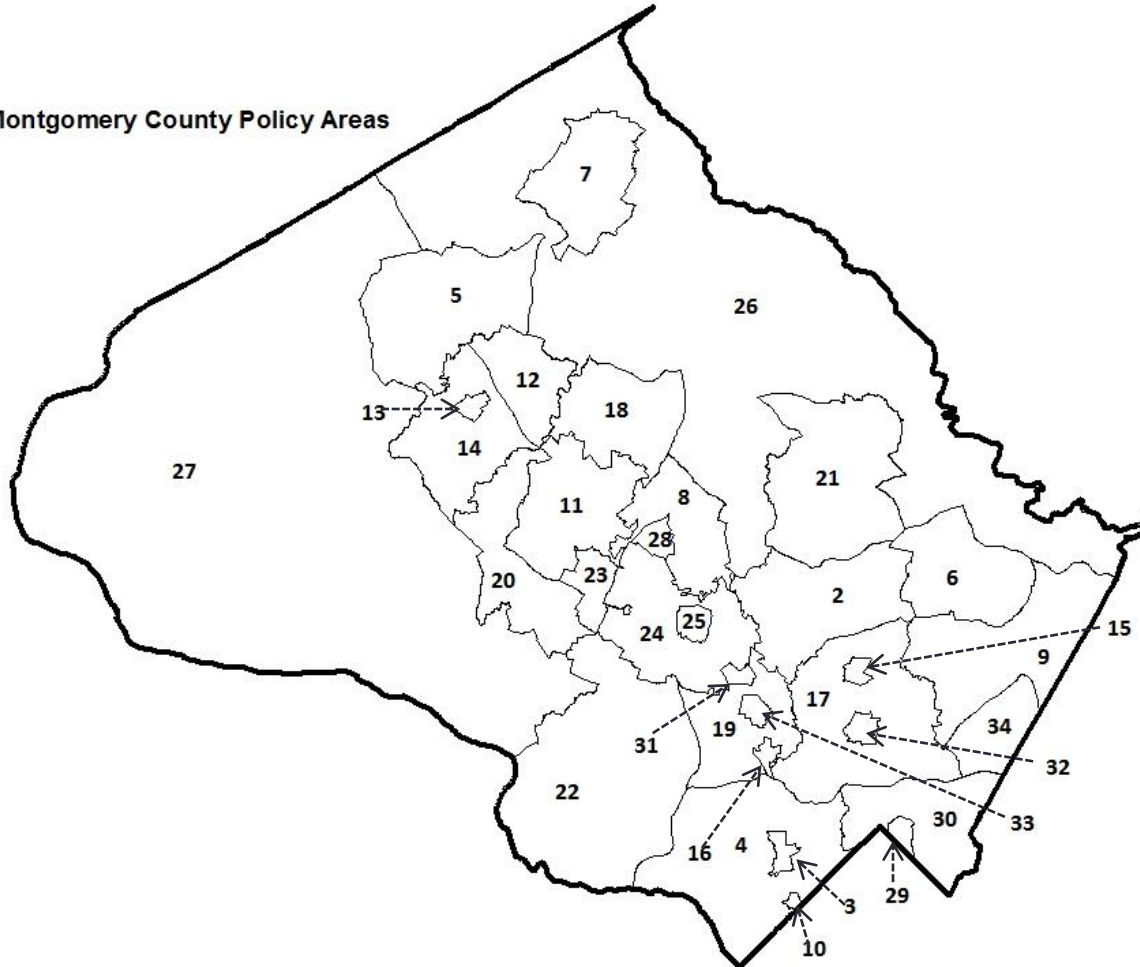
Local Area Transportation Review and Transportation Policy Area Review Guidelines

Subdivision Staging Policy				
Results of School Test for FY 2016				
Reflects County Council Adopted FY 2016 Capital Budget and Amendments to the FY 2015-2020 Capital Improvements Program (CIP) Effective July 1, 2015				
School Test Level	Description	Cluster Outcomes by Level		
		Elementary Inadequate	Middle Inadequate	High Inadequate
Clusters over 105% utilization				
School facility payment required in inadequate clusters to proceed.	5-year test Effective July 1, 2015 Test year 2020-21	Clarksburg (113.8%) Gaithersburg (109.4%) Northwood (105.5%) Quince Orchard (115.3%)	Blair (117.1%) Damascus (109.3%) Gaithersburg (106.0%) Kennedy (115.6%) Northwood (119.6%) Rockville (109.6%) Wheaton (114.2%) Whitman (111.9%)	Blair (110.0%) Churchill (106.4%) Clarksburg (113.8%) Einstein (113.7%) Walter Johnson (119.8%) Kennedy (107.7%) Richard Montgomery (110.8%) Northwest (113.3%) Northwood (112.6%) Paint Branch (106.1%) Quince Orchard (108.7%) Wheaton (108.8%) Whitman (114.0%)
Clusters over 120% utilization **	5-year test Effective July 1, 2015 Test year 2020-21			
Moratorium required in clusters that are inadequate.				

Transportation

Transportation Policy Area Review is a policy area test of adequacy.

Montgomery County Policy Areas

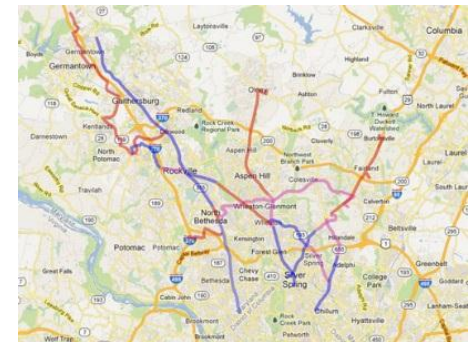


- 2. Aspen Hill
- 3. Bethesda CBD*
- 4. Bethesda/Chevy Chase
- 5. Clarksburg
- 6. Cloverly
- 7. Damascus
- 8. Derwood
- 9. Fairland/White Oak
- 10. Friendship Heights
- 11. Gaithersburg City
- 12. Germantown East
- 13. Germantown Town Center
- 14. Germantown West
- 15. Glenmont*
- 16. Grosvenor*
- 17. Kensington/Wheaton

- 18. Montgomery Village
- 19. North Bethesda
- 20. North Potomac
- 21. Olney
- 22. Potomac
- 23. R&D Village
- 24. Rockville City
- 25. Rockville Town Center*
- 26. Rural East
- 27. Rural West
- 28. Shady Grove*
- 29. Silver Spring CBD*
- 30. Silver Spring/Takoma
- 31. Twinbrook*
- 32. Wheaton*
- 33. White Flint*
- 34. White Oak

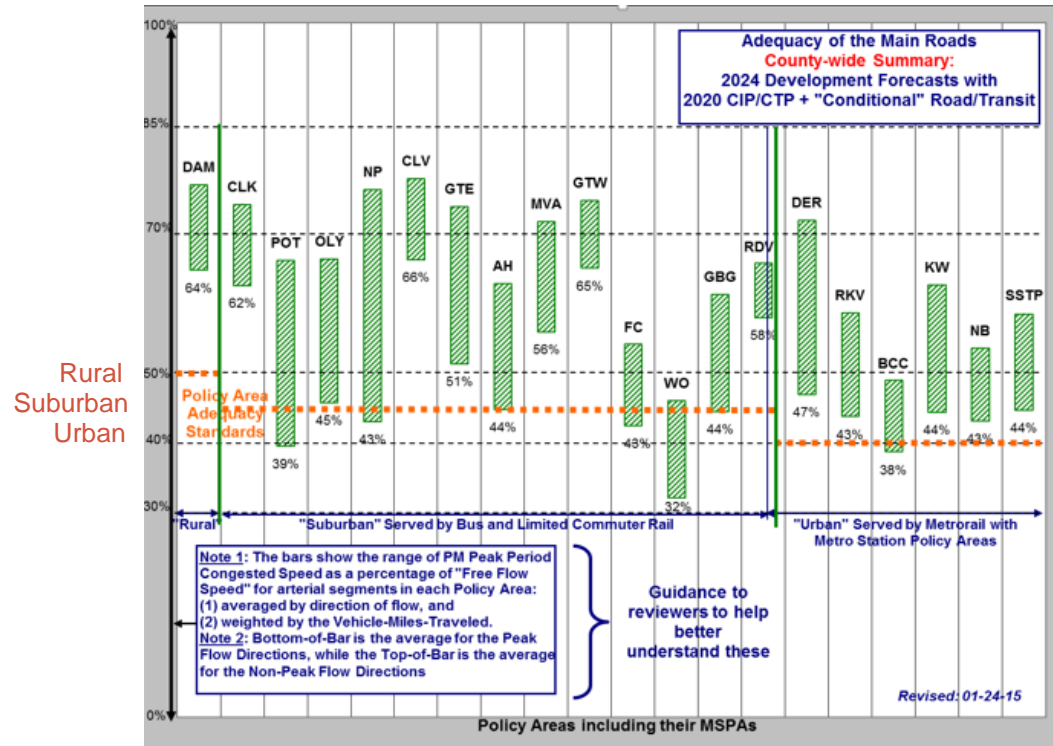
Under Transportation Policy Area Review:

- **Roadway Adequacy**
 - Policy area average arterial roadway congestion cannot exceed specified standard.
 - Standard varies depending on transit availability and usage.
- **Transit Adequacy**
 - Focuses on the availability and quality of local transit service.
 - Three metrics considered: coverage, peak headway, span of service.



Roadway Adequacy:

2014 TPAR Roadway Adequacy Test



Relative to the 2012 TPAR test:

- White Oak (WO) & Fairland/Colesville (FC) are reported as separate policy areas
- For most policy areas, results are generally similar Countywide
- Three additional policy areas deemed inadequate— North Potomac (NP), Aspen Hill (AH) & Bethesda Chevy Chase (BCC)

Transit Adequacy:

Transit Adequacy Standards			
	Minimum Coverage	Maximum Headway	Minimum Span
Urban	≥80 percent	≤14 minutes	≥17 hours
Suburban	≥70 percent	≤20 minutes	≥14 hours
Rural	>50 percent	≤60 minutes	≥4 hours

Coverage- How much of a policy area is within walking distance of transit?

Peak Headway – How frequently do buses arrive?

Span of Service – How many hours a day is transit service available?

If a policy area does not achieve adequacy for all three measures, that policy area is determined to be inadequate for transit.

Transportation Mitigation Payment

If projected transportation capacity in a policy area is inadequate, the Planning Board may approve a subdivision in that area if the applicant commits to either:

- Fully mitigate the incremental traffic impact of the subdivision by adding capacity or implementing a trip reduction program; or
- Pay a Transportation Mitigation Payment as provided in County law.



Local Area Transportation Review

- Tests capacity of nearby intersections.
- Applied to all projects generating 30 or more peak hour trips.
- If an intersection fails, developer can make improvements, mitigate trips or in limited cases – make a payment to the County.



Direction from Council following the 2012 SSP:

- Convert the most recently adopted version of the MWCOG regional transportation model to a more refined tool suitable for application in Montgomery County.
- Update LATR trip generation rates to better reflect the traffic effects of mixed-use development and access to multi-modal travel options (last updated in 1989).
- Identify and assess alternative LATR metrics and procedures (Traffic Impact Study Technical Working Group).
- Refine the transit component of TPAR to reflect the travel implications of bus rapid transit.



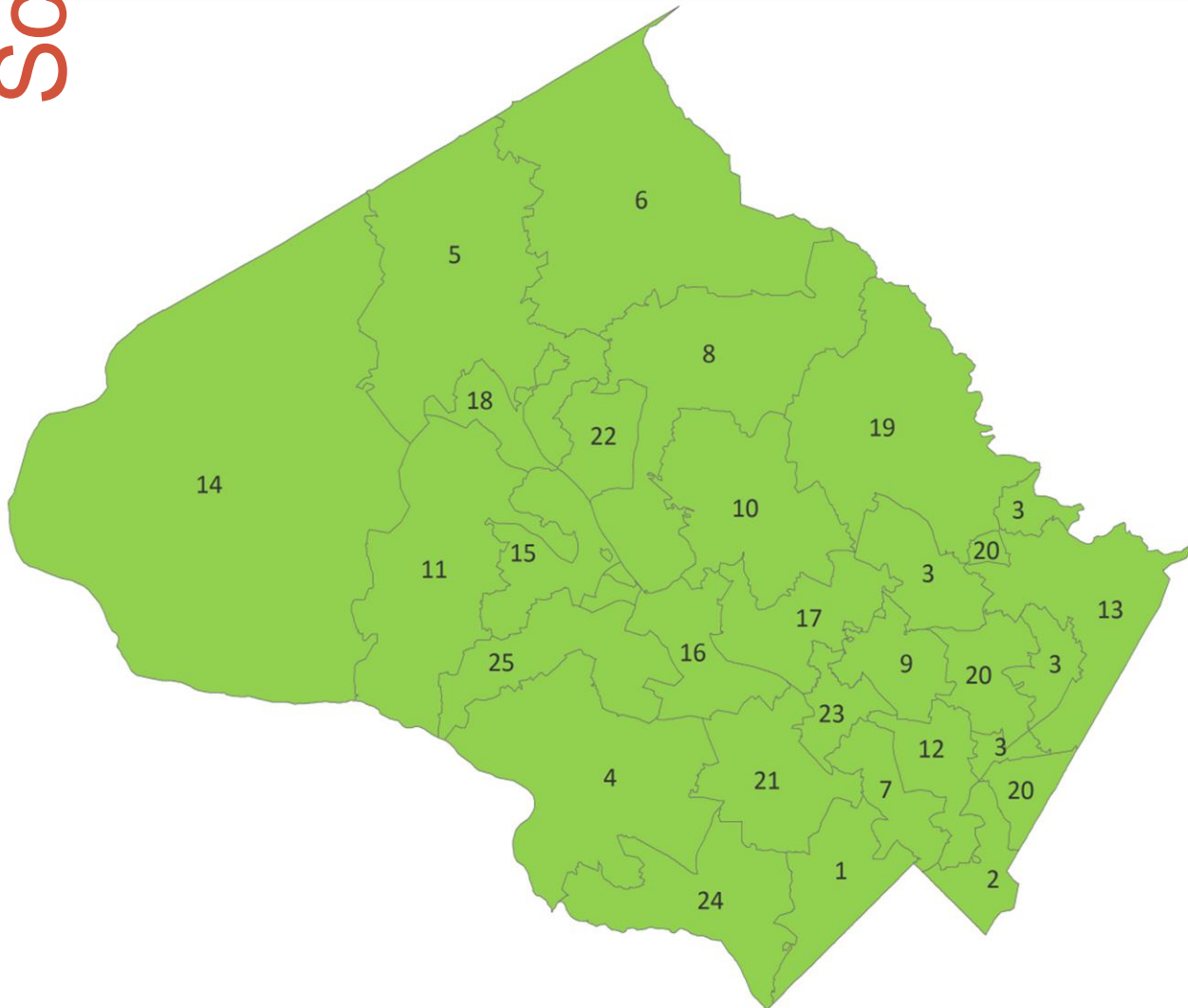
New Ideas

- Expand the pro-rata share concept beyond White Oak
- Look at incorporating Vehicle Miles of Travel (VMT) metric into the LATR process
- Consider consolidation of LATR and TPAR into a single transportation test



Annual School Test

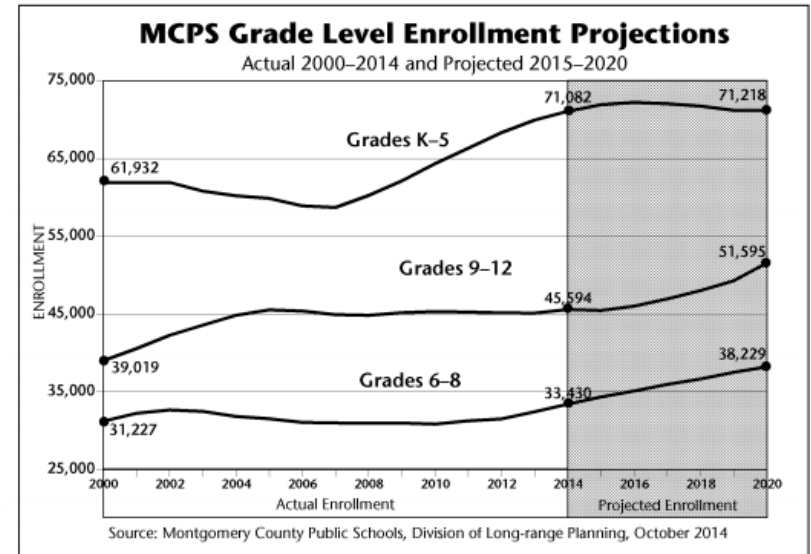
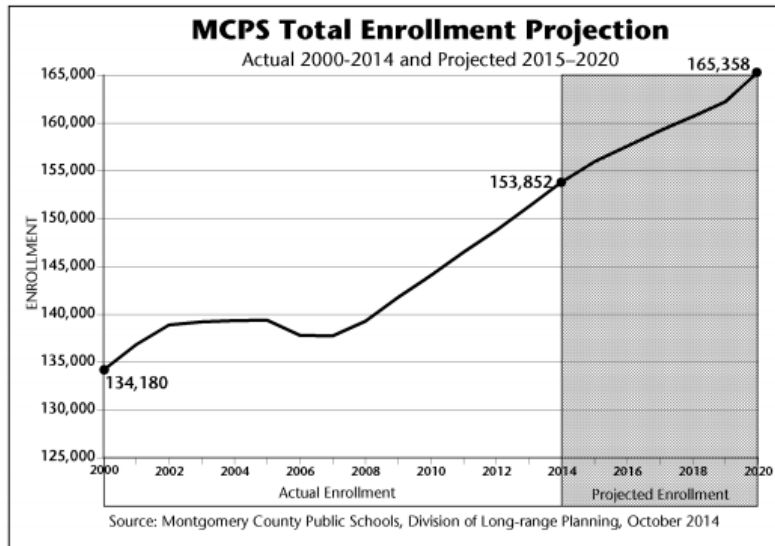
School adequacy is measured for each school level by high school cluster.



Cluster
1 Bethesda-Chevy Chase HS
2 Blair HS
3 Blake HS
4 Churchill HS
5 Clarksburg HS
6 Damascus HS
7 Einstein HS
8 Gaithersburg HS
9 Kennedy HS
10 Magruder HS
11 Northwest HS
12 Northwood HS
13 Paint Branch HS
14 Poolesville HS
15 Quince Orchard HS
16 Richard Montgomery HS
17 Rockville HS
18 Seneca Valley HS
19 Sherwood HS
20 Springbrook HS
21 Walter Johnson HS
22 Watkins Mill HS
23 Wheaton HS
24 Whitman HS
25 Wootton HS

Annual School Test

School facility adequacy is based on **projected school capacity** compared to **projected enrollment**.



Annual School Test

Projected capacity measures existing and planned school capacity.

- Existing school capacity is defined as MCPS program capacity.
- Planned school capacity is the capacity funded in the 6-year CIP.

CAPITAL PROJECTS

School	Project	Project Status*	Date of Completion
Bethesda-Chevy Chase HS	Classroom addition	Recommended	Aug. 2017
Bethesda-Chevy Chase MS #2	New school	Programmed	Aug. 2017
Bethesda ES	Classroom addition	Approved	Aug. 2015
North Chevy Chase ES	Classroom addition	Approved	Aug. 2015
Rock Creek Forest ES	Revitalization/expansion	Approved	Jan. 2015
Rosemary Hills ES	Classroom addition	Approved	Aug. 2015
	Revitalization/expansion	Programmed	Jan. 2022 (Delayed)

Program Capacity Table
(School Year 2013–2014)

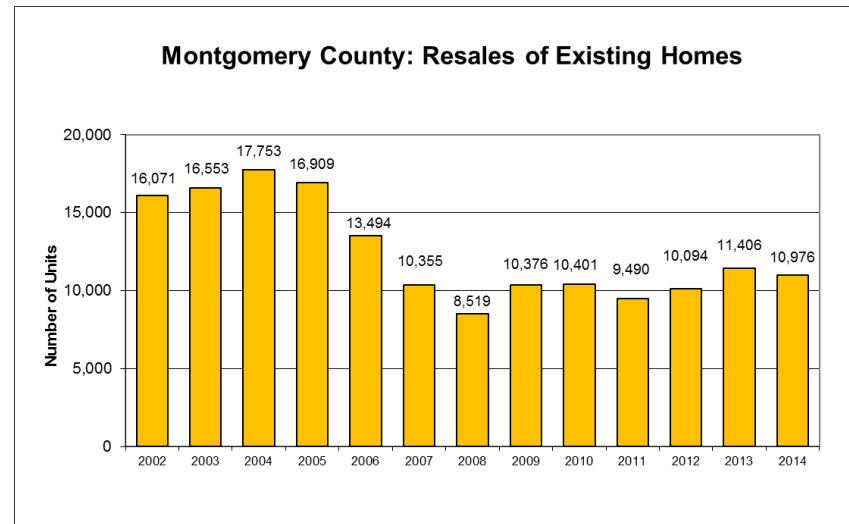
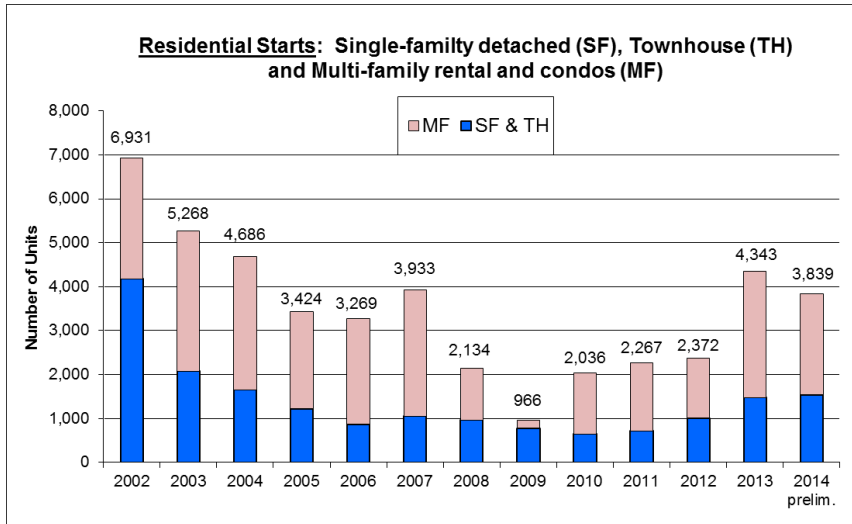
Schools	Grades Served	Capacity (HS @90% MS@85%)	Total Rooms	Support Rooms	Regular Secondary @25	Regular Elementary @23	CSR Grades 1-2 @17	Pre-K @20	Pre-K @40	HS @20	CSR KIND @15	KIND @22	ESOL @15	METS @15
Montgomery Blair HS	9-12	2939	133	127									4	2
Albert Einstein HS	9-12	1621	80	67									3	1
John F. Kennedy HS	9-12	1847	86	79									3	
Northwood HS	9-12	1575	73	67									3	
Wheaton HS	9-12	1320	65	53									5	1
Argyle MS	6-8	905	43	42									1	
Eastern MS	6-8	1024	51	45									2	2
Col. E. Brooke Lee MS	6-8	777	39	34									3	

Annual School Test



Projected enrollment is based on several factors:

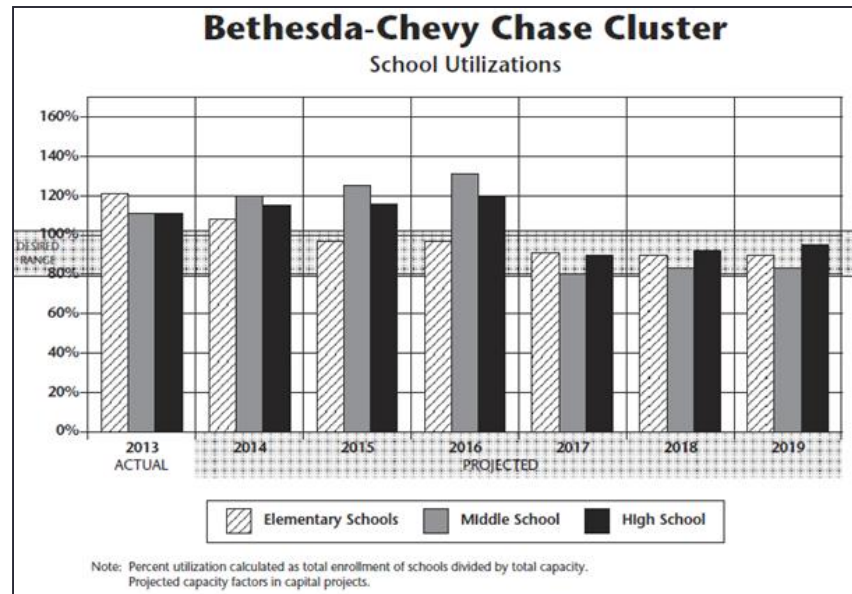
- Births in the County.
- Aging of the school-age population.
- Migration of residents into and out of the County.
- Housing (new housing and the resale of existing homes).
- Forecast 5 years into the future.



Annual School Test

Test is conducted annually at all three school levels (elementary, middle and high) for a school cluster area.

When projected enrollment exceeds projected capacity (termed utilization level), either a payment is required for development to proceed or a moratorium is imposed.



Annual School Test

The threshold for moratorium is **120 percent** utilization.

This means projected enrollment 5 years in the future exceeds **120 percent** of projected capacity (existing and planned).

Exceptions:

Senior or Age-restricted Housing.

No more than 3 new housing units, School Facility Payment still required.



Annual School Test

Threshold for requirement to make a School Facility Payment (SFP) is **105 percent** utilization.

This means projected enrollment 5 years in the future exceeds **105 percent** of projected capacity **but** does not exceed 120 percent.

Payment is required for each school level over 105 percent.

Payment rates vary by school level based on construction costs and dwelling unit type.



Annual School Test

Student Generation Rates - an estimate of the number of students generated by different housing types.

New methodology developed in cooperation between Montgomery County Public Schools (MCPS) and Montgomery County Planning.

Two major inputs:

- **Student addresses** with grade-level information attached (confidential information removed).
- **Parcel File** with residential structure information.



New Ideas

- Work with MCPS to update student generation rates and develop measures of housing turnover.
- Continue collaboration on school design. Cross-agency Work Group on School Design Options report recently released.
- Continue joint community meetings such as the one held Sept. 17th with the Walter Johnson Cluster.



Impact Tax, Facility/Mitigation Payment, Recordation Tax

Impact taxes are assessed on new residential and commercial buildings, and additions to commercial buildings to help fund improvements necessary to increase transportation or public school capacity.

Some exemptions apply – MPDUs, multi-family senior housing, development in an Enterprise (or former Enterprise) zone.

School Facility Payments and **Transportation Mitigation Payments** are levied on development located in an area with inadequate facilities.

A **recordation tax** is an excise tax levied when a land transfer is recorded in the Maryland Land Records – such as the purchase of new or existing home.

Transportation Impact Taxes - All new development is required to pay a transportation impact tax levied on every dwelling unit constructed, and on every new square foot of non-residential development.

Building Type	Metro Station Policy Area	Clarksburg	General
Single-family detached (per unit)	\$ 6,984	\$ 20,948	\$ 13,966
Single-family attached (per unit)	\$ 5,714	\$ 17,141	\$ 11,427
Multi-family low-mid rise (per unit)	\$ 4,443	\$ 13,330	\$ 8,886
Multi-family high rise (per unit)	\$ 3,174	\$ 9,522	\$ 6,347
Multi-family senior (per unit)	\$ 1,269	\$ 3,808	\$ 2,539
Office (per sq ft of GFA)	\$ 6.35	\$ 15.30	\$ 12.75
Industrial (per sq ft of GFA)	\$ 3.20	\$ 7.60	\$ 6.35
Bioscience (per sq ft of GFA)	\$ 0	\$ 0	\$ 0
Retail (per sq ft of GFA)	\$ 5.70	\$ 3.70	\$ 11.40
Place of Worship (per sq ft of GFA)	\$ 0.35	\$ 0.90	\$ 0.65
Private School (per sq ft of GFA)	\$ 0.50	\$ 1.35	\$ 1.05
Hospital (per sq ft of GFA)	\$ 0	\$ 0	\$ 0
Social Service Agency (per sq ft of GFA)	\$ 0	\$ 0	\$ 0
Other non-residential (per sq ft of GFA)	\$ 3.20	\$ 7.60	\$ 6.35

School Impact Taxes - All new residential development is required to pay a school impact tax levied on every dwelling unit constructed.

The school impact tax = approximately 90 percent of the cost of a student seat.

School Impact Tax	
Single-family detached	\$26,827
Single-family attached	\$20,198
Multi-family Low-Mid Rise	\$12,765
Multi-family High Rise	\$5,412

School Facility Payments and Transportation Mitigation Payments are levied on development located in an area with inadequate facilities.

Transportation Mitigation Payments = 25 percent of the transportation impact tax for roadway or transit inadequacy. In areas inadequate for both roadways and transit, payment rates are set to equal 50 percent of the impact tax.

School Facility Payments = 60 percent of the cost of a student seat.

Montgomery County School Facility Payment Rates			
	Elementary	Middle	High
Single-family detached	6,940	3,251	4,631
Single-family attached	4,160	1,743	2,754
Multi-family low to mid rise	2,838	1,169	1,877
Multi-family high rise	1,166	531	804

Infrastructure Financing

- Update school and transportation impact tax rates based on current construction/capital costs
- Consider localized use of school and transportation impact taxes (within the cluster or policy where collected)
- Evaluate the proportion of costs covered by impact taxes
- Consider changes in recordation tax collected
- Consider options for public private partnerships



Schedule & Participation

Briefing on New TPAR Transit Adequacy Component and Trip Generation Rate Update	December 2015
Briefing on Advanced Modeling Tool by consultant	January 2016
Work Sessions on Draft LATR/TPAR Recommendations	February and March 2016
Draft Status Report on General Land Use Conditions & Forecasts	February 2016
Draft School Test and Impact Tax Recommendations	March 2016
Working (Staff) Draft	April/May 2016
Public Hearing on the Working (Staff) Draft	May 2016
Work Sessions on the Working (Staff) Draft	June 2016
Planning Board Draft and Resolution	July 2016
Council Public Hearing on the Planning Board Draft	September 2016
PHED Committee Work Sessions	September/October 2016
County Council Work Sessions	October/November 2016
Council Adoption	Required by November 2016

QUESTIONS?

