




**MONTGOMERY COUNTY PLANNING DEPARTMENT**  
THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION


MCPB  
10/25/07  
Item No. 17

October 22, 2007

**MEMORANDUM**

**TO:** Montgomery County Planning Board

**VIA:** Gwen Wright, Acting Planning Director 

**FROM:** Mary G. Dolan, Acting Chief   
Countywide Planning Division

**SUBJECT:** Request for Special Appropriation FY08 Funding for Planning Department Work Program to develop Sustainable Quality of Life Indicators

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Staff Recommendation

Staff recommends the Planning Board approval to transmit to the County Council and County Executive a Special Appropriation to the FY08 Adopted Budget. Staff's recommendation is to add \$150,000 for Professional Services based on prevailing rates and projections of needed consultant services. The Department will accommodate staff needs through the Department's authorized strength. The attachments include the following:

- A Program Element for the project,
- The proposed Scope of Work (including a discussion of deliverables and estimated staff time) which the Board and Council has reviewed as part of the Growth Policy discussion, and
- The packet submitted to the Planning Board in response the PHED Committee's discussions in July.

Background

The report containing the Planning Board's Growth Policy recommendations, "*Toward Sustainable Growth for Montgomery County: A Growth Policy for the 21st Century*," signals the Planning Board's objective to move beyond *adequacy* to *sustainability* as the key concept underlying growth management in Montgomery County. The Growth Policy proposes a set of Indicators be developed to measure progress toward sustainability and quality of life. County Council discussions have supported this effort and the County Executive is undertaking a parallel effort to define indicators of County government progress toward healthy and sustainable communities. The County Executive staff has

indicated that they wish to pursue a partnership relationship to produce a comprehensive set of indicators that will track progress in achieving outcomes that are supported from planning through implementation. If the County Executive supports this effort, and the County Council approves the additional FY 2008 funding, Planning staff will develop a joint approach to coordinate efforts and make the most efficient use of resources and arrive at a set of indicators that will measure all the County's efforts toward a Sustainable Quality of Life.

#### Approach

See attached Scope of Work.

#### Summary

Staff seeks the Planning Board's approval to transmit this request to the County Council and County Executive as a Special Appropriation Request.

MD:ss

**PROGRAM: PLAN IMPLEMENTATION**  
**SUB-PROGRAM 1: Regulatory Policy Development**

**PROGRAM ELEMENT 5: SUSTAINABLE**  
**QUALITY OF LIFE INDICATORS**

**LEAD DIVISION: COUNTYWIDE**  
**LEAD STAFF: MARY DOLAN**

LABOR DISTRIBUTION CODES: NEW # NEEDED      LATEST EDITS: OCTOBER 22, 2007

**DESCRIPTION/SCOPE:** Develop a set of indicators based on the General Plan and our existing policies and programs quickly that can be used to measure outcomes or conditions related to the effects of growth policies, master plans and other county policies that influence quality of life and sustainability. Use the assistance of a consultant to convene an expert panel and/or a series of symposia to bring the best minds to bear on this issue. Park and Planning staff would direct the consultant, develop relevant databases, coordinate with Executive staff efforts and provide assistance in packaging the information for the Planning Board, County Council and public to review.

**HOW THIS WORK PROGRAM ELEMENT BENEFITS THE COUNTY:**

- Enable measurement of progress toward a sustainable quality of life in Montgomery.
- Provide feedback about the effectiveness of growth policies in promoting sustainable development.
- Develop a partnership with the County government in preparing indicators of sustainable quality of life for planning and implementation of policies.
- Evaluate the Capital Improvement Program to determine how planned expenditures contribute to a sustainable quality of life.
- Develop a tool that can be used to measure the sustainability of master plans.

**SPECIFIC TASKS/PRODUCTS FOR FY08:**

- Survey Indicator programs nationwide, select consultant and expert panel. (Winter 2008)
- Convene Expert Panel, hold first symposium. (Spring 2008)
- Review potential indicators with stakeholders. (Spring 2008)
- Present proposed indicators to Planning Board. (Summer 2008)
- Report recommended indicators to County Council. (Summer 2008)

**PERFORMANCE MEASURES:**

- Manageable number of indicators developed to measure sustainable quality of life
- Partnership developed with County Executive to develop indicators
- Stakeholders involved in reviewing the potential indicators.

**Budgeted Resources:**

	WY	Expenditures	Professional Services	Publications
FY07				
FY08			\$150,000	

## Sustainable Quality of Life Indicators

### Proposed Scope of Work

**Purpose:** Develop a limited number of Indicators that will measure progress toward the goals of the Growth Policy for a sustainable quality of life in Montgomery County. These should be designed to be used to guide the 2009 Growth Policy discussion and added to or refined as more information is gathered.

**Background:** The 2007 Growth Policy marks an important evolution in the management of growth and change in Montgomery County. It moves from its historical roots as guideline for *staging* new development in concert with the provision of basic public facilities, such as transportation and schools, toward managing growth and change in ways that are *sustainable* and monitoring their consequences for the County's economy, environment, and social equity. The Planning Board recommended developing a set of *Indicators* to monitor the extent to which the growth policy affects sustainability in Montgomery County. Councilmembers have expressed their strong interest in indicators that will support efforts to measure, maintain, and improve the County's quality of life, and we have agreed to combine the Sustainability Indicators with Quality of Life Indicators as part of this effort. At the same time, the County Executive is undertaking a more extended effort to develop outcome-based performance indicators for his eight policy objectives (attached), one of which is "Building Healthy & Sustainable Communities." The Executive Branch has expressed an interest in collaborating with our efforts. The sum total of these efforts will be enable County policymakers to monitor policy outcomes, providing a needed evaluative tool to guide future policy.

**Approach:** Develop a set of indicators based on the General Plan and our existing policies and programs quickly that can be used to measure outcomes or conditions related to the effects of growth policies, master plans and other county policies that influence quality of life and sustainability. Use the assistance of a consultant to convene an expert panel and/or a series of symposia to bring the best minds to bear on this issue. Park and Planning staff would direct the consultant, develop relevant databases, coordinate with Executive staff efforts and provide assistance in packaging the information for the Planning Board, County Council and public to review. The indicators should measure progress in the following areas and be measured also for three to five similar counties (possible candidates include Fairfax, VA, Contra Costa CA, Broward County, FL, Westchester County, NY, Baltimore County, MD):

1. Economic well-being of residents
2. Environment quality and resource management
3. Public health
4. Public safety
5. Mobility/access/proximity
6. Education – access and attainment
7. Infrastructure investment and maintenance
8. Culture and recreation opportunities
9. Development pattern and land use (mixed use, sprawl)
10. Housing conditions

**Process:**

1. Identify a set of trial indicators based on a review of currently available, reliable, and consistent data and research other jurisdictions' efforts. Determine what topics they measure, why it is important to measure these topics and whether data is available at different geographic scales and in time series. Select benchmark jurisdictions for comparison.
2. Review potential indicators with an expert panel or in a series of symposia to determine the soundness of each measure, as well as the reliability of data and other parameters.
3. Review with public stakeholders, the County Executive, the Planning Board and the County Council.
4. Construct indicators, map and compare to benchmark jurisdictions.
5. Circulate results and use as input to the 2009 Growth Policy.
6. Determine, with the advice of County Council, if further work is necessary.

**Schedule:**

November – January	Indicator research and data review, select Consultant and Expert Panel, set up web-enabled outreach
February	Convene Expert Panel, hold first symposium
March	Follow-up on Panel and Consultant advice, analyze additional data
April	Review potential indicators with public stakeholders through focus groups, web and other technology tools
May - June	Incorporate public input, present proposed set of indicators to the Planning Board
July	Present Planning Board recommended set of indicators to the County Council

**Resources Needed:** The Department anticipated additional work on the indicators program in the FY08 budget. In addition, some of the work on indicators will overlap with other budgeted work. Without affecting our existing Work Program for FY08, we could devote part of the time assigned to Growth Policy for:

MNCP staff	Supervisor	.1 workyear
	Staff	.5 workyear

In addition, the Department has the services of a part-time student researcher from the University of Maryland who can devote .3 workyears to the effort.

We recommend supporting this staff work with the participation of those with considerable experience in developing indicators. This will help us meet the dual objectives of producing indicators in a timely manner and that meet the needs of Montgomery County. Toward this effort, we recommend support for a supplemental budget request for:

Consultant and Expert Panel fees	\$150,000
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Otherwise, it would take approximately 1.5 workyears and affect other Program Elements, delaying some products.

# MONTGOMERY COUNTY GOVERNMENT

**WE** pursue the common good by working *for* and *with* Montgomery County's diverse community members to provide:

- A Responsive and Accountable County Government
- Affordable Housing in an Inclusive Community
- An Effective and Efficient Transportation Network
- Children Prepared to Live and Learn
- Healthy and Sustainable Communities
- Safe Streets and Secure Neighborhoods
- Strong and Vibrant Economy
- Vital Living for All of Our Residents

**AS** dedicated public servants, the employees of the Montgomery County government strive to embody in our work these essential values:

Collaboration  
Competence  
Fiscal Prudence  
Inclusiveness  
Innovation  
Integrity  
Knowledge  
Respect for the Individual  
Transparency



**MONTGOMERY COUNTY PLANNING DEPARTMENT**  
THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

**MEMORANDUM**

Date: September 24, 2007

To: The Honorable Marilyn Praisner, President  
The Montgomery County Council

From: Royce Hanson, Chairman  
The Montgomery County Planning Board

Re: Growth Policy Recommendations

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I am pleased to transmit for your consideration the recommendations of the Montgomery County Planning Board on the Growth Policy issues identified by the Council for further research and analysis. I, along with Planning Department staff, will present these recommendations to you and the members of the Planning Housing and Economic Development Committee on Monday, October 1, 2007.

## **THE MONTGOMERY COUNTY PLANNING BOARD'S RECOMMENDED DECISION POINTS FOR THE MONTGOMERY COUNTY COUNCIL**

The Planning Board recommends that the Council make the following decisions:

- 1) Amend the Growth Policy Resolution and the Planning Department's Work Program to direct the Planning Board to develop a set of Sustainable Quality of Life Indicators that can be used to guide and assess the effects on the environment, economy, and social equity of land use and other public policies, including master plans, capital programming, and the design of centers, communities, and public facilities. These indicators should be produced within 18 months and be developed with the involvement of other agencies, expert advisers, and broad public participation.
- 2) Amend the Growth Policy Resolution to direct the Planning Board to prepare a report and recommendations not later than July 1, 2008 for measures to promote excellence in the sustainable design of newly built and redeveloped places and public facilities subject to Mandatory Referral. This report should precede or accompany the first phase of the revision of the Zoning Ordinance.
- 3) Adopt Policy Area Mobility Review, as revised, as a threshold test for determining the extent to which new development projects must mitigate transit and/or arterial mobility in meeting Adequate Public Facility requirements.
- 4) Require that development proceed only with full trip mitigation in any policy area where either the arterial or transit level of service is "level of service is "F".
- 5) Direct the Planning Board, with the aid of the Executive, to prepare a Growth Policy amendment that would replace PAMR and LATR in Metro station policy areas with a broad requirement for trip mitigation from new development. The amendment will be delivered to the Montgomery County Council by March 2008 accompanied by an analysis of the development review and monitoring activities that would be required. In the interim, the Planning Board recommends that the Growth Policy allow development projects located in Metro station policy areas to use the Alternative Review Procedure in lieu of PAMR and LATR tests that requires paying double the Transportation Impact tax and enter into a Trip Mitigation Agreement.
- 6) Retain Local Area Transportation Review for all projects, with the following refinements:
  - a) Where an intersection CLV exceeds the standard for its Policy Area in the background condition, a development project must reduce the CLV level below the background condition by an amount equal to half the number of trips attributable to the project.



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- b) Require the Planning Board to broaden the study area requirements for very large development applications and direct it to amend its guidelines on the number of intersections to be included in LATR studies for projects generating more than 1750 vehicle trips.
  - c) Recognize that the urban design and transit amenity goals in Germantown Town Center justify resetting the congestion standard at 1600, rather than 1450.
- 7) Amend the Growth Policy Resolution to direct the Planning Board to conduct the following studies to guide decisions in the 2009 Growth Policy revisions:
- a) A comprehensive parking management study for the county to consider how parking can be better employed as a travel demand management tool, particularly in Metro station policy areas.
  - b) A study of how, and where, proximity to various levels of transit service and pedestrian connectivity can be used as a basis for actions required to meet area and local mobility standards.
    - i) Evaluation of a multi-modal quality of service requirement to provide a more seamless integration of pedestrian, bicycle, transit, and auto modes.
    - ii) Feasible revisions of mechanisms such as CLV standards, sliding scales to match trip reduction goals, the duration of Transportation Mitigation Agreements, and impact tax rates.
    - iii) Identification of more pedestrian and transit-oriented urban areas, other than Metro Station Policy Areas, which may be eligible for different standards.
  - c) A study of options to increase efficiency in the allocation of development capacity, including the trading of capacity among private developers.
- 8) Authorize the Planning Board to convene by December 2007 a technical working group consisting of staff from MNCPPC, DPWT, SHA, transportation consultants, Interest groups such as the Action Committee for Transit and Coalition for Smart Growth, to work with an independent consultant to consider and test various proposals, and practices in other jurisdictions, and to recommend appropriate changes in approaches, standards, and measures that should be adopted in the administration of Growth Policy or in its subsequent revision.
- a) The group should deliver a report on measures of effectiveness by June 2008, including measure to encourage and support changes in individual transportation choices that reduce the number of trips in prime commuting times;

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- b) recommendations on performance standards by September 2008; and
  - c) recommendations on mitigation approaches by March 2009.
- 9) The Growth Policy Resolution should require a School Facilities Payment when enrollment in enrollment exceeds 110 percent of MCPS Program Capacity, and prohibit development when enrollment exceeds 135 percent of MCPS Program Capacity.
  - 10) The School Facilities Payment should equal the County cost per-pupil of school infrastructure.
  - 11) The Transportation Impact Tax and School Impact Tax should be set at rates that reflect the full County cost of planned increases in the capacity of the respective facilities needed to meet the needs generated by new growth.
  - 12) The School Impact Tax should be applied only to residential development.
  - 13) The recordation tax should not be raised to provide funding for increases in enrollment resulting from neighborhood turnover.
  - 14) Affordable Housing Units should be excluded for the transportation and school impact taxes.
  - 15) Impact tax rates should be phased in three installments over the course of a year.
  - 16) The Planning Board concurs with staff on all other issues that they raised in their September 27 memo. Many of these staff recommendations expressed continued support for positions that the Planning Board took in its May 21st report. Unless otherwise noted here, the Board continues to support its May 21 positions.

## **REASONS FOR THE RECOMMENDATIONS**

- 1. Amend the Growth Policy Resolution and the Planning Department's Work Program to direct the Planning Board to develop a set of Sustainable Quality of Life Indicators that can be used to guide and assess the effects on the environment, economy, and social equity of land use and other public policies, including master plans, capital programming, and the design of centers, communities, and public facilities. These indicators should be produced within 18 months and be developed with the involvement of other agencies, expert advisers, and broad public participation.**
  - As Montgomery County has matured and as the public has become increasingly aware of the implications of global warming, the energy crisis, and the measures that will be necessary in tributary watersheds to protect the Chesapeake Bay, the time has come to refocus county policy on the sustainability of our development. A Growth Policy keyed essentially to the adequacy of facilities has tended to encourage sprawl at a time when livable density should have high priority. In short, building policy on "adequacy" is inadequate to the challenges the county must confront these challenges.
  - Planning for, and establishing indicators of sustainable quality of life will move the county in a positive, reinvigorating direction, and raise awareness of opportunities, choices, issues and potential solutions.
  - An indicators program can serve as a touchstone, or reference point, that helps ensure that the County's many different planning and implementation are moving in the same, desired direction. For example, the indicators program will inform, and clarify the objectives, of each of the Board's recommended initiatives that follow.
- 2. Amend the Growth Policy Resolution to direct the Planning Board to prepare a report and recommendations not later than July 1, 2008 for measures to promote excellence in the sustainable design of newly built and redeveloped places and public facilities subject to Mandatory Referral. This report should precede or accompany the first phase of the revision of the Zoning Ordinance.**
  - Improved design is critical to achievement of environmental, energy, and livability goals. Design allows us to most efficiently use the existing capacity of our natural systems and public facility networks.
  - Well-designed communities are essential to a sustainable quality of life. As we use the term, "design" is practical, not ephemeral. It is focused on meeting specific functional objectives, not to debate matters of taste or

decoration. Design is the process through which we can ensure that new development projects and public facilities meet the public's objectives.

- Because future growth will increasingly be infill and redevelopment, each additional component – new private development or new public facility – must be designed with great care to enhance the community of which it is a part.
- Design is important, at bottom, because people care about it. When issues of design are at stake, the Planning Board is likely to have a long list of speakers at a public hearing. When those speakers testify, it is clear that they are speaking from the heart about an issue that is important to them and to their daily lives.

**3. Adopt Policy Area Mobility Review, as revised, as a threshold test for determining the extent to which new development projects must mitigate transit and/or arterial mobility in meeting Adequate Public Facility requirements**

Policy Area Mobility Review has several advantages as an instrument of growth policy:

- It focuses on the average experience of both the auto and transit users in a policy area. This makes it possible annually to assess whether relative travel times for residents of an area improve or worsen. Because it portrays the relative travel times for each mode of travel, it takes into account the role of transit. This provides a basis for identifying and addressing both roadway and transit conditions and making strategic judgments about where to apply capital and operational resources.
- It is efficient and straightforward to administer in the subdivision process. The Planning staff will annually update the information for each policy area, eliminating the need for expensive and time-consuming analyses by applicants and review of these studies by staff.
- It makes it possible for an applicant to know in advance of filing whether it will be required to incur costs and/or provide special measures to mitigate congestion or reduce trips.
- All projects proposed in areas where the relative mobility of roads and transit are unacceptable, as measured by national standards, must provide full mitigation in order to proceed.
- The modification of PAMR requires projects that are in areas that are close to the line separating acceptable from unacceptable travel times to provide a proportionate level of mitigation and/or trip reduction measures.

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- Projects in policy areas that are within the triangle formed by a line connecting the “steps” of the PAMR graph, must mitigate a portion of the project’s trips, based on their distance from unacceptable performance.
  - Since the overall objective of the policy is to promote sustainability, projects that are in areas that are approaching unacceptable average experiences should be required to provide measures to improve conditions rather than contribute to their deterioration.
- 4. Require that development proceed only with full trip mitigation in any policy area where either the arterial or transit level of service is “level of service” is “F”.**
- The Planning Board’s original transmittal contained language that suggested that either arterial or transit levels of service of “F” could be considered acceptable if the corresponding factor had a level of service of “A.” Recognizing that F levels of service are never acceptable, the Planning Board recommends including this prohibition in the Growth Policy resolution.
- 5. Direct the Planning Board, with the aid of the Executive, to prepare a Growth Policy amendment that would replace PAMR and LATR in Metro station policy areas with a broad requirement for trip mitigation from new development. The amendment will be delivered to the Montgomery County Council by March 2008 accompanied by an analysis of the development review and monitoring activities that would be required. In the interim, the Planning Board recommends that the Growth Policy allow development projects located in Metro station policy areas to use the Alternative Review Procedure in lieu of PAMR and LATR tests that requires paying double the Transportation Impact tax and enter into a Trip Mitigation Agreement.**
- The County Council and members of the general public requested that the Planning Board re-examine its recommendation that development in Metro station policy areas be treated the same as development in other policy areas under PAMR. Among the arguments that the Board found persuasive: that the transportation impacts of development in Metro station policy areas are quantitatively different than development in other areas.
  - The Planning Board recommends replacing PAMR and LATR in Metro station policy areas with a trip mitigation requirement because it would enforce and strengthen the expected benefit of locating development

near high quality transit. For example, it may be that one can routinely expect development in Metro station areas to achieve at least a 25 percent non-driver mode share. Unless the project is designed and programmed to support non-auto use, however, those non-driver mode shares may not be achieved. On the other hand, a well designed project with programmatic support will be able to achieve improved non-driver mode shares.

- This proposal, as does the Board's other major proposal for PAMR, moves away from a situation where most development projects receive "free" development capacity while an unlucky few – those who wish to move forward when the area is "inadequate" – have major transportation improvement conditions placed on them. Requiring each project to provide partial mitigation of auto trips may yield greater overall benefit than requiring a few projects to mitigate 100 percent of their trips (which would be the case if PAMR were applied in Metro station areas).
- The Planning Board is recommending that the initiative proceed as a Growth Policy amendment by March (instead of immediately) because this is a completely new concept for treatment of Metro station areas, which would benefit from additional detail and public comment.

**6. Retain Local Area Transportation Review for all projects, with the following refinements:**

- **Where an intersection CLV exceeds the standard for its Policy Area in the background condition, a development project must reduce the CLV level below the background condition by an amount equal to half the number of trips attributable to the project.**
  - This proposal would condition approval on the development project improving conditions at these intersections by up to 150% of the trips generated by the development project.
  - These are our most congested intersections. Simply requiring new projects to "not make the situation worse" is not acceptable to County residents.
  - Such a requirement is justifiable legally (other jurisdictions successfully apply this approach) and essential to maintaining acceptable service levels.
- **Require the Planning Board to broaden the study area requirements for very large development applications and direct it to amend its**

**guidelines on the number of intersections to be included in LATR studies for projects generating more than 1750 vehicle trips.**

- This requirement would add to the certainty in the development review process for both applicants and members of the general public.
- **Recognize that the urban design and transit amenity goals in Germantown Town Center justify resetting the congestion standard at 1600, rather than 1450.**
  - This departure from current practice is justified because the current congestion standards undermine, rather than support, the County's goals for the Town Center.

**7. Amend the Growth Policy Resolution to direct the Planning Board to conduct the following studies to guide decisions in the 2009 Growth Policy revisions:**

- **A comprehensive parking management study for the County to consider how parking can be better employed as a travel demand management tool, particularly in Metro station policy areas.**
  - Without effective travel demand management, the County will not be able to achieve a sustainable high quality of life as far as transportation is concerned. Managing travel demand requires comprehensive approaches; of the many options for managing travel, an effective parking policy is perhaps first among equals.
  - This study will look at the number, pricing, and other attributes of public and private parking; the relationship of those attributes to travel demand; and recommending planning, policy and regulatory changes to achieve travel demand management goals.
  - This study will require linkages with the sustainable quality of life indicators program and other initiatives that suggest travel demand management goals for the County.
- **A study of how, and where, proximity to various levels of transit service and pedestrian connectivity can be used as a basis for actions required to meet area and local mobility standards.**
  - Evaluation of a multi-modal quality of service requirement to provide a more seamless integration of pedestrian, bicycle, transit, and auto modes.

- **Feasible revisions of mechanisms such as CLV standards, sliding scales to match trip reduction goals, the duration of Transportation Mitigation Agreements, and impact tax rates.**
  - **Identification of more pedestrian and transit-oriented urban areas, other than Metro Station Policy Areas, which may be eligible for different standards.**
    - The Planning Board agrees with the comments of Council members as well as the points contained in the letters from the Action Committee for Transit and Coalition for Smarter Growth (ACT/CSG) that we can continue to improve how the transportation tests take all modes of travel into account.
  - **A study of options to increase efficiency in the allocation of development capacity, including the trading of capacity among private developers.**
    - The current practice of allocating development capacity on a first-come, first served basis; and then prohibiting the trading of development capacity among developers, is not efficient. This is because at any point in time, a large fraction of the County's development capacity is held by development projects that are not moving forward.
    - The County has addressed this issue in the past by reducing time limits of APF approvals, and additional reductions are still necessary, as the Board recommended in May. That is a partial solution. This study would identify additional steps that could be taken, with a particular emphasis on capacity trading.
- 8. Authorize the Planning Board to convene by December 2007 a technical working group consisting of staff from MNCPPC, DPWT, SHA, transportation consultants, interest groups such as the Action Committee for Transit and Coalition for Smart Growth, to work with an independent consultant to consider and test various proposals, and practices in other jurisdictions, and to recommend appropriate changes in approaches, standards, and measures that should be adopted in the administration of Growth Policy or in its subsequent revision.**



**The group should deliver a report on measures of effectiveness by June 2008, including measures to encourage and support changes in individual transportation choices that reduce the number of trips in prime commuting times; recommendations on performance standards by September 2008; and recommendations on mitigation approaches by March 2009.**

- The Board's objective is to continue to make progress in our transition from tests that measure how well a facility operates toward tests that measure the experiences of all users of the transportation network.
- The Board supports the recommendation to work with independent consultants but notes that doing so will have budgetary implications that the Board will explore with the Council during the Semi-Annual Report.

**9. The Growth Policy Resolution should require a School Facilities Payment when enrollment in enrollment exceeds 110 percent of MCPS Program Capacity, and prohibit development when enrollment exceeds 135 percent of MCPS Program Capacity.**

- The current definitions of capacity in the Growth Policy do not reflect the practical fact that classroom capacity can vary based on how the classroom is used, and moreover, the fact that classrooms used for the same purpose may have a different capacity from cluster to cluster. Basing the school test on MCPS program capacity addresses this issue.
- The move to program capacity results in a tighter test than currently used. The Board recommends requiring the School facilities Payment at 110 percent of MCPS program capacity to reflect the fact that there is judgment involved in both the enrollment forecasts and the assignment of programs to classrooms.
- The Board's recommendation that moratoria be imposed when enrollment exceeds 135 percent of capacity reflects the Board's finding that new development is often not the major contributor to school enrollment change.

**10. The School Facilities Payment should equal the County cost per-pupil of school infrastructure.**

- The School Facilities Payment is a useful tool to help prevent clusters from becoming unacceptably crowded. In order to perform that function, the payments should be commensurate with the cost of constructing school infrastructure.

**11. The Transportation Impact Tax and School Impact Tax should be set at rates that reflect the full County cost of planned increases in the capacity of the respective facilities needed to meet the needs generated by new growth.**

- The Planning Board's impact tax recommendations are careful to charge new development only for its share of the cost of these new facilities. New development will increase demand on other public facilities for which an impact tax is not charged. Overall, these impact taxes only partially recapture the benefits private landowners receive from previous public investments.
- The analysis conducted and reviewed by the Planning Board does not support the view that impact tax rate changes will have an effect on the County's economy. Therefore, there is no economic basis for rejecting the full rates recommended by the Planning Board. Impact taxes are a small component of the overall cost of construction in Montgomery County relative to their importance to maintaining the quality of public facilities.

**12. The School Impact Tax should be applied only to residential development.**

- The Planning Board recommends that the County continue the current practice of charging the School Impact Tax only on development projects that are of the type that generate school students.

**13. The recordation tax should not be raised to provide funding for increases in enrollment resulting from neighborhood turnover.**

- The Planning Board's previous recommendation was intended to capture the effect on enrollment of the turnover of existing neighborhoods.
- Upon additional review, the Planning Board agreed that the County has other taxing mechanisms that can assess the costs of neighborhood turnover, and of those options, a substantial increase in the recordation tax may not be the best one.

**14. Affordable Housing Units should be excluded for the transportation and school impact taxes.**

- The Planning Board continues to recommend that only the affordable units in a development project be exempt from the impact tax. In the Board's view, Workforce Housing units are not sufficiently affordable to warrant the impact tax exemption.

**15. Impact tax rates should be phased in three installments over the course of a year.**

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- The phasing is to reduce harm to those developers with development projects with narrow profit margins that will move to construction very soon.
- The phasing recommended by the Planning Board is longer than the County has historically used for impact tax rate changes, even significant ones.
- Partial phasing (rather than a full implementation delay) decreases the likelihood that developers will accelerate project approvals simply to beat a rate hike.
- The Planning Board notes that increased costs over the course of constructing a development project are routine and typically built into construction budgets. Increased impact taxes have been the subject of public discussion since early in 2007.

**16. The Planning Board concurs with staff on all other issues that they raised in their September 27 memo. Many of these staff recommendations expressed continued support for positions that the Planning Board took in its May 21<sup>st</sup> report. Unless otherwise noted here, the Board continues to support its May 21 positions.**



**MONTGOMERY COUNTY PLANNING DEPARTMENT**  
THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

September 24, 2007

Memorandum

To: Montgomery County Planning Board

From: Growth Policy Team  
*Khalid Afzal, Community-Based Planning*  
*Mary Dolan, Countywide Planning*  
*Pamela Dunn, Research & Technology Center*  
*Roselle George, Research & Technology Center*  
*Dan Hardy, Transportation Planning*  
*Rick Hawthorne, Transportation Planning*  
*Karl Moritz, Research & Technology Center*

Re: Further "Toward Sustainable Growth for Montgomery County: A Growth Policy for the 21<sup>st</sup> Century." Addressing Issues Raised in Response to the Planning Board's Final Draft 2007-2009 Growth Policy

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**SUMMARY**

In May 2007, the Montgomery County Planning Board transmitted a report to the Montgomery County Council entitled, "*Toward Sustainable Growth for Montgomery County: A Growth Policy for the 21<sup>st</sup> Century.*" That report responded to the County Council's request for analysis and recommendations concerning the County's growth policies, impact taxes, and adequate public facilities ordinance. Much of the report focused on the Planning Board's recommendation to move beyond *adequacy* to *sustainability* as the key concept underlying growth management in Montgomery County. Moving *beyond adequacy* does not mean that the County should no longer require that public facilities be adequate to support growth. Instead, it is a recognition that adequacy alone does not encompass all of the aspects of growth that are important to the County and its future.

The Planning Board's report was the subject of public hearings and County Council worksessions in June and July. When the County Council adjourned for its August recess, it requested that the Planning Board and staff conduct some additional analysis based on issues raised by Councilmembers and others over the summer. These specific issues are included in a memo from Council President Praisner, attached. Several of the options mentioned in the attachment do not require additional work, but

others were to be addressed with staff work over the August break – and still others require more work than can be completed in a month or two.

This memorandum responds to the Council’s request for additional information about the next steps for both the sustainable growth and design excellence recommendations for the Planning Board. It addresses the questions, concerns, and new ideas expressed in response to the proposed transportation and school adequacy tests, and it provides requested impact tax analysis.

The Council’s Planning, Housing and Economic Development Committee is scheduled to take up the Growth Policy resolution on October 1, and the Management and Fiscal Policy Committee is scheduled to resume work on impact tax/recordation tax issues in mid-October.

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## SUSTAINABLE QUALITY OF LIFE

### Recommendations

The Planning staff asks that the following recommendations be transmitted to the County Council for further strengthening the Growth Policy report with respect to Sustainable Growth.

- 1) Sustainability should be the overarching vision for decisions about growth and redevelopment in Montgomery County.
- 2) The proposed Growth Policy resolution should be amended to require the Planning Board to combine Sustainability and Quality of Life indicators and develop a set of *Sustainable Quality of Life Indicators*.
- 3) The initiative should involve the public, county agencies and other stakeholders in a significant, inclusive public participation program to set the vision and goals that will be used in formulating the Indicators.
- 4) To the extent possible, the indicators program should be conducted on a timeline so that products are available for use as input to the 2009 Growth Policy. Planning staff notes that our survey of other jurisdictions suggests that similar projects take between 18 months and two years.
- 5) The Planning Board will request supplemental resources to conduct this effort in the FY08 work program.
- 6) As part of the ongoing work program on Growth Policy, propose targets for each indicator for public review and comment and consideration and adoption by the Planning Board and County Council.
- 7) Develop an ongoing public participation process to provide continuous feedback on progress of the indicators, public policies and programs.

*Resource request - FY08 - \$500 comb of staff & consultant resources over 2 yrs*

### Issues Raised by the Council

As the Chairman's transmittal letter to the Council predicted, the majority of the Council's worksession time was spent on transportation and schools adequacy and paying for growth. However, the Planning Board's sustainability recommendations – including the establishment of a sustainability indicators program – were positively received.

Councilmember Knapp asked how the Planning Board's APFO and infrastructure financing recommendations moved the County closer toward sustainability. They do so principally in two ways:

- Policy Area Mobility Review moves the focus of the test for transportation adequacy away from a roadway-based approach and toward a mobility-based approach which recognizes that sustainable transportation solutions encompass more than the automobile.

- Setting impact tax rates to capture 100 percent of the cost of infrastructure is more fiscally sustainable than allowing new development to create deficits that must be supported by other sources.

Attached is a memorandum from Councilmembers Praisner and Berliner requesting more information about the next steps in the indicators program and Chairman Hanson's response. In August and September, Planning staff (with the assistance of a graduate intern from the University of Maryland) conducted additional research on the processes used by other jurisdictions. Staff used this information to supplement their earlier recommendations, forming the basis of this memo.

During the Council worksession on the Growth Policy (and in the memo from Councilmembers Praisner and Berliner), we were asked to combine the sustainability indicators program with quality of life indicators. Although staff does not believe that *quality of life* and *sustainability* are the same thing, there is considerable overlap in the two concepts. In concept, the combination of the two into *Sustainable Quality of Life Indicators* encompasses the desire to sustain not just adequacy, but to achieve higher goals. Those goals should still be aimed at a quality of life that does not compromise the ability of future generations to have that same quality of life or better.

Planning for, and establishing indicators of a sustainable quality of life for Montgomery County residents, workers and businesses will move the County in a positive, reinvigorating direction and provide a direct link to our constituents. Engaging the public and stakeholders in an ongoing discussion of their vision both quality of life and sustainability will raise awareness of the opportunities and choices that face the County and allow positive interaction with our programs and policies.

Well-designed, sustainable growth and development will allow the County to explore combining many existing efforts with new information and trends to do the following:

- a) Address climate change\*
- b) Increase proximity of people to work and other desirable activities\*\*
- c) Create an interesting and safe environment\*\*
- d) Integrate the natural and built environments\*
- e) Include design for active and healthy living\*
- f) Provide access to high quality transportation and offer transportation choices\*\*
- g) Maximize building energy efficiency and utilize environmentally sound construction materials and techniques\*
- h) Create new and preserve existing open and recreation spaces\*\*
- i) Build green\*
- j) Include a range of housing types and affordability\*\*

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\* County already pursues this goal in a limited way

\*\* County already pursues this goal in a substantial way

- k) Reduce the impact on natural resources\*
- l) Pay the average marginal costs of needed facilities\*
- m) Work economically for the County\*\*
- n) Empower residents to participate in decision making processes\*\*
- o) Reflect and respect the values of residents and workers\*\*
- p) Promote social equity and fairness\*

## **Summary of Survey of Other Jurisdictions**

Planning staff surveyed eight other jurisdictions that have had indicators programs in place for 2-22 years. All reported that their programs have been valuable, are still vital and provide useful information to citizens and policymakers. The full report on the survey, conducted by Brooke Taylor (a graduate student intern) follows.

These programs often have many indicators. The jurisdiction surveyed had between 19-150 individual measures that are usually combined into 10 or fewer categories. Of those surveyed, Jacksonville, Florida and Charlotte, North Carolina were most similar in population size and area to Montgomery County. The survey found the following important characteristics of successful programs in four categories:

### *Developing an Indicators Program*

- Start with a clear shared community vision
- Use vision for goal and targets for the indicators.
- Determine whether indicators are descriptive (just state facts, track trends) or prescriptive (set goals and targets to meet).
- Determine what is important for analyzing “quality of life” or “sustainability.”
- Determine the level of geography used for each indicator.

### *Public Participation*

- Open and inclusive from the beginning.
- Public participation should have strong roots in the community.
- Targeted participation (selection of certain individuals, experts, sectors of the community) may be useful to maximize meaningful positive public feedback.
- Think about who needs to be invited to the table to make decisions

### *Program Implementation*

- Need for both top-down support (from elected officials) and bottom-up support (from public).



- Start small/manageable. Limit the scope or number of indicators.
- Be realistic with regard to the project timeline.
- Focus on the long view and on consistency. Do not change indicators for 3-5 years.
- Distribute the report widely.
- Once selected, “ownership” or “adoption” of indicators is essential.

#### *Adequate Resources*

- Support program with adequate resources, including staff assigned to the program and consultant support.
- Truckee Meadows received a grant of \$500,000 for their program.
- Jacksonville says that it currently takes about \$40,000 per year to maintain and update their program.

#### **Next Steps**

Developing a set of Sustainable Quality of Life Indicators is a long-term, serious effort. It should be tied into every facet of planning and, eventually, programs and policies of the County. The first step would be to amend the Growth Policy resolution so that it directs the Planning Board to develop Sustainable Quality of Life Indicators with the immediate step of returning to the Council with a supplemental budget request and a revision to the Planning Department’s work program to accommodate the project. The following changes are proposed:

**F2 Sustainability Indicators Program:** The Planning Board, with the aid of the Executive and with broad public participation, must develop a set of sustainable quality of life indicators addressing issues of environment, social equity, and economy. These recommended indicators must be suitable for guiding land use and other public policy decision-making, including capital programming and design of public facilities. An initial set of tracking indicators should be prepared in time to inform the 2009 Growth Policy review. The public participation effort will extend well beyond this period and require the assistance of a skilled consultant to prepare materials and organize outreach events. Supplemental funding to support the consultant services and staff supervision will be needed to meet the goals and timeline.

Perhaps the most productive and rewarding side of all the programs we have investigated is public awareness and participation. Public outreach on this issue is something that interests all communities and cultures. Even if there are some “standard” indicators established early in the process, a sustained effort to involve residents, stakeholders and schools in setting additional indicators and targets will result

in an informed and involved constituency. Later in this memo staff highlights the characteristics of a proposed public outreach program. The objectives of the public outreach program should include:

- Broad spectrum of stakeholders
- Education and awareness a key focus
- Involve schools, libraries, institutions, internet community

The sustainability of the indicators program itself will rely on a continuous, funded program to provide long term public involvement and feedback to the indicators, master plans and the CIP process. If the program is to remain vigorous, it must receive constant renewal with newcomers and young people as they mature. Specific groups or neighborhoods may even develop their own indicators that inform the progress of their own neighborhoods, businesses and civic efforts toward a sustainable quality of life.

Planning staff recommends that an expert panel be convened from the various governmental agencies, educational institutions, research establishments and technical groups to assure the scientific, technical and statistical soundness of the indicators. They can also assist in finding the appropriate data to measure progress. That data must have the following characteristics to serve as indicators:

- Available data in time series
- Provides accurate measurement
- Can be used to compare different parts of the County
- Can be influenced by growth policy or expenditure of public funds

All the programs we investigated had significant resources assigned to the effort. The projected cost of staff and consultant services for Montgomery is anticipated to be approximately \$500,000 over two years, with some ongoing funding for outreach annually to continue the program.

## Current and Future Plans and Projects

Early work on the Sustainable Quality of Life Indicators will inform the Zoning Code Re-write and the Housing Policy Element of the General Plan projects that are currently underway, as well as the continuation of the Growth Policy's design excellence program. These projects will also inform the Sustainable Quality of Life Indicators program in return.

An indicators program is truly useful when it forms the basis for future work program projects. In the Growth Policy, the Planning Board recommends additional studies and initiatives to continue progress toward a sustainable growth policy for Montgomery County. These include studies that explore additional issues related to transportation tests and impact taxes. Planning staff is suggesting some refinements to those studies in this report.

As an example of how the Sustainable Quality of Life Indicators program can shift the direction of these future Growth Policy studies, we note that *vehicle miles of travel* and *greenhouse gas emissions* have been proposed as important indicators of the County's progress toward sustainability. If, for example, vehicle miles of travel (VMT) is selected by Montgomery County as an indicator, and a goal of reducing VMT is adopted, then it is a logical next step to revise the Growth Policy's to test new development for its effect on VMT.

Councilmember Elrich expressed his interest in pursuing reductions in VMT and CO2 emissions through the Growth Policy and other avenues, as has the Coalition for Smarter Growth and its local partner, the Action Committee on Transit. In the Coalition for Smarter Growth's latest newsletter, Community Clips, they report:

*The Coalition for Smarter Growth and local partners are recommending judging new growth based on how many vehicle miles traveled and global warming emissions are generated. For proposed projects that generate high levels of vehicle miles traveled, the project could be required to reduce vehicle miles traveled through changes in mix of uses, design, transit and street investments, pricing parking and other approaches. If vehicle miles cannot be sufficiently reduced through mitigation, then the project would be disallowed from moving forward.*

The Coalition for Smarter Growth has also proposed changing the impact tax regimen to support reductions in VMT, possibly by charging impact taxes on parking spaces. Although we are not endorsing that approach, staff is recommending that the County pursue a comprehensive parking policy and additional work on impact tax issues to support the County's sustainable quality of life objectives.

In the Planning Board Chairman's budget priorities letter to the County Council President Praisner, several proposed initiatives are closely aligned with a sustainable quality of life indicators program. This includes the proposal for an *Energy Conservation and Environmental Protection Plan* with specific mandates and methods to create a greener future for the County and reduce greenhouse gas emissions. The Plan could include recommendations to:

- Provide information for a set of environmental indicators
- Increase pervious and semi-pervious area and tree planting
- Establish forest banking for carbon sequestration
- Adopt design standards and guidelines for energy conservation, water conservation and material reuse
- Provide for restoration of water quality in intensely developed areas
- Increase non-SOV travel mode share countywide

Ultimately, the Sustainable Quality of Life Indicators will be a touchstone, or reference point, for the core mission of the Department: master planning and development review.

#### **Detailed Results: Survey of Other Jurisdictions**

The Montgomery County Planning Department contacted 11 jurisdictions that have implemented indicator programs. Eight were available to discuss their efforts, and the data below summarizes answers to a telephone questionnaire that was administered to them. Key findings are detailed in below, followed by a discussion of how this may help Montgomery County implement an indicators program. Appendix A includes two tables that provide characteristics about each of the eight indicator programs, including the date the program started, the number and category of indicators, goals of the program, contact information, size of the jurisdiction population, and size of the jurisdiction land area. Appendix B provides detailed feedback received from the questionnaire, and Appendix C discusses the public participation component.

## Key Findings From Questionnaire

### Sustainability/Quality of Life Plan Development

- *Impetus for indicators project development:* The impetus for indicator projects differed widely across organizations contacted. Reasons cited for implementation include: desire to measure “quality of life” (Jacksonville); recommendation from a departmental task force in response to global environmental concerns and international conferences (Santa Monica); long term research funding (Boston); requirement as part of a state plan (Oregon); improvement of inner-city neighborhoods (Charlotte); and conception of private non-profit (San Mateo).
- *How indicators programs work:*
  - Many programs have large-scale, general indicator sectors (e.g. economy), goals (e.g. economic strength and resilience), and specific individual indicator measures (e.g. unemployment rate).
  - The development and maintenance of indicators programs varied widely across organizations contacted. Development processes cited included a citizen review committee in conjunction with the Chamber of Commerce (Jacksonville); Board of Directors in conjunction with experts in the field (Oregon); a sustainable city plan with 2010 performance-based targets (Santa Monica); and a small number of non-profit staff members in conjunction with several dozen community volunteers (San Mateo).
- *Aspects of the plan’s development that are integral to its overall success:* Citizen participation for support, buy-in, and ownership was by far the most cited factor in the success of indicator projects (Boston, Jacksonville, Sarasota, San Mateo). This also includes “adopt an indicator” programs to increase project ownership (Truckee Meadows). Vision and specific goal areas was also mentioned (Santa Monica). Long view and consistency was included as well (Charlotte). It was also noted that projects should be limited in scope, and realistic about timelines (Santa Monica).
- *Primary stakeholders:*
  - Stakeholders varied widely depending on what type of organization had ownership over the indicators project. Generally speaking, government leaders, business leaders, and the general public played a major role in all the indicator programs contacted.
  - Specific examples of stakeholders cited include: the United Way, commercial services, The Chamber of Commerce, local government, and environmental groups were all invited (Jacksonville); Governor (chair of

Oregon Progress Board), representatives from districts in the state (Oregon); city staff, Task Force on the Environment, Council (Santa Monica); SCOPE (non-profit which does indicator work), community at large, nonprofits (Sarasota); Planning Department, Police Department, County Department of Social Services, School System, Mental Health, Researchers (Charlotte).

- *Benefits of having a sustainability plan:* Benefits were cited from many of the organizations contacted. These include: better allocation of resources (Santa Monica); better communication with the constituency (Santa Monica); real-world performance benefits (Santa Monica); acquisition of additional funding (Boston); sharing of ideas and data with other groups (Boston); ability to develop visual tracking method of progress (i.e. maps) (Charlotte); quality of life improvement (Truckee Meadows).
- *Impact of indicators on decision makers:* Indicators programs in most of the jurisdictions contacted have been used by decision makers. They have been used to update the General Plan (Santa Monica); to convene decision makers and business leaders about issues (Boston); for grant writing (Sarasota); to acquire additional funding for projects in specific areas (Charlotte); to change water use in certain areas (San Mateo); and to include in the county's strategic planning process (Truckee Meadows).

#### Performance Indicators/Targets

- *Use of performance indicators or targets:*
  - All projects contacted use indicators; some set targets and goals (prescriptive approach), and others do benchmarking and trend analysis (descriptive approach). Descriptive projects only assess current conditions and show trends over time, but make no attempt to determine whether a trend is good or bad or to set goals. This makes it more difficult to make policy decisions; however, it keeps dialog about an issue open.
  - Most projects contacted (five) were used to increase public information and inform public expenditures. Seven projects cited that they were used to determine public policy. Three were used to rank performance (greater detail in Appendix B).
- *How indicators/targets are developed:*
  - Most indicators are data-driven, in that topics which already have data readily available are included.

- The process for developing indicators ranged widely from project to project. Some were done in a more top-down approach with a select few individuals who determined the indicators that would be used, and others held several large-scale community meetings to collect public feedback. Often a group of indicators was selected, then community participation was used to narrow this list and determine how to measure the indicators, and then the indicators were developed in-house by staff.
- *Reviewing, changing, modifying indicators:* Most indicator programs have in place a process for reviewing, adding/deleting, or otherwise modifying indicators. Two cited an annual review process (Jacksonville, Santa Monica); two cited a two-year review cycle with collaboration with the community (Boston, Charlotte); and one reviews indicators within a committee on an as-needed basis as issues arise (San Mateo).
- *Successful indicators:* Successful indicators tend to be those with readily available, reliable, replicable data. These included: housing, education, economy, social, physical development, energy use, water use, air quality.
- *Problematic indicators:* Problematic indicators tend to be those with limited data available and questionable indicator definitions. These included: cultural life and the arts, civic vitality, mental health, environment, learning preparation, human dignity, civic participation, education, crime, and land use and open space.

#### Public Participation Process

- *Public process:* Inclusion of the public in the indicators projects varied by project. Some projects were very inclusive (Jacksonville, Charlotte, Truckee Meadows), and others were mainly driven by staff and experts (Oregon). Those that were inclusive, held both large (Jacksonville, Truckee Meadows) and small (Sarasota, Charlotte, Truckee Meadows) scale meetings. Some also held both and used e-surveys and written feedback from the community as well (Truckee Meadows).
- *Amount of public participation:* The amount of participation varied by project; however, all agreed it was essential. In updating the indicators, 18 months was mentioned as a timeframe (Truckee Meadows).
- *Benefits of public participation:* The benefits of public participation were heralded. It provided for community buy-in and ownership of the project (Jacksonville, San Mateo) and high utilization of the report/indicators (Jacksonville)

- *Drawbacks to public participation:* While it was noted that citizen participation is essential, it was also noted that it can be difficult working with certain members of the public (Santa Monica), and that there was some difficulty with determining “indicators” versus “issues” with the public because they are not experts (Sarasota).

## Lessons Learned

- *Changes to approach/process of plan development:* There were many lessons learned that were shared by projects. In terms of the approach to the process, lessons cited included: being more inclusive in the approach (Oregon, Boston, Charlotte); starting with a shared community vision (Jacksonville); considering what geographic level to measure each indicator at (Jacksonville); maintaining a more realistic timeline (Sarasota); and being more proactive about distribution of the report (San Mateo).
- *Changes to performance indicators or targets:* In terms of the actual indicators selected, lessons cited included: setting strong indicators and not changing them frequently. This ensures tracking of trends over time. Without this, the indicators are much less useful (San Mateo).
- *New directions and initiatives spurred by indicators:* Specific examples of initiatives started as a result of the indicators were cited. Such examples include: with regard to energy and greenhouse gas indicators, Solar Santa Monica was created and human dignity indicators have influenced a rethinking of the homeless issue (Santa Monica). In addition, it has caused the three local governments to work more closely on regional issues and regional planning and has caused the discussion of impacts from policy decisions to be broader than just fiscal, considering environmental and other impacts, across indicators (Truckee Meadows).

## What Does this Mean for Montgomery County?

In terms of applying the results of the questionnaire to Montgomery County, the key messages could be categorized into the following broad areas:

### Developing an Indicators Program

- An indicators program should start with a clear shared community vision to measure against. This clear vision will also lead to specific goal areas and targets for the indicators.
- Montgomery County should determine whether they want their indicators project to be descriptive (just state facts, track trends) or prescriptive (set goals and targets to meet).



- Determine what is important for analyzing “quality of life” or “sustainability.”
- Attention should be paid to the level of geography used for each indicator. Some indicators are better analyzed at the neighborhood level; others at the city level; others at the county level. Boston has an option on their website to cross-cut data at different geographic levels (different neighborhoods, Metro Boston, inner-core).

#### Convening Public Participation

- The process of indicator selection should be open and inclusive from the beginning.
- Public participation should be highly emphasized for stakeholder buy-in, support, and ownership. The indicators will more likely be used by decision-making bodies if the project has strong roots in the community.
- Targeted participation (selection of certain individuals, experts, sectors of the community) may be useful to maximize meaningful positive public feedback, while minimizing negative feedback.
- Think about who needs to be invited to the table to make decisions – what other departments and organizations, what stakeholders, and how and who do you reach out to in the public?

#### Program Implementation

- Need for both top-down support (from Council) and bottom-up support (from public).
- Start small / manageable. Choose artificial boundaries if necessary to limit scope of the project.
- Be realistic with regard to the project timeline.
- Focus on the long view and on consistency. Do not change indicators for 3-5 years at least as it is important to acquire data over time to track trends.
- Be proactive about distributing the report widely to different Departments, the public, the Council, etc. to encourage more widespread support, ownership, healthy competition between cities, and implementation by decision makers.
- Once selected, “ownership” or “adoption” of indicators is essential to ensure that the data is being used and appropriate positive changes are implemented. It must be determined who owns the indicator and what the target is. Truckee Meadows has implemented a successful “adopt an indicator” program.

## SUSTAINABLE QUALITY OF LIFE

### APPENDIX A: REFERENCE INFORMATION (TABLES AND QUESTIONNAIRE)

Table 1: Background Information about Indicators Programs Contacted

Jurisdiction/ Name of Indicators Program	Date Program Started	Current Number of Indicators	Indicator Categories	Goals of Project	Contact Information	Website
Boston, MA/ The Boston Indicators Project	2000	10 indicator sectors, 70 indicator goals, 150 individual measures  (i.e. indicator sector = Housing; indicator goal = Housing Affordable to All Residents; Individual measure = Median home price vs. median household income, Metro Boston)	Civic Vitality, Cultural Life and the Arts, Economy, Education, Environment, Health, Housing, Public Safety, Technology, Transportation	Democratize access to information; Foster informed public discourse; Track progress on shared civic goals, report on change.	Charlotte Kahn, Sr. Director <a href="mailto:cbk@tbf.org">cbk@tbf.org</a> 617-338-1700  Tim Davis, Director of Research <a href="mailto:Tim.davis@tbf.org">Tim.davis@tbf.org</a> 617-338-1700	<a href="http://www.bostonindicators.org">www.bostonindicators.org</a>
Jacksonville, FL/ Quality of Life	1985	9 indicator sectors, 111 individual measures	Education, Economy, Environment, Social wellbeing, Arts/culture/ recreation, Health, Government, Transportation, Safety	Provide ongoing analysis of the state of the region; Monitor effectiveness of solutions proposed	Ben Warner Deputy Director JCCI <a href="mailto:ben@jcci.org">ben@jcci.org</a> (904) 396-3052 ext.14	<a href="http://www.jcci.org/statistics/qualityoflife.aspx">www.jcci.org/statistics/qualityoflife.aspx</a>
State of Oregon/ Oregon Benchmarks	1999	7 indicator sectors, 91 individual measures or "benchmarks"	Economy, Education, Civic engagement, Social support, Public safety, Community development, Environment	Provide long view perspective; Used for a broad array of policymaking and budget- related activities; State agencies are required to link their performance measures to it	Rita Conrad Executive Director <a href="mailto:rita.r.conrad@state.or.us">rita.r.conrad@state.or.us</a> (503) 378-3202  Jay Grussing Data Analyst <a href="mailto:jay.grussing@state.or.us">jay.grussing@state.or.us</a> (503) 378-3205	<a href="http://benchmark.oregon.gov/">benchmark.oregon.gov/</a>
Santa Monica/ Sustainable City Indicators	1994	8 indicator sectors, 60 individual measures	Resource Conservation, Environmental and Public Health, Transportation, Economic Development, Open Space and	Present vision for sustainability; Represent what Santa Monica must achieve to become a sustainable city.	Shannon Parry Program Coordinator <a href="mailto:shannon.parry@smgov.net">shannon.parry@smgov.net</a> (310) 458-2227	<a href="http://www.smgov.net/epd/scp/goals_indicators.htm">www.smgov.net/epd/scp/goals_indicators.htm</a>

			Land Use, Housing, Community, Education and Participation, Human Dignity			
Sarasota, FL/ Sarasota County Openly Plans for Excellence (SCOPE) Community Report Card	2005	8 indicator sectors, 121 individual measures	Civic Participation, Culture & Recreation, Economy, Health & Medical Care, Learning, Natural environment, Social environment, Transportation, Built environment	Engage community in planning; Monitor change to enhance the quality of life; Tool that people in our community can use to better understand Sarasota County	Kate Irwin Data & Indicators Coordinator <a href="mailto:kirwin@scopeexcel.org">kirwin@scopeexcel.org</a> (941) 365-8751	<a href="http://www.scopeexcel.org/data/index.html">www.scopeexcel.org/data/index.html</a>
Charlotte, NC & Mecklenburg County / Quality of Life Indicators	1993	4 indicator sectors, 19 individual measures	Social, Physical, Crime, Economic	Monitor neighborhood level quality of life and take proactive actions to protect and improve these basic building blocks of the city.	Stanley Watkins Director Neighborhood Development, City of Charlotte <a href="mailto:swatkins@ci.charlotte.nc.us">swatkins@ci.charlotte.nc.us</a> (704) 336-3796	<a href="http://216.1.6.76/cgi-bin/MsmGo.exe?grab_id=129660186&amp;EXTRA_ARG=&amp;CFGNAME=MssFind%2Ecfcg&amp;host_id=1&amp;page_id=1136&amp;query=%22quality+of+life%22&amp;keyword=QUALITY+LIFE+QUALITIES+QUALITYS+">216.1.6.76/ cgi- bin/MsmG o.exe?grab id=12966 0186&amp;EXTR A_ARG=&amp;C FGNAME= MssFind%2 Ecfcg&amp;host id=1&amp;page id=1136&amp; query=%22 quality+of+ life%22&amp;hi word=QUA LITY+LIFE+ QUALITIES+ QUALITYS+</a>
San Mateo County/ Sustainable San Mateo	1998	3 indicator sectors, 32 individual measures	Environment, Economy, Society	Fact-based information about local trends over time	Tyler Hammer Executive Administrator (650) 638-2323 <a href="mailto:tyler@sustainable sanmateo.org">tyler@sustainable sanmateo.org</a>	<a href="http://www.sustainable sanmateo.org/indicators-report">www.sustainable sanmateo.org/indicators-report</a>
Truckee Meadows/ Truckee Meadows Tomorrow	1994	10 indicator sectors 33 individual measures	Arts & cultural vitality, Civic engagement, Economic wellbeing, Education & lifelong learning,	A stipulation of Regional Planning was that Truckee Meadows must define and monitor its area's quality of	Karen Hruby, Executive Director (775) 323-1518 <a href="mailto:karenhruby@sbcglobe.net">karenhruby@sbcglobe.net</a>	<a href="http://www.truckeemeadowstomorrow.org/indicators">www.truckeemeadowstomorrow.org/indicators</a>

			Enrichment, Health & wellness Innovation, Land use & infrastructure, Natural environment, Public wellbeing	life		
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Table 2: Demographic Information about Indicators Programs Contacted

Jurisdiction/Name of Indicators Program	Public or Private Undertaking	Population of Jurisdiction in 2000 (number of people) <sup>1</sup>	Population of Jurisdiction in 2006 (number of people) <sup>2</sup>	Land Area of Jurisdiction in 2000 (square miles) <sup>3</sup>
<b>City</b>				
Boston, MA/ The Boston Indicators Project	Public-Private	589,141	575,187	48
Jacksonville, FL/ Quality of Life	Private	735,617	799,875	758
Santa Monica/ Sustainable City Indicators	Public	84,084	88,244	8
Sarasota, FL/ Sarasota County Openly Plans for Excellence (SCOPE) Community Report Card	Private	325,957	369,535	15
<b>County</b>				
<b>Montgomery County, MD</b>		<b>873,341</b>	<b>932,131</b>	<b>496</b>
Charlotte, NC & Mecklenburg County / Quality of Life Indicators	Public	540,828 (city)/ 827,445 (county)	648,387 (city)/ 695,454 (county)	242 (city)/ 526 (county)
San Mateo County/ Sustainable San Mateo	Private	707,161	705,499	449
Truckee Meadows (encompasses Reno- Sparks/Washoe County area)/ Truckee Meadows Tomorrow	Private	339,486 (Washoe County)	396,428 (Washoe County)	6,342 (Washoe County)
<b>State</b>				
State of Oregon/ Oregon Benchmarks	Public	3,421,399	3,700,758	95,997

<sup>1</sup> According to the U.S. Census Bureau 2000 Census.

<sup>2</sup> According to the U.S. Census Bureau 2006 American Community Survey.

<sup>3</sup> According to the U.S. Census Bureau State & County Quick Facts.

## SUSTAINABLE QUALITY OF LIFE

### APPENDIX B: DETAILED QUESTIONNAIRE FEEDBACK

#### Sustainability/Quality of Life Plan Development

- Impetus for indicators project development
  - One jurisdiction began thinking differently about its relationship with the world and what it meant to improve the 'quality of life' (QOL) in communities. It wanted to expand this view to be larger than just economic. It wondered how QOL could be measured, and decided to use indicators (Jacksonville).
  - Indicators were recommended by the Task for on the Environment in response to Rio Declaration. This group created the Sustainable City Plan in 1994 with 4 goals; by 2000 it grew to 8 goal areas (Santa Monica).
  - The impetus for some of the projects is commitment from funders for long-term research (Boston).
  - For others, it evolved out of state planning efforts, such as Oregon Shines, an economic revitalization plan for the state, which required a measurement technique (Oregon).
  - Other programs are more neighborhood-specific. Indicators were used to look at inner-city neighborhood to determine if city improvement efforts were working. This project was conducted by a local university (UNC-Chapel Hill) to do the indicator research based on other work being done nationally (Charlotte).
  - Some organizations are private non-profits who administer the indicator research and produce reports. These are not directly affiliated with the local or county government. For one project, the impetus came out of the Earth Summit, and the desire for a citizen-community project (San Mateo).
- How indicators programs work
  - Many of the projects are designed to be long term to analyze trends.
    - Determining the indicator sectors is usually a long process that involves convening large groups of stakeholders.
  - Each year, citizens convene to review the QOL report. The report is measured against the vision. A citizen review committee reviews the draft report of the indicators, and adds and removes indicators, prioritizes issues, and red-flags important issues. This committee is lead by the incoming head of the Chamber of Commerce (Jacksonville).
  - Benchmarks and targets may be established by a board of directors through interaction with experts in the field (Oregon).
  - The Sustainable City Plan has large scale guiding principles, 8 goal areas, and then specific goals within those goal areas. Specific indicators track progress on the goals. Each has a performance-based target (2010 target) (Santa Monica).
  - Some organizations are run by both staff, and an even larger number of volunteers (from varied fields like transportation, education, health), who serve on an Indicators Committee. Each year, they come together to guide the project, to determine what has worked, and what work needs to be done on the

indicators. The program has developed a research guide and Excel files to crunch the data, and volunteers from the community each take on an indicator to do the work. This requires roughly 35 people. A new effort has included local high school students who excel in their work. Consultants review all the work (San Mateo).

- Aspects of the plan's development that are integral to its overall success
  - Citizen participation (this was echoed by all indicator projects)
    - Gaining large-scale public support (Boston).
    - Brining people on board so that the process is data-driven and people look to the results as representative (Boston).
    - Citizens think of new things that staff did not consider (Jacksonville).
    - Citizen participation encourages community ownership of the project (Jacksonville).
    - By engaging citizens, the city is viewed as a neutral convener, and gains trust (Jacksonville).
    - Input from the community was essential. A meeting was held every week for two months to learn about indicators. Indicators were selected based on whether there was data available (Sarasota)
    - Community buy-in is essential for those who will use the product (San Mateo)
  - Clear vision at the start, which will lead to specific goal areas and targets (Santa Monica).
  - Look at outcomes, not actions (Santa Monica).
  - Start small / manageable. Choose artificial boundaries if necessary to limit scope of the project (Santa Monica).
  - Long view, consistency (Charlotte)
  - Making information publically available (Charlotte)
  - Meet with elected officials to determine what is important (Charlotte)
  - Adopt an indicator program. Participants were asked to adopt the indicators, providing stewardship for improvement following the grant. Then the adoption program was opened to the entire community. Over the last decade, there have been about 750 adoptions of the QOL indicators, by hundreds of individuals and organizations. Adoption is free and open to anyone, including students and families. In 2007, the program was put online. Anyone can adopt the indicators they are passionate about and report their actions / outcomes online. The compacts program goes to the next level, through a formalized contract agreement among the compact partners and Truckee Meadows Tomorrow to improve targeted indicators, over a specific time period, including deliverable reporting and stewardship following the compact. To date there have been 7 successful compacts with documented results. Initial seed money was essential to advertise the adoption program, followed by adopter recognition via newsletter articles, event programs, and media stories. (Truckee Meadows).
- Primary stakeholders

- An open process is essential from the beginning. The United Way, commercial services, The Chamber of Commerce, local government, and environmental groups were all invited. They strived for breadth and inclusion at the beginning. As a “Community Report,” they felt everyone should be involved because “everyone is a stakeholder” (Jacksonville).
- Governor (chair of Oregon Progress Board), representatives from districts in the state (Oregon).
- City staff, Task Force on the Environment, Council (need top-down support) (Santa Monica).
- SCOPE (non-profit who does indicator work), community at large, nonprofits (Sarasota)
- Planning Department, Police Department, County Department of Social Services, School System, Mental Health, Researchers (Charlotte).
- Nonprofit leaders, government leaders, and citizens (San Mateo)
- Benefits of having a sustainability plan
  - Can allocate resources appropriately (Santa Monica).
  - Can communicate with constituency in a positive manner (Santa Monica).
  - Will see real-world performance benefits (Santa Monica).
  - These programs can bring in additional funding from outside sources (Boston).
  - They also encourage cross-pollination of ideas and sharing of data with others (Boston).
  - Able to show a map with problem areas so policy makers must address issues (Charlotte).
  - Collective actions leading to QOL improvement, one indicator at a time (Truckee Meadows).
- Impact of indicators on decision makers
  - Indicators have been a “critical element” and have been used to update the General Plan (land use, circulation, and housing) (Santa Monica).
  - Some programs strive to be a ‘convener’ for decision makers and business leaders for making decisions about data. In Boston, a quarterly meeting is held with 300 decision makers and business leaders, and indicators data is used (Boston)
  - Some programs survey decision makers to determine how they use the indicators. Key areas, especially human services are linked in (Jacksonville).
  - Difficulty arises where there is only data and no community support or use of information. “Ownership” of indicators is essential (Jacksonville).
  - Report cards helpful for grant writing (Sarasota).
  - Elected officials give additional funding for neighborhood outreach efforts (Charlotte).
  - One organization hired an outreach consultant to present its annual findings to the community and elected officials. While this group was passive in the past, they have become more pro-active about putting their report out and their outreach efforts, so decision makers have become more tuned into the report

- and progress. For instance, water use was found to be very high in an affluent neighborhood, and this has been addressed since the last report (San Mateo).
- Report has been used in General Plan for data and background information (San Mateo).
  - Caused the county to use the QOL indicators in their strategic planning process and performance reporting (Truckee Meadows).

### Performance Indicators/Targets

- Use of performance indicators or targets
  - All projects contacted use indicators; some set targets and goals, and others do benchmarking and trend analysis
    - Indicators are sometimes discussed in terms of trends, not goals. Programs that use this method indicate whether the trend is going up, down, or staying the same without declaring a specific goal or whether or not a trend is positive or negative (Boston).
    - Some projects are descriptive as opposed to prescriptive. Descriptive projects make it more difficult to make policy decisions. This is sometimes preferred because it creates an open dialog. In 1991, Jacksonville set targets for 2000 that didn't work; in 2000 they set targets for 2005 which worked better, but still not well. The problem was that no entity took ownership over the target. Need to determine who owns the indicator and what the target is working towards (Jacksonville).
    - No targets are used because they do not want to imply that a certain measure must be achieved to succeed (Sarasota)
  - Many are used to increase public information, inform public expenditures, rank performance, and determine public policy
    - Public Information
      - The Metro Boston Data Common is taking the indicators data collected to manipulate it and make it more user-friendly for the public (Boston)
      - Value-added, non-political information becomes available (Boston)
      - Awareness and community actions (Truckee Meadows)
      - Santa Monica
      - Sarasota
      - Charlotte
    - Public Expenditures
      - Boston
      - Jacksonville
      - Santa Monica
      - Charlotte, especially in neighborhood revitalization
      - County performance reporting (Truckee Meadows)
    - Rank Performance



- Boston
  - Santa Monica
  - Ranks its cities, encourages competition between cities (San Mateo).
- Determine Public Policy
  - Boston
  - Oregon
  - Santa Monica
  - Charlotte
  - San Mateo
  - Truckee Meadows
  - The indicators program is looked to as a core shared resource. It is used by all decision makers, including the United Way, business leaders, the Chamber of Commerce, at CEO orientation, by community activists, by local radio/television programmers, and the Sherriff's office. This is because it is citizen-based and rooted in the community (Jacksonville).
- How indicators/targets are developed
  - With the Chamber of Commerce, 100 volunteers were selected to determine which indicators to use and how to measure them (Jacksonville).
  - Most indicators are data-driven, in that topics which already have data readily available are included (Boston).
  - Large-scale meetings (4-6) after a small set of indicators was determined (Santa Monica).
    - Facilitator – Maureen Hart is highly recommended. Maureen Hart, President of Sustainable Measures, develops and presents training courses on sustainability and indicators, provides technical assistance to community indicator projects, evaluates indicators and indicator sets, consults with businesses and business-related non-profits on sustainable production indicators, consults with foundations and other grant-making organizations on defining strategies for and evaluating decisions relating to funding sustainable development related projects, and does research on measuring sustainability. (Santa Monica).
  - Indicators were selected through a community-wide process, and then they were developed by staff in house (Sarasota).
  - University researchers at UNC-Chapel Hill researched other indicator programs and selected the indicators to use (Charlotte).
  - Targets have not been set due to limited staff resources, but they plan to set benchmarks and targets in the future to create a 'sustainability plan.' To date, trends have been tracked, and information has been presented in an objective fashion (San Mateo).
- Reviewing, changing, modifying indicators

- Two year review cycle; convene people for each of the 10 indicator sectors to see if indicators are still valid, or if new indicators should be included. Afternoon-long event. People are selected over time based on their expertise in the field (Boston).
- Environment indicator used to mean only green space; now it has been extended to the context of climate change (Boston).
- Annual review cycle; of the original 85 indicators, about 45 are the same. An additional 60 indicators have been added (Jacksonville).
- Annual review cycle; some indicators are not explaining what they should be. Believe that a project should report on an indicator for 3-5 years before changing it (Santa Monica).
- Two-year review cycle; measures change over time, and the program has been extended to city-wide instead of just inner-city neighborhoods (Charlotte).
- Reviewed on as-needed basis by Indicators Committee as important issues arise, like climate change and disaster preparedness (San Mateo).
- Successful indicators (tend to be those with readily available, reliable, replicable data)
  - Housing – data readily available; great deal of dialog about the issue already (Boston)
  - Education
    - very important for driving decision making (Boston)
    - easy to measure (Jacksonville)
  - Economy – easy to measure (Jacksonville)
  - Social
    - easy; great deal of data (Oregon)
    - easy; great deal of data (Charlotte)
  - Physical development indicators such as crime are very helpful (Charlotte)
  - Energy Use – easy, noncontroversial, available data (San Mateo)
  - Water Use – easy, noncontroversial, available data (San Mateo)
  - Air Quality – easy, noncontroversial, available data (San Mateo)
- Problematic indicators (tend to be those with limited data available, and questionable indicator definitions)
  - Cultural life & the arts – data not readily available; difficult to measure (Boston)
  - Civic vitality – data not readily available; difficult to measure (Boston)
  - Mental health – difficult to measure (Jacksonville)
  - General issues that lack data, such as early learning preparation, quality of life for the elderly, etc. (Jacksonville)
  - Environmental – need work; difficult to determine the benchmark needed to accurately capture the data; data not there; trade-offs with other indicators (Oregon)
  - Human Dignity – important but data not available (Santa Monica)
  - Civic participation – important but data not available (Santa Monica)
  - Education – problematic methodology and data (San Mateo)
  - Crime – problematic methodology and data (San Mateo)

- Land Use and Open Space – problematic definition of open space (San Mateo)

### Public Participation Process

- Public process
  - Everyone interested in the program (large-scale community involvement) gathered at a meeting to discuss (Jacksonville).
  - The benchmarks were a Board decision, with collaboration with experts; Oregon Shines included a lot of public involvement and strategic planning in developing the revitalization plan (Oregon).
  - Large Community Assembly (350 people) met to discuss issues, facilitated by Executive Director of SCOPE. Small meetings were then held of 10-15 people who volunteered and were selected out of the Community Assembly to determine indicators (Sarasota).
  - Initially, there was a great deal of public dialog about where the boundaries of geographic analysis should be. Agreement about neighborhood designation was needed (Charlotte).
  - Several town meetings were held in which indicators were presented, and feedback about which to include was obtained from the community.
  - The 2005-06 update process used a combination of public meetings and small group forums/roundtables, written and e-surveys, presentations/roundtables at community groups and organizations, CEO forum, input from the community's environmental scan and United Way compact to review all the indicators being used by partner agencies to measure impact, along with e-prioritization by thousands of citizens to narrow the most important indicators to QOL in the region (Truckee Meadows).
- Amount of public participation
  - This is an essential issue for Jacksonville. They involve the community in two ways: 1) On an annual basis by invitation. A grid with their nine QOL indicators is made and people are located with expertise in those areas. It is ensured that the group convened is representative of the community at large (age, gender, geographic distribution). 2) Every five years, a larger community effort is undertaken. Invitations are sent and it is open to the entire community. The invitation is published on their website and through different media. These groups then look through the elements section-by-section (Jacksonville).
  - The most recent 2005-06 process took 18-months to update the indicators. The follow-up metrics, research and survey work will take another 18-months resulting in the next community wellbeing report 2/08 (Truckee Meadows).
- Benefits of public participation
  - Buy-in and ownership of project (Jacksonville).
  - Gets used by the community because it is rooted in the community (Jacksonville).
  - Keeps costs low if there are volunteers (San Mateo).

- If this will be used as a resource to the public, it provides buy-in and ownership, as well as spreads the word (San Mateo).
- Drawbacks to public participation
  - Double-edged sword: need community buy-in, but those who come out tend to be on the extreme (usually negative); suggests going out for targeted participation (Santa Monica).
  - The citizen group selected “issues” not “indicators,” which meant that there was not data readily available for all the things they wanted to look at (Sarasota).
  - Challenging to work with the public (San Mateo).

### Lessons Learned

- Changes to approach/process of plan development
  - Would include an inclusive approach to engaging the state (Oregon).
  - Broaden convening groups to determine if the ‘right’ people were included (Boston).
  - Start with a shared community vision to measure against. Indicators need to be useful, and flexibility is needed when making decisions, especially about what geographic level to measure. Some issues should be measured at the neighborhood level, while others at the county. An issue may be missed if the wrong geographic level is analyzed (Jacksonville).
  - Would house it in the City Manager’s office, so there was no need to horizontally influence other city entities from the Environmental Department (Santa Monica).
  - Keep funding out of the general fund (Santa Monica).
  - Not so ambitious; would have included a more realistic timeline (such as one forum per year, instead of 4) (Sarasota).
  - Need public participation (Charlotte).
  - Must determine what is important for determining “quality of life” (Charlotte).
  - Would be more aggressive/proactive about distributing the report widely to different Departments, the public, the Council, etc. (San Mateo).
  - Establish endowment funding to continue the work each year. This organization is an independent nonprofit, funded through memberships, contributions and grants. Since it is not actually a “service provider” it is extremely difficult to generate grant funding, even though its work benefits and overall QOL in the region, benefiting every citizen, business, organization and individual (Truckee Meadows).
- Changes to performance indicators or targets
  - Some new data sources should be located (Boston).
  - There was controversy over the ecological footprint issue, as to whether it was a “measure” or an “indicator” (Sarasota).
  - There was criticism received regarding how neighborhoods were labeled as “fragile” or in need. This was changed to indicate stable, transitioning, and challenged neighborhoods (Charlotte).

- Be sure to set strong indicators initially and then do not change them. It is important to have continuity to track trends over time (San Mateo).
- New directions and initiatives spurred by indicators
  - With regard to energy and greenhouse gas indicators, Solar Santa Monica was created; human dignity indicators have influenced a rethinking of the homeless issue (Santa Monica).
  - Led the three local governments to work more closely on regional issues and regional planning and has caused the discussion of impacts from policy decisions to be broader than just fiscal, considering environmental and other impacts, across indicators (Truckee Meadows).

## SUSTAINABLE QUALITY OF LIFE

### APPENDIX C: Details of the Public Participation Process

The Sustainability Team is currently researching how other jurisdictions throughout the U.S. developed, communicated and continue to maintain sustainability and quality of life indicator programs. The collected information benefits the Department by providing insight into how indicator programs are created, and how they evolve over time. This memo provides some initial thoughts about how Montgomery County can develop its indicators program, and an associated outreach program targeted to three distinct groups of stakeholders. The ideas provided here are meant to offer only a starting point for further discussion; they are not viewed as the course that should be followed. *It should be noted at the outset that developing a successful outreach program will require consultant assistance and expertise, as well as additional staff within the Department.*

#### Vision for the County

The proposed Growth Policy, currently under consideration by the County Council, proposes that future growth within the County should pursue a goal of sustainability. The Growth Policy states:

*Sustainable Development meets the needs of the present without compromising the ability of future generations to meet their own needs. It recognizes the fundamental inextricable interdependence between the economy, the environment, and social equity, and works to promote each to the benefit of all.*

Using this guiding principle, the Department has also proposed using sustainability, or quality of life indicators to monitor progress in key aspects of sustainability.<sup>4</sup> Based on staff research, supplemented by a survey of other jurisdictions conducted by a researcher from the University of Maryland, it appears that sustainability indicator programs are most effective when originated:

- a) From the top down (e.g., by a high level elected official) as done in Mecklenberg County, NC; or
- b) From the ground up, such as through the efforts of a grass-roots campaign as done in Jacksonville, FL.

In between, the larger stakeholder groups must also be involved. These stakeholders include civic associations, Chambers of Commerce and other business organizations, religious institutions, and other stakeholders integral to both the built environment of Montgomery County, but also integral to providing a high quality of life. Educating and achieving buy-in for these distinct constituencies requires tailored outreach strategies and timeframes that reflect different interests and subject knowledge.

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<sup>4</sup> Department staff recognizes that growth can be sustainable without improving quality of life. Similarly, growth may not be sustainable over time yet in the short term enhance quality of life. There is suitable overlap between the two; the goal of the Planning Department is to achieve sustainability *and* enhance quality of life.

## **Developing a Strategy**

### ***Outreach***

The outreach strategy involves three distinct components:

- 1) **Education** of the various constituent groups, particularly decision-makers, about what indicators do and how they can be used; and
- 2) A **marketing** effort, intended to bring greater awareness about the underlying premise of sustainability, identify what that means in real terms, and how indicators relate to policy efforts.
- 3) Create a **support** network to develop meaningful input to both strengthen program understanding, and develop indicators reflective of community needs, better ensuring buy-in and involvement over time.

Since the Council has asked for development of an indicators program, an outreach strategy should proceed with their support. Defining the program and communicating that to stakeholders is the first step to take to ensure buy-in and continued support.

### ***Education***

Tools to better inform stakeholders can include a multimedia presentation similar to the recently produced marketing video developed by Community Relations. The program should make full use of technology as a tool to greatly increase public participation, not only to provide information but also to gather public input considering the extensive use of the web through web pages, videos on the web, blogs, list serves, as well as other technologies such as electronic voting. In addition, the Council and Executive Staff may require in-person workshops, conducted by Planning staff, to develop a keen understanding of what indicators do and how they might be used. Convening an expert panel can add to the knowledge base of elected officials and staff as the program evolves. Table 1 offers a high level breakdown of a possible multi-tiered outreach strategy targeting different constituencies using different outreach tools.

### ***Marketing***

Concurrently, the Department can also implement a marketing campaign to develop buy-in from stakeholder groups, particularly the business community. This effort will likely necessitate consultant assistance to most effectively raise awareness about the program. But our research found that indicator programs are most successful when individual indicators are “adopted,” by an organization or community stakeholder who takes responsibility for monitoring that indicator.

***Grassroots Support***

Lastly, a successful indicator program needs grassroots support. Again, this may require consultant expertise to most effectively collect and develop outreach materials and market the program. But we know, based on demographic analysis, that the County faces growth from three key areas: 1) seniors; 2) children; and 3) non-traditional households. Effectively targeting each group can raise awareness about the program, but also inform selection of indicators based on what these groups view as sustainable development, and what attributes they identify as being integral to a high quality of life.

***Cost***

Initial investigation indicates that a similar effort cost \$500,000 in Truckee Meadows (Washoe County, Nevada). Jacksonville, Florida has a well-established program that is allocated about \$40,000 per year to maintain the indicators and public outreach.



## DESIGN EXCELLENCE

### Background

The Planning Board recommended that the County Council, when it adopts the Growth Policy resolution, include the following directive:

“The Planning Board, with the aid of the Executive, must convene a “design summit” of public agencies involved in the design and development of public facilities and the review of private development to develop consensus and commitment to design excellence as a core value in all public and private projects, and focus on how to improve design of public facilities and private development through various means including better coordination among agencies. The Planning Board must report its findings to the County Council not later than July 1, 2008.”

In addition, in its *Final Draft 2007-2009 Growth Policy*, the Planning Board identified other initiatives to further the design excellence goals in the Growth Policy. These include emphasizing design excellence in the zoning ordinance re-write, developing design protocols for the Planning Department staff, and develop urban design compendiums to master plans for mixed use centers.

### Design Summit

The Planning Department is moving forward with the Design Summit concept, exploring ideas with CADRE, a non-profit entity for planning, design and research affiliated with, and managed by, the University of Maryland School of Architecture, Planning and Preservation. More specifically, the Department is working with Professor Emeritus Roger K. Lewis, FAIA, who is a director of CADRE and well-known to area residents as a Washington Post columnist. Professor Lewis recently managed the design competition for the downtown Silver Spring Civic Building and Veteran's Plaza.

The design summit is a launching point, not only for the long process of developing a culture of design excellence but also to inform specific aspects of the Planning Department's work program in FY08 and beyond, including the zoning ordinance rewrite, the master plan reassessment, and review of the public and private development projects by staff and public officials.