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

Subdivision Staging Policy – Alternative Constructs for Transportation Adequacy Testing

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Completed: 2/1/16

Description

This item is a continuation of the Planning Board roundtable discussion held on January 14th regarding potential new Subdivision Staging Policy (SSP) constructs for transportation adequacy testing. In the context of that discussion, the Board was briefed on a potential new policy area typology structure differentiated by development character – Transit Oriented Development ("TOD") and "Beyond TOD". This typology groups the County's Metro Station Policy Areas (MSPAs), Central Business Districts (CBDs) and "Emerging Centers" as "TOD" areas while grouping the remainder of County as "Beyond TOD" areas. In addition, the Board was presented with the following three (3) alternative approaches for the application of transportation adequacy testing:

- **JOB ACCESS VIA TRANSIT & VMT/HOUSEHOLD -** This approach places a priority for the policy area-wide test on job access via transit in TOD areas and VMT per household in the Beyond TOD areas.

- **JOB ACCESS VIA TRANSIT & JOBS/HOUSING BALANCE -** This approach places a priority for the policy area test on job access via transit in TOD areas and the balance between jobs and housing in the Beyond TOD areas.

- **NON-AUTO DRIVER MODE SHARE (NADMS) & JOBS/HOUSING BALANCE –** This approach entails an initial payment in lieu of the impact tax based upon the cost of the development and the Policy Area NADMS goal.

The recent feedback received from the Board concerning the SSP is clearly focused on moving in a new direction for transportation adequacy testing. Key elements of this feedback are summarized and organized categorically as depicted below.

Place Types	**Tests for Adequacy**	**Payments**
Use Metrics to Group Places or Areas	Should Reflect Policy	How Much is Collected?
Grouping Should be Intuitive	Combine Area and Local Test Where Feasible	Where Does It Go?
Group Should Reflect Policy	Try to Address "Last In" Issue	Capital vs Operating Cost?
Consider General Plan Guidance	"Look Up" Metrics Better Than "Black Box" Metrics	
Grouping of current policy area boundaries OK	Need to Be Able to Forecast Metrics	

Today's roundtable will include discussion of the following:

- A hypothetical new SSP framework generally reflective of the County's General Plan in terms of policy area categorization and described in terms of how the approach would work with respect to: (1) **screening** to determine when transportation tests are applied; (2) **evaluation** thresholds to determine transportation adequacy and; (3) **mitigation** for inadequate transportation conditions.

- Next steps regarding the consideration of alternative new SSP constructs, including a review of key SSP Update schedule milestones.

The Planning Board is strongly encouraged to review the information provided in the PowerPoint presentation developed in support of this discussion. This item is included as an attachment to this report.

Attachment – PowerPoint presentation entitled "Subdivision Staging – New Concepts Discussion (Continued): Planning Board Worksession, February 4, 2016"

EG/ PD/TA/aj

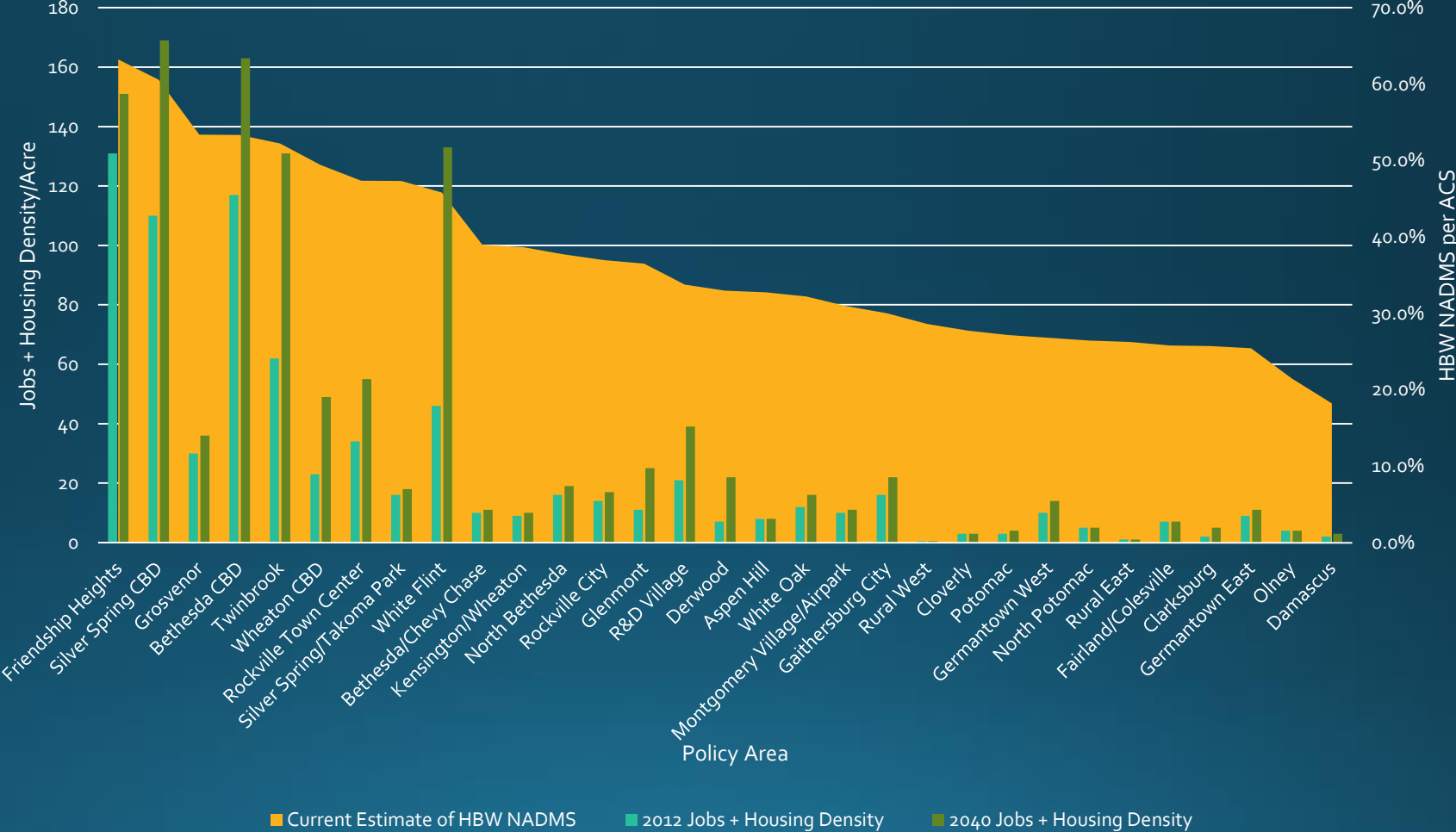# Subdivision Staging – New Concepts Discussion (Continued)

Planning Board
Worksession
February 4, 2016

What We Have Heard & Today's Focus

Place Types $\longrightarrow$ Tests for Adequacy $\longrightarrow$ Payments

Place Types
- Use Metrics to Group Places or Areas
- Grouping Should Be Intuitive
- Grouping Should Reflect Policy
- Consider General Plan Guidance
- Grouping of Existing Policy Area Boundaries OK

Tests for Adequacy
- Should Reflect Policy
- Combine Area & Local Test Where Feasible
- Simplify-Try to Address "Last In" Issue
- "Look Up" Metrics Better Than "Black Box" Metrics
- Need to Be Able to Forecast Metrics

Payments
- How Much Is Collected?
- Where Does It Go?
- Capital vs Operating Costs?

= Making Some Progress

Using Three Metrics to Group Places

Comparing Existing & Future Density with Current HBW NADMS by Policy Area

Legend: Current Estimate of HBW NADMS | 2012 Jobs + Housing Density | 2040 Jobs + Housing Density

Example Grouping of Policy Areas

Core, or Corridor with Metrorail

FH
Silver Spring CBD
Bethesda CBD
Twinbrook
White Flint

Suburban, or Corridor with Metrorail, Purple Line, or CCT

Grosvenor   Silver Spring / Takoma
Wheaton CBD   North Bethesda
Rockville Town Center   Bethesda / Chevy Chase
Chevy Chase Lake   Kensington / Wheaton
Glenmont
R&D Village
Long Branch
Takoma Langley

Remaining Suburban and Residential Wedge

Rockville City
Derwood
Aspen Hill
White Oak
MV/Airpark
Gaithersburg City
Cloverly
Potomac
Germantown West
North Potomac
Fairland Colesville
Clarksburg
Germantown East
Olney
Damascus

Rural

Rural East
Rural West

Core, or Corridor with Metrorail

FH
Silver Spring CBD
Bethesda CBD
Twinbrook
White Flint

Area Test	Area Payment	Local Test	Local Payment	Impact Tax	Pay & Go?	Notes
None	None	None	None	Yes	Yes	Portion of Impact Tax Allocated to Operations?

Suburban, or Corridor with Metrorail, Purple Line, or CCT

Grosvenor

Silver Spring / Takoma

Wheaton CBD

North Bethesda

Rockville Town Center

Bethesda / Chevy Chase

Chevy Chase Lake

Kensington /Wheaton

Glenmont

R&D Village

Long Branch

Takoma Langley

	Screen	Evaluate		Mitigate		Impact Tax	Pay & Go?
Test Type >>	Local	Local	Area	Local	Area	Area	
Option 1	30 Trips	1600 clv	Job Access by Transit	25% of Impact Tax	25% of Impact Tax	Yes	Yes
Option 2	50 Trips	1700 clv	VMT / Capita Within Category	50% of Impact Tax	25 % of Impact Tax	Yes	Yes

Remaining Suburban and Residential Wedge

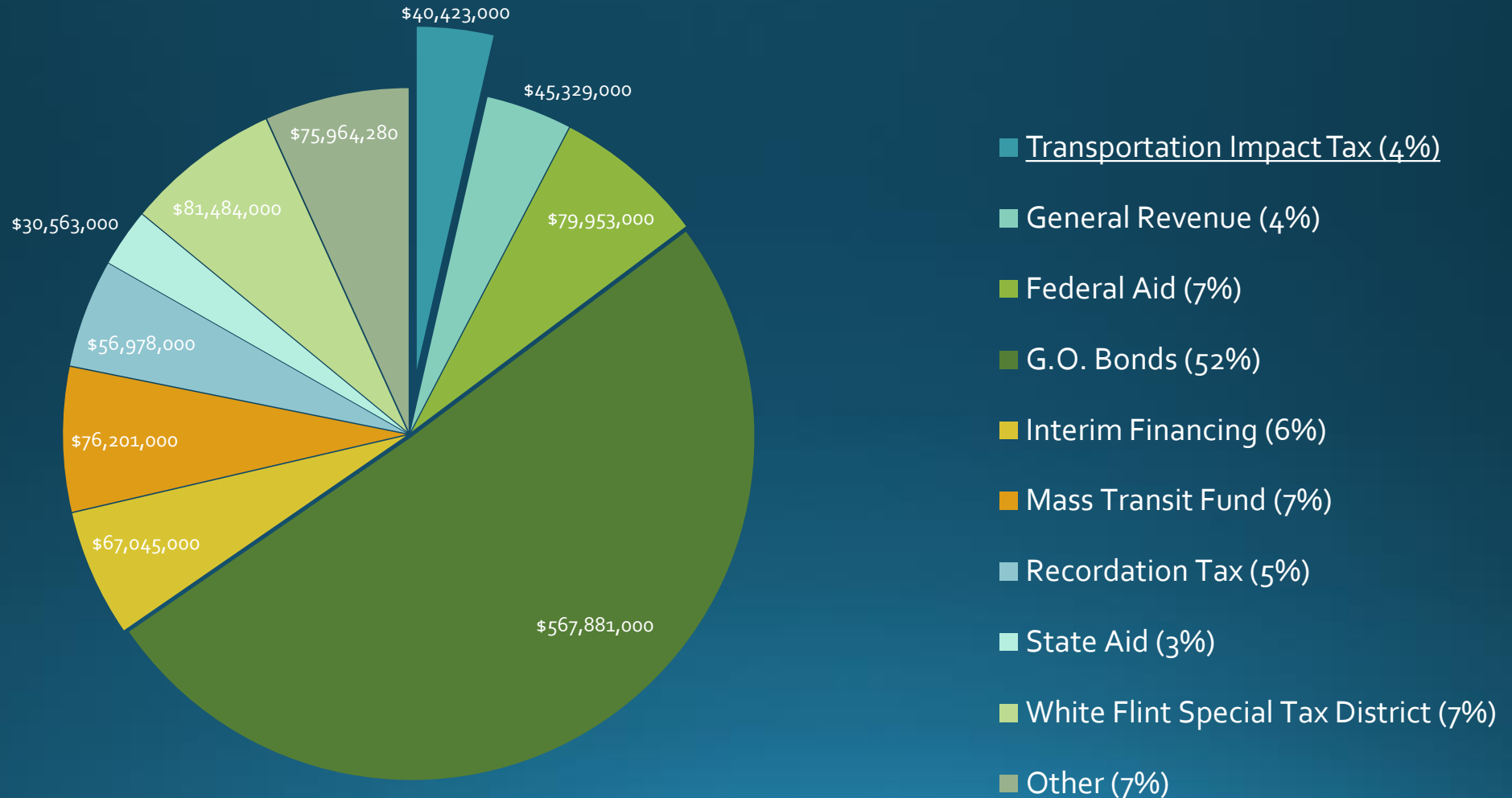|	Screen	Evaluate		Mitigate		Impact Tax	Pay & Go?
Test Type >>	Local	Local	Area	Local	Area	Area	
Option 1	30 Trips	1500 clv	Job Access by Transit	Mitigate Unless Road Code Urban Area (25% of Impact Tax)	25% of Impact Tax	Yes	No – Unless Road Code Urban Area
Option 2	30 Trips	1600 clv	VMT / Capita Within Category	Mitigate Standard Unless Road Code Urban Area (25% of Impact Tax)	25 % of Impact Tax	Yes	No – Unless Road Code Urban Area

Rockville City
Derwood
Aspen Hill
White Oak
MV/Airpark
Gaithersburg City
Cloverly
Potomac
Germantown West
North Potomac
Fairland Colesville
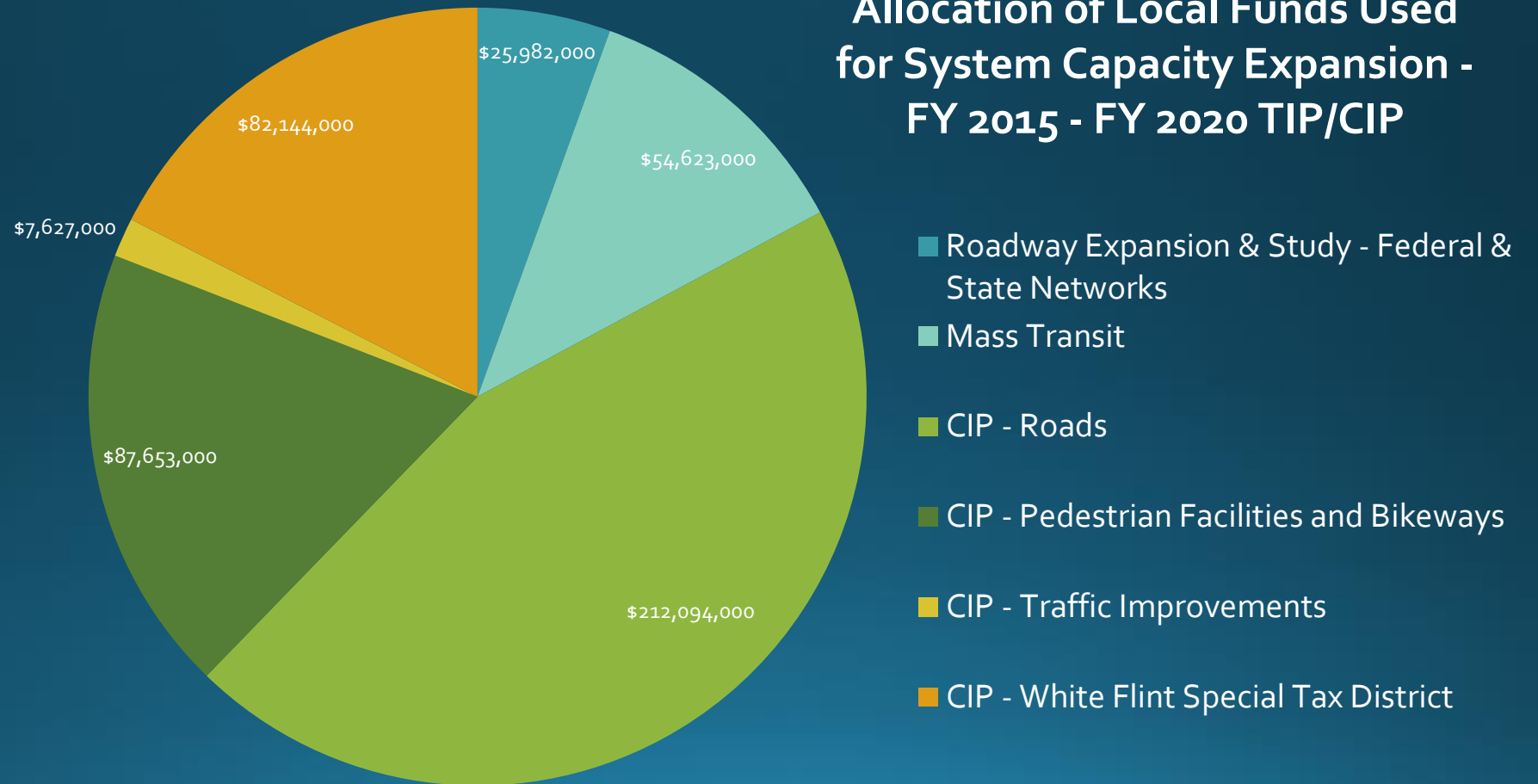Clarksburg
Germantown East
Olney
Damascus

The Transportation Impact Tax (estimated at $40.4 million over the six year CIP) funds only about 4% of all transportation projects in the CIP ...

Funding Sources for All Transportation Projects in FY 2015 - FY 2020 CIP

$40,423,000
$45,329,000
$79,953,000
$75,964,280
$81,484,000
$30,563,000
$56,978,000
$76,201,000
$67,045,000
$567,881,000

- Transportation Impact Tax (4%)
- General Revenue (4%)
- Federal Aid (7%)
- G.O. Bonds (52%)
- Interim Financing (6%)
- Mass Transit Fund (7%)
- Recordation Tax (5%)
- State Aid (3%)
- White Flint Special Tax District (7%)
- Other (7%)

The Transportation Impact Tax (estimated at $40.4 million) is a little less than 10% of the $470 million in <u>local funds allocated for capacity expansion in the six-year CIP.</u>

Allocation of Local Funds Used for System Capacity Expansion - FY 2015 - FY 2020 TIP/CIP

$25,982,000
$54,623,000
$82,144,000
$7,627,000
$87,653,000
$212,094,000

- Roadway Expansion & Study - Federal & State Networks
- Mass Transit
- CIP - Roads
- CIP - Pedestrian Facilities and Bikeways
- CIP - Traffic Improvements
- CIP - White Flint Special Tax District

Transportation Impact Tax Collections
(source Mont. Co. Department of Finance)

Fiscal Year ending in:	Transportation Impact Tax Collections for CIP Projects – Includes Cities of Rockville & Gaithersburg
2004	$ 5,245,203
2005	$ 8,470,768
2006	$ 6,252,060
2007	$ 11,500,814
2008	$ 9,743,841
2009	$ 2,398,310
2010	$ 3,812,138
2011	$ 5,444,115
2012	$ 6,352,401
2013	$ 13,179,898
2014	$ 20,274,781
2015	$ 16,643,380

PAMR Payments FY 10 – FY 16

FY 10 - $132,000
FY 11 - $176,000
FY 12 - $ 45,400
FY 13 - $383,000
FY 14 - $468,000
FY 15 - $214,058
FY 16 - $16,694

Total - $1,435,452

How Impact Tax Was Initially Calculated in 2007

	New Residential 25 Year Growth Estimate		New Commercial Growth 25 Year Growth Estimate			
A	County Capital Improvement Program (CIP) – Local $ for Projects adding Network Capacity Expansion – 25 Year Estimate					
B	**New Residential 25 Year Growth Estimate**		**New Commercial Growth 25 Year Growth Estimate**			
C	Residential Units		Office Jobs	Retail Jobs	Industrial Jobs	Other Jobs
D	Single family	Multi-Family	Office SF	Retail SF	Industrial SF	Other SF
E	Trip Rate	Trip Rate	Trip Rate	Trip Rate	Trip Rate	Trip Rate
F	New Daily Trips	New Daily Trips	New Daily Trips	New Daily Trips	New Daily Trips	New Daily Trips
G	Cost (A) Allocated by Trips (F)	Cost (A) Allocated by Trips (F)	Cost (A) Allocated by Trips (F)	Cost (A) Allocated by Trips (F)	Cost (A) Allocated by Trips (F)	Cost (A) Allocated by Trips (F)
Est. Tax Rate	G/C	G/C	G/C	G/C	G/C	G/C