



THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION

February 28, 2003

MEMORANDUM

TO: Montgomery County Planning Board

VIA: John A. Carter, Chief *JAC*
Community-Based Planning Division

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Community-Based Planning Division *KA*

FROM: Frederick Vernon Boyd, Community Planner (301/495-4654) *fvb*
Georgia Avenue Team

SUBJECT: Planning Board Worksession #5 for the Upper Rock Creek Area Master
Plan—Housing and Land Use

RECOMMENDATION: *Discussion* of options for affordable and elderly housing throughout the planning area, and for land uses on the Dungan, Casey, Freeman, Hendry, Fraley and Woodlawn properties.

Overview

The fifth worksession on the Upper Rock Creek Area Master Plan seeks the Planning Board's approval of recommendations to increase the inventory of affordable housing in the planning area and of land use recommendations on the six major undeveloped properties—the Dungan, Casey, Freeman, Hendry, Fraley and Woodlawn properties—in the Upper Rock Creek master plan area.

The land use recommendations were originally scheduled for the second master plan worksession, in December 2002. The Planning Board did not review the recommendations at that worksession, instead directing the staff to reevaluate the land use analysis for the entire master plan area with particular emphasis on increasing its contribution to the countywide inventory of affordable housing.

This memorandum reviews the results of that reevaluation and identifies individual properties that will add affordable units in this part of Montgomery County. Four development options emerged from the analysis:

- **Option 1 retains the existing land use pattern and the existing zones for the major undeveloped properties.** It envisions no extensions of community sewer service and development using septic fields. Affordable housing opportunities are more limited and are concentrated in higher density areas near commercial or industrial districts.
- **Option 2 modifies the existing land use pattern to allow cluster development that preserves environmentally sensitive areas in common ownership.** This option is the original Public Hearing Draft recommendation. It envisions use of the RE-2C Zone. It expands the sewer envelope to areas that can be served by existing sewer lines and explicitly recommends against construction of new sewer lines in stream valleys. Like Option 1, this option concentrates affordable housing near non-residential areas.
- **Option 3 modifies Option 2 to assume implementation of draft text amendments expanding the Moderately Priced Dwelling Unit (MPDU) program to large lot zones when community sewer service is available.** This option attempts to balance three important public policies: preservation of sensitive areas, retention of low-density residential character and provision of additional affordable housing. It further modifies the existing land use pattern by allowing minimum lot sizes of 15,000 square feet and by allowing affordable units to be detached or semi-detached houses. A maximum density bonus of 22 percent would be available to encourage provision of MPDUs. It also envisions use of the RE-2C Zone.
- **Option 4 emphasizes affordable housing by tying extension of sewer service to provision of MPDUs.** To receive community sewer service, a development proposal would be required to provide 20 percent MPDUs. This option would allow development in the Rural Neighborhood Cluster (RNC) Zone as a means of preserving sensitive areas in common open space. It too would modify the existing land use pattern by allowing smaller minimum lot sizes. The appropriate density would be set by the Master Plan at 0.532 dwelling units per acre, or 1.87 dwelling units per acre (0.4 units per acre multiplied by 1.33).

A table detailing the properties evaluated in the affordable housing analysis, the issues associated with each, and an approximate idea of the number of units each property might yield is on the following page.

Summary of Development Options Analysis

Property	Acres	Option 1 No Sewer Extensions		Option 2 Public Hearing Draft		Option 3 Public Hearing Draft w/MPDU Text Amnd		Option 3a Casey All RE-2C		Option 4 RNC with MPDUs on Larger Parcels	
		Yield	MPDUs	Yield	MPDUs	Yield	MPDUs	Yield	MPDUs	Yield	MPDUs
Smaller Private Parcels											
C Fraley	6	74	12	74	12	74	12	74	12	74	12
WINX*	10	0	0	73	10	73	10	73	10	73	10
Public Properties											
MCPS Sherwood #6	17	0	0	0	0	42	6	42	6	42	6
MCPS Laytonsville JHS	23	0	0	0	0	0	0	0	0	0	0
Winters Run Local Park	10	0	0	0	0	0	0	0	0	0	0
Laytonia Rec. Park	50	0	0	0	0	0	0	0	0	0	0
Muncaster Rec. Park	35	0	0	0	0	0	0	0	0	0	0
Larger Private Parcels											
Casey**	336	78 to 120	0	132	0	136	17	163	25	178	36
Dungan***	132	26 to 34	0	0	0	0	0	0	0	69	14
Freeman	332	83 to 136	0	132	0	161	25	161	25	175	35
Woodlawn	79	15 to 20	0	31	0	31	0	31	0	41	9
Totals	1030	276 to 384	12	442	22	517	70	544	78	652	122
Percentage of MPDUs		3% to 4%		5%	14%	14%		19%			

* Environmental and use constraints on the WINX property, along with compatibility issues, suggest that an appropriate density for the property is about six units to the acre. The yields shown on this spreadsheet reflect that base density. This property could also be the subject of a special exception application for elderly housing, which could yield as many as 100 units of affordable elderly housing.

** Option 2 includes 90 clustered units in the RE-2C Zone and as many as 42 septic units in the RE-2 Zone. Option 3 provides MPDUs on the portion of the property in the RE-2C Zone. Option 3a extends the RE-2C Zone to the entire property.

*** Developers of the Casey and Dungan properties have proposed joint development with a maximum of 250 units, all on the Casey property. See memorandum section on Casey and Dungan properties for details.

This packet also includes:

- Maps showing the undeveloped properties (Attachment 1);
- Tables showing comparative development standards in a range of zones (Attachment 2);
- Decision matrices for the undeveloped properties and a summary sheet on when to consider specific zones (Attachment 3);
- A table showing percentages of active and passive parkland in the Upper Rock Creek master plan area and a revised map of schools, parks and trail corridors (Attachment 4);
- Letters from representatives of the WINX and Dungan properties regarding development on those properties (Attachment 5).

Housing—Discussion of Individual Properties

In reevaluating housing issues in the master plan area, staff examined a number of specific sites in three broad categories.

- *Smaller Private Properties*—Private properties recommended in the Public Hearing Draft as suitable for affordable or elderly housing were reviewed to see if they could support additional units.
- *Publicly Owned Properties*—Undeveloped sites in public ownership were analyzed to see if they could support affordable or elderly housing projects.
- *Affordable Housing Opportunities in the Large Lot Zones*—Undeveloped properties in the master plan area were reviewed in light of the proposed zoning text amendment that would extend the Moderately Priced Dwelling Unit program to the large lot residential zones when sewer service is available.

Smaller Private Properties

Catherine Fraley Property: Maintain Public Hearing Draft Recommendation for RT-10 Zone; amend Plan to encourage assembly of all land in townhouse zones to maximize ability to provide MPDUs

The Public Hearing Draft identified two sites—the Catherine Fraley property and the WINX property—as suitable for affordable housing. For the Catherine Fraley property, located adjacent to the Redlands commercial area, staff evaluated possibilities for increasing density on the 6.1-acre site and at alternatives requiring additional adjacent land. The prospective developer of the site had indicated earlier that increasing density was problematic, because of constraints in providing access to the site and the need to consider access and parking issues for a church adjacent to the site's access roads. Staff next considered the Planned Development zones, but, even with assembly, the land available seemed too small to accommodate a Planned Development, especially when requirements to mix housing types and provide significant amounts of open space were considered.

To maximize the potential for affordable housing, **the Public Hearing Draft recommendation should be amended to encourage assembly of the Catherine Fraley property and the two remaining redevelopable properties now zoned for townhouses, which would create a total of about 7.5 acres. Assembly would increase potential yield, and result in additional affordable housing.** The potential yield on the Catherine Fraley property is 74 units including 12 MPDUs.

WINX Property: Maintain I-1 Zone; amend Public Hearing Draft to emphasize residential uses for the property and identify it as suitable for elderly housing project as a special exception

For the WINX property near Rockville, staff again sought ways to increase the yield of affordable units. As the Public Hearing Draft notes, annexation is necessary to develop this property for uses and densities that require public sewer service. This property is included within Rockville's Urban Growth Limits, and the City has made land use recommendations for it in its neighborhood plan. As part of its reevaluation of this site, staff met with the property owner and learned that, while the radio transmission towers now operating on the site are likely to remain in place for at least the next decade, the owners' long term plans are no longer limited to light industrial uses. In addition, the City is revising the neighborhood plan for this area and may consider townhouse development for it.

The Public Hearing Draft recommendation for this property should be amended to state more clearly that residential development is an appropriate use for this property, which will allow for its annexation and reclassification to a residential zone by the City of Rockville. The City maintains a Moderately Priced Dwelling Unit program similar to the County's and development of this property in the City would include such units under that program. The Public Hearing Draft should also state that the property is suitable for an elderly housing project. Such a project, designed in a way that insures compatibility with the Lincoln Park community, could make a significant contribution to affordable elderly housing. In either case, development of the WINX property could yield 73 units including 10 MPDUs in the Rockville program, or as many as 100 units of affordable elderly housing.

Publicly-Owned Properties

Publicly-owned sites are the second broad category evaluated. Staff looked at two undeveloped properties owned by the Montgomery County Public Schools (MCPS) and three as-yet undeveloped park properties. Because the sites were relatively small and were located among already developed areas, the review focused both on a site's ability to support an individual residential project, such as elderly housing, or residential development with Moderately Priced Dwelling Units.

Sherwood Elementary School Site #6: Suitable for residential development if MCPS elects not to build elementary school (Potential yield: 42 units including six MPDUs)

Sherwood Elementary School Site #6 is located on Wickham Road, north of its intersection with Bowie Mill Road and adjacent to the Norbeck Grove community. The 17-acre property was dedicated to MCPS as part of Norbeck Grove's development, but no plans for construction are imminent. The property contains forest and sensitive environmental buffer areas, and has portions with moderate slopes. Norbeck Grove is served by community sewer service, which would be extended to a school on this property.

This property could support an elderly housing project or institutional use, but it is relatively far from local commercial areas. It is located north of a community of detached houses and townhouses, and is immediately south of land recommended in the Public Hearing Draft for cluster development in the RE-2C Zone. Developing the property at the density of the Norbeck Grove community (two dwelling units per acre) would provide some additional Moderately Priced Dwelling Units.

In the short term, MCPS recommends that it retain this site. For the long term, **the Public Hearing Draft should be amended to include language indicating that this site is suitable for residential development if MCPS does not build a school on it.** The property should be developed using transferable development rights at a density of two units per acre. The underlying zone should remain RE-1.

MCPS Warfield Road property: Maintain existing RE-1 Zone

The second undeveloped school site is on Warfield Road, near its intersection with Woodfield Road in the northernmost part of the planning area. This 23-acre property is in the RE-1 Zone. Unlike the Sherwood Elementary School site to the south, it is not adjacent to more densely developed land. It is also some distance from the nearest sewer lines, which are across the Upper Rock Creek watershed boundary on the west side of Woodfield Road. The property's isolated location makes it less suitable for an elderly housing or other individual project. Therefore, **the Public Hearing Draft should not be amended to include a recommendation for housing at this location.**

Park Properties: Retain as parkland

Several undeveloped park properties were also reviewed as potential affordable housing sites. The first, Winters Run Local Park, is a former elementary school site on Muncaster Mill Road that was acquired more than a decade ago, when MCPS constructed Sequoyah Elementary School on Bowie Mill Road. A second site, Muncaster Recreational Park, is near the intersection of Muncaster Mill and Woodfield roads. A 35-acre portion of this park nearest Woodfield Road is recommended in the Public Hearing Draft for active recreation. The third site, Laytonia Recreational Park, is a former high school site located at the intersection of Airpark and Muncaster Mill roads. This 50-acre property has been planned to include an athletic complex with softball and baseball fields, a roller hockey facility, basketball courts and playgrounds. A portion of the park, about five acres, has been set aside for a library, but no plans for construction are imminent.

While these properties could in some circumstances support residential development, such development is not recommended for them because they are needed for park purposes. Each was acquired to add recreation or open space in the Upper Rock Creek watershed. More importantly, each contributes to a cohesive park system that provides both active recreation and the opportunity for County residents to experience undeveloped areas in their natural states. Maintaining the integrity of that cohesive system—and the opportunities it offers—is an important public policy and should be preserved. Therefore, **park properties should not be considered as potential sites for affordable housing.**

Affordable Housing Opportunities in the Large Lot Zones

Several of the major undeveloped properties in the Upper Rock Creek master plan area were considered as part of the affordable housing analysis in light of draft text amendments to the Zoning Ordinance that would extend the Moderately Priced Dwelling Unit program to large lot zones when community sewer service is available. The text amendments would extend the program to the cluster development option in the RE-1 Zone, to the RE-2C Zone and to the Rural Neighborhood Cluster (RNC) Zone. It also proposes development standards for an extension of the program to those zones.

The accompanying table (page 3) summarizes the potential yields in the categories evaluated in the affordable housing analysis. Scenarios emphasizing affordable housing are shown alongside a “status quo” scenario (Option 1), which emphasizes septic development of the large undeveloped properties. Option 2 encompasses the Public Hearing Draft recommendations and assumes no MPDUs would be required in the relevant zones. Option 3 assumes approval of the text amendments and uses the Public Hearing Draft recommendations with maximum bonus densities on the undeveloped properties and maximum provision of MPDUs. Option 3a alters the Public Hearing Draft recommendation to apply the RE-2C Zone to the entire Casey property. Option 4 applies the RNC Zone to those properties recommended for sewer service, assumes a density 0.532 units per acre (1 dwelling unit for every 1.88 acres) and requires provision of 20 percent MPDUs as a condition of extending sewer service.

In the affordable housing options, additional units are allowed above the original zoning maximum. Achieving bonus densities means significantly reducing lot sizes across the property. In the large lot zones, these reductions raise compatibility issues where new developments on smaller lots abut older developments on considerably larger lots. If the Zoning Ordinance is amended to extend MPDUs to the large lot zones, clear guidelines are needed to encourage developments to provide a range of lot sizes that will enable compatible integration of new development with existing development while allowing for provision of affordable housing.

Increases in densities of single-family or semi-detached houses associated with MPDUs also increase imperviousness. The accompanying tables offer an approximate idea of how providing additional affordable housing on the large undeveloped properties might affect imperviousness on individual properties and on the watershed. For Option 1, the assessment is based on existing subdivisions in and near the planning area. For Options 2-4, it is based on conceptual schemes devised earlier in the master plan

process whose yields approximate those that would be achieved under a given development option. The Woodlawn property has been excluded from the second table because it is outside the Use III portion of the watershed.

Table 1. Watershed Imperviousness Under Specific Development Scenarios

Watershed Area	Option 1	Option 2	Option 3	Option 4
Upper Rock Creek Mainstem at Muncaster Mill Road (Use III stream)	10.9%	11.0%	11.1%	11.1%
North Branch Rock Creek at Muncaster Mill Road (Use III stream)	13.7%	13.1%*	13.2%*	13.4%
Combined Rock Creek Tributaries above Muncaster Mill Road. (Use III stream)	12.4%	12.1%*	12.2%*	12.3%
Upper Rock Creek Watershed Total Below Lakes	15.7%	15.5%*	15.5%*	15.5%

*This figure may be up to 0.3% higher if the Dungan property is developed at RE-2 densities and not purchased as parkland.

Table 2. Site Imperviousness for Large Developable Properties

Property	Option 1	Option 2	Option 3	Option 4
Casey Total	12.0%	10.4%	12.5%	13.8%
Casey (draining to the Mainstem)	12.0%	18.9%	23.3%	25.1%
Casey (draining to North Branch)	12.0%	7.5%	8.8%	9.9%
Dungan	12.2%	0.0%	0.0%	8.9%
Freeman	12.4%	12.0%	12.7%	13.0%
North Branch Total (for these properties)	12.2%	8.4%	9.1%	11.2%

In general, cluster development allows more protection and restoration of forest and wetlands than development on septic systems if new sewer lines in stream valleys can be avoided and natural resources are protected from development. The Public Hearing Draft recommendations avoid new sewer lines in stream valleys and are designed to protect sensitive areas through parkland acquisition. From a strictly environmental point of view, the tighter clustering permitted by the RNC Zone could potentially reduce both site and watershed imperviousness, if the total number of dwelling units is not increased and more variability in housing types is allowed. In all cases, imperviousness increases as dwelling units are added to the cluster.

Large Undeveloped Properties

The attached decision matrix of land use options should be read alongside the summary sheet on when to consider specific zones, which is also included in this packet. The first column in the decision matrix provides the Public Hearing Draft's recommendation for the property, keyed to the summary sheet so that it offers the planning staff's rationale for lot sizes, resource protection, provision of sewer service and master plan guidance. The second column broadly summarizes testimony on the property and the third adds information about new development schemes and MPDU yields. The fourth column provides options for the Planning Board's consideration. The recommendations for the Hendry and Fraley properties found in the Public Hearing Draft are unchanged.

The options for the Casey, Dungan, Freeman and Woodlawn properties are:

- Amend Public Hearing Draft to recommend retaining septic development in existing zones (Option 1);
- Retain Public Hearing Draft recommendation without provision of MPDUs (Option 2);
- Retain Public Hearing Draft recommendation with provision of MPDUs (Option 3); or amend Public Hearing Draft recommendation to extend RE-2C Zone to Casey property (Option 3a);
- Amend the Public Hearing Draft to recommend the RNC Zone for these properties with the requirement that they provide 20 percent MPDUs (Option 4); this option also could include a recommendation for joint development on the Casey and Dungan properties.

Casey and Dungan Properties—Available options: 1, 2, 3, 3a, 4

The Public Hearing Draft (Option 2) recommends reclassifying the northern portion of the Casey property (225 acres) to RE-2C and retaining RE-2 on the remainder of the property (109 acres) and allowing cluster development to protect tributary valleys, forest and wet areas that drain to North Branch and are adjacent to parkland. It recommends using the existing sewer line that serves Sequoyah Elementary School and proposes master plan language that would keep development between the two schools and direct large lot development to areas next to existing large lot neighborhoods.

The Public Hearing Draft recommends that the existing RE-1 and RE-2 zones on the Dungan property be retained meaning that any development on the property would use septic systems. It also recommends that the property be acquired through the Legacy Open Space program.

In Option 3, the smaller lot sizes associated with development that includes MPDUs increase the importance of maintaining compatibility, particularly where new development "meets" existing neighborhoods. If bonus densities are to be achieved on the Casey property, it may be appropriate to consider reclassifying the entire property to the RE-2C Zone (Option 3a), which would allow the higher density to be distributed over the entire property, would result in a larger number of MPDUs and could encourage designs that provide a broader array of lot sizes.

To adhere to the Plan's broader objective of protecting sensitive environmental resources, these schemes would have to avoid new sewer lines to the North Branch. As the Public Hearing Draft notes, construction of such lines would cause significant loss of forest and forest fragmentation adjacent to the North Branch biodiversity area. At the same time, WSSC has informally noted its reluctance to allow pump stations in areas it believes can be readily served by gravity systems, which means that implementing through the regulatory process any recommendation requiring pump stations could be difficult.

To implement the scenario contemplated in Option 4, sewer service would be provided for the southern part of the Casey property and to the Dungan property only if 20 percent of the units are MPDUs. The southern portion of the Casey property can be served by pump stations connecting to the existing sewer line in Muncaster Mill Road. For the Dungan property, development would be concentrated in tight clusters in areas near Muncaster Mill Road. Even with such a tight cluster, sewer construction would have a substantial adverse impact on smaller tributaries that flow into the biodiversity area in North Branch Stream Valley Park.

In Option 4, the properties would be placed in the RNC Zone. The density could be set at 0.532 units per acre, or one dwelling unit for every 1.88 acres, which provides additional density in the same way used to calculate such added density when the MPDU development option is used. The Master Plan could include guidelines for minimum lot sizes to reduce the impact of the affordable units on adjacent neighborhoods.

On the Casey property, imperviousness is lowest under the cluster development scenario recommended for a portion of the property by the Public Hearing Draft (Option 2), because cluster developments generally have smaller lots, shorter driveways and fewer and shorter roads. (Septic developments generally require longer roads and driveways to serve larger lots spread over more land, assuming an average lot yield. If the soils are badly suited to septic development, yields—and imperviousness—are reduced.) As lot yields increase in Options 3 and 4, the additional houses and driveways increase imperviousness.

The Casey property could yield 136 units including 17 MPDUs with 15 percent MPDUs in Option 3; 163 units including 25 MPDUs if entire property is in RE-2C Zone; 178 units including 36 MPDUs with 20 percent MPDUs. The Dungan property could yield 69 units including 14 MPDUs with 20 percent MPDUs.

Joint development of the Casey and Dungan properties has been suggested by the owner/developers of the two properties. Their proposal contemplates placing the properties in the RNC Zone, dedication of the Dungan property to parkland and transfer of its yield to the southern portion of the Casey property. The proposal estimated that the property could support 250 units with MPDUs. There are two benefits to this proposal: provision of additional MPDUs, and dedication of the Dungan property to parkland that would help protect the sensitive North Branch biodiversity area. Because the Dungan property would become parkland, imperviousness in North Branch

subwatersheds would be less than would result from separate development of the properties. Other impacts of sewer construction through forested stream valleys would be avoided as well if sewer can be provided via Muncaster Mill Road.

Freeman Property—Available options: 1, 2, 3, 4

The Public Hearing Draft recommendation reclassifies the property from RE-1 to RE-2C and permits cluster development to encourage a range of lot sizes. This development will protect forest and headwaters areas adjacent to existing or proposed parkland. An adjacent sewer line can serve clustered units and the draft emphasizes the need for minimum environmental disturbance in constructing connecting sewer lines. The draft includes additional language.

Option 3 poses fewer compatibility issues on the Freeman property than it does on the Casey property. Stream valley parkland separates the property from adjacent communities to the west, and Norbeck Grove, to the south, already includes a mix of single-family houses and townhouses, including some MPDUs. Existing adjacent sewer lines can serve much of the Freeman property, eliminating the need for significant extensions in stream valleys.

In Option 4, the property would be placed in the RNC Zone, and the density could be set at the same 0.532 dwelling units per acre suggested for Option 4 on the Casey property. Community sewer service would be available only if 20 percent MPDUs were provided. If Option 4 is recommended, guidelines in the Public Hearing Draft aimed at maintaining consistency of lot sizes with nearby properties should be amended to emphasize the importance of maintaining diversity of lot sizes while providing MPDUs.

Options 3 and 4 increase imperviousness on the Freeman property beyond the levels achieved in Option 2. Increases in imperviousness on this property will adversely affect segments of headwaters tributaries of North Branch that play an important role in maintaining high stream quality for the entire tributary.

The potential yield on the Freeman property is 161 units including 25 MPDUs at 15 percent contribution in RE-2C Zone or 175 units including 35 MPDUs at 20 percent contribution in RNC Zone.

Hendry and Fraley properties—Available option: 1 (No MPDUs provided in absence of community sewer service.)

The Public Hearing Draft retains existing zones on these properties. It recommends acquisition of portions of both properties for added parkland and use of easements to preserve sensitive areas outside of park acquisition lines. It contemplates septic development on these properties to avoid extensive new construction over long distances in stream valleys. As such, no Moderately Priced Dwelling Units would be provided when these properties develop.

Woodlawn Property—Available options: 1, 2, 4

The Public Hearing Draft recommends reclassifying this property from RE-2 to RE-2C to encourage a range of lot sizes and permits cluster development to preserve forest and other sensitive areas. It recommends community sewer service that would connect to existing lines in the Rock Creek mainstem with a minimum of disturbance. The property does not meet current MPDU guidelines, which use a threshold of 35 units to trigger MPDU requirements. A pending text amendment would allow developments of 20-35 units the option of using MPDUs. Should that amendment be approved, this property could also generate MPDUs.

Option 4 could be implemented on this property to maximize its affordable housing potential. Like the Freeman property, it is close to an existing sewer line in the mainstem of Rock Creek and would not require significant sewer line extensions. It also could be placed in the RNC Zone at a density of 0.532 units per acre and provision of sewer service could be tied to provision of 20 percent MPDUs. Guidelines would be included that would strongly encourage design that promoted diversity of lot sizes and maintained consistency of lot sizes with adjacent homes.

The Woodlawn property could yield 31 units with no MPDUs or 41 units including 9 MPDUs with 20 percent MPDU contribution in the RNC Zone.

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Attachments