



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

March 11, 2008

MEMORANDUM

TO: Montgomery County Planning Board

VIA: Rollin Stanley, Director

FROM: Gwen Wright, Chief, Countywide Planning Division
Karl Moritz, Chief, Research and Technology
Matt Zisman, Strategic Planning

SUBJECT: Final Report on the Master Plan Process Reassessment

This report results from a 6-month effort by the Planning Department to examine opportunities to improve the process by which it develops master plans, improve their content to enhance readability and conceptual clarity, and strengthen implementation. The concepts presented here were developed by Department staff, with the assistance of outside consultants who brought both objective distance and multi-jurisdictional experience. A summary of our methodology is provided below. This is followed by an overview of the broad framework and hierarchy of master plans developed by the Department, as well as specific suggestions for how two new master plan models can be developed to provide the Department with greater ability to plan for an urbanizing county. We conclude with next steps, which consist of both actions in progress, and those to be developed over time.

BACKGROUND

During the past three decades, Montgomery County has developed a respected community master planning program that has successfully tackled issues such as rural preservation, transit-oriented development, and revitalization of urban centers. Montgomery County is a large and varied geographic area and, as it matures, there is recognition that master planning activities need to evolve in response to both changing land uses and the increasing socioeconomic, age and ethnic diversity of its residents. This need for change has been recognized by the Planning Department through many discussions with citizens, the Board, and the County Council over the last few years. As the result of one major study – the October 2007 Centers and Boulevards Report – there were a number of recommendations for actions to improve the Department’s ability to respond to rapid changes and to deliver the communities that County residents desire. This report included these key ideas:

- Prioritize development of Master Plans and concept studies along two of the county's major roadways, I270/MD355 and Georgia Avenue, to more clearly articulate how individual master plans work within their respective corridors.
- Review the Department's Master Plan process to identify opportunities to create plans more quickly that better respond to neighborhood-scale infill development. The project will determine best practices and their potential applicability to the County, with a specific focus on creating a range of master plan products reflective of different planning environments. This includes broad master plans focusing on large areas, as well as smaller-scale, shorter timeframe plans.
- Rewrite the existing zoning code to a form-based code to improve plan implementation and better support mixed use developments that also improve the "quality of place."
- Recognize that community outreach informs the planning process as much as it informs the public.
- Convene a Montgomery County Design Summit to explore the concepts of good design, and how they can best be applied to future development in the county.
- Initiate a Functional Master Plan for Public Facilities, beginning with a strategic exploration of the types, quantities and costs of infrastructure – both new and maintenance of existing – that is needed to support future development. This effort will address concepts expressed in *Centers and Boulevards* to expand consideration of infrastructure beyond the critical components of school and transportation capacity to include a wider range of amenities such as public and open space. The goals of the plan will be to identify the types of infrastructure Master Plans should address that are critical to creating and sustaining well-designed communities and provide some options for creating a stronger link between Master Plans and the Capital Improvement Program.

PROJECT METHODOLOGY

In undertaking its review of the current Master Plan process, the Department used a multi-tiered methodology based on focus group interviews, research, and consultant expertise. We sought input from a wide spectrum of stakeholders including civic representatives, the development community, institutional/religious/educational communities, planning staff, and county agencies.

The Department also hired a consultant to undertake a nationwide comparative practice survey to identify potential improvements, and conducted its own research into how other large jurisdictions throughout the country develop master plans, convey information, and implement concepts.

Attached appendices, which reflect much of the data gathered during this project, include:

- An existing conditions report developed by the Community-Based Planning Division;

- A report on current conditions in master plan process and outreach developed by the Community-Based Planning Division;
- *A Report on the Stakeholder Focus Groups* developed by Rhodeside and Harwell;
- *A Nationwide Comparative Survey of Planning in other Jurisdictions* developed by Rhodeside and Harwell;
- *A Report on Master Plan Content and Form Based Codes* developed by Ferrell Madden and Associates;
- *A Report on Technology and Public Outreach* developed by the Research and Technology Division; and
- *A Report on Information Counter Public Outreach* developed by the Community-Based Planning Division.

All of the information gathered has been critically analyzed and has been the genesis of the recommendations that make up the core of this report.

HIERARCHY OF MASTER PLANS IN MONTGOMERY COUNTY

A major focus of the Master Plan Reassessment project has been looking at the hierarchy of plan types that are done in the County and creating a new plan type – a small area or neighborhood plan – that will allow for an increased emphasis on redevelopment of existing areas and on infill projects. This more “urban” milieu requires a planning effort that can focus in on smaller geographic areas and that can more quickly respond to fast-changing trends driven by changing economic conditions.

This is not to say that small area/neighborhood plans will be the only type of plans needed. They are one of several tools, functioning within a broader planning context that begins with the County’s General Plan, *On Wedges and Corridors*. The next layer of plans includes Functional Plans that address particular County-wide planning issues (such as the *Master Plan for Historic Preservation*, the *Water Resources Plan*, etc.) This hierarchy continues with framework studies such as the *I-270/MD 355 Corridor Study* and the *Georgia Avenue Corridor Study*, which examine how larger corridor areas function both collectively and individually within the context of the General Plan. Additionally, the traditional “Planning Area” master plans will still be need to be updated every 20 years so as to address important broad planning issues that require more specificity than what is offered through the General Plan. Finally, another new concept that is being fleshed out as part of the Master Plan Reassessment project is the use of Limited Master Plan Amendments to address very narrowly defined planning issues that arise.

The Department has developed a wide range of master plans to apply to the County and each has different time lines and related issues. Clearly, a County-wide Functional Plan on a topic of major importance will take longer to prepare than a small area/neighborhood

plan with limited planning issues.

The effort to develop small area/neighborhood master plans and explore the relationships between the different scales and functionalities of the County's master plans will provide opportunities to improve the effectiveness and efficiency of the larger planning structure the County uses to develop its land use plans. Ultimately, the goal is to simplify the range of tools available to the Department while improving their effectiveness, clearly recognizing that this nested hierarchy of plans works interactively to create an overall framework, from conceptual to zone-specific, for development in the County.

Existing Hierarchy of Land Use Plans

A description of the existing range of plan types and relationships offers a useful starting point. The hierarchy of land use plans in Montgomery County begins with the General Plan, *On Wedges and Corridors*, updated in 1993. The General Plan provides broad policy guidance, framing development in Montgomery County within broad wedges interspersed with roadway corridors. The vision of the General Plan, including protection of the northern third of the County as agricultural space, has largely remained intact. The results comprise distinct neighborhoods, bounded by transportation networks that function as commercial corridors. From the General Plan, the Department develops the following master plans for geographic areas of different size:

- **Master Plans for Large Areas:** these plans provide land use recommendations for larger geographic areas – usually identified Planning Areas. They focus on broad concepts and planning issues, as well as recommendations for specific parcels, and a recent example is the Olney Area Master Plan.
- **Sector Plans for Smaller Geographic Areas:** these plans provide land use recommendations for smaller areas such as central business districts (CBDs). Because of the smaller geographic area, they can offer greater detail and the opportunity to be more responsive to time-sensitive issues. Examples include the recently completed staff draft of the Twinbrook Sector Plan.
- **Master Plan Amendments:** these plans focus on a limited number of key issues. They retain a community outreach and public hearing process, but are completed in a shorter time period because of the limited number of issues to be considered. Recently approved amendments include both comprehensive amendments (such as the Woodmont Triangle Amendment) and limited amendments (such as the Montrose Parkway Amendment).
- **Concept plans and studies:** these include studies for areas like the Georgia Avenue and the I-270/MD 355 corridors, which examine how several planning areas, while unique in character and function, contribute to a coherent vision for the corridor. **Functional plans:** these include documents like the *Master Plan for Historic Preservation*, the *Green Infrastructure Functional Plan* and the *Countywide Water Resources Functional Plan*, covering specific issues that impact the entire County.

Existing Thematic Categories of Master Plans

In addition to the types of land use plans listed above, the Department also groups planning projects into several thematic groups. Broadly, they fall into the following categories:

- Corridor City Plans: including the Germantown Employment Corridor and the Gaithersburg West Master Plan.
- Metro Station Plans: which include the Twinbrook and White Flint Sector Plans and the Wheaton Central Business District Plan. These plans address the unique possibilities provided by metro stations, which offer high-capacity alternative transportation linking County employment centers like Bethesda and Silver Spring, as well as the District of Columbia. The Department has made a consistent effort to develop areas adjacent to Metro stations at higher densities, to create pedestrian-oriented environments focused on transit as the primary transportation mode.
- Plans for Neighborhoods and Centers: including the Takoma/Langley Crossroads Master Plan and the Kensington Sector Plan. These plans offer land use recommendations for existing, moderate density communities that have distinct characteristics achieved over time.

New Additions to the Hierarchy of Master Plans

As noted above, there has been an identified need to create a mechanism for undertaking master plan tools that will be quicker, more nimble, and more responsive to rapidly emerging planning issues and economic trends. Also as noted above, there will still be a need to undertake Master Plans for larger areas, Functional Plans, and Concept Studies. These projects – given their complexity and broad geographic boundaries – will take longer to develop and will need to be updated less frequently.

The current Master Plan Reassessment Project recommends adding two types of plans to the existing hierarchy and recognizes that these new planning tools will require looking at ways of streamlining the planning process. The two new plan types are:

Small Area/Neighborhood Master Plans

Small area or neighborhood master plans offer an opportunity for more detailed analysis and focus on a more limited geography. Unlike limited master plan amendments, which examine a finite number of issues (see below), small area master plans examine the entirety of land use issues addressed by larger master plans. Their primary differences are: 1) they focus on a limited geography with high potential for changes in economic activity (and therefore changes in land use); and 2) because of the rapid change, they require a similarly rapid planning process.

The time frame for completion of a small area or neighborhood master plan should be approximately 18 to 24 months from initiation of the plan to approval by the County

Council (but not including adoption of a Sectional Map Amendment). This is a target only and if additional time is needed to produce an excellent plan, then there should be flexibility to do this.

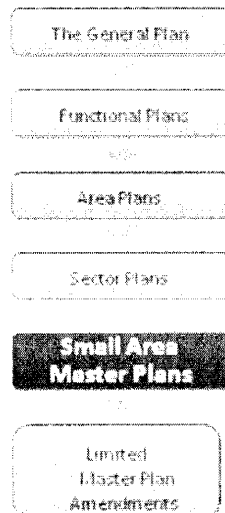
With an increasing focus on infill development as the County matures, these small area master plans may well represent the predominant master plan process in the future.

Limited Master Plan Amendments

Occasionally, critical planning issues arise that may justify undertaking very Limited Master Plan Amendments. These amendments can be produced by the Department in a very short time frame (i.e. 90 days) because they address very finite, very discrete land use issues and very small geographic areas (i.e. one or two properties). This extraordinarily accelerated and abbreviated planning process must focus on a very finite geography and a limited set of issues that will minimally impact the existing master plan. As a pilot project, the Department is undertaking a Limited Master Plan Amendment to extend the Wheaton CBD zone to accommodate changes to a very finite geographic area.

Although the Limited Master Plan Amendment process offers an opportunity to replace the current reliance on zoning text amendments, it will be important to only undertake a very small number of these Limited Master Plan Amendments each fiscal year or there will be negative consequences for the overall work program. A system for selecting which Limited Master Plan Amendments to undertake should be developed, which will allow the Planning Board to weigh the public benefit in each potential amendment and make best use of staff resources in the overall context of the entire master planning program.

Hierarchy of Plans in Montgomery County



Assuring Certainty of Master Plan Boundaries and Issues of Interest

A key element in developing both of these plan types is assuring certainty of plan boundaries and highlighting of significant issues. Stakeholders mentioned that master plans can be delayed due to changing boundaries and new issues popping up late in the process. For this reason, it becomes all the more essential to carefully develop project scoping that can be approved by the Planning Board early in the life of a master plan project. The Department's work program, with these carefully scoped projects outlined, can then be reviewed by the Council as part of the normal Semi-Annual and Budget discussions.

RECOMMENDED IMPROVEMENTS TO MASTER PLAN DEVELOPMENT

This conceptual framework articulates the need for more finely grained tools for master plan development into the future. In particular, small-area master plans will likely function as the workhorse of the County's planning efforts. But stakeholders voiced both concerns and suggested improvements for the Department to improve the timeliness of its master plan development, enhance the readability and presentation quality of its written products, and strengthen implementation. These ideas were distilled by the Department's consultants, Rhodeside & Harwell. Additionally, Rhodeside & Harwell conducted a comparative survey of the planning processes for comparable jurisdictions throughout the country.¹ These reports served as the basis for the recommendations presented below, which specifically link back to consultant findings to ensure that improvements adequately address stakeholder feedback.

RECOMMENDATIONS

Recommendation 1: For the majority of planning efforts, plan area boundaries should be narrowed to focus on clearly-defined, smaller geographic areas where significant land use changes are anticipated or desired – i.e., small area or neighborhood plans.

The need to accommodate more people within a confined space necessitates developing, or redeveloping, parcels of land with immediately adjacent land uses that includes residents, businesses and commercial centers. The focus on smaller geographic areas should flow throughout the planning process. This means that the plan boundaries, subsequent data collection, and outreach efforts should target those most directly affected by the Master Plan. This narrowed geographic focus does not in any way reduce the complexity of issues that Master Plans must address. Indeed, the higher population and development densities mean that more human and economic activity may take place within these smaller areas than occurs in larger but less economically active areas. A focus on smaller geographic areas reflects best practices from around the country, as

¹ These reports will be available online for public review. At the time of this memo, the web links were not yet available.

jurisdictions attempt to translate high-level direction from their respective general or comprehensive plans into on-the-ground planning strategies for affected neighborhoods. This concept directly responds to consultant recommendations #1 and #7.

Recommendation 2: For small area master plans with clearly defined, smaller geographic boundaries, the time frame for completion should be 18 to 24 months – from inception through Council approval of the Final Draft Plan.

While the changing land uses of the County necessitate a focus on smaller geographies, the more immediate impacts felt by neighboring residents and land uses necessitate a faster planning approach. Greenfield planning can take decades to materialize, requiring population additions and infrastructure improvements that may take years to realize. And with few residents or land uses immediately adjacent to these new and more slowly emerging land uses, the planning process mandated a patient and long-range approach. But as redevelopment and infill occur, the effects are immediate. As a result, the planning process must adapt to become more nimble without losing any of its comprehensiveness.

We suggest that a suitable timeframe for development of future small area master plans should be about 18 - 24 months from inception through Council approval.² This timeframe appears consistent with practices in other comparable jurisdictions, and directly responds to consultant recommendations #6. However, we again note that this time frame – while an important goal – needs to be flexible enough to allow for all issues to be addressed in the development of the plan. It would be counterproductive to short-change planning discussions at the Board level, because this will simply make the Council’s deliberations more difficult and time-consuming.

This shortened timeline is achievable only in conjunction with other recommendations presented here, including:

- Improved project scoping and standardization of routine tasks so that adequate time is available to focus on issues unique to the plan area;
- Dedicated resources to lead planners;
- Clear lines of accountability and authority; and
- Establishment of larger staff teams to ensure staff availability.

Each of these concepts are discussed in greater detail in later recommendations, but should be acknowledged at the outset. Meeting timeframes requires not only that the Department strengthen its project management controls and its procedures, but that we look at different ways to organize and use our staffing resources.

In addition, we believe that planning timeframes should offer guidelines, rather than rigid requirements that the Department must follow. There are several reasons for this, including:

² Some additional time may be required to complete the sectional map amendment process, but some time savings could be achieved by beginning this work during Council review of the plan.

- Planning necessitates a thorough dialogue with the community, the time for which can vary depending on the issues and magnitude of change;
- New information, regardless of how thorough the initial scoping and data gathering effort, can always emerge; and
- Outside factors beyond the planners control, including changing economic conditions, can affect plan development.

The focus of this recommendation is on small area plans. It is understood that some functional and large area plans will take longer than 24 months. In addition, in cases where opinions sharply diverge on the future vision for an area, then a master plan will require additional time. Even if no community consensus ever results on the plan vision, planners must be careful not to shortchange the public participation process, nor to ignore alternative development concepts. In such cases, the planning process may need additional time to discuss issues, if not resolve them. Shortchanging the process on the front end (where the actions largely fall under direct purview of the Planning Department) will not necessarily save time, and could in fact lengthen it by requiring additional scrutiny and direction from the Council.

Recommendation 3: Limited Master Plan Amendments, which focus on a very small area where there is an immediate planning concern, may be undertaken once or twice a year; however, they should be infrequent so as not to disrupt the regular master plan program.

A primary rationale behind the more rapid master plan development recommended here is to create a more responsive master planning process that limits the use of zoning text amendments (ZTAs). Currently, this legal mechanism provides the County not only with a legal tool to address specific zoning issues, but is also used to indirectly amend master plans. While shorter timeframes for plan development can address some uses of ZTAs, situations will continue to occur mandating an even more rapid planning response. Staff recommend that each year, the Department retain capacity to undertake one or two of these limited master plan amendments to allow the County to respond to unforeseen but critical planning issues.

An important benefit of the overall master plan approach that we suggest is that it offers scalability. While the master plan approach outlined in this report will remain consistent, the time required for the various tasks can be lengthened or shortened as needed for a particular project. For limited master plan amendments, the timeframes could be shortened to as little as 90 days.

Our recommendation that the Department limit the number of times such limited master planning efforts are pursued derives from our concern that over-use of master plan amendments will undermine the public's confidence that an adopted plan will be followed. To prioritize among proposed amendments, the Planning Board could, after consultation with staff, devise criteria for when this approach would be applied. Such criteria could include:

- Limited geographical scale (e.g., one or two parcels);
- Limited deviation from existing master plan recommendations;
- Key economic benefit to the County; and
- Limited opportunity period.

In short, limited master plan amendments offer an additional tool to the Department that can be applied under specific circumstances. But in order to limit the potential for undercutting the primary master plan process, this concept should be applied under constrained and clearly defined circumstances.

Recommendation 4: The Department should improve the processes related to developing all types of master plans by focusing on standardization plan development and content.

One way to accomplish this recommendation is to develop a standardized procedure template for all Master Plans that provides greater structure to streamline processes and administrative plan elements, efficiently allocate resources, and improve communication with the Board. The template should include the following elements:

- improved project scoping to identify project boundaries, plan milestones, needed and resources;
- systemization of communications and outreach strategies, possibly with a focus on charrettes, a series of charrettes, or similar outreach strategies to enhance community participation in plan development, and emphasize new technologies;
- elimination of the current Staff Draft process, with the emphasis shifted to preparing a Public Hearing (Preliminary) Draft Plan;
- replacement of the 60-day County Executive fiscal review period with a planning process that emphasizes Executive agency involvement throughout;
- periodic updates to the Planning Board during the development of the Public Hearing (Preliminary) Draft Plan to assure that major policy concerns are being addressed,
- standardization of plan formats and graphics to improve consistency and heighten efficiency.

The need to improve efficiency and consistency in the master plan process is important to all types of master plans, but it is particularly important in implementation of Small Area or Neighborhood Plans. Critical to maintaining an efficient project schedule is establishing a clearly defined scope of work. That scope of work, developed after a focused analysis of existing conditions in the study area, should clearly delineate the geographic boundaries of the plan and be approved by the Planning Board.³ It should also set out key tasks, project milestones, and staff resources needed. To further support this effort, the Department will be purchasing new software (know aptly as NAG), to

automate notification of deadlines and critical tasks. Elimination of the staff draft is suggested as a means of eliminating an interim project deliverable that can lengthen plan development. Additionally, increased and scheduled communication with the Board during plan development will elevate issues and concerns to decision makers more quickly. This combination of measures underscores the Department's efforts to enhance its master plan process even as it takes steps to condense timeframes.

Recommendation 5: To shorten the time for development of all master plans, the Department should eliminate the Staff Draft.

To speed development of master plans, we recommend that the Department eliminate the current Staff Draft process. Faster plan development not only responds to stakeholder feedback that the current process appears overly time consuming, but also reflects the need to more rapidly provide updated planning frameworks to areas in the midst of economic activity and change.

The Staff Draft represents a stakeholder-identified bottleneck that can be removed without compromising the Department's ability to develop and deliver high-quality plans. Instead, we suggest that Community Planning staff prepare shorter staff reports outlining critical plan elements and scheduled at key intervals in the plan's development, which are communicated through periodic worksessions with the Planning Board.

We do not believe that eliminating the Staff Draft will short-circuit staff's ability to provide objective technical expertise in plan development. Rather, we are recommending replacing one large staff deliverable with smaller deliverables at critical intervals and regular discussions with the Planning Board to keep tight timelines on track. This will allow staff to raise major policy issues and planning concerns with the Board while there is time for guidance and resolution. These efforts also increase transparency by providing more opportunities for the public to hear Planning Board suggestions for plan development and responses to staff recommendations.

These combined recommendations – eliminating the Staff Draft, but increasing the number of smaller staff reports at critical intervals and Board discussions – ultimately increase staff input and create a stronger partnership between the technical and community expertise of the staff and the policy expertise of the Board. These concepts directly address consultant recommendation #2.

Recommendation 6: Eliminate the 60-Day Executive Review Period

We suggest further time savings be achieved through the elimination of the Executive's fiscal review. With growing economic expertise within the Department, and with heightened collaboration between M-NCPPC and County Executive agencies, the political and technical support for this strategy exist. The idea is to develop a fiscal impact review in-house in close coordination with the County Executive and Executive Branch agencies. This would be done during the development of the Planning Board (Final) Draft Plan and would be delivered to the Council for review with this draft.

While the issue of staff skills and training are elaborated further in this memo, a key aspect of this new planning construct is a greater recognition that economic activity drives planning, and vice versa. This fact necessitates stronger economic understanding within the Department's staff and processes, as well as additional fiscal impact assessment.⁴ This fiscal review should estimate both the revenues expected from development under a Master Plan (in the form of income taxes, sales taxes and property taxes) as well as the fiscal costs imposed by infrastructure requirements and service needs (including schools and emergency services). This fiscal analysis will better relate to the goals of the Growth Policy by more clearly analyzing both the benefits and costs of additional jobs and residents in the County. Executive participation in this process will remain in place, but the closer coordination between agencies and the growing technical resources of the Department will allow the review to be done in conjunction with the Department's work and will not delay the Council's review of plans. This change would require legislative action.

Recommendation 7: Create larger planning teams within the Community-Based Planning Division that are focused on fewer geographic areas. This should include assigning a lead planner with access to sufficient resources to ensure plan delivery, including outreach support, graphics, administrative support, and legal advice.

Internal stakeholders commented that one cause for delay in master plan development stems from resource constraints. To address this challenge, we suggest that the Department consider restructuring the Community-Based Planning Division into a fewer number of larger teams. The rationale for this concept centers on providing a greater number of staff resources to complete plans within a geographic area. The purpose is to add efficiency and flexibility, providing more staff resources to address unforeseen problems while also creating larger teams that will have a wider geographic perspective, facilitating understanding of planning issues for a greater number of communities.

Additionally, master plan teams must have dedicated resources and skill sets, including legal, graphical and editorial staff, to help in plan development. Planning teams would continue to need support from the technical staff in Countywide Planning who specialize in transportation, environmental protection, and historic preservation and staff in the Research and Technology Center. These concepts reflect stakeholder concerns and respond to consultant recommendations # 3 and #4.

Additionally, we suggest that master plans should be developed by a lead planner, who serves as a project manager. In this capacity, the lead planner should be responsible not only for actual planning, but also development of the project scope, as discussed above. We also suggest that the lead planner have clear supervisory oversight for the planning staff dedicated to a master plan, to limit possible resource constraints as work priorities shift. In terms of support staff, including technical staff from other Divisions, we suggest

⁴ Fiscal impact assessment would require close coordination with Executive agencies, including the Finance Department and departments responsible for implementing infrastructure, such as roads, schools, and libraries.

that the lead planner carefully detail staff requirements in the project scope and budget.

It should be noted that other planning departments across the country have succeeded in delivering master plans with the same staff resources as currently provided, but in shorter timeframes than is currently the case of the Department. Doing so did not necessarily require consultant assistance. It is not clear whether other jurisdictions have the complexity of planning regulations, such as cumbersome a zoning code, or as active a constituency. All of these issues affect the time required for plan development. But the consistent message is that master plans can be developed in about 18 – 24 months with a staff of 3-4 and this underscores the possibility of successfully delivering these types of master plans in Montgomery County.

Recommendation 8: Enhance staff skills, including greater training in principles of sound project management for senior staff, and in technical training for junior and mid-level staff.

This study identified the need to use more effective outreach techniques and take advantage of emerging technologies that can more effectively translate design concepts (consultant recommendations #12 and #15). It was also recommended that staff receive additional training, particularly with respect to managing effective public outreach (consultant recommendation #9). To that end, we suggest that the Department provide additional training resources in both project management and technical skills. On the issue of project management, the imperative to conduct small-area master plans within a 18 - 24 month period mandates efficiency and effectiveness. To assist the Department's capable and hard-working staff to meet this condensed timeline, we suggest training intended to help senior staff work "smarter." Training should center on how to effectively scope projects, how to identify needed resources, how to prepare budgets, how to delegate effectively, and how to estimate timelines. This training, in conjunction with familiarity with the revised master plan process, should help managers make the most of their time and resources.

Effective project management must extend beyond plan leaders and ground the overall work program. The Department has recently improved its project management by aligning varied Program Elements within a Program Budget, followed up with closer monitoring of project schedules and labor distribution. Effective management of the master plan program will ultimately require close coordination between the Director and Division Chiefs, who must prioritize the work program based on Council needs, the professional judgment of staff, and the resource constraints of the Department.

Similarly, staff need training in key areas necessary to both understanding community needs and articulating plan vision. This includes enhanced training in community outreach, as well as increased capabilities with GIS and 3D visualization. GIS can function as both an analytic and graphics tool, offering the ability to conduct spatial evaluations of an area. In the same way, 3D visualization tools improve the ability to translate planning visions into understandable forms. The Department is currently making strides in both these areas, providing training in GIS and 3D visualization tools like

Community Viz. Additionally, the Department will be offering a series of design workshops that should further strengthen staff skills.

Recommendation 9: Improve plan implementation through expanded regulatory tools, improved coordination with Executive Agencies, enhancement of planning staff skills to support implementation, and closer monitoring of plan results.

Implementation concerns expressed by stakeholders centered on a disconnect between master plan vision and resulting development (see consultant recommendation #26). We suggest a few key efforts to address these concerns. First, the Department should expand its zoning options through both improvements to the existing code (particularly streamlining and simplifying zones), and development of new tools. The existing zoning code has been characterized by the consultant as "...not fulfilling the needs of either the community or developers..." with respect to reliably translating the vision of a master plan into reality.

Yet while the Department works to improve its code, opportunities to improve plan implementation exist through Optional Method zoning. Development under the Optional Method allows planners to negotiate for specific design elements and public amenities in exchange for higher allowing developers higher densities. The Optional Method allows the Department needed flexibility to respond to dynamic market conditions, shifting community priorities and innovative design concepts. But the optional method, as a negotiated process, remains dependent on the willingness and creativity of the involved parties – namely the planners and the developer – to create good design or obtain needed public amenities. This precludes certainty in outcomes, and may not consistently yield desired results.

Alternatively, the Department can also explore applicability of form-based codes, which offer another tool to achieve good design and public amenities, with requirements explicitly detailed in the zoning code. Form-based codes focus less on use and more on building form; codes can be written to specify fenestration requirements, building materials, architectural styles. Form-based codes require master plans that explicitly detail development locations, building types, setbacks or build-to lines, and other details that the Department currently addresses in site planning; they mandate a closer, more prescriptive relationship to zoning. Developing these master plans therefore requires careful coordination with the public to ensure that the design elements required in the code accurately reflect community vision. Additionally, while form-based codes work well for greenfield development or in locations with a prevailing design style, allowing easy codification the architectural vernacular, they are challenging to implement in diverse and built-out areas.

Other regulatory tools to help the Department improve plan implementation include urban design overlays and design guidelines. For overlay zones, the code is developed based on what already exists and what the future master plan requires. Urban design overlays function similarly to form-based codes, but are essentially retroactive design requirements. Design guidelines offer another potentially useful tool. Design guidelines,

if specifically referenced in the Zoning Code, carry legal authority similar to form-based codes. Also similar to form-based codes, they offer clear and unambiguous requirements for developers to follow. Design guidelines adopted by the Planning Board can provide clear design direction while retaining a measure of flexibility that Council-adopted guidelines cannot.

Because successful master plan implementation also involves Executive agencies, we also suggest that the Department strengthen coordination throughout the master plan process (see consultant recommendation #25). This should include notification that a master plan has been initiated, invitation for agency representatives to attend community charrettes, and an opportunity to comment on report drafts. The Department may want to consider forming an Implementation Advisory Group, which would include representatives from the County's Regional Service Centers and a liaison to the County Executive.

As an initial step in improving plan implementation, the Department should annually report back to the Planning Board on the status of master plan implementation. These annual reports should pay particular attention to the following:

1. Capital Improvement Program (CIP) projects vital to plan implementation; and
2. Catalyst developments that could serve to accelerate realization of master plan vision.

On a *biannual* basis, in coordination with the CIP, the Planning Board should submit a report to the County Executive and County Council prioritizing projects necessary for master plan implementation.

The Department should also consider developing implementation pages for each master plan website. These pages could use interactive tools, including GIS, to graphically illustrate in real time the status of plan implementation. This website could include the status of CIP projects, existing development, and proposed developments.

Communities around the country are dedicating staff to implementation, recognizing the fundamental difference in skill sets required as compared to those needed for plan development (see consultant recommendation #24). Implementation staff also function as liaisons between government agencies and the community. Based on these lessons, the Department should similarly dedicate staff to plan implementation. These staff should be actively involved in master plan development to be sure that master plans offer sufficient clarity in their recommendations and guidance to support implementation.