

Growth Policy Study: Progress Report
Appendix A – Impact Tax Issues
(Resolution 16-376 F9)

Lead Staff: Jacob Sesker

Objective:

To address impact tax issues designated for follow-up, with specific focus on the potential refinement of land use categories, charging impact taxes for additional public facilities or purposes, and charging linkage fees to non-residential development for affordable housing.

Progress Report:

The objective identifies 3 separate aspects of the inquiry:

- 1) Potential further refinement of land use categories
- 2) Consideration of charging impact taxes for additional public facilities or purposes
- 3) Consideration of charging linkage fees to non-residential development for affordable housing

The inquiry is to be led by the County Executive, with the support of the Planning Board and the Board of Education.

Staff will be providing input, as appropriate, to the Executive in the preparation of the Executive's recommendations. In general, Staff anticipates that the Executive Branch will recommend few changes as a result of the F9 inquiries and interagency discussions.

Upon completion of the Executive Branch inquiries, Staff will transmit to the Planning Board a summary of the work completed by the Executive Branch. That summary will include Staff recommendations or commentary as appropriate.

To date staff has not received recommendations regarding F9 from the Executive Branch.

Growth Policy Study: Progress Report
Appendix B - Analysis of the Current/Future Pace and
Pattern of Growth
(Resolution 16-376 F11)

Lead Staff: Wayne Koempel

Objective:

To provide an analysis of the current and future pace and pattern of growth in the County

Progress Report:

Employment

The Round 7.2 employment forecast shows the County's employment growing by 31,100 jobs between 2000 and 2009 (Table 1). This is about 52 percent of the 60,000 employment growth the County experienced between 1990 and 2000. Over 80 percent of this growth occurred between 2000 and 2005. The County's annual employment growth rate this decade is 0.7 percent per year, compared to an annual growth rate of 1.4 percent during the 1990s. Figure 1 shows the County's 2009 employment density per acre by traffic zone.

Between 2009 and 2030 the County's Round 7.2 employment forecast shows an increase of 164,000 jobs. In order to achieve this job growth, the County's annual employment growth rate will have to match the 1990s rate of 1.4 percent.

In the Round 7.2 forecasts, the Cities of Gaithersburg and Rockville produced their own forecasts. Their forecasts are based on the current city boundaries and do not assume any annexations. The cities forecasts are included in the Montgomery County forecasts.

In 2005, 15 percent of the County's jobs were in the City of Rockville (76,600 jobs). During the Round 7.2 forecast period, Rockville maintains its relative share of the County's jobs. In 2030, Rockville has 100,800 jobs, 15 percent of the County total.

The Round 7.2 forecast suggests that the City of Gaithersburg will become more of an employment center. In 2005, Gaithersburg had 48,800 jobs, 10 percent of the County total. By 2030, Gaithersburg expects to have 84,200 jobs, 13 percent of the County total.

Between 2000 and 2009, almost 70 percent of the County's job growth occurred in five policy areas. Rockville City had the most growth 5,500 jobs, 18 percent of the County's job growth. The R&D Village ranked second growing by 4,400 jobs (14 percent) followed by Fairland/White Oak +4,100 jobs (13 percent), Gaithersburg City +3,600 jobs (12 percent), and the Bethesda CBD +3,600 jobs (12 percent). The Metro Station Policy Areas combined grew by 7,600 jobs, 24 percent of the County's job growth.

Between 2009 and 2030, of all the Policy Areas, Gaithersburg City and Rockville City are projected to grow the most. Gaithersburg City is projected to grow by 33,400 jobs, 20 percent of the County's growth, and Rockville City is projected to grow by 23,100 jobs, 14 percent of the County's growth. The R&D Village Policy Area is projected to have the third highest growth 16,600 jobs, 10 percent of the County's growth, followed by Clarksburg +12,500 jobs (8 percent), and North Bethesda +12,200 jobs (7 percent). These five Policy Areas are projected to have almost 60 percent of the County's job growth. The Metro Station Policy Areas are projected to grow by 19,200 jobs, 12 percent of the County's job growth. Figure 2 shows the changes in employment density from 2009 to 2030.

Table 1
Montgomery County Employment Growth by Policy Area
Round 7.2 Cooperative At-Place Employment Forecast

Policy Areas	2000 Total Jobs	2000 to 2009 Job Growth	% Change	% of County Growth	2009 Total Jobs	2009 to 2030 Job Growth	% Change	% of County Growth	2030 Total Jobs
Aspen Hill	6,270	(69)	-1.1%	-0.2%	6,201	113	1.8%	0.1%	6,314
Bethesda CBD	32,228	3,621	11.2%	11.6%	35,849	2,760	7.7%	1.7%	38,609
Bethesda/Chevy Chase	43,480	153	0.4%	0.5%	43,633	5,930	13.6%	3.6%	49,563
Clarksburg	2,550	1,269	49.8%	4.1%	3,819	12,543	328.4%	7.6%	16,362
Cloverly	1,255	93	7.4%	0.3%	1,348	(2)	-0.1%	0.0%	1,346
Damascus	2,372	(57)	-2.4%	-0.2%	2,315	161	7.0%	0.1%	2,476
Darnestown/Travilah	903	4	0.4%	0.0%	907	10	1.1%	0.0%	917
Derwood	16,942	1,088	6.4%	3.5%	18,030	3,332	18.5%	2.0%	21,362
Fairland/White Oak	25,082	4,100	16.3%	13.2%	29,182	9,497	32.5%	5.8%	38,679
Friendship Heights	8,100	518	6.4%	1.7%	8,618	2,221	25.8%	1.3%	10,839
Gaithersburg City	49,926	3,640	7.3%	11.7%	53,566	33,446	62.4%	20.3%	87,012
Germantown East	6,797	2,021	29.7%	6.5%	8,818	8,927	101.2%	5.4%	17,745
Germantown Town Center	3,343	656	19.6%	2.1%	3,999	3,285	82.1%	2.0%	7,284
Germantown West	9,049	1,564	17.3%	5.0%	10,613	9,997	94.2%	6.1%	20,610
Glenmont	570	64	11.2%	0.2%	634	84	13.2%	0.1%	718
Goshen	1,037	(5)	-0.5%	0.0%	1,032	6	0.6%	0.0%	1,038
Grosvenor	607	(19)	-3.1%	-0.1%	588	3	0.5%	0.0%	591
Kensington/Wheaton	14,223	(180)	-1.3%	-0.6%	14,043	117	0.8%	0.1%	14,160
Montgomery Village/Airpark	12,668	72	0.6%	0.2%	12,740	2,960	23.2%	1.8%	15,700
North Bethesda	52,250	(497)	-1.0%	-1.6%	51,753	12,230	23.6%	7.4%	63,983
North Potomac	1,441	4	0.3%	0.0%	1,445	105	7.3%	0.1%	1,550
Olney	5,393	296	5.5%	1.0%	5,689	331	5.8%	0.2%	6,020
Patuxent	2,605	15	0.6%	0.0%	2,620	510	19.5%	0.3%	3,130
Poolesville	1,744	31	1.8%	0.1%	1,775	3	0.2%	0.0%	1,778
Potomac	12,234	(151)	-1.2%	-0.5%	12,083	2,836	23.5%	1.7%	14,919
R & D Village	15,855	4,429	27.9%	14.2%	20,284	16,551	81.6%	10.1%	36,835
Rock Creek	1,898	(47)	-2.5%	-0.2%	1,851	25	1.4%	0.0%	1,876
Rockville City	72,102	5,492	7.6%	17.7%	77,594	23,083	29.7%	14.0%	100,677
Shady Grove	2,850	4	0.1%	0.0%	2,854	2,618	91.7%	1.6%	5,472
Silver Spring CBD	28,750	1,808	6.3%	5.8%	30,558	2,529	8.3%	1.5%	33,087
Silver Spring/Takoma Park	15,976	(420)	-2.6%	-1.4%	15,556	(643)	-4.1%	-0.4%	14,913
Twinbrook	9,142	1,121	12.3%	3.6%	10,263	804	7.8%	0.5%	11,067
Wheaton CBD	8,545	497	5.8%	1.6%	9,042	915	10.1%	0.6%	9,957
White Flint	6,113	(15)	-0.2%	0.0%	6,098	7,313	119.9%	4.4%	13,411
Montgomery County Total	474,300	31,100	6.6%	100.0%	505,400	164,600	32.6%	100.0%	670,000

Source: Montgomery County Planning Department, Research and Technology Center, April 2009

Households

County's households grew by 34,500 between 2000 and 2009, an increase of 10.6 percent (Table 2). This is slower than the County's pace of household growth in the 1990s when households grew by 42,300 an increase of 15 percent. The County's annual household growth rate this decade is 1.1 percent per year, compared to an annual growth rate of 1.4 percent during the 1990s. Figure 3 shows the County's 2009 household density per acre by traffic zone.

Between 2009 and 2030 the County's Round 7.2 forecast shows an increase of 80,900 households an increase of 22.5 percent. County's annual household growth rate during this period would be 1.0 percent per year slightly lower than the current annual growth rate.

In 2005, 6.5 percent of the County's households were in the City of Rockville (22,500). During the Round 7.2 forecast period, Rockville slightly increases its relative share of the County's households. In 2030, Rockville has 30,800 households, 7.0 percent of the County total.

In 2005, Gaithersburg had 21,700 households, 6.2 percent of the County total. By 2030, Gaithersburg expects to have 33,900 households, increasing its share of the County's households to 7.7 percent.

Between 2000 and 2009, five Policy Areas scattered around the County had over half of the County's household growth. Rockville City had the most growth 6,500 households, 19 percent of the County's household growth. Germantown West ranked second growing by 3,300 households (10 percent) followed by Clarksburg +3,200 households (9 percent), Gaithersburg City +2,700 households (8 percent), and Fairland/White Oak +2,200 households (6 percent). Between 2000 and 2009, Clarksburg had the highest rate of household growth, increasing by 417 percent. The Metro Station Policy Areas combined grew by 4,800 households, an increase of 23 percent, and they represent 14 percent of the County's projected household growth.

Between 2009 and 2030, of all the Policy Areas, Gaithersburg City and Clarksburg are projected to grow the most. Gaithersburg City is projected to grow by 9,900 households, 12 percent of the County's growth, and Clarksburg is projected to grow by 9,200 households, 11 percent of the County's growth. The Rockville City Policy Area is projected to have the third highest growth 6,400 households, 8 percent of the County's growth, followed by the Silver Spring CBD +6,200 households (8 percent), R&D Village +5,900 households (7 percent), Shady Grove +5,200 households (6 percent), and North Bethesda +5,100 jobs (6 percent). These seven Policy Areas are projected to have almost 60 percent of the County's household growth. The Metro Station Policy Areas are projected to grow by 21,400 households, an increase of 83 percent, and they represent 27 percent of the County's projected household growth. Figure 4 shows the changes in household density from 2009 to 2030.

Table2
Montgomery County Household Growth by Policy Area
 Round 7.2 Cooperative Household Forecast

Policy Area	2000 Households	2000 to 2009 Household Growth	% Change	% of County Growth	2009 Households	2009 to 2030 Household Growth	% Change	% of County Growth	2030 Households
Aspen Hill	23,742	1,122	4.7%	3.2%	24,864	130	0.5%	0.2%	24,994
Bethesda CBD	5,841	1,320	22.6%	3.8%	7,161	3,970	55.4%	4.9%	11,131
Bethesda/Chevy Chase	27,693	1,409	5.1%	4.1%	29,102	193	0.7%	0.2%	29,295
Clarksburg	757	3,155	416.8%	9.1%	3,912	9,206	235.3%	11.4%	13,118
Cloverly	5,207	273	5.2%	0.8%	5,480	72	1.3%	0.1%	5,552
Damascus	3,281	431	13.1%	1.2%	3,712	1,120	30.2%	1.4%	4,832
Darnestown/Travilah	3,306	508	15.4%	1.5%	3,814	210	5.5%	0.3%	4,024
Derwood	5,587	107	1.9%	0.3%	5,694	587	10.3%	0.7%	6,281
Fairland/White Oak	26,278	2,174	8.3%	6.3%	28,452	452	1.6%	0.6%	28,904
Friendship Heights	3,325	30	0.9%	0.1%	3,355	903	26.9%	1.1%	4,258
Gaithersburg City	20,520	2,730	13.3%	7.9%	23,250	9,933	42.7%	12.3%	33,183
Germantown East	7,196	820	11.4%	2.4%	8,016	1,795	22.4%	2.2%	9,811
Germantown Town Center	131	850	648.9%	2.5%	981	1,375	140.2%	1.7%	2,356
Germantown West	18,022	3,328	18.5%	9.6%	21,350	4,703	22.0%	5.8%	26,053
Glenmont	1,067	3	0.3%	0.0%	1,070	900	84.1%	1.1%	1,970
Goshen	4,891	421	8.6%	1.2%	5,312	256	4.8%	0.3%	5,568
Grosvenor	2,682	967	36.1%	2.8%	3,649	965	26.4%	1.2%	4,614
Kensington/Wheaton	32,101	447	1.4%	1.3%	32,548	1,238	3.8%	1.5%	33,786
Montgomery Village/Airpark	18,337	427	2.3%	1.2%	18,764	76	0.4%	0.1%	18,840
North Bethesda	13,792	762	5.5%	2.2%	14,554	5,069	34.8%	6.3%	19,623
North Potomac	8,534	472	5.5%	1.4%	9,006	1,355	15.0%	1.7%	10,361
Olney	10,725	646	6.0%	1.9%	11,371	1,697	14.9%	2.1%	13,068
Patuxent	2,969	661	22.3%	1.9%	3,630	294	8.1%	0.4%	3,924
Poolesville	2,925	164	5.6%	0.5%	3,089	442	14.3%	0.5%	3,531
Potomac	16,457	773	4.7%	2.2%	17,230	606	3.5%	0.7%	17,836
R & D Village	2,603	953	36.6%	2.8%	3,556	5,911	166.2%	7.3%	9,467
Rock Creek	1,844	414	22.5%	1.2%	2,258	422	18.7%	0.5%	2,680
Rockville City	17,193	6,479	37.7%	18.8%	23,672	6,430	27.2%	7.9%	30,102
Shady Grove	347	3	0.9%	0.0%	350	5,214	1489.7%	6.4%	5,564
Silver Spring CBD	5,187	1,092	21.1%	3.2%	6,279	6,170	98.3%	7.6%	12,449
Silver Spring/Takoma Park	29,073	172	0.6%	0.5%	29,245	698	2.4%	0.9%	29,943
Twinbrook	3	0	0.0%	0.0%	3	2,549	84966.7%	3.2%	2,552
Wheaton CBD	1,993	475	23.8%	1.4%	2,468	1,841	74.6%	2.3%	4,309
White Flint	956	947	99.1%	2.7%	1,903	4,118	216.4%	5.1%	6,021
Montgomery County	324,565	34,535	10.6%	100.0%	359,100	80,900	22.5%	100.0%	440,000

Source: Montgomery County Planning Department, Research and Technology Center, April 2009

Population in Households

The County's population living in households increased from 863,900 in 2000 to 945,200 in 2009, an increase of 81,300 about 9 percent (Table 3). The average annual growth rate was 1 percent per year, slower than the average annual growth rate of 1.4 percent that occurred during the 1990s.

The County's Round 7.2 forecast shows the household population reaching slightly over 1.1 million by 2030. Between 2009 and 2030, the County's household population is projected to grow by 177,100 an increase of almost 19 percent. County's annual growth rate during this period would be 0.8 percent per year slightly lower than the current annual growth rate of 1 percent per year.

Four of the County's Policy Areas grew by more than 10,000 people between 2000 and 2009. Rockville City's household population grew the most increasing by 13,000 16 percent of the County's growth. Germantown West grew by 11,500 14 percent of the County's growth, Bethesda/Chevy Chase grew by 11,100 almost 14 percent of the County's growth and Clarksburg grew by 10,100 12 percent of the County's growth.

Between 2000 and 2009 three Policy areas have growth rates over 100 percent: the Germantown Town Center's population increased by 1,500 an increase of 566 percent, Clarksburg's population increased by 10,100 an increase of 472 percent, and White Flint's population increased by 2,200 an increase of 136 percent.

Between 2000 and 2009 five Policy Areas showed population declines. Kensington/Wheaton's population dropped by almost 6,000 a decrease of 6.5 percent, Silver Spring/Takoma Park's population dropped by about 1,000 a decrease of 1.4 percent, North Potomac's and Montgomery Village/Airpark's populations dropped by about 900 decreases of 3.3 percent and 1.8 percent respectively, and Derwood's population dropped by about 140 a decrease of 0.8 percent. These five Policy Areas also had low household growth during this period, combined they had 4.7 percent of the County's household growth.

The Round 7.2 population in households forecast shows two Policy Areas growing the most between 2009 and 2030. Clarksburg's population is projected to grow by 25,000 an increase of 204 percent and Gaithersburg City's population is projected to grow by 24,500 an increase of 41 percent. Each of these Policy Areas will have about 14 percent of the County's household population growth. No other Policy Area has more than 8 percent of the County's population growth. Five Policy Areas are each projected to have between about 7 to 8 percent of the County's population growth. Rockville City's population will grow by 13,600 an increase of 23 percent and have 8 percent of the County's population growth. Each of the following Policy Areas will have about 7 percent of the County's population growth: the R & D Village's population grows by 12,800 an increase of 177 percent, the Silver Spring CBD's population grows by 12,600 (+105 percent), North Bethesda's population grows by 12,000 (+32 percent),

and Shady Grove's population grows by 11,900 (+1,445 percent). Along with Shady Grove, two other Policy Areas are emerging areas of population growth. White Flint's population grows by 9,900 and increase of 262 percent and Twinbrook's population grows from 8 in 2009 to about 5,300 in 2030 an increase of 66,163 percent.

Five Policy Areas show declines in population between 2009 and 2030: Fairland/White Oak's population declines by 2,100 a decrease of 3 percent, North Potomac's population declines by 1,000 a decrease of 4 percent, Darnestown/Travilah's population declines by 400 a decrease of 4 percent, Aspen Hill's population declines by 400 a decrease of less than 1 percent, and Cloverly's population declines by 200 a decrease of 1 percent.

Table3
Montgomery County Household Population Growth by
Policy Area
Round 7.2 Cooperative Household Population Forecast

Policy Areas	2000 Population Living In Households	2000 to 2009 Population Growth in Households	% Change	% of County Growth	2009 Population Living In Households	2009 to 2030 Population Growth in Households	% Change	% of County Growth	2030 Population Living In Households
Aspen Hill	59,352	1,347	2.3%	1.7%	60,699	(391)	-0.6%	-0.2%	60,308
Bethesda CBD	9,023	2,540	28.2%	3.1%	11,563	7,683	66.4%	4.3%	19,246
Bethesda/Chevy									
Chase	70,278	11,137	15.8%	13.7%	81,415	5,032	6.2%	2.8%	86,447
Clarksburg	2,144	10,112	471.6%	12.4%	12,256	25,042	204.3%	14.1%	37,298
Cloverly	15,333	878	5.7%	1.1%	16,211	(219)	-1.4%	-0.1%	15,992
Damascus	9,984	590	5.9%	0.7%	10,574	2,552	24.1%	1.4%	13,126
Darnestown/Travilah	10,564	1,461	13.8%	1.8%	12,025	(428)	-3.6%	-0.2%	11,597
Derwood	17,647	(145)	-0.8%	-0.2%	17,502	1,448	8.3%	0.8%	18,950
Fairland/White Oak	70,685	5,360	7.6%	6.6%	76,045	(2,121)	-2.8%	-1.2%	73,924
Friendship Heights	5,058	207	4.1%	0.3%	5,265	1,905	36.2%	1.1%	7,170
Gaithersburg City	53,154	6,882	12.9%	8.5%	60,036	24,493	40.8%	13.8%	84,529
Germantown East	20,567	2,606	12.7%	3.2%	23,173	1,559	6.7%	0.9%	24,732
Germantown Town Center	271	1,535	566.4%	1.9%	1,806	2,629	145.6%	1.5%	4,435
Germantown West	47,817	11,455	24.0%	14.1%	59,272	9,024	15.2%	5.1%	68,296
Glenmont	2,579	92	3.6%	0.1%	2,671	2,399	89.8%	1.4%	5,070
Goshen	14,949	1,118	7.5%	1.4%	16,067	156	1.0%	0.1%	16,223
Grosvenor	4,467	1,815	40.6%	2.2%	6,282	3,279	52.2%	1.9%	9,561
Kensington/Wheaton	91,341	(5,960)	-6.5%	-7.3%	85,381	4,526	5.3%	2.6%	89,907
Montgomery Village/Airpark	51,771	(910)	-1.8%	-1.1%	50,861	1,214	2.4%	0.7%	52,075
North Bethesda	32,415	4,584	14.1%	5.6%	36,999	11,953	32.3%	6.7%	48,952
North Potomac	28,294	(920)	-3.3%	-1.1%	27,374	(1,013)	-3.7%	-0.6%	26,361
Olney	32,022	980	3.1%	1.2%	33,002	2,542	7.7%	1.4%	35,544
Patuxent	8,943	1,555	17.4%	1.9%	10,498	439	4.2%	0.2%	10,937
Poolesville	8,565	351	4.1%	0.4%	8,916	1,398	15.7%	0.8%	10,314
Potomac	46,801	1,913	4.1%	2.4%	48,714	208	0.4%	0.1%	48,922
R & D Village	5,821	1,383	23.8%	1.7%	7,204	12,759	177.1%	7.2%	19,963
Rock Creek	5,967	1,572	26.3%	1.9%	7,539	382	5.1%	0.2%	7,921
Rockville City	45,746	13,020	28.5%	16.0%	58,766	13,563	23.1%	7.7%	72,329
Shady Grove	614	212	34.5%	0.3%	826	11,936	1445.0%	6.7%	12,762
Silver Spring CBD	8,878	3,174	35.8%	3.9%	12,052	12,607	104.6%	7.1%	24,659
Silver Spring/Takoma Park	76,219	(1,039)	-1.4%	-1.3%	75,180	676	0.9%	0.4%	75,856
Twinbrook	8	0	0.0%	0.0%	8	5,293	66162.5%	3.0%	5,301
Wheaton CBD	5,023	193	3.8%	0.2%	5,216	4,627	88.7%	2.6%	9,843
White Flint	1,610	2,192	136.1%	2.7%	3,802	9,948	261.7%	5.6%	13,750
Montgomery County Total	863,910	81,290	9.4%	100.0%	945,200	177,100	18.7%	100.0%	1,122,300

Source: Montgomery County Planning Department, Research and Technology Center, April 2009

Development Pipeline

The Planning Department maintains Montgomery County's commercial and residential development pipelines. The pipelines include commercial and residential projects that have been approved for development but not yet built. In the commercial pipeline, the gross floor area approved is converted into a job potential for the development.

Commercial Pipeline

There are 33 million square feet of commercial space remaining to be built in the March 2009 commercial pipeline (Table 4). This represents the equivalent of about 111,600 jobs. If the pipeline would be built to capacity, these jobs would represent about 68 percent of the Round 7.2 job growth forecast between 2009 and 2030, or the jobs remaining in the commercial pipeline would fill the County's job growth to between the years 2023 and 2024.

The Round 7.2 forecasts are not only based on the current remaining pipeline but include the potential growth in adopted and proposed master plans and sector plans. Much of the potential development in these plans has not yet entered the pipeline of approved development. Most of the development potential in the adopted Shady Grove and Twinbrook sector plans has not entered the pipeline. None of the proposed new development potential in plans currently in process (Gaithersburg West, Germantown, and White Flint) has entered the pipeline. The potential new development in all these plans is considered in the Round 7.2 forecasts. The current commercial pipeline is not built to capacity by 2030 in the Round 7.2 forecast.

Housing Pipeline

There are 29,000 housing units remaining to be built in the February 2009 pipeline, 9,600 single-family units and 19,400 multi-family units (Table 5). Based on the Round 7.2 2009 to 2030 household growth forecast, the pipeline units represent about 58 percent of the single-family growth, 30 percent of the multi-family growth and 36 percent of the total household growth. The 29,000 housing units in the pipeline would fill the County's projected household growth from 2009 to between 2015 and 2016.

Table 4
Pipeline of Approved Commercial Development by Policy Area
 Montgomery County, Maryland
 as of: March 27, 2009

Policy Area	Square Feet		Estimated Job Capacity			Estimated Job Capacity, Remaining Development			
	Approved	Remaining	Approved	Remaining	% of Remaining	Office	Retail	Industrial	Other
Aspen Hill	62,986	62,986	80	80	0.1%	75	0	5	0
Bethesda Central Business District	500,004	500,004	958	957	0.9%	351	411	0	195
Bethesda/Chevy Chase	299,023	299,023	1,006	1,006	0.9%	721	285	0	0
Clarksburg	3,979,220	3,442,359	12,738	10,590	9.5%	9,195	1,395	0	0
Cloverly	223,148	106,172	17	16	0.0%	6	0	0	11
Damascus	3,162	3,162	13	13	0.0%	13	0	0	0
Derwood	424,643	406,793	1,565	1,564	1.4%	1,389	31	144	0
Fairland/White Oak	3,484,613	2,824,247	9,672	7,591	6.8%	4,879	199	128	2,385
Friendship Heights	760,055	760,055	3,033	3,033	2.7%	2,670	197	0	166
Gaithersburg City	4,532,096	3,827,007	15,488	15,488	13.9%	12,030	2,973	226	259
Germantown East	3,105,288	1,945,543	10,679	9,019	8.1%	8,682	274	0	63
Germantown West	1,878,570	1,702,053	7,301	7,226	6.5%	6,926	285	0	15
Germantown Town Center	150,269	145,217	15	15	0.0%	8	7	0	0
Glenmont	8,585	8,585	17	17	0.0%	0	0	0	17
Grosvenor	0	0	0	0	0.0%	0	0	0	0
Kensington/Wheaton	38,904	33,974	77	22	0.0%	14	0	8	0
Montgomery Village/Montgomery									
Airpark	1,304,211	1,294,711	3,213	3,213	2.9%	1,638	0	1,575	0
North Bethesda	3,473,068	2,164,153	13,740	7,913	7.1%	6,344	947	73	549
North Potomac	40,000	40,000	160	160	0.1%	160	0	0	0
Olney	579,755	579,755	208	207	0.2%	10	20	0	177
Potomac	1,446,480	1,446,480	3,485	3,485	3.1%	1,664	1,514	0	307
Research & Development Villlage	4,237,629	2,531,815	12,457	7,584	6.8%	1,600	0	3,507	2,477
Rockville City	5,628,148	5,166,720	20,197	18,556	16.6%	16,320	694	272	1,271
Shady Grove	6,400	6,400	0	16	0.0%	0	16	0	0
Silver Spring Central Business District	1,644,784	804,826	5,450	5,218	4.7%	3,285	1,629	0	304
Silver Spring/Takoma Park	203,445	183,300	284	283	0.3%	261	21	1	0
Twinbrook	447,914	447,914	1,280	1,280	1.1%	0	0	0	1,280
Wheaton Central Business District	4,000	4,000	10	10	0.0%	0	10	0	0
White Flint	1,684,937	1,603,199	5,895	5,691	5.1%	4,592	1,098	0	1
Rural	657,568	617,924	1,313	1,312	1.2%	216	954	1	141
Montgomery County Total	40,808,905	32,958,377	130,349	111,565		83,049	12,960	5,940	9,618
County (not including Gaithersburg & Rockville)	30,648,661	23,964,650	94,663	77,521	69.5%	54,699	9,293	5,442	8,088

Source: Montgomery County Planning Department, Research and Technology Center, April 2009

Table 5
Pipeline of Approved Residential Development by Policy Area
 Montgomery County, Maryland

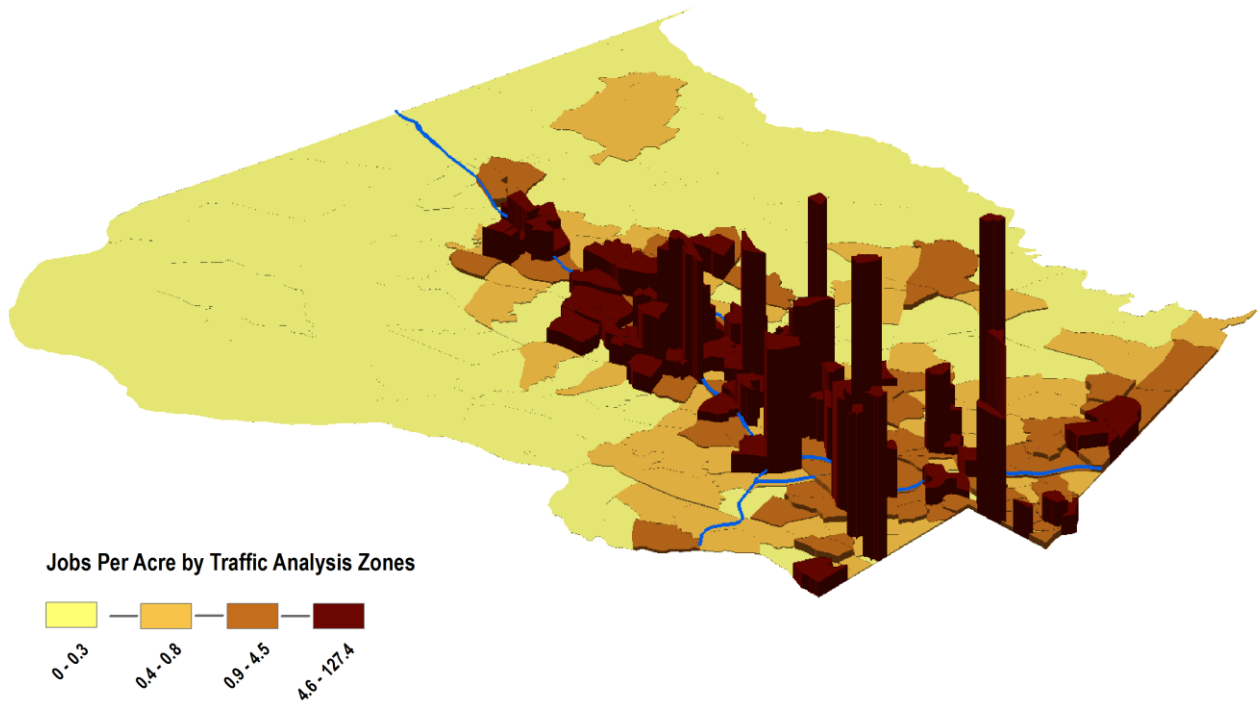
as of: February 28, 2009

Policy Areas	Approved Unit Type				Remaining to be Built Unit Type			
	Single-family Detached	Townhouse	Multi-Family	Total Units	Single-family Detached	Townhouse	Multi-Family	Total Units
Aspen Hill	92	54	46	192	62	48	46	156
Bethesda CBD	8	12	1,277	1,297	8	12	1,277	1,297
Bethesda/Chevy Chase	34	39	0	73	27	17	0	44
Clarksburg	2,945	2,627	2,621	8,193	1,722	1,379	1,701	4,802
Cloverly	70	0	0	70	58	0	0	58
Damascus	64	52	0	116	63	52	0	115
Derwood	206	256	196	658	206	256	196	658
Fairland/White Oak	98	386	0	484	75	258	0	333
Friendship Heights	0	200	733	933	0	200	733	933
Gaithersburg City	341	1,220	4,609	6,170	341	1,220	4,833	6,394
Germantown East	7	147	0	154	3	119	0	122
Germantown Town Center	0	0	604	604	0	0	162	162
Germantown West	438	225	300	963	215	170	179	564
Glenmont	0	0	0	0	0	0	0	0
Grosvenor	0	112	0	112	0	112	0	112
Kensington/Wheaton Montgomery	517	446	45	1,008	513	440	27	980
Village/Airpark	22	0	0	22	21	0	0	21
North Bethesda	10	0	1,250	1,260	10	0	860	870
North Potomac	66	85	0	151	53	61	0	114
Olney	179	103	241	523	141	103	141	385
Potomac	207	165	547	919	111	38	467	616
R & D Village	4	0	168	172	4	0	52	56
Rockville City	42	47	3,516	3,605	42	17	3,516	3,575
Shady Grove	6	36	0	42	6	36	0	42
Silver Spring CBD	0	0	2,918	2,918	0	0	2,918	2,918
Silver Spring/Takoma Park	23	121	169	313	22	90	169	281
Twinbrook	0	0	0	0	0	0	0	0
Wheaton CBD	0	0	180	180	0	0	180	180
White Flint	1	0	1,973	1,974	1	0	1,973	1,974
Rural	1,312	109	0	1,420	1,125	103	0	1,228
Montgomery County Total	6,692	6,442	21,393	34,526	4,829	4,731	19,430	28,990

Source: Montgomery County Planning Department, Research and Technology Center, April 2009

Figure 1

Jobs Per Acre in Montgomery County
January 1, 2009 Estimates by Traffic Analysis Zones

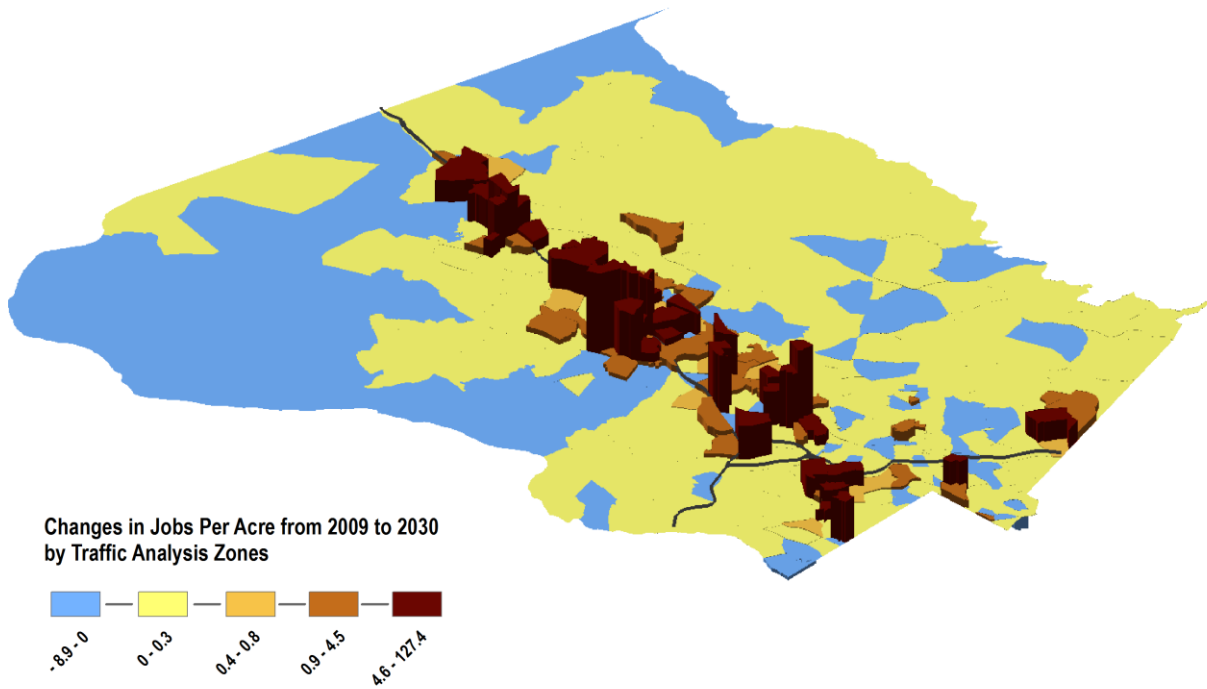


Source: Montgomery County Planning Department, Research & Technology Center

Prepared by Jay Mukherjee, March 2009
D:\jay\Tasks\Golan\Growth Policy\Jobs Housing Ratio

Figure 2

Jobs Per Acre in Montgomery County
2009 - 2030 Growth Estimates by Traffic Analysis Zones

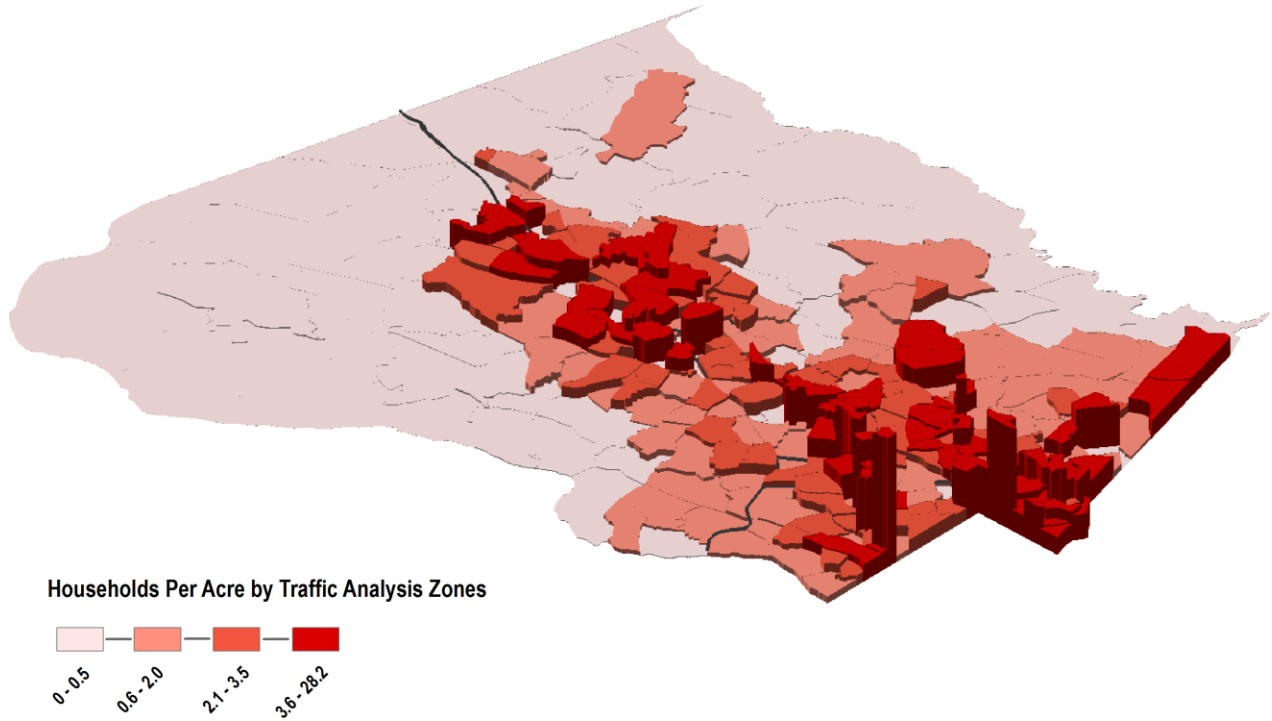


Source: Montgomery County Planning Department, Research & Technology Center

Prepared by Jay Mulheisen, March 2009
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Figure 3

Households Per Acre in Montgomery County
January 1, 2009 Estimates by Traffic Analysis Zones

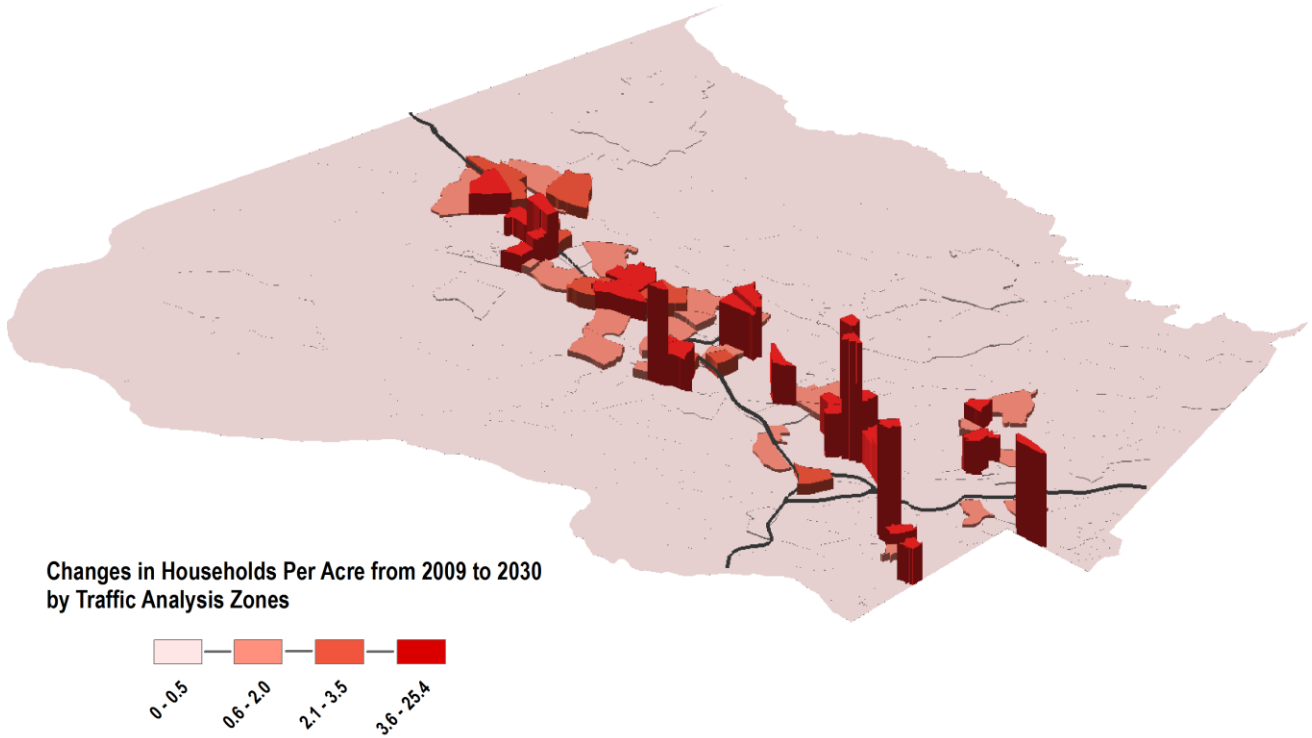


Source: Montgomery County Planning Department, Research & Technology Center

Prepared by Jay Mukherjee, March 2009
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Figure 4

Households Per Acre in Montgomery County
2009 - 2030 Growth Estimates by Traffic Analysis Zones



Source: Montgomery County Planning Department, Research & Technology Center

Prepared by Jay Mukherjee, March 2009
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Growth Policy Study:

Draft Report

Appendix C – Factors Affecting Demand for
Public Facilities in Established Communities
(Resolution 16-376 F11)

Lead Staff:

Khalid Afzal

Objective:

To provide an analysis of the factors that may affect the demand for public facilities and how to meet that demand in established communities.

Draft Report:

Factors affecting demand in established communities may include: demographics (more families with younger children moving into a neighborhood); standards or expectations (class size changes may influence the need for more class rooms); economic conditions (recent economic downturn has created more demand for library services); and technology (more water efficient household devices help reduce demand for water).

Traditionally, Growth Policy has focused on the affect of new development on the demand for public facilities. Yet, new development is not the only source of demand for public facilities. For example, as neighborhoods “age”, older residents move out, younger ones in, and the school age population within the neighborhood will increase. Thus the demand for school facilities increases without an increase in development.

The department currently coordinates its assessment of public facilities through its coordination with the County and other agencies responsible for meeting demand for public services as part of its master plans and regulatory review processes.

The following is a matrix representing various public facilities and the factors which may affect the demand for such facilities. The purpose of this analysis is to identify trends and future needs for these resources, which could be recommended in future CIPs if the demand reaches a point where it cannot be accommodated through programmatic changes in existing facilities.

An “x” means that a particular factor may change demand for that facility; the change could cause an increase or decrease in demand for public services. In many cases, higher demand up to a certain level can be accommodated in existing facilities by programmatic changes, such as extended hours for libraries and recreation centers or the temporary addition of relocatable classrooms.

Factors that are cyclical in nature typically do not generate demand for new facilities in established neighborhoods. For example, the recent downturn in the economy has increased demand for library services. But this is considered cyclical and the demand for increased services can be accommodated within the existing facilities. Non-cyclical changes represent sustained increases or decreases in demand such as a shift in the ethnic mix of the population and popularity of soccer which generated new demand for soccer fields.

Chart follows on the next page.

Factors affecting demand for public facilities in established communities (other than new growth through redevelopment)

Draft April 24, 2009

Factors	Cyclical	Sustained	Demand for public facilities/services											
			Schools	Roads	Transit	Police	Fire	Water	Sewer	Health	Parks	Rec Centers	Solid Waste	Libraries
Demographics														
Population change		x	x	x	x	x	x	x	x	x	x	x	x	x
Aging population		x			x					x		x		
Ethnic mix of population		x	x		x					x	x			
Household size		x	x	x	x			x	x		x	x	x	x
Economic conditions														
Unemployment	X											x		x
Higher gas prices	X	x			x									
Autos per dwelling unit		x		x										
Technological improvements														
Energy star appliances		x						x	x					
High-speed internet		x		x	x									
Changes in standards/regulations		x												
Changes in class size		x	x											
Universal Pre-K		x	x											

Cyclical: up to 10 years

Sustained: more than 10 years