

staff draft

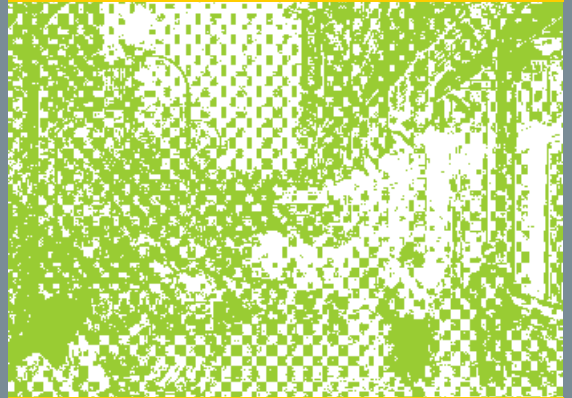
June 2012

growing smarter

2012-2016 Subdivision Staging Policy

appendix

closer communities



reducing traffic



connected neighborhoods



staging growth



Montgomery County Planning Department
The Maryland-National Capital Park and Planning Commission

MontgomeryPlanning.org

2012 Subdivision Staging Policy

Appendix 1

Pace and Pattern of Development

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Background

Since 1973 Montgomery County has conducted the exercise of evaluating whether County public facilities are adequate to meet the needs induced by increases in its population and employment base. The County's subdivision Staging Policy, (formerly, the Growth Policy) governs the timing and conduct of this analysis. In 2009, there was extended discussion of the need for the subdivision staging policy provide an extended analysis of the County's pace and pattern of growth.

This initial pace and pattern study presents a framework for understanding development patterns as the County enters a new period in which the demand for of new housing and commercial space will be met primarily through the redevelopment of existing properties. This is a transition from the traditional regime of green field development that formerly characterized County's growth.

The analysis examines the assumptions of the County's 2030 demographic forecast. Then, its attempts to determine the amount of land needed to accommodate the projected growth. It identifies where gaps exists between the projected growth and the availability of land needed to accommodate it. The lack of vacant land for a specific category of use acts as an indicator of the types of redevelopment pressures the County will face.

The following information is provided:

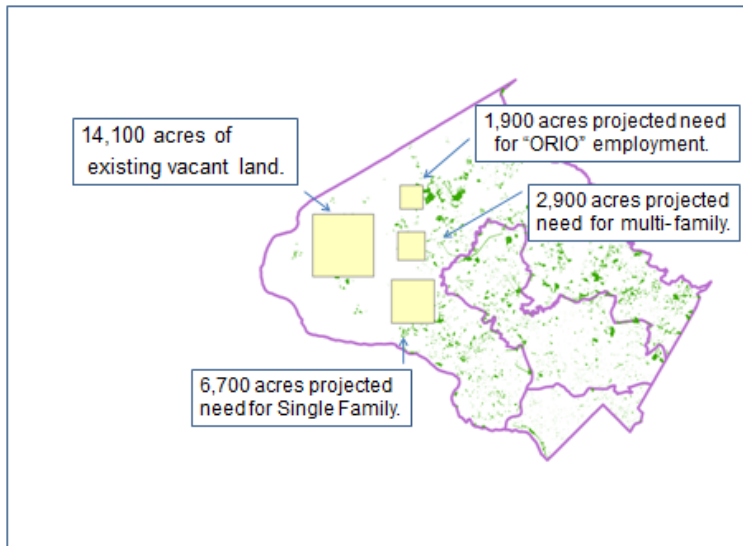
- Projections of acres land needed across the housing and job categories used in the County forecast
- Comparisons of the projected need for land by category to the amount of available vacant land
- Indicators of historical changes in the densities at which County land is developed (i.e., change in Floor Area Ratio)
- Historical trends in sub-County rates of land development
- Explanation of Small Area Forecast methodology and components
- Review of the County pipeline of approved but "un-built" development
- Small Area Forecast Results: 2010-2030

Implications of Declining Vacant Land

There has been a rapid decline in the availability of the vacant land that fueled Montgomery County's development in the 1970s, 80s, and 90s. Only 4.8 percent of the County land remains vacant.

Based on the County's regional forecast of housing and jobs, the County will need to accommodate an additional 9,600 acres of residential development and 1,913 acres of commercial development over the next 20 years.

Figure 1
Existing Vacant Land Compared to Land Needed to Accommodate Projected New Development



During the 1980s, the planning literature was characterized by debates over whether newly emerging suburbs or older central cities were winning a competition for new infrastructure investments. This competition was played out as developers chose between newer suburbs and older central cities as the primary choices for new retail, office, and high income residential

developments.¹

Currently, there is even a wider variety of location options for developers to choose from. First ring suburbs like Montgomery County find themselves in competition with reemerging central cities, younger inner suburbs within the same metro areas, as well with fast growing newly emerging "exurbs" that emerged along the urban region's outer fringe. A suburb's ability to compete with newer emerging exurban locations is a primary factor that determine how well the suburb will age. In the worst cases, older suburbs can face economic decline characterized by increased joblessness and a self-reinforcing cycle of deteriorating infrastructure. In the best cases, thoughtful policies lead to the ability to attract new investment and to maintain a healthy economic base.²

As the amount of vacant land in the Montgomery County declines, redevelopment of existing properties becomes increasing crucial as a source for new investment dollars. Comparing the County forecast to the existing profile of vacant land will help policy makers anticipate the types of redevelopment pressures that the County will face. This will also help us better understand the impact County growth controls will have on County residents' quality of life in the face of new development.

Approximately 14,100 acres of vacant land remain in the County. (The available acres reduced even further when small, undevelopable parcels are excluded.) We can use the current zoning to develop and indicator for the acres of vacant land currently available for commercial and residential use.

Under the current zoning, the projected need for acres of single-family is in balance the existing amount of vacant land zoned for single-family use. However, there is a surplus of vacant land zoned for retail and industrial/research uses when compared to future projected need. Correspondingly, there is a shortage of vacant land zoned for office and multifamily use.

Figure 2
Montgomery County Planning Department Geographic Area Teams

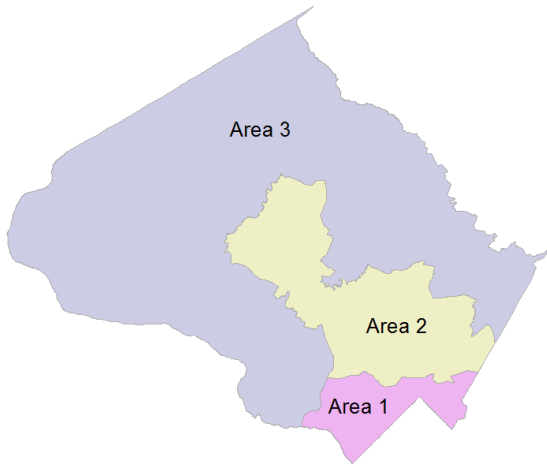
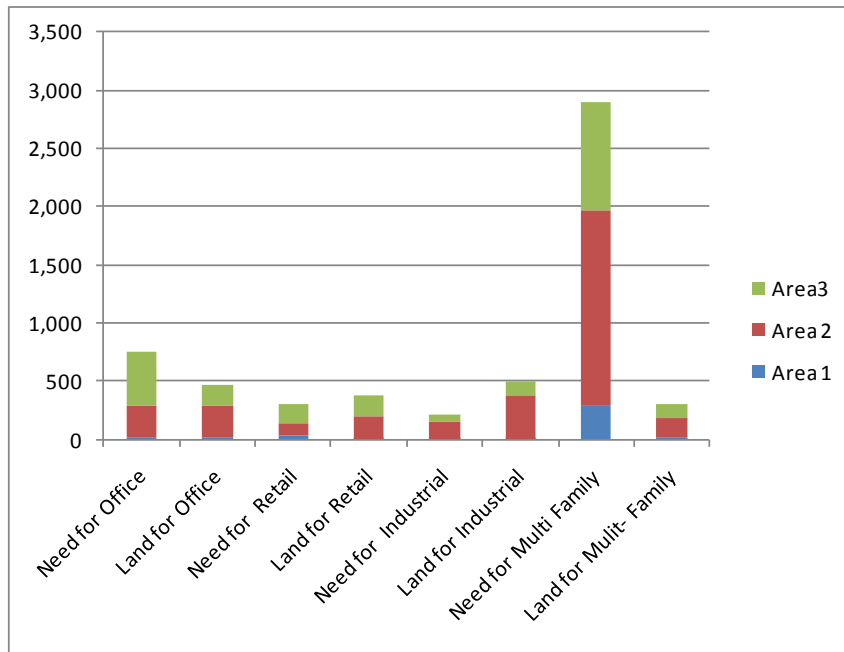
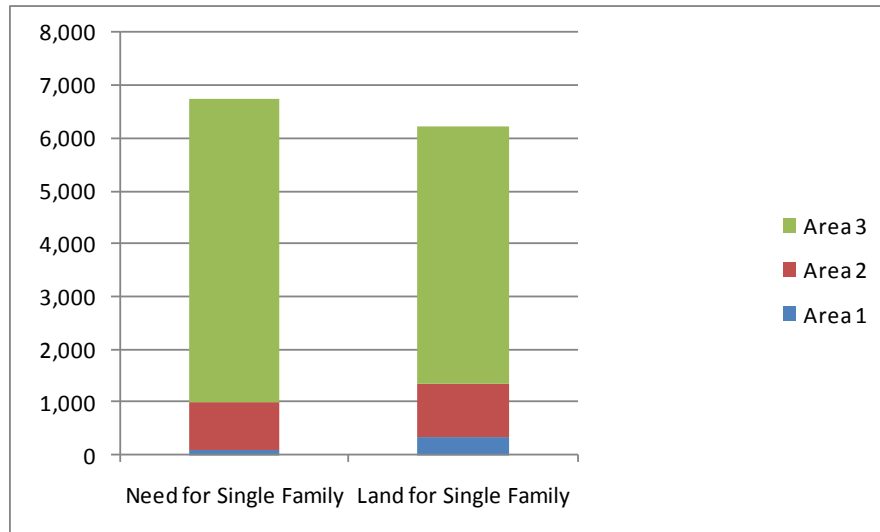


Figure 3
Projected Need for Acres of Land Compared to Amount of Vacant Land Currently Zoned for Commercial Use



| | Need for Office | Land for Office | Need for Retail | Land for Retail | Need for Industrial | Land for Industrial | Need for Multi Family | Land for Multit- Family | Need for Other | Land for Other |
|--------|-----------------|-----------------|-----------------|-----------------|---------------------|---------------------|-----------------------|-------------------------|----------------|----------------|
| Area 1 | 18 | 10.9 | 32 | 7.9 | 1 | 5.1 | 286 | 23 | 55 | 55.5 |
| Area 2 | 268 | 281.3 | 111 | 192.6 | 155 | 367.6 | 1,687 | 167 | 337 | 280.5 |
| Area 3 | 462 | 179.7 | 154 | 170.8 | 52 | 125.4 | 925 | 108 | 268 | 412.5 |
| | 748 | 471.9 | 297 | 371.3 | 207 | 498.1 | 2,898 | 298 | 660 | 748.6 |

Figure 4
 Projected Need for Acres of Land Compared to Amount of Vacant Land Currently Zoned for Single-family



| | Need for Single Family | Land for Single Family |
|--------|------------------------|------------------------|
| Area 1 | 93 | 334.8 |
| Area 2 | 892 | 1,022.2 |
| Area 3 | 5,747 | 4,846.9 |
| County | 6,732 | 6,203.9 |

Methodology for Projecting Future Land Use Needs

How do we determine the amount of land needed to accommodate future growth?

The forecast uses employment categories (Office, Retail, Industrial, Other, i.e. ORIO categories) that match those used in the Washington Metro Area Council of Government's regional transportation model. Within this framework, a conversion factor is used to translate the number of projected jobs within each category to the gross square footages needed to accommodate the projected employment.

| | Office | Retail | Industrial | Other |
|--------------|------------|-----------|------------|------------|
| New Jobs | 116,860 | 15,907 | 12,868 | 21,365 |
| Multiplier | 225 | 400 | 450 | 500 |
| Required GSF | 26,293,500 | 6,362,800 | 5,790,600 | 10,682,500 |

This approach provides an estimate of the total gross square footage of built space needed to accommodate all future jobs.

However, the acres of land needed to accommodate this new development depends on how intensely land is developed. For example, 3,000 office jobs could be located in a two story office park or in a 10-story mid-rise office building. The gross square footage of built space would be the same in each case. However, the building footprint of the high rise would be 1/5th the size of the office park. Obviously,

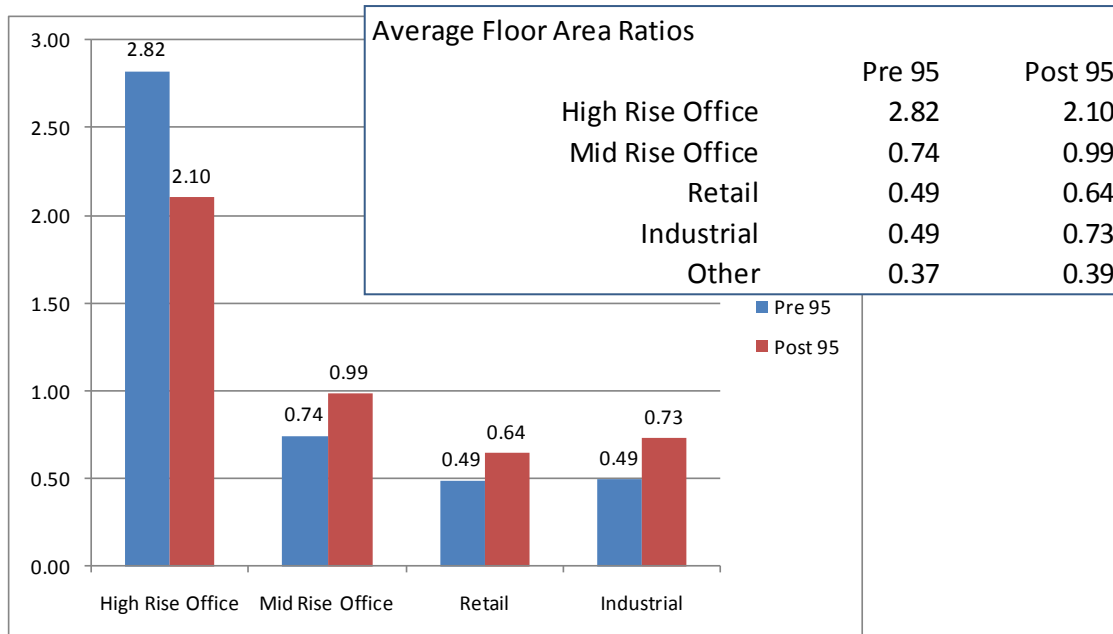
2012 Subdivision Staging Policy Appendix

the amount of land needed to contained new employment decreases as one assumes that land is developed at higher densities.

How densely do we build?

Floor Area Ratio (FAR) is the ratio of building gross square footage to the size of the parcel on which the building sits. An increase in FAR is an indicator of building more intensely on available land.

Since 1995, as the supply of vacant land has shrunk, developers have built more intensely on the remaining land.



Note: The apparent increase since 1995 in FAR for highrise office buildings is due to the large number of office buildings that were built inside the Beltway before 1995. After 1995, a larger number of office developments occurred along the I-270 corridor and outside of the Beltway. These post-1995 buildings provided much more on site space for parking and other amenities. For the purposes of this analysis, the more intense pre-1995 FAR is used.

A different approach is used to estimate how densely we build residential units. The existing average number of dwelling units per acre was used to determine current residential densities.

| | Single Family Avg Dwelling Units per Acre | Multi- Family Avg Dwelling Units per Acre |
|--------|---|---|
| Area 1 | 4.6 | 43.5 |
| Area 2 | 4.9 | 22.1 |
| Area 3 | 1.8 | 13.8 |
| County | 2.9 | 23.4 |

Projections for the amount of commercial land needed for new development were derived by dividing the gross building area measure by the assumed post-1995 FAR. Projects for the amount of residential

land needed for new development were derived by multiplying the units projected in the COG forecast by the current measures for residential dwelling unit per acre.

Forecast Methodology and Results

Montgomery County’s forecast of jobs, households, and population provides a framework for conducting the analysis of pace and pattern of growth. The forecast is completed in two stages. The first stage provides a Countywide measure for employment, population, and households. The second stage allocates the Countywide numbers to smaller neighborhood-like units of geography within the County.

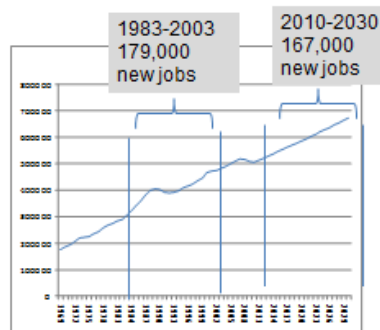
Stage 1: County level

The first stage determines the overall amount of population and job growth likely to occur in the County. During the first stage, demographic and economic models are used that consider the amount of growth likely to occur based on the County’s current economic and demographic structure. The effort develops projections that are relatively independent of any specific County master planning exercises.

The region’s forecast of housing, jobs, and population is a collaborative effort between the Metropolitan Washington Council of Governments (MWCOG) and local jurisdictions. MWCOG calibrates a regional econometric model that provides an estimate of overall growth in the Washington metro region. At the same time that MWCOG is preparing its economic projects, each member jurisdiction prepares its own projections of local growth, independently of MWCOG. The jurisdictions then meet with MWCOG to ensure that sum of the jurisdictional totals are within three percent of the MWCOG control total. Montgomery County’s participation in this process ensures that the County forecast fits within a framework that considers both regional and national economic trends.

Montgomery County projects over 75,000 new households and over 160,000 new jobs by year 2030. Both the jobs and housing forecast are consistent with previous 30-year trends that capture both the booms and busts of the previous periods. The demographic projections capture the dynamics of county-level births, deaths, net migration, and household formation rates. The employment model is a trend line projection based on current Bureau of Economic Analysis county employment estimates.

- The projected 2030 employment represents a 33% increase over 2010
- Parallels the period between 1983 and 2003 in which the region gained 179,000 jobs.
- Similar growth rates occurred between 1992 and 2007

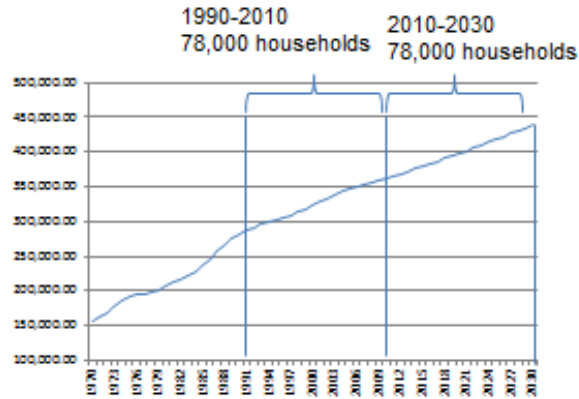


| | Office | Retail | Industrial | Other |
|--------|--------|--------|------------|-------|
| Area 1 | 21.9% | 17.7% | 1.7% | 9.5% |
| Area 2 | 46.4% | 17.0% | 29.8% | 27.3% |
| Area 3 | 123.6% | 19.0% | 28.0% | 14.6% |
| County | 47.2% | 17.5% | 27.2% | 17.8% |

Source: BEA, 1960-2011 scaled to 2010 forecast base, 2010-2030, interpolated from MWCOG round 4 forecast.

- The projected 2030 household growth represents a 21.5% increase over 2010
- Parallels 1990 to 2010 when County gained 78,000 households.
- Decrease from 1980-2000 when County gained 116,000 households.

Household Growth 2010 - 2030



Percent increase in households: 2010- 2030

| Single family | Multi-family | total households |
|---------------|--------------|------------------|
| 1.1% | 34.2% | 17.3% |
| 4.0% | 59.2% | 24.2% |
| 10.7% | 69.4% | 20.2% |
| 6.1% | 53.7% | 21.5% |

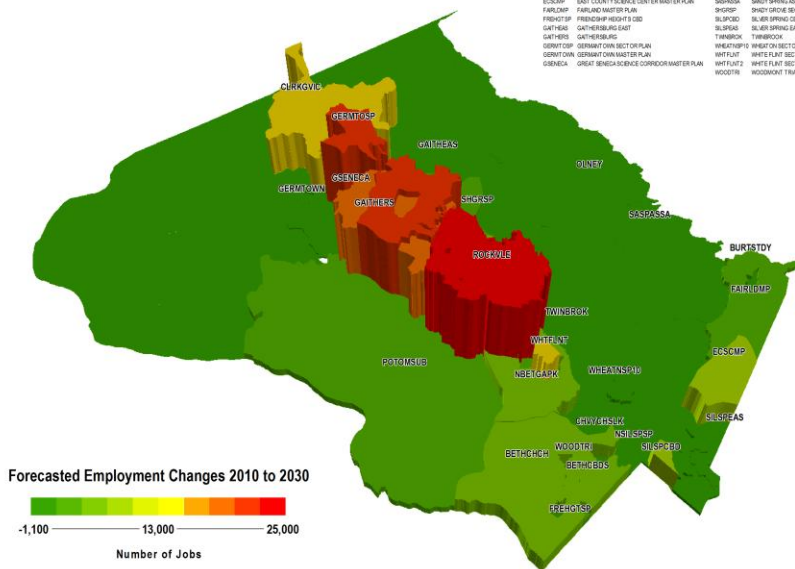
Stage 2: Small Area Allocation

The second stage in the forecast process attempts to identify the places within the County where new growth will occur. The jobs and households projected in Stage 1 are allocated within the County based on historical small area growth rates.

Employment Forecast, Montgomery County Forecasted Employment Estimates by Master Plan Areas

Code Translation Table:

| CODE | NAME | CODE | NAME |
|----------|--|----------|---|
| BETHSDS | BETHESDA CSD MASTER PLAN | MSFCAN | NORTH-BETHESDA GARRETT PARK MASTER PLAN |
| BETHCHC | BETHESDA CHEV CHASE | NLSRSP | NORTH AND WEST ALDER SPRING 2000 |
| BURTSTDY | BURTONVILLE CROSSROADS AND NEIGHBORHOOD PLAN | OLNEP | OLNEY MASTER PLAN |
| CHNDHLS | CHERRY CHASE LAKE MASTER PLAN | POTOMBL | POTOMAC SUBURBAN 2002 |
| CLMDFAC | CLARIBURG MASTER PLAN | ROCKLE | ROCKVILLE |
| ECSCMP | EAST COUNTY SCIENCE CENTER MASTER PLAN | SARNSA | SARASOTA |
| FAIRLNDP | FAIRLAND MASTER PLAN | SHGRSP | SHADY GROVE SECT OR PLAN |
| FRENTFR | FREEDSWAY HEIGHTS CSD | SLRSPD | SLATER SPRING CSD |
| GATHEAS | GATHERBURG EAST | SLRSPD | SLATER SPRING EAST |
| GATHEAS | GATHERBURG | THNRBCK | THUNDERBOLT |
| GOWNTOP | GOWNTOWN SECTOR PLAN | WHEKTOPS | WHEATON SECTOR PLAN 2010 |
| GOWNTOWN | GOWNTOWN MASTER PLAN | WHTFLAT | WHITE FLAT SECTOR PLAN |
| GRSMDA | GREAT SENeca SCIENCE CORRIDOR MASTER PLAN | WHTFLAT2 | WHITE FLAT SECTOR PLAN PHASE 2 |
| | | WOODTR | WOODMONT TRANGLE AMENMENT |



The geographic areas with the fastest growth rates received a larger share of the County's overall projected growth. This allocation occurs until the zoned capacity of the target areas is reached. Historical growth rates are adjusted by three factors.

- The Development Pipeline

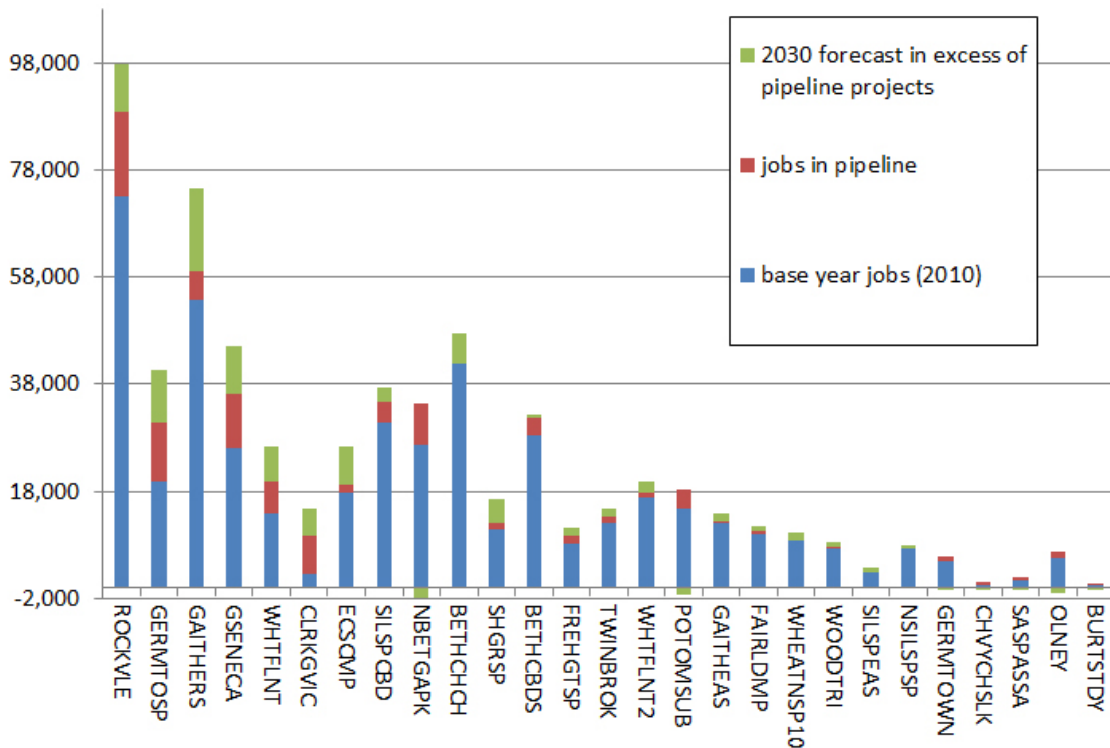
The development pipeline consists of the land development applications that have been approved by the planning department, but remain unbuilt. Development pipeline projects are assumed to be completed within the first five years of the forecast period.

- Current Master Plans

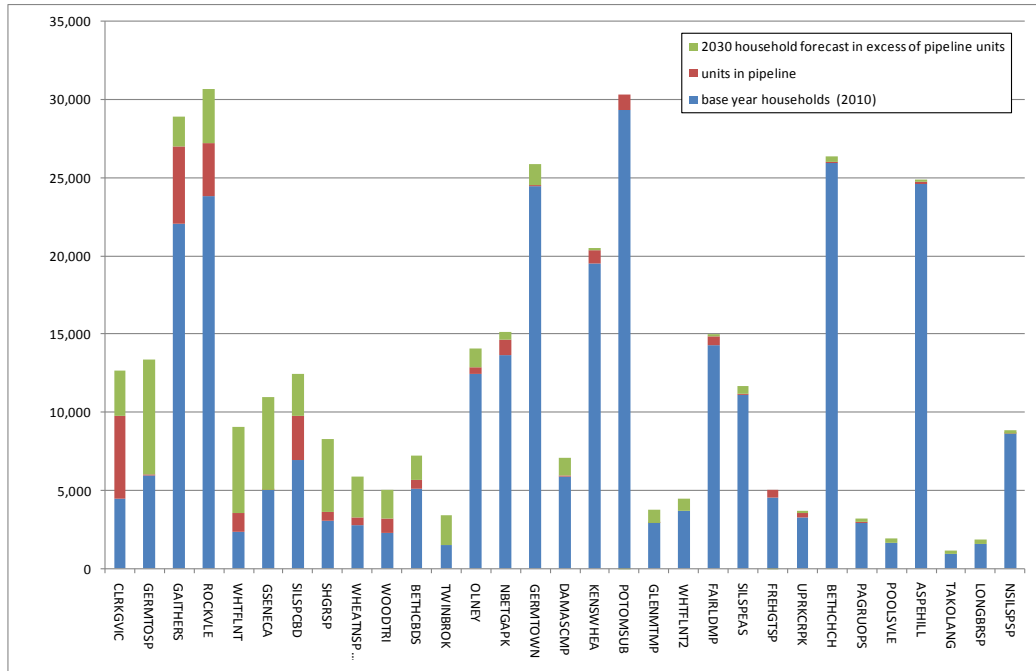
Forecasters conduct a survey of high profile projects that are deemed likely to occur as the result of federal expansions or as components of newly approved master plans. The Great Seneca Science Center Master Plan, the White Flint Sector Plan, the Wheaton Sector Plan, and the White Oak Science Gateway Master Plan (currently underway) are the recent plans whose buildout assumptions have been embedded in the 8.1 forecast.

- The Constrained Long Range Transportation Plan

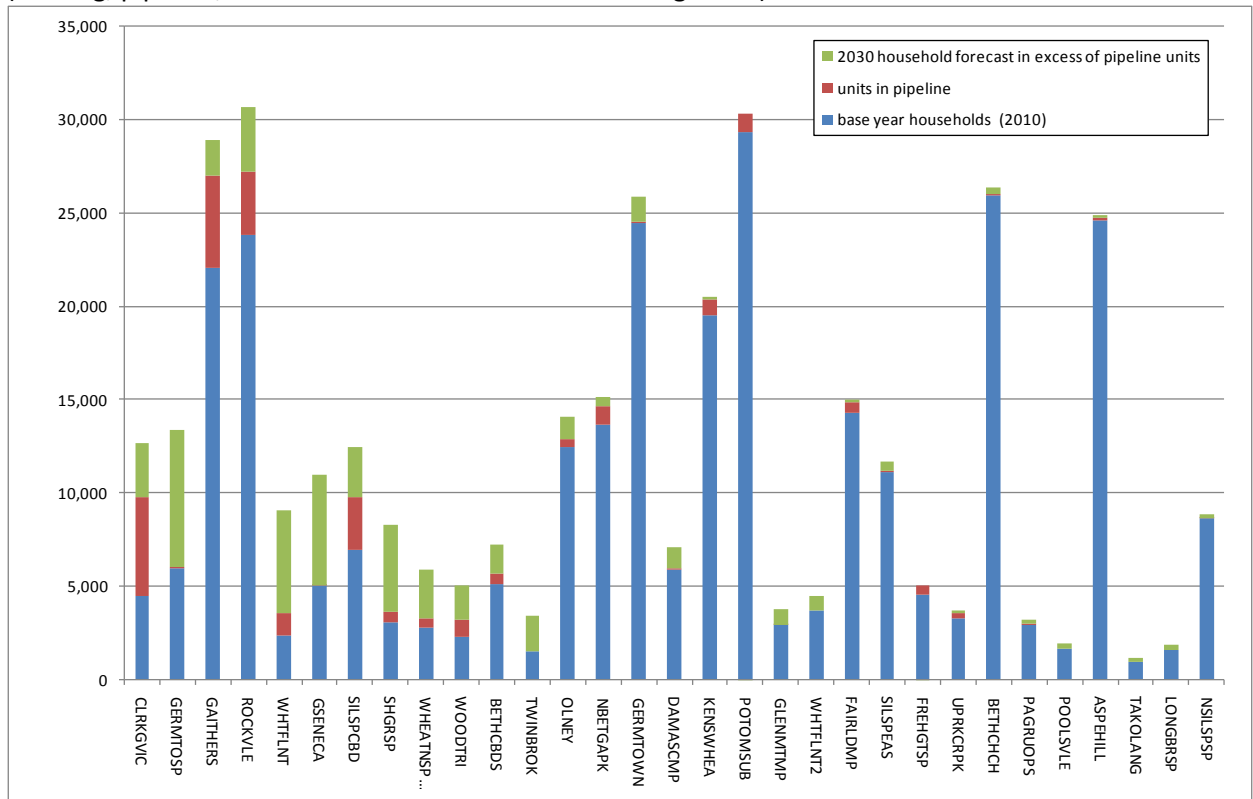
Sites adjacent to the proposed transportation network are developed under an accelerated timeframe.



2030 Jobs Forecast by Master Plan Area
(existing, pipeline, and additional forecasted employment growth)



2030 Household Forecast by Master Plan Area (units)
(existing, pipeline, and additional forecasted household growth)



The results of the Round 8.1 Forecast and selected inputs are available in the following tables.

- Table 1A: Round 8.1 Employment Forecast by Policy Area
- Table 1B: Round 8.1 Household Forecast by Policy Area
- Table 2A: Ten-Year Historical Growth Rates (Commercial Gross Square Footage)
- Table 2B: Ten-Year Historical Growth Rates (Units)
- Table 2C: Countywide Ten-Year Historical Growth Rates (Units)
- Table 3A: Historical Pipeline of Development
- Table 3B: Current Pipeline of Development

Table 1A: Round 8.1 Employment Forecast by Policy Area

JOBS FORECAST (2010 to 2040)

Montgomery County, Maryland

by Policy Area and land use type

| AREA | 2010 | | | | | 2030 | | | | |
|----------------------------|----------------|---------------|---------------|----------------|----------------|----------------|----------------|---------------|----------------|----------------|
| | office | retail | industrial | other | total | office | retail | industrial | other | total |
| Aspen Hill | 1,231 | 2,734 | 0 | 3,245 | 7,210 | 1,299 | 2,777 | 0 | 3,263 | 7,339 |
| Bethesda CBD | 29,407 | 4,554 | 134 | 1,626 | 35,721 | 33,949 | 5,049 | 135 | 1,751 | 40,884 |
| Bethesda/Chevy Chase | 4,450 | 1,074 | 378 | 38,099 | 44,001 | 5,216 | 1,500 | 391 | 42,963 | 50,070 |
| Clarksburg | 1,052 | 64 | 687 | 737 | 2,540 | 11,733 | 776 | 1,534 | 846 | 14,889 |
| Cloverly | 73 | 351 | 38 | 1,151 | 1,613 | 73 | 352 | 38 | 1,155 | 1,618 |
| Damascus | 289 | 1,519 | 28 | 837 | 2,673 | 295 | 1,537 | 28 | 849 | 2,709 |
| Derwood | 6,831 | 2,140 | 7,120 | 901 | 16,992 | 8,583 | 2,700 | 8,848 | 895 | 21,026 |
| Fairland/White Oak | 12,766 | 5,717 | 2,681 | 10,414 | 31,578 | 20,412 | 6,072 | 3,495 | 15,727 | 45,706 |
| Friendship Heights | 6,535 | 1,369 | 26 | 330 | 8,260 | 9,367 | 1,533 | 26 | 454 | 11,380 |
| Gaithersburg City | 18,019 | 16,689 | 12,479 | 7,854 | 55,041 | 34,014 | 19,411 | 14,659 | 9,538 | 77,622 |
| Germantown East | 5,642 | 2,697 | 307 | 1,312 | 9,958 | 12,740 | 3,144 | 843 | 2,888 | 19,615 |
| Germantown Town Center | 1,982 | 1,897 | 277 | 672 | 4,828 | 7,242 | 2,182 | 377 | 1,485 | 11,286 |
| Germantown West | 5,532 | 1,128 | 958 | 2,512 | 10,130 | 10,130 | 1,510 | 1,237 | 2,971 | 15,848 |
| Glenmont | 9 | 605 | 0 | 63 | 677 | 9 | 618 | 0 | 72 | 699 |
| Grosvenor | 376 | 22 | 0 | 97 | 495 | 376 | 22 | 0 | 97 | 495 |
| Kensington/Wheaton | 3,703 | 2,247 | 1,201 | 9,235 | 16,386 | 3,827 | 2,264 | 1,217 | 9,304 | 16,612 |
| Montgomery Village/Airpark | 1,682 | 2,542 | 4,892 | 2,537 | 11,653 | 2,380 | 2,578 | 5,577 | 2,557 | 13,092 |
| North Bethesda | 33,736 | 2,687 | 2,954 | 3,486 | 42,863 | 40,923 | 3,189 | 3,064 | 3,862 | 51,038 |
| North Potomac | 68 | 300 | 0 | 1,192 | 1,560 | 146 | 382 | 0 | 1,216 | 1,744 |
| Olney | 1,508 | 989 | 13 | 3,049 | 5,559 | 1,572 | 1,021 | 13 | 3,105 | 5,711 |
| Potomac | 1,417 | 4,639 | 32 | 6,325 | 12,413 | 2,845 | 5,497 | 32 | 6,526 | 14,900 |
| R&D Village | 16,203 | 751 | 507 | 2,806 | 20,267 | 24,568 | 1,240 | 4,482 | 6,371 | 36,661 |
| Rockville City | 38,086 | 6,471 | 4,010 | 7,656 | 56,223 | 53,874 | 6,610 | 4,021 | 9,828 | 74,333 |
| Rockville Town Center | 7,733 | 1,576 | 1,132 | 761 | 11,202 | 11,674 | 1,881 | 1,135 | 1,621 | 16,311 |
| Rural East | 889 | 1,064 | 1,208 | 2,443 | 5,604 | 1,385 | 1,500 | 1,294 | 2,515 | 6,694 |
| Rural West | 486 | 1,128 | 448 | 1,127 | 3,189 | 488 | 1,142 | 449 | 1,130 | 3,209 |
| Shady Grove Metro Station | 209 | 1,002 | 661 | 657 | 2,529 | 3,142 | 994 | 1,312 | 630 | 6,078 |
| Silver Spring CBD | 24,208 | 4,731 | 829 | 1,278 | 31,046 | 29,290 | 6,031 | 850 | 1,717 | 37,888 |
| Silver Spring/Takoma Park | 2,961 | 3,202 | 2,443 | 7,476 | 16,082 | 4,758 | 3,513 | 2,482 | 6,687 | 17,440 |
| Twinbrook | 11,845 | 4,260 | 1,115 | 646 | 17,866 | 15,522 | 4,407 | 1,362 | 831 | 22,122 |
| Wheaton CBD | 2,641 | 5,523 | 388 | 278 | 8,830 | 3,537 | 6,060 | 395 | 373 | 10,365 |
| White Flint | 8,538 | 5,598 | 539 | 472 | 15,147 | 18,498 | 8,689 | 948 | 765 | 28,900 |
| TOTAL | 250,107 | 91,270 | 47,485 | 121,274 | 510,136 | 373,867 | 106,181 | 60,244 | 143,992 | 684,284 |

Table 1B: Round 8.1 Household Forecast by Policy Area

HOUSEHOLD FORECAST (2010 to 2040)

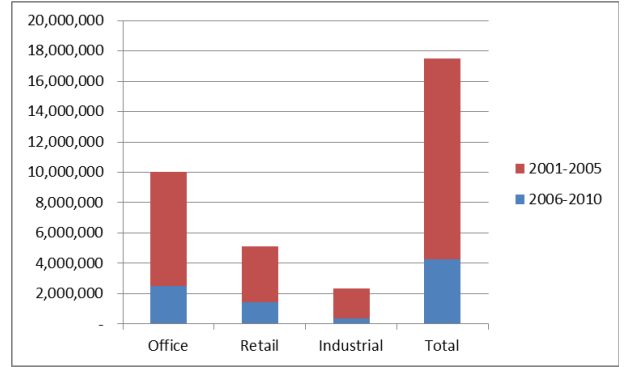
Montgomery County, Maryland

by Policy Area and type

| AREA | 2010 | | | 2030 | | |
|----------------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | single-family | multifamily | total | single-family | multifamily | total |
| Aspen Hill | 14,576 | 10,123 | 24,699 | 14,769 | 10,169 | 24,938 |
| Bethesda CBD | 716 | 6,480 | 7,196 | 730 | 11,495 | 12,225 |
| Bethesda/Chevy Chase | 24,440 | 4,073 | 28,513 | 24,669 | 4,193 | 28,862 |
| Clarksburg | 4,100 | 91 | 4,191 | 9,934 | 2,609 | 12,543 |
| Cloverly | 5,312 | 0 | 5,312 | 5,421 | 0 | 5,421 |
| Damascus | 3,479 | 313 | 3,792 | 3,803 | 1,133 | 4,936 |
| Derwood | 4,891 | 676 | 5,567 | 4,983 | 676 | 5,659 |
| Fairland/White Oak | 17,912 | 10,092 | 28,004 | 18,724 | 10,092 | 28,816 |
| Friendship Heights | 2 | 3,910 | 3,912 | 102 | 4,310 | 4,412 |
| Gaithersburg City | 11,092 | 11,702 | 22,794 | 12,560 | 18,578 | 31,138 |
| Germantown East | 5,780 | 2,396 | 8,176 | 5,738 | 4,291 | 10,029 |
| Germantown Town Center | 337 | 730 | 1,067 | 339 | 2,940 | 3,279 |
| Germantown West | 14,473 | 6,663 | 21,136 | 15,052 | 10,747 | 25,799 |
| Glenmont | 616 | 551 | 1,167 | 827 | 1,251 | 2,078 |
| Grosvenor | 458 | 3,648 | 4,106 | 570 | 4,090 | 4,660 |
| Kensington/Wheaton | 28,371 | 4,687 | 33,058 | 29,460 | 4,687 | 34,147 |
| Montgomery Village/Airpark | 14,548 | 3,972 | 18,520 | 14,710 | 3,972 | 18,682 |
| North Bethesda | 8,035 | 6,040 | 14,075 | 8,094 | 6,888 | 14,982 |
| North Potomac | 8,816 | 80 | 8,896 | 9,201 | 1,080 | 10,281 |
| Olney | 10,513 | 942 | 11,455 | 11,273 | 1,812 | 13,085 |
| Potomac | 15,811 | 1,575 | 17,386 | 16,034 | 1,970 | 18,004 |
| R&D Village | 827 | 2,789 | 3,616 | 833 | 6,089 | 6,922 |
| Rockville City | 13,426 | 8,074 | 21,500 | 13,463 | 9,777 | 23,240 |
| Rockville Town Center | 539 | 2,296 | 2,835 | 539 | 3,677 | 4,216 |
| Rural East | 10,954 | 172 | 11,126 | 11,920 | 172 | 12,092 |
| Rural West | 7,060 | 0 | 7,060 | 7,744 | 0 | 7,744 |
| Shady Grove Metro Station | 61 | 138 | 199 | 453 | 3,505 | 3,958 |
| Silver Spring CBD | 57 | 6,879 | 6,936 | 67 | 12,382 | 12,449 |
| Silver Spring/Takoma Park | 14,490 | 14,319 | 28,809 | 14,569 | 15,721 | 30,290 |
| Twinbrook | 864 | 64 | 928 | 864 | 5,044 | 5,908 |
| Wheaton CBD | 1,092 | 1,519 | 2,611 | 1,144 | 4,635 | 5,779 |
| White Flint | 31 | 2,339 | 2,370 | 31 | 9,581 | 9,612 |
| TOTAL | 243,679 | 117,333 | 361,012 | 258,620 | 177,566 | 436,186 |

Table 2A: Ten-Year Historical Growth Rates
(places with highest 10-year historical growth rates [gfa])

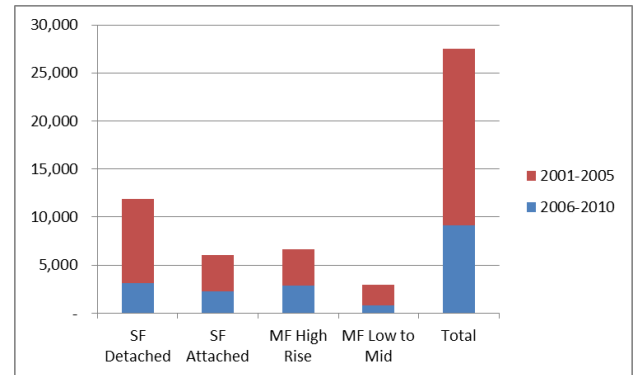
| <i>Planning Place</i> | <i>GFA, 2001-2005</i> | <i>GFA, 2006-2010</i> | <i>% change</i> |
|---------------------------|-----------------------|-----------------------|-----------------|
| Gaithersburg and Vicinity | 2,935,369 | 416,341 | -85.8% |
| Rockville | 2,546,027 | 1,200,684 | -52.8% |
| Bethesda | 1,980,221 | 896,679 | -54.7% |
| Germantown | 1,537,819 | 219,438 | -85.7% |
| Silver Spring | 1,350,174 | 236,350 | -82.5% |
| Agriculture East 2 | 818,284 | 121,382 | -85.2% |
| North Bethesda | 811,097 | 230,720 | -71.6% |
| North Potomac | 758,316 | 50,847 | -93.3% |
| Clarksburg | 282,573 | 38,655 | -86.3% |
| Fairland | 280,666 | 229,583 | -18.2% |
| Total | 13,300,546 | 3,640,679 | -72.6% |



Countywide GFA

Table 2: Ten Year Historical Growth Rates
(places with highest 10-year historical growth rates [units])

| <i>Planning Place</i> | <i>Units, 2001-2005</i> | <i>Units, 2006-2010</i> | <i>% change</i> |
|---------------------------|-------------------------|-------------------------|-----------------|
| Rockville | 3,673 | 624 | -83.0% |
| Germantown | 2,583 | 54 | -97.9% |
| Gaithersburg and Vicinity | 2,113 | 809 | -61.7% |
| Clarksburg | 1,996 | 1,757 | -12.0% |
| Fairland | 1,333 | 189 | -85.8% |
| Bethesda | 1,103 | 742 | -32.7% |
| Agriculture East 1 | 614 | 128 | -79.2% |
| Silver Spring | 473 | 1,116 | 135.9% |
| Aspen Hill | 471 | 276 | -41.4% |
| Damascus | 369 | 93 | -74.8% |
| Total | 14,728 | 5,788 | -60.7% |



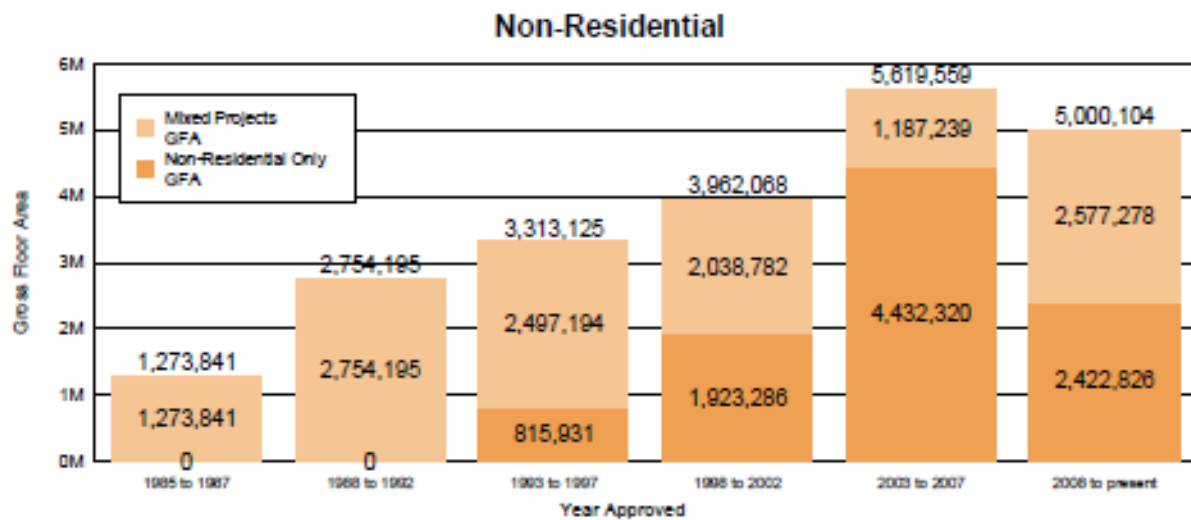
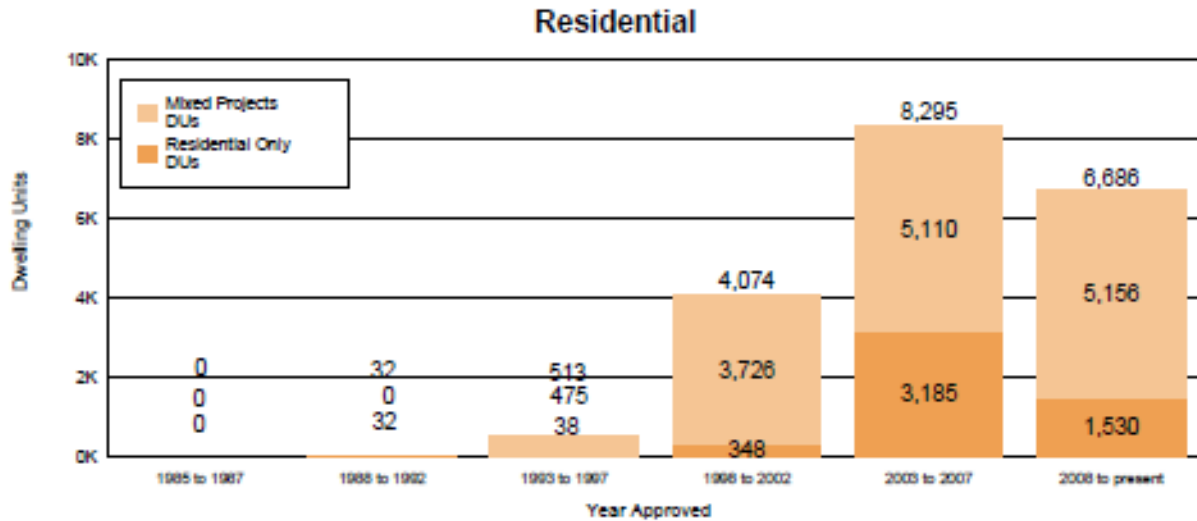
Countywide Units

Table 2C: Countywide Ten-Year Historical Growth Rates

| Planning Place | GFA, 2001-2005 | Growth Rate, 01-05 | GFA, 2006-2010 | Growth Rate, 06-10 | Units, 2001-2005 | Growth Rate, 01-05 | Units, 2006-2010 | Growth Rate, 06-10 |
|---------------------------|----------------|--------------------|----------------|--------------------|------------------|--------------------|------------------|--------------------|
| Agriculture East 1 | 35,520 | 20.5% | - | 0.0% | 614 | 11.8% | 128 | 2.2% |
| Agriculture East 2 | 818,284 | 12.1% | 121,382 | 1.6% | 202 | 3.3% | 57 | 0.9% |
| Agriculture West 1 | - | 0.0% | - | 0.0% | 101 | 6.0% | 75 | 4.2% |
| Agriculture West 2 | - | - | - | - | - | 0.0% | - | 0.0% |
| Asian-Sandy Spring | 16,000 | 4.8% | - | 0.0% | 281 | 19.4% | 81 | 4.7% |
| Ashton Hill | - | 0.0% | - | 0.0% | 471 | 2.1% | 276 | 1.2% |
| Bartonsville | - | 0.0% | - | 0.0% | - | 0.0% | 1 | 1.7% |
| Bethesda | 1,980,221 | 14.4% | 896,679 | 5.7% | 1,103 | 3.0% | 742 | 2.0% |
| Brookville | - | 0.0% | - | 0.0% | 4 | 9.3% | 2 | 4.3% |
| Burkeville | 9,600 | 0.8% | - | 0.0% | 206 | 7.8% | 21 | 0.7% |
| Cherry Chase View | - | - | 6,114 | - | 7 | 2.4% | 18 | 5.9% |
| Clarksburg | 282,573 | 32.4% | 38,655 | 3.3% | 1,996 | 209.2% | 1,757 | 59.6% |
| Cloverly | 49,400 | 34.2% | 2,856 | 1.5% | 171 | 3.6% | 48 | 1.0% |
| Collesville | 14,000 | 6.6% | 3,285 | 1.4% | 129 | 2.6% | 42 | 0.8% |
| Danvers | - | 0.0% | 3,078 | 0.6% | 369 | 8.0% | 93 | 1.9% |
| Danvers West | - | 0.0% | 23,113 | 21.9% | 144 | 6.9% | 53 | 2.4% |
| Darlington | - | 0.0% | 4,100 | 0.4% | - | 0.0% | 1 | 0.1% |
| Deerfield | - | 0.0% | 229,583 | 5.0% | 1,333 | 12.7% | 189 | 1.6% |
| Fairfax | 280,666 | 6.5% | - | 0.0% | 120 | 4.5% | 5 | 0.2% |
| Forest Glen | - | 0.0% | - | 0.0% | 8 | 0.3% | 1 | 0.0% |
| Four Corners | - | 0.0% | - | 0.0% | 2,113 | 9.2% | 809 | 3.2% |
| Gaithersburg and Vicinity | 2,935,369 | 15.6% | 416,341 | 1.9% | 7 | 2.0% | 9 | 2.5% |
| Garrett Park | - | - | - | - | 2,583 | 10.2% | 54 | 0.2% |
| German town | 1,537,819 | 29.9% | 219,438 | 3.3% | 47 | 1.0% | 31 | 0.6% |
| Glenmont | 60,000 | 39.3% | - | 0.0% | 5 | 0.3% | 4 | 0.3% |
| Hillandale | - | 0.0% | 55,116 | 12.5% | 14 | 0.3% | 6 | 0.1% |
| Kemp Mill | - | 0.0% | - | 0.0% | 7 | 0.9% | 6 | 0.8% |
| Kensington | 4,527 | 0.4% | 75,000 | 5.9% | 49 | 2.7% | 31 | 1.6% |
| Layhill | - | 0.0% | - | 0.0% | 3 | 2.6% | 10 | 8.5% |
| Laytonsville | - | 0.0% | - | 0.0% | 7 | 0.1% | - | 0.0% |
| Montgomery Village | 72,598 | 6.5% | 12,900 | 1.1% | 171 | 0.9% | 1,190 | 6.4% |
| North Bethesda | 811,097 | 4.3% | 230,720 | 1.2% | 336 | 4.3% | 51 | 0.6% |
| North Potomac | 758,316 | 413.7% | 50,847 | 5.4% | 303 | 2.7% | 104 | 0.9% |
| Olney | 36,996 | 4.0% | - | 0.0% | 5 | 0.3% | 21 | 1.3% |
| Poolesville | 18,280 | 10.3% | - | 0.0% | 309 | 2.0% | 657 | 4.1% |
| Potomac | - | 0.0% | 238,849 | 8.3% | 105 | 1.9% | 1 | 0.0% |
| Redland | 49,900 | 5.6% | - | 0.0% | 3673 | 18.6% | 624 | 2.7% |
| Rockville | 2,546,027 | 14.9% | 1,200,684 | 6.1% | 473 | 1.7% | 1,116 | 3.9% |
| Silver Spring | 1,350,174 | 10.0% | 236,350 | 1.6% | 91 | 2.9% | 49 | 1.5% |
| South Kensington | - | 0.0% | - | 0.0% | 46 | 9.3% | 3 | 0.6% |
| Spencerville | - | 0.0% | - | 0.0% | 27 | 0.4% | 113 | 1.6% |
| Takoma Park | - | 0.0% | 146,620 | 14.7% | 235 | 6.8% | 188 | 5.1% |
| Travilah | - | 0.0% | - | 0.0% | 10 | 4.4% | 1 | 0.4% |
| Washington Grove | - | 0.0% | - | 0.0% | 248 | 1.4% | 343 | 1.9% |
| Wheaton | 66,305 | 1.9% | 65,635 | 1.9% | 316 | 4.8% | 109 | 1.6% |
| White Oak | 139,950 | 10.8% | - | 0.0% | 18,442 | 5.5% | 9,120 | 2.6% |
| County | 13,873,622 | 11.7% | 4,277,345 | 3.2% | - | - | - | - |

Table 3A: Historical Pipeline of Development

The Montgomery Planning Department tracks the residential and non-residential development Pipeline for Montgomery County (Rockville and Gaithersburg included). The Pipeline is a quarterly inventory of development projects that have been approved by the Planning Board but not completely built. This inventory covers unbuilt dwellings units and unbuilt nonresidential building gross square footage.



| | # of Plans | Residential Unbuilt DUs | Mixed Unbuilt DUs | NonResidential Unbuilt GFA | Mixed Unbuilt GFA |
|-----------------|------------|-------------------------|-------------------|----------------------------|-------------------|
| 1985 to 1987 | 3 | 0 | 0 | 1,273,841 | 0 |
| 1988 to 1992 | 8 | 32 | 0 | 2,754,195 | 0 |
| 1993 to 1997 | 25 | 38 | 475 | 2,497,194 | 815,931 |
| 1998 to 2002 | 52 | 348 | 3,726 | 2,038,782 | 1,923,286 |
| 2003 to 2007 | 169 | 3,185 | 5,110 | 1,187,239 | 4,432,320 |
| 2008 to present | 117 | 1,530 | 5,156 | 2,577,278 | 2,422,826 |
| Total | 374 | 5,193 | 14,487 | 12,928,628 | 8,684,383 |

Table 3B: Current Pipeline of Development

Montgomery County Development Pipeline

March 2012

| Policy Area | Projects | Approved Dwelling Units | Unbuilt Dwelling Units | Unbuilt Single Family Dwellings | Unbuilt Multi-Family Dwellings | Approved Gross Floor Area | Unbuilt Gross Floor Area | Unbuilt Office Jobs | Unbuilt Retail Jobs | Unbuilt Industrial Jobs | Unbuilt Other Jobs |
|----------------------------|------------|-------------------------|------------------------|---------------------------------|--------------------------------|---------------------------|--------------------------|---------------------|---------------------|-------------------------|--------------------|
| Aspen Hill | 10 | 136 | 117 | 65 | 52 | 150,625 | 49,432 | 0 | 73 | 0 | 10 |
| Bethesda Chevy Chase | 16 | 41 | 26 | 26 | 0 | 458,372 | 221,363 | 508 | 268 | 0 | 0 |
| BethesdaCBD | 15 | 1,541 | 1,510 | 5 | 1,505 | 2,009,959 | 1,119,781 | 4,996 | 277 | 0 | 0 |
| Clarksburg | 19 | 8,622 | 5,291 | 4,109 | 1,182 | 2,750,223 | 2,750,220 | 0 | 6,810 | 0 | 53 |
| Cloverly | 10 | 55 | 50 | 50 | 0 | 95,102 | 95,101 | 13 | 0 | 0 | 10 |
| Damascus | 11 | 127 | 54 | 54 | 0 | 33,130 | 33,130 | 0 | 0 | 0 | 5 |
| Derwood | 4 | 404 | 395 | 218 | 177 | 383,929 | 344,227 | 1,317 | 0 | 33 | 0 |
| Fairland/White Oak | 32 | 565 | 488 | 390 | 98 | 2,447,993 | 641,454 | 1,850 | 38 | 337 | 5 |
| Friendship Heights | 1 | 500 | 500 | 200 | 300 | 810,000 | 295,743 | 1,314 | 0 | 0 | 0 |
| Gaithersburg City | 35 | 5,795 | 5,173 | 806 | 4,367 | 3,530,936 | 3,458,628 | 11,811 | 1,210 | 0 | 0 |
| Germantown East | 5 | 24 | 22 | 22 | 0 | 2,522,670 | 1,236,008 | 4,080 | 539 | 0 | 0 |
| Germantown West | 10 | 35 | 25 | 25 | 0 | 2,478,602 | 1,946,584 | 7,488 | 0 | 0 | 5 |
| Glenmont | 2 | 6 | 5 | 5 | 0 | 14,966 | 14,965 | 10 | 0 | 0 | 5 |
| Great Seneca | 1 | 0 | 0 | 0 | 0 | 12,700 | 12,700 | 51 | 0 | 0 | 0 |
| Grosvenor | 1 | 112 | 82 | 82 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Kensington/Wheaton | 22 | 1,024 | 655 | 655 | 0 | 117,794 | 59,734 | 24 | 0 | 40 | 20 |
| Montgomery Village/Airpark | 4 | 55 | 51 | 51 | 0 | 24,868 | 24,867 | 0 | 62 | 0 | 0 |
| North Bethesda | 14 | 3,277 | 2,862 | 5 | 2,857 | 7,247,220 | 3,812,908 | 12,768 | 2,038 | 0 | 5 |
| North Potomac | 8 | 86 | 78 | 78 | 0 | 63,800 | 63,800 | 160 | 0 | 0 | 5 |
| Olney | 23 | 712 | 620 | 306 | 314 | 1,068,932 | 651,262 | 0 | 20 | 0 | 1,126 |
| Potomac | 27 | 1,156 | 799 | 67 | 732 | 2,864,721 | 1,119,336 | 1,893 | 1,375 | 0 | 193 |
| R&D Village | 9 | 793 | 33 | 33 | 0 | 6,403,348 | 3,349,610 | 9,923 | 0 | 0 | 0 |
| Rockville City | 39 | 4,793 | 4,793 | 37 | 4,756 | 3,906,702 | 3,704,127 | 11,342 | 1,751 | 0 | 5 |
| Rural East | 52 | 579 | 400 | 400 | 0 | 921,544 | 714,973 | 253 | 511 | 260 | 39 |
| Rural West | 45 | 295 | 173 | 173 | 0 | 37,557 | 37,556 | 11 | 5 | 0 | 59 |
| Shady Grove | 2 | 198 | 198 | 81 | 117 | 0 | 0 | 0 | 0 | 0 | 0 |
| SilverSpring_CBD | 17 | 3,374 | 3,138 | 0 | 3,138 | 2,746,920 | 1,077,935 | 3,404 | 433 | 0 | 0 |
| Silver Spring/Takoma Park | 6 | 103 | 36 | 4 | 32 | 59,911 | 59,911 | 232 | 5 | 0 | 0 |
| Twinbrook | 2 | 0 | 0 | 0 | 0 | 1,318,692 | 776,557 | 3,451 | 0 | 0 | 220 |
| Wheaton CBD | 4 | 772 | 772 | 27 | 745 | 59,500 | 36,521 | 0 | 91 | 0 | 0 |
| White Flint | 2 | 1,533 | 1,220 | 0 | 1,220 | 1,459,537 | 1,377,214 | 5,102 | 573 | 0 | 0 |
| Project Totals | 448 | 36,713 | 29,566 | 7,974 | 21,592 | 46,000,253 | 29,085,647 | 82,001 | 16,079 | 670 | 1,765 |

Source: Montgomery County Planning, Research and Technology Division

Source: Cities of Rockville and Gaithersburg have their own planning functions, Rockville's data provided on March 2012, Gaithersburg's data provided on January 2012.

Mandatory Referral data is not included

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