

STRATEGIC PLANNING DIVISION

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HOUSING MONTGOMERY: Housing the People who Make Montgomery County Work

The Department delivered several key housing projects assigned in the County Council's Action Plan for Affordable Housing (projects tasked to the Department are on target, Attachment #1).

The Housing Montgomery work program is a cooperative effort, involving the Master Plan Program, the Regulatory Program, Strategic Planning, and the Research and Technology Center. Strategic Planning continues to coordinate the Housing Montgomery Program. The Program focuses on initiatives that serve to: (a) increase the supply, mix, and affordability of housing, (b) improve tracking of housing data, and (c) expand community outreach opportunity.

Strategic Planning

- **Workforce Housing Information Packet** – This information is designed to: a) expand understanding of the need for workforce housing to the business and civic communities, and b) promote the development of employer assisted housing throughout the county. Copies will be distributed widely to Council and Executive staff, housing providers and key employers. It is a web friendly document.
- **Employer Assisted Housing (EAH) Workforce Housing Information Roundtable** – The Planning Board and Fannie Mae are jointly sponsoring this event on November 10, 2004 to promote development of employer assisted housing programs throughout Montgomery County. This event will bring together key business, corporate, and government leadership to focus on the need for workforce housing in Montgomery County, the desirability of promoting employer assisted housing, and a “tool kit” to develop an EAH Program.
- **Park Workforce Housing** – The County Council requested that Park and Planning study the possibility of using park property for workforce housing. The Division, in concert with senior park staff, completed a study suggesting a range of innovative options that selectively use park property, not needed for park use, to help address housing need, while also strengthening the stewardship mission of the Park System. The Planning Board identified a limited number of candidate park property with high potential to provide workforce and/or special need housing. The Department will launch an REOI/RFP process, through a partnership with HOC, to solicit innovative proposals from private and not-for-profit housing providers during the next six months.
- **Montgomery County Department of Park and Planning EAH Program** – The Planning Board recently endorsed a Program for all full-time Department employees. This new EAH Program helps the Department to address the need for housing that is affordable to its own workforce. It is the first EAH government sponsored program in the County. The Program consists of three elements:
 - A formalized park house program, which will expand access to park house rentals for employees whose household income is less than \$85,000 or \$70,000 individually. The EAH Program includes an innovative “shared housing” option.
 - A comprehensive EAH Financial Management Program to help interested staff manage their household finances and move on to homeownership.

- A Financial Incentive Program through Fannie Mae, whereby a network of national and local mortgage lenders agree to offer employees homeownership assistance. The Strategic Planning and Enterprise Divisions will soon complete operational guidelines and the educational curriculum. HOC and DHCA will work with Department staff to develop the educational curriculum.
- **EAH Park House Maintenance Funding Strategy** – The new Grants Manager is working to identify and secure new revenue sources to help repair park houses included in the new Park and Planning EAH Program.
- **Housing Affordability Statement** – To help decision makers monitor the implications of planning and regulatory decisions on the supply and affordability of housing a *Housing Affordability Statement*, will soon accompany pre-application plans, preliminary plans, and site plans. Additionally, the Housing Impact Statement will accompany area master plans, sector plans, functional plans, re-zonings and mandatory referrals (including federal and county capital improvement programs) throughout the entire review process.
- **Green Tape for Affordable Housing Development Projects** – The Department continues to implement an expedited review and approval process for affordable housing projects in cooperation with county government’s Department of Permitting Services and the WSSC. During the past year three projects have been approved using Green Tape.
- **Strategic Planning Assessments Supporting the Departmental Work Program**
 - **Employer Assisted Workforce Housing:** At the request of the County Council, the Division conducted follow-up research to determine the “Best of the Best” employer assisted housing programs in the United States. The research identified the key features of the most innovative programs with proven records of successful outcomes. Staff developed its research in conjunction with Fannie Mae experts.
 - **Green Design in Public Buildings:** To support the SilverPlace project, the Division conducted a nationwide survey of “green design and development” strategies successfully used by forward-looking jurisdictions throughout the country.

Master Plan Housing Initiatives

- **Master Plans** – The most recent round of staff draft Master Plans and Sector Plans provide approximately 10,000 new housing units, including approximately 1,200 moderately priced housing units. These Plans increase opportunity for a wide range of housing types.
- **Mixed-Use Commercial Centers and Mature Commercial Centers** – An amendment to a portion of the Zoning Ordinance has been started to implement the current round of master and sector plans and support the efforts of the upcoming Mature Commercial Center Study. These amendments will provide mixed-use zones at a variety of scales that offer opportunities for housing and commercial uses in pedestrian oriented communities.

Regulatory Housing Initiatives

- **Zoning Cases and Special Exceptions** – The review of a variety of zoning cases is underway to increase opportunities for housing near Metro stations, including: a joint development project for Garage 31 in Bethesda, two new projects near the White Flint Metro Station, a new project at the Twinbrook Metro Station, and two projects adjacent to the Silver Spring Metro Station.
- **Text Amendments for Moderately Price Dwelling Units** – The Planning Board completed the review of several text amendments to Montgomery County Zoning Ordinance and

Subdivision Regulations. These text amendments are designed to increase opportunities for moderately priced dwelling units throughout Montgomery County.

Research and Technology Center Housing Initiatives

- **Development Review Committee** - The Research Center serves as an advocate for housing within the Department by identifying and promoting opportunities for a variety of housing types and income ranges as development projects are reviewed and master plans prepared.
- **Residential Capacity Study** - A quantification of the County’s capacity for residential housing development and redevelopment under current zoning was completed
- **Interjurisdictional Housing Affordability Study** - Reviews affordable housing in neighboring localities, prepared at the request of the County Council.
- **The 55+ Housing Survey** - Contains the results of a telephone survey of the housing preferences of older Montgomery County residents.
- **Mature Commercial Areas Study** - In February 2004, the County Council requested this study to explore redevelopment opportunities for older shopping centers, including the potential for workforce housing. In addition, the County Council requested preparation of a countywide inventory of mature commercial centers and an economic assessment of factors needed to spur redevelopment, inclusive of housing.
- **Housing Snapshot** – A new chart reflecting recent housing activity, as follows:

HOUSING SNAPSHOT

December 31, 2003 to June 30, 2004

2003 EXISTING HOUSING UNITS	SFD	SFA	MF	MPDUs	MPDUs Bought Out	Other Affordable Housing	TDRs Used
Total Countywide	178,964	70,520	103,409	11,939	315	16,516	10,400
January-June 2004 HOUSING COMPLETIONS	SFD	SFA	MF	MPDUs	MPDUs Bought Out	Other Affordable Housing	TDRs Used
Total Countywide	488	272	877	119	23	54	29
PIPELINE APPROVALS	SFD	SFA	MF	MPDUs	Other Affordable Housing		
Total Countywide	406	37	3,372	294	152		

RECENTLY APPROVED HOUSING UNITS NEAR METRO STATIONS

STATION NAME	APPROVED	MCPB APPROVED MPDU'S	HOUSING TYPE
Bethesda	458	58	High-Rise
Grosvenor	473	53	High-Rise
Twinbrook 1	690	124	High-Rise
Twinbrook 2	242		Low-Rise
White Flint	465	59	High-Rise
Silver Spring	471	59	High-Rise
TOTAL	2,799	353	

- Most of the housing units completed last year and in the pipeline were multi-family units. Multi-family units include both rental apartments and condominium units. Approved multi-family units included 2,799 units near metro stations.

SILVERPLACE: A Public-Private Partnership Providing Mixed-Use Development, Affordable Housing, an Urban Park, and a New Headquarters for Park and Planning in the Heart of Silver Spring

In May, the County Council approved a Planning Board recommendation for a CIP allocation to allow for the provision of continued project planning for SilverPlace through FY05. The *Development Management Advisor* came under contract in July, 2004 to provide development assistance.

Summary of Activities

- During the past five months, staff focused on the execution of the “Agreement for Advisor Service”, interviewing, and selection of a nationally prominent *Development Management Advisor*- Donald Zuchelli of ZHA, Inc. of Annapolis, Maryland. ZHA has extensive nation experience in joint public/private development projects.
- ZHA will lead a multidisciplinary team to provide the Commission with the expertise required to solicit and evaluate private sector development proposals, financial programming, and business term negotiations for future development agreements. This work effort will culminate in the selection of a Development Partner.
- During the next six months, work will focus on preparation of technical tasks associated with completion of Pre-Facility Planning, preparation of the RFP for the *Project Development Partner*, and selection of the Partner, which is *targeted for summer, 2005*.
- It is anticipated that interest to develop SilverPlace will be very strong. The required costs associated with facility planning and design, in large part, will come from the private sector.

