



June 6, 2003

Memorandum

To: The Montgomery County Planning Board

From: Karl Moritz, Research Manager, 301-495-1312

Re: 3rd Worksession on the Annual Growth Policy

Summary

The Planning Board will be holding its third worksession on the Annual Growth Policy on June 12, 2003. This packet contains the following material:

- *Summary of the Planning Board's consensus position thus far.* The public should be aware that this is staff's write-up of the Planning Board's June 5 discussion; staff's account will likely be corrected and/or evolve further during the June 12 worksession.
- *Discussion of the pipeline of approved development.* Planning Board members requested information about the size and age of the pipeline because of the potential impact of the backlog of prior approvals on the ability of the County to manage the pace of growth.
- *Review of possible geographic subareas.* These subareas of the County may be used for the purposes of assessing impact taxes and/or allocating the amount of new approvals that are permitted each year.

During the Planning Board's review of the *FY04 AGP Ceiling Element*, the Mayor of the City of Rockville expressed concern that the current AGP shows a deeper deficit for the City than it would if the AGP treated Rockville the same as other policy areas. Staff promised to address this issue during the *AGP Policy Element*, but we have not been able to do so while providing the resources to support the Policy Element process. Staff agrees that Rockville has identified instances where adjustments could fairly be made which would reduce Rockville's deficit. However, given the substantial analysis needed to estimate the size of that adjustment and the Planning Board's focus on replacing Policy Area Transportation Review entirely, staff plans to continue to work on the issue as time permits in case PATR is retained in some form.

Among the issues the Planning Board may wish to address during its June 12 worksession are: material that should be included in the Planning Board's Final Draft AGP Policy Element that is due on June 15 and the Board's expectations for an AGP work program post-June 15. These may include additional worksessions, another public forum, outreach to stakeholders, etc.

Planning Board Consensus Position

The Montgomery County Planning Board finds that congestion on the County's transportation network, and crowding in the County's public schools, have both reach the point that all additional development should make a contribution toward transportation and school facilities.

The lack of facilities to support additional development argues that there should continue to be overall limits on the pace of development; that is, the amount of development that can be approved over a period. However, the fact that the County is moving closer to buildout allows the system for setting the limits on the pace of development to be simpler and less micro-managed than in the past.

The Planning Board is considering a system which replaces the current Policy Area Transportation Review but retains Local Area Transportation Review. Replacing Policy Area Transportation Review (and possibly the School Test as well) would be a less formula-driven biennial¹ assessment of the amount of growth Montgomery County can support over the next two years based on a thorough review of factors such as economic conditions, rates of past and future growth, current and expected levels of transportation congestion and school crowding, and funding available for investment in new facilities.

Everybody Pays

The Planning Board envisions a base development impact tax (for roads, for schools, or both) that all development would pay. On top of that base rate, there could be higher rates depending on the type and location of development: in general development in the smartest of smart growth areas would be pay lowest rates and development in rural areas would pay the highest rates.

The Planning Board is considering a system where the transportation impact tax would vary by area but the school tax would be the same Countywide.

The development impact tax would be paid at building permit. Already-approved development would be subject to the impact tax. Impact taxes for transportation and schools would be dedicated toward transportation and school capital projects.

Certain types of development that addresses public needs or achieves public goals could be wholly or partially exempt from the impact tax. Land uses that potentially fit

¹ or other time period.

this category are: affordable housing², corporate headquarters, hospitals, and strategic economic development projects.

In order to facilitate the completion of needed infrastructure, the Planning Board would, during the subdivision approval process, be able to reach agreement with developer applicants to provide needed facilities in lieu of paying (or as a credit against paying) the development impact tax. This might work for both transportation and schools.

Staging Development

The current AGP is distinguished by a complicated set of formulas that are used to determine the amount of development that can be supported by public facilities. The Planning Board finds that this level of complication has resulted in a system that is not transparent, that can still be manipulated despite the fact that it is predominantly formula-driven, and while less precise than it appears, it is more precise than necessary for staging development in Montgomery County.

Similarly, the Planning Board finds that the practice of setting staging ceilings for 29 policy areas is more geographically-specific than is now needed. The Board believes that traffic congestion conditions do not vary to the great extent that the current geographies suggest. The Board is looking for a smaller set of larger geographic areas that could be used to allocate amount of approvable development.

The periodic assessment of the amount of growth Montgomery County can support over the next period is not envisioned as an input-output model but rather than opportunity for officials and the public to review relevant information and to come to a consensus on the County's growth rate. This review can include factors such as economic conditions, rates of past and future growth, current and expected levels of transportation congestion and school crowding, and funding available for investment in new facilities. The Planning Board expressed its confidence that such a review can be accomplished without the result being considered arbitrary, as Montgomery County's past experience on consideration of growth issues suggests that the analysis will be thorough.

The Planning Board suggested that a possible approach would designate a default growth rate of 1 percent, and the periodic review would determine if the growth rate should be higher or lower than the default rate. The rate might be higher if there were additional funds available for transportation or school capital facilities, or if the previous year's growth rate was slower than normal. The periodic review would also involve updating planned development and infrastructure, which might, in turn, require an update to the impact tax rates.

Once a Countywide growth rate is selected, the resulting amount of development would be allocated to geographic subareas of the County. There may be instances where a geographic area does not receive an allocation; this may be an area that has not used a previous allocation, or it may be an area where the existing infrastructure cannot support additional approvals. As in the case of the impact tax, there may be either preferred land

² potentially: projects including a mix of affordable and market rate units, or just the affordable units.

uses (such as affordable housing) or preferred locations (such as Metro station policy areas or enterprise zones) where approvals may occur despite the fact that the area's allocation is used up.

The Planning Board noted that a question was raised during the FY04 AGP Ceiling Element about the number of jobs or housing units by which the ceilings in one area of the County should be reduced because an anticipated road improvement was not funded. The question of whether the reduction should be taken in the form of housing or jobs or should be taken from one Metro station policy area or another nearby suggested to the Board that the current process requires micro-management beyond what is necessary to achieve desirable outcomes.

The Pipeline of Approved Development

The pipeline of approved development contains development projects that have an approved preliminary plan and have successfully been tested for the adequacy of transportation and school facilities. Pipeline projects must still receive a building permit, and at that stage they are required to pay the development impact tax.

The pipeline of approved development contains approximately 114,000 jobs and 31,000 housing units. The jobs pipeline is much larger and, in general, is older than the housing pipeline. About 22% of the residential pipeline and 43% of the jobs pipeline is in the cities of Rockville and Gaithersburg.

In 1989 the County implemented a time limit on a finding of adequate public facilities. The new time limit was 12 years. All non-residential development was made subject to the new time limit; non-residential development approved prior to 1989 was given a new, 12-year time limit. However, in 1989 the County did not retroactively impose a 12-year time limit on residential subdivisions; rather, the new 12-year time limit applied only to new residential applications.

In 1999, the County acted again, reducing the default time limit to 5 years. The Planning Board may grant larger projects a longer time limit – up to 12 years – but the developer must agree to a staging plan.

In 2001, many non-residential subdivisions expired. These included many of the pre-1989 approvals. The only pre-1989 non-residential approvals that remain in the pipeline are those that qualified for an extension and those in Rockville and Gaithersburg. A County non-residential project may qualify for a limited extension if the project is more than 40 percent complete and has completed at least 10 percent of the project in the last four years.³

Planning staff began expiring residential projects in 2002. As noted, pre-1989 residential approvals do not expire. Residential approvals from 1989 to 1999 have a 12-year time limit, but can be extended if they are more than 50 percent complete and the developer submits a letter to the Planning Board stating a completion date. In 1999, APF

³ Or has completed 60 percent total and 5 percent in the last four years.

time limits for residential projects were similarly reduced to 5 years, with a 12-year limit available to larger projects at the discretion of the Planning Board.

Tables 1 and 2 show the pipeline by year of approval.

Possible Geographies for Annual Growth Allocations

Planning staff reviewed 6 different possible geographies for handling the annual growth allocations envisioned by the Planning Board. For each geography, staff reviewed the past growth rate (1990-2003), the forecast growth rate (2003-2030), and the pipeline of approved development.

The six geography scenarios range from one with just two geographies (rural areas and “growth” areas) to one with seven different areas based on the Transportation Policy Report II districts.

The Planning Board indicated that it is looking at geographies not only to see how well they relate to public facilities adequacy but also to achieving other policy objectives, such as Smart Growth. One of the potential geographies (number 5) revives an old idea: the Red Line Policy Area. These are policy areas that are not Metro Station Policy Areas, but they contain Metro Station Policy Areas. Staff developed the “Red Line Policy Area” concept several years ago when there was interest in discounting the pipeline of approved development. Staff postulated then and still believes that these areas have generally higher levels of transit service than other areas of the County.

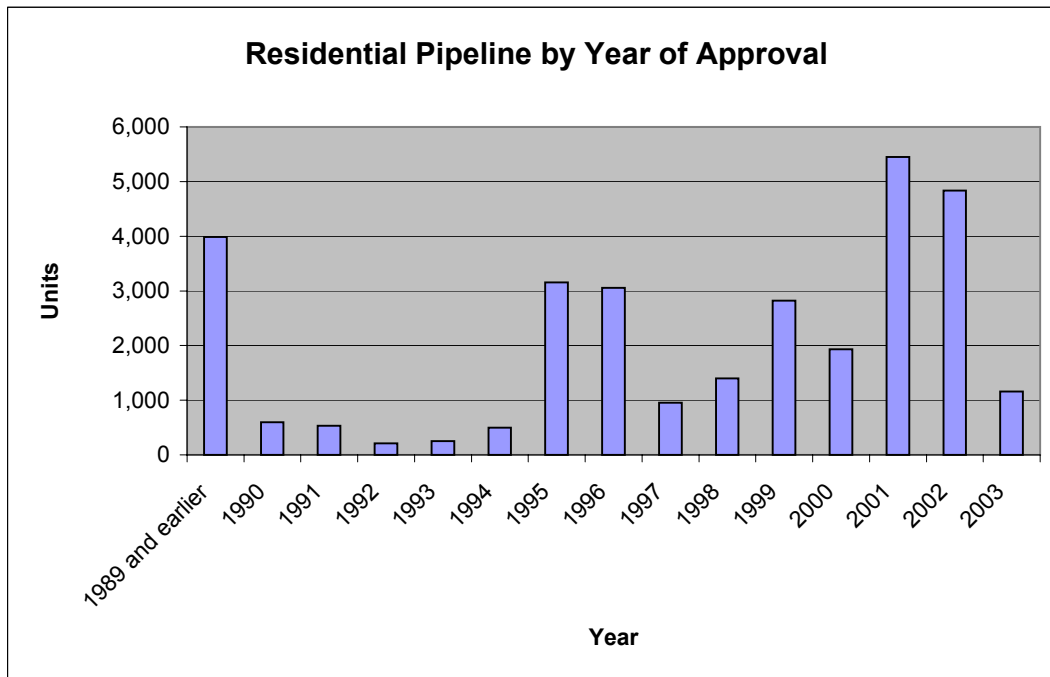
For speed, staff used policy areas as building blocks for the six proposed geographies. However, we are not opposed to splitting policy areas where needed.

The best set of geographies will be the one that provides a rational basis for distributing the annual growth allocation. In other words, the County should be able to defend why it chose to allow development approvals in one area rather than another.

Table 1

Housing Pipeline by Year of Approval

Year Approved	Single Family Approved	Multi-Family Approved	Total Approved	Single Family Remaining	Multi-Family Remaining	Total Remaining
1989 and earlier	6,701	3,730	10,431	1,885	2,104	3,989
1990	751	1,092	1,843	167	431	598
1991	654	241	895	316	217	533
1992	359	168	527	198	13	211
1993	947	58	1,005	192	58	250
1994	855	0	855	499	0	499
1995	2,596	1,359	3,955	1,877	1,281	3,158
1996	1,880	2,596	4,476	1,000	2,056	3,056
1997	503	742	1,245	326	629	955
1998	1,379	1,787	3,166	537	861	1,398
1999	855	2,160	3,015	680	2,143	2,823
2000	1,175	867	2,042	1,066	867	1,933
2001	3,481	2,048	5,529	3,402	2,048	5,450
2002	2,481	2,357	4,838	2,481	2,357	4,838
2003	626	528	939	626	535	1,161
Total	25,243	19,733	44,761	15,252	15,600	30,852



Unit Breakdown

5 years old or less: 16,205 units (53% of total)
 6-10 years old: 9,066 units (29% of total)
 More than 10 years old: 5,581 units (18% of total)

Location of Remaining Units

Rockville: 4,239 units (14%)
 Gaithersburg: 2,412 units (8%)
 Rest of County: 24,201 (78%)

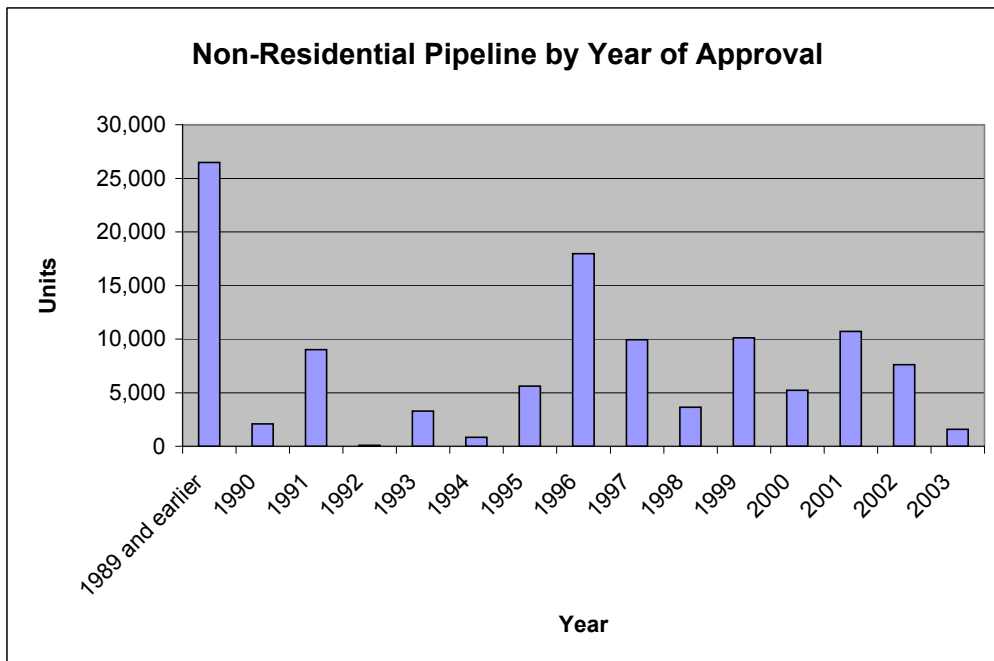
Source: MNCPPC Research & Technology Center June 2003

Note: Completions in 2002 and 2003 have not yet been removed.

Table 2

Non-Residential Pipeline by Year of Approval

Year Approved	Jobs Approved	Office Jobs Remaining	Retail Jobs Remaining	Industrial Jobs Remaining	Other Jobs Remaining	Total Remaining
1989 and earlier	24,773	24,437	795	785	469	26,486
1990	2,108	1,207	196	621	52	2,076
1991	9,429	8,550	128	279	70	9,027
1992	1,142	0	25	30	22	77
1993	3,271	3,161	94	0	16	3,271
1994	4,095	235	93	444	67	839
1995	5,601	5,140	375	0	86	5,601
1996	18,895	17,824	82	12	62	17,980
1997	10,828	7,171	2,592	106	71	9,940
1998	5,818	1,642	1,349	195	468	3,654
1999	10,577	8,182	1,152	361	412	10,107
2000	5,226	4,239	114	30	843	5,226
2001	11,569	6,250	1,537	2,660	267	10,713
2002	7,517	6,604	693	-137	461	7,621
2003	1,572	895	403	143	131	1,572
Total	122,421	95,537	9,627	5,529	3,497	114,189



Jobs Breakdown

5 years old or less: 35,239 jobs (31% of total)
 6-10 years old: 38,014 jobs (31% of total)
 More than 10 years old: 40,936 jobs (38% of total)

Location of Remaining Units

Rockville: 31,326 jobs (31%)
 Gaithersburg: 11,919 jobs (12%)
 Rest of County: 59,106 jobs (57%)

Source: MNCPPC Research & Technology Center June 2003

Note: Completions in 2002 and 2003 have not yet been removed.

Geography 1

Two Subareas: Rural Areas and Growth Areas

Policy Areas	1990 Total Households	Avg. Annual Growth	2000 Total Households	Avg. Annual Growth	Avg. Annual Growth Rate	2030 Total Households
Aspen Hill	21,268	207	23,957	84	0.4%	26,237
Bethesda CBD	5,036	99	6,326	91	1.4%	8,771
Bethesda/Chevy Chase	26,056	162	28,168	88	0.3%	30,543
Clarksburg	561	80	1,607	393	24.5%	12,222
Cloverly	4,733	43	5,295	21	0.4%	5,852
Damascus	2,943	33	3,371	33	1.0%	4,261
Derwood	5,238	29	5,617	68	1.2%	7,442
Fairland/White Oak	24,202	217	27,028	93	0.3%	29,533
Friendship Heights	3,168	12	3,325	39	1.2%	4,375
Gaithersburg City	16,531	387	21,560	311	1.4%	29,949
Germantown East	4,008	279	7,636	69	0.9%	9,505
Germantown Town Center	2	29	381	70	18.5%	2,281
Germantown West	13,056	502	19,583	142	0.7%	23,428
Glenmont	1,047	2	1,067	55	5.2%	2,557
Grosvenor	2,622	37	3,107	70	2.3%	4,998
Kensington/Wheaton	31,103	89	32,261	74	0.2%	34,261
Montgomery Village/Airpark	15,970	186	18,382	22	0.1%	18,972
North Bethesda	12,910	89	14,068	68	0.5%	15,893
North Potomac	6,598	163	8,714	49	0.6%	10,044
Olney	8,122	224	11,030	61	0.6%	12,690
Potomac	14,753	148	16,682	81	0.5%	18,877
R & D Village	889	156	2,913	124	4.3%	6,263
Rockville City	15,561	233	18,584	248	1.3%	25,284
Shady Grove	335	1	347	74	21.3%	2,347
Silver Spring CBD	4,317	80	5,352	162	3.0%	9,723
Silver Spring/Takoma Park	26,425	207	29,111	42	0.1%	30,253
Twinbrook	3	0	3	41	1360.5%	1,105
Wheaton CBD	1,815	17	2,033	75	3.7%	4,062
White Flint	0	99	1,283	141	11.0%	5,077
Growth Areas	269,272	3,809	318,788	2,890	0.9%	396,805
Darnestown/Travilah	2,474	86	3,586	65	1.8%	5,346
Goshen	4,033	79	5,056	65	1.3%	6,811
Patuxent	2,566	43	3,122	44	1.4%	4,309
Poolesville	2,368	49	3,000	20	0.7%	3,540
Rock Creek	1,287	53	1,982	45	2.3%	3,189
Rural	12,728	309	16,745	239	1.4%	23,195
Montgomery County Total	282,000	4,118	335,533	3,128	0.9%	420,000

1990 Total	Avg. Annual Growth	2003 Total Jobs	Avg. Annual Growth	Avg. Annual Growth Rate	2030 Total Jobs	Residential Pipeline	Jobs Pipeline
7,417	64	8,243	12	0.1%	8,562	1,579	119
37,386	175	39,666	256	0.6%	46,575	1,237	1,880
43,605	488	49,955	152	0.3%	54,056	586	1,204
2,644	147	4,559	362	7.9%	14,338	6,563	3,819
1,009	31	1,417	4	0.3%	1,524	255	234
1,740	72	2,673	4	0.1%	2,772	338	140
17,121	244	20,297	192	0.9%	25,475	15	1,630
27,782	287	31,517	329	1.0%	40,387	1,631	3,435
9,270	18	9,505	104	1.1%	12,318	1,106	3,111
38,134	1,207	53,829	532	1.0%	68,184	2,412	11,919
4,124	338	8,521	337	4.0%	17,611	43	10,731
2,799	49	3,440	142	4.1%	7,281	1,165	1,403
6,459	322	10,645	225	2.1%	16,725	1,603	9,302
878	6	955	1	0.1%	971	122	17
521	9	644	1	0.1%	668	860	52
17,193	106	18,567	44	0.2%	19,757	302	273
13,218	189	15,673	61	0.4%	17,309	178	680
55,265	477	61,466	312	0.5%	69,893	1,436	6,384
1,264	52	1,939	11	0.5%	2,223	368	35
6,190	73	7,136	11	0.2%	7,442	923	338
10,761	123	12,361	24	0.2%	13,014	412	249
9,133	480	15,374	410	2.7%	26,445	1,013	19,014
62,483	1,738	85,082	1,139	1.3%	115,828	4,239	31,236
3,786	40	4,302	19	0.4%	4,824	0	213
34,204	80	35,248	273	0.8%	42,610	835	4,128
16,176	373	21,026	44	0.2%	22,217	71	173
10,843	47	11,453	36	0.3%	12,426	0	660
10,790	50	11,442	17	0.2%	11,907	436	69
6,556	121	8,129	98	1.2%	10,764	480	2,135
458,751	7,409	555,067	5,150	0.9%	694,106	30,208	114,583
767	30	1,151	1	0.1%	1,185		
1,173	31	1,582	3	0.2%	1,669		
2,493	17	2,708	12	0.4%	3,022		
1,793	38	2,287	4	0.2%	2,395		
993	93	2,206	15	0.7%	2,623		
7,219	209	9,933	36	0.4%	10,894	1,995	734
465,970	7,618	565,000	5,185	0.9%	705,000	32,203	115,317

Geography 2

Three Subareas: Rural Areas, Growth Areas, and Metro Station Policy Areas

Policy Areas	1990 Total Households	Avg. Annual Growth	2000 Total Households	Avg. Annual Growth	Avg. Annual Growth Rate	2030 Total Households	1990 Total	Avg. Annual Growth	2003 Total Jobs	Avg. Annual Growth	Avg. Annual Growth Rate	2030 Total Jobs	Residential Pipeline	Jobs Pipeline
Bethesda CBD	5,036	99	6,326	91	1.4%	8,771	37,386	175	39,666	256	0.6%	46,575	1,237	1,880
Friendship Heights	3,168	12	3,325	39	1.2%	4,375	9,270	18	9,505	104	1.1%	12,318	1,106	3,111
Glenmont	1,047	2	1,067	55	5.2%	2,557	878	6	955	1	0.1%	971	122	17
Grosvenor	2,622	37	3,107	70	2.3%	4,998	521	9	644	1	0.1%	668	860	52
Shady Grove	335	1	347	74	21.3%	2,347	3,786	40	4,302	19	0.4%	4,824	0	213
Silver Spring CBD	4,317	80	5,352	162	3.0%	9,723	34,204	80	35,248	273	0.8%	42,610	835	4,128
Twinbrook	3	0	3	41	1360.5%	1,105	10,843	47	11,453	36	0.3%	12,426	0	660
Wheaton CBD	1,815	17	2,033	75	3.7%	4,062	10,790	50	11,442	17	0.2%	11,907	436	69
White Flint	0	99	1,283	141	11.0%	5,077	6,556	121	8,129	98	1.2%	10,764	480	2,135
Metro Station Policy Areas	18,343	346	22,842	747	3.3%	43,015	114,234	547	121,346	804	0.7%	143,063	5,076	12,265
Aspen Hill	21,268	207	23,957	84	0.4%	26,237	7,417	64	8,243	12	0.1%	8,562	1,579	119
Bethesda/Chevy Chase	26,056	162	28,168	88	0.3%	30,543	43,605	488	49,955	152	0.3%	54,056	586	1,204
Clarksburg	561	80	1,607	393	24.5%	12,222	2,644	147	4,559	362	7.9%	14,338	6,563	3,819
Cloverly	4,733	43	5,295	21	0.4%	5,852	1,009	31	1,417	4	0.3%	1,524	255	234
Damascus	2,943	33	3,371	33	1.0%	4,261	1,740	72	2,673	4	0.1%	2,772	338	140
Derwood	5,238	29	5,617	68	1.2%	7,442	17,121	244	20,297	192	0.9%	25,475	15	1,630
Fairland/White Oak	24,202	217	27,028	93	0.3%	29,533	27,782	287	31,517	329	1.0%	40,387	1,631	3,435
Gaithersburg City	16,531	387	21,560	311	1.4%	29,949	38,134	1,207	53,829	532	1.0%	68,184	2,412	11,919
Germantown East	4,008	279	7,636	69	0.9%	9,505	4,124	338	8,521	337	4.0%	17,611	43	10,731
Germantown Town Center	2	29	381	70	18.5%	2,281	2,799	49	3,440	142	4.1%	7,281	1,165	1,403
Germantown West	13,056	502	19,583	142	0.7%	23,428	6,459	322	10,645	225	2.1%	16,725	1,603	9,302
Kensington/Wheaton	31,103	89	32,261	74	0.2%	34,261	17,193	106	18,567	44	0.2%	19,757	302	273
Montgomery Village/Airpark	15,970	186	18,382	22	0.1%	18,972	13,218	189	15,673	61	0.4%	17,309	178	680
North Bethesda	12,910	89	14,068	68	0.5%	15,893	55,265	477	61,466	312	0.5%	69,893	1,436	6,384
North Potomac	6,598	163	8,714	49	0.6%	10,044	1,264	52	1,939	11	0.5%	2,223	368	35
Olney	8,122	224	11,030	61	0.6%	12,690	6,190	73	7,136	11	0.2%	7,442	923	338
Potomac	14,753	148	16,682	81	0.5%	18,877	10,761	123	12,361	24	0.2%	13,014	412	249
R & D Village	889	156	2,913	124	4.3%	6,263	9,133	480	15,374	410	2.7%	26,445	1,013	19,014
Rockville City	15,561	233	18,584	248	1.3%	25,284	62,483	1,738	85,082	1,139	1.3%	115,828	4,239	31,236
Silver Spring/Takoma Park	26,425	207	29,111	42	0.1%	30,253	16,176	373	21,026	44	0.2%	22,217	71	173
Growth Areas	250,929	3,463	295,946	2,142	0.7%	353,790	344,517	6,862	433,721	4,345	1.0%	551,043	25,132	102,318
Damestown/Travilah	2,474	86	3,586	65	1.8%	5,346	767	30	1,151	1	0.1%	1,185		
Goshen	4,033	79	5,056	65	1.3%	6,811	1,173	31	1,582	3	0.2%	1,669		
Patuxent	2,566	43	3,122	44	1.4%	4,309	2,493	17	2,708	12	0.4%	3,022		
Poolsville	2,368	49	3,000	20	0.7%	3,540	1,793	38	2,287	4	0.2%	2,395		
Rock Creek	1,287	53	1,982	45	2.3%	3,189	993	93	2,206	15	0.7%	2,623		
Rural	12,728	309	16,745	239	1.4%	23,195	7,219	209	9,933	36	0.4%	10,894	1,995	734
Montgomery County Total	282,000	4,118	335,533	3,128	0.9%	420,000	465,970	7,618	565,000	5,185	0.9%	705,000	27,127	103,052

Geography 3

6 Subareas: Modified TPRII Areas Plus Metro Station Policy Areas

Policy Areas	1990 Total Households	Avg. Annual Growth	2000 Total Households	Avg. Annual Growth	Avg. Annual Growth Rate	2030 Total Households	1990 Total	Avg. Annual Growth	2003 Total Jobs	Avg. Annual Growth	Avg. Annual Growth Rate	2030 Total Jobs	Residential Pipeline	Jobs Pipeline
Bethesda CBD	5,036	99	6,326	91	1.4%	8,771	37,386	175	39,666	256	0.6%	46,575	1,237	1,880
Friendship Heights	3,168	12	3,325	39	1.2%	4,375	9,270	18	9,505	104	1.1%	12,318	1,106	3,111
Glenmont	1,047	2	1,067	55	5.2%	2,557	878	6	955	1	0.1%	971	122	17
Grosvenor	2,622	37	3,107	70	2.3%	4,998	521	9	644	1	0.1%	668	860	52
Shady Grove	335	1	347	74	21.3%	2,347	3,786	40	4,302	19	0.4%	4,824	0	213
Silver Spring CBD	4,317	80	5,352	162	3.0%	9,723	34,204	80	35,248	273	0.8%	42,610	835	4,128
Twinbrook	3	0	3	41	1360.5%	1,105	10,843	47	11,453	36	0.3%	12,426	0	660
Wheaton CBD	1,815	17	2,033	75	3.7%	4,062	10,790	50	11,442	17	0.2%	11,907	436	69
White Flint	0	99	1,283	141	11.0%	5,077	6,556	121	8,129	98	1.2%	10,764	480	2,135
Metro Station Policy Areas	18,343	346	22,842	747	3.3%	43,015	114,234	547	121,346	804	0.7%	143,063	5,076	12,265
Bethesda/Chevy Chase	26,056	162	28,168	88	0.3%	30,543	43,605	488	49,955	152	0.3%	54,056	586	1,204
Silver Spring/Takoma Park	26,425	207	29,111	42	0.1%	30,253	16,176	373	21,026	44	0.2%	22,217	71	1,373
Inside the Beltway	52,481	369	57,279	130	0.2%	60,796	59,781	862	70,981	196	0.3%	76,273	657	1,737
Aspen Hill	21,268	207	23,957	84	0.4%	26,237	7,417	64	8,243	12	0.1%	8,562	1,579	119
Cloverly	4,733	43	5,295	21	0.4%	5,852	1,009	31	1,417	4	0.3%	1,524	255	234
Fairland/White Oak	24,202	217	27,028	93	0.3%	29,533	27,782	287	31,517	329	1.0%	40,387	1,631	3,435
Kensington/Wheaton	31,103	89	32,261	74	0.2%	34,261	17,193	106	18,567	44	0.2%	19,757	302	273
E.Montgomery Co./Georgia Ave	81,306	557	88,541	272	0.3%	95,883	53,401	488	59,745	388	0.6%	70,230	3,767	4,061
Clarksburg	561	80	1,607	393	24.5%	12,222	2,644	147	4,559	362	7.9%	14,338	6,563	3,819
Derwood	5,238	29	5,617	68	1.2%	7,442	17,121	244	20,297	192	0.9%	25,475	15	1,630
Gaithersburg City	16,531	387	21,560	311	1.4%	29,949	38,134	1,207	53,829	532	1.0%	68,184	2,412	11,919
Germantown East	4,008	279	7,636	69	0.9%	9,505	4,124	338	8,521	337	4.0%	17,611	43	10,731
Germantown Town Center	2	29	381	70	18.5%	2,281	2,799	49	3,440	142	4.1%	7,281	1,165	1,403
Germantown West	13,056	502	19,583	142	0.7%	23,428	6,459	322	10,645	225	2.1%	16,725	1,603	9,302
Montgomery Village/Airpark	15,970	186	18,382	22	0.1%	18,972	13,218	189	15,673	61	0.4%	17,309	178	680
North Bethesda	12,910	89	14,068	68	0.5%	15,893	55,265	477	61,466	312	0.5%	69,893	1,436	6,384
North Potomac	6,598	163	8,714	49	0.6%	10,044	1,264	52	1,939	11	0.5%	2,223	368	35
R & D Village	889	156	2,913	124	4.3%	6,263	9,133	480	15,374	410	2.7%	26,445	1,013	19,014
Rockville City	15,561	233	18,584	248	1.3%	25,284	62,483	1,738	85,082	1,139	1.3%	115,828	4,239	31,236
I-270 Corridor	91,324	2,132	119,043	1,564	1.3%	161,283	212,644	5,245	280,825	3,722	1.3%	381,312	19,035	96,153
Darnestown/Travilah	2,474	86	3,586	65	1.8%	5,346	767	30	1,151	1	0.1%	1,185		
Poolesville	2,368	49	3,000	20	0.7%	3,540	1,793	38	2,287	4	0.2%	2,395		
Potomac	14,753	148	16,682	81	0.5%	18,877	10,761	123	12,361	24	0.2%	13,014	412	249
Rural West	12,728	309	16,745	239	1.4%	23,195	7,219	209	9,933	36	0.4%	10,894		
Damascus	2,943	33	3,371	33	1.0%	4,261	1,740	72	2,673	4	0.1%	2,772	338	140
Goshen	4,033	79	5,056	65	1.3%	6,811	1,173	31	1,582	3	0.2%	1,669		
Olney	8,122	224	11,030	61	0.6%	12,690	6,190	73	7,136	11	0.2%	7,442	923	338
Patuxent	2,566	43	3,122	44	1.4%	4,309	2,493	17	2,708	12	0.4%	3,022		
Rock Creek	1,287	53	1,982	45	2.3%	3,189	993	93	2,206	15	0.7%	2,623		
Rural East	17,664	378	22,579	203	0.9%	28,071	11,596	193	14,099	30	0.2%	14,905	3,668	1,461
Montgomery County Total	282,000	4,118	335,533	3,128	0.9%	420,000	465,970	7,618	565,000	5,185	0.9%	705,000	32,203	115,317

Geography 4

7 Subareas: Split I-270 Corridor Plus Metro Station Policy Areas

Policy Areas	1990 Total	Avg. Annual	2000 Total	Avg. Annual	Avg. Annual	2030 Total	1990 Total	Avg. Annual	2003 Total Jobs	Avg. Annual	Avg. Annual	2030 Total Jobs	Residential	Jobs Pipeline
	Households	Growth	Households	Growth	Growth Rate	Households		Households	Growth		Growth	Growth Rate	Jobs	Pipeline
Bethesda CBD	5,036	99	6,326	91	1.4%	8,771	37,386	175	39,666	256	0.6%	46,575	1,237	1,880
Friendship Heights	3,168	12	3,325	39	1.2%	4,375	9,270	18	9,505	104	1.1%	12,318	1,106	3,111
Glenmont	1,047	2	1,067	55	5.2%	2,557	878	6	955	1	0.1%	971	122	17
Grosvenor	2,622	37	3,107	70	2.3%	4,998	521	9	644	1	0.1%	668	860	52
Shady Grove	335	1	347	74	21.3%	2,347	3,786	40	4,302	19	0.4%	4,824	0	213
Silver Spring CBD	4,317	80	5,352	162	3.0%	9,723	34,204	80	35,248	273	0.8%	42,610	835	4,128
Twinbrook	3	0	3	41	1360.5%	1,105	10,843	47	11,453	36	0.3%	12,426	0	660
Wheaton CBD	1,815	17	2,033	75	3.7%	4,062	10,790	50	11,442	17	0.2%	11,907	436	69
White Flint	0	99	1,283	141	11.0%	5,077	6,556	121	8,129	98	1.2%	10,764	480	2,135
Metro Station Policy Areas	18,343	346	22,842	747	3.3%	43,015	114,234	547	121,346	804	0.7%	143,063	5,076	12,265
Bethesda/Chevy Chase	26,056	162	28,168	88	0.3%	30,543	43,605	488	49,955	152	0.3%	54,056	586	1,204
Silver Spring/Takoma Park	26,425	207	29,111	42	0.1%	30,253	16,176	373	21,026	44	0.2%	22,217	71	173
Inside the Beltway	52,481	369	57,279	130	0.2%	60,796	59,781	862	70,981	196	0.3%	76,273	657	1,377
Aspen Hill	21,268	207	23,957	84	0.4%	26,237	7,417	64	8,243	12	0.1%	8,562	1,579	119
Cloverly	4,733	43	5,295	21	0.4%	5,852	1,009	31	1,417	4	0.3%	1,524	255	234
Fairland/White Oak	24,202	217	27,028	93	0.3%	29,533	27,782	287	31,517	329	1.0%	40,387	1,631	3,435
Kensington/Wheaton	31,103	89	32,261	74	0.2%	34,261	17,193	106	18,567	44	0.2%	19,757	302	273
E.Montgomery Co./Georgia Ave	81,306	557	88,541	272	0.3%	95,883	53,401	488	59,745	388	0.6%	70,230	3,767	4,061
North Bethesda	12,910	89	14,068	68	0.5%	15,893	55,265	477	61,466	312	0.5%	69,893	1,436	6,384
Rockville City	15,561	233	18,584	248	1.3%	25,284	62,483	1,738	85,082	1,139	1.3%	115,828	4,239	31,236
I-270 Corridor South	28,471	322	32,652	316	1.0%	41,177	117,748	2,215	146,548	1,451	1.0%	185,721	5,675	37,620
Clarksburg	561	80	1,607	393	24.5%	12,222	2,644	147	4,559	362	7.9%	14,338	6,563	3,819
Derwood	5,238	29	5,617	68	1.2%	7,442	17,121	244	20,297	192	0.9%	25,475	15	1,630
R & D Village	889	156	2,913	124	4.3%	6,263	9,133	480	15,374	410	2.7%	26,445	1,013	19,014
Gaithersburg City	16,531	387	21,560	311	1.4%	29,949	38,134	1,207	53,829	532	1.0%	68,184	2,412	11,919
Germantown East	4,008	279	7,636	69	0.9%	9,505	4,124	338	8,521	337	4.0%	17,611	43	10,731
Germantown Town Center	2	29	381	70	18.5%	2,281	2,799	49	3,440	142	4.1%	7,281	1,165	1,403
Germantown West	13,056	502	19,583	142	0.7%	23,428	6,459	322	10,645	225	2.1%	16,725	1,603	9,302
Montgomery Village/Airpark	15,970	186	18,382	22	0.1%	18,972	13,218	189	15,673	61	0.4%	17,309	178	680
North Potomac	6,598	163	8,714	49	0.6%	10,044	1,264	52	1,939	11	0.5%	2,223	368	35
I-270 Corridor North	62,853	1,811	86,392	1,249	1.4%	120,106	94,896	3,029	134,277	2,271	1.7%	195,590	13,360	58,533
Darnestown/Travilah	2,474	86	3,586	65	1.8%	5,346	767	30	1,151	1	0.1%	1,185		
Poolesville	2,368	49	3,000	20	0.7%	3,540	1,793	38	2,287	4	0.2%	2,395		
Potomac	14,753	148	16,682	81	0.5%	18,877	10,761	123	12,361	24	0.2%	13,014	412	249
Rural West	12,728	309	16,745	239	1.4%	23,195	7,219	209	9,933	36	0.4%	10,894		
Damascus	2,943	33	3,371	33	1.0%	4,261	1,740	72	2,673	4	0.1%	2,772	338	140
Goshen	4,033	79	5,056	65	1.3%	6,811	1,173	31	1,582	3	0.2%	1,669		
Olney	8,122	224	11,030	61	0.6%	12,690	6,190	73	7,136	11	0.2%	7,442	923	338
Patuxent	2,566	43	3,122	44	1.4%	4,309	2,493	17	2,708	12	0.4%	3,022		
Rock Creek	1,287	53	1,982	45	2.3%	3,189	993	93	2,206	15	0.7%	2,623		
Rural East	17,664	378	22,579	203	0.9%	28,071	11,596	193	14,099	30	0.2%	14,905		
Montgomery County Total	282,000	4,118	335,533	3,128	0.9%	420,000	465,970	7,618	565,000	5,185	0.9%	705,000	32,203	115,317

Geography 5

5 Subareas: Metro Station Policy Areas, Red Line Policy Areas, Lower and Higher-Growth Suburban, and Rural

Policy Areas	1990 Total Households	Avg. Annual Growth	2000 Total Households	Avg. Annual Growth	Avg. Annual Growth Rate	2030 Total Households	1990 Total	Avg. Annual Growth	2003 Total Jobs	Avg. Annual Growth	Avg. Annual Growth Rate	2030 Total Jobs	Residential Pipeline	Jobs Pipeline
Bethesda CBD	5,036	99	6,326	91	1.4%	8,771	37,386	175	39,666	256	0.6%	46,575	1,237	1,880
Friendship Heights	3,168	12	3,325	39	1.2%	4,375	9,270	18	9,505	104	1.1%	12,318	1,106	3,111
Glenmont	1,047	2	1,067	55	5.2%	2,557	878	6	955	1	0.1%	971	122	17
Grosvenor	2,622	37	3,107	70	2.3%	4,998	521	9	644	1	0.1%	668	860	52
Shady Grove	335	1	347	74	21.3%	2,347	3,786	40	4,302	19	0.4%	4,824	0	213
Silver Spring CBD	4,317	80	5,352	162	3.0%	9,723	34,204	80	35,248	273	0.8%	42,610	835	4,128
Twinbrook	3	0	3	41	1360.5%	1,105	10,843	47	11,453	36	0.3%	12,426	0	660
Wheaton CBD	1,815	17	2,033	75	3.7%	4,062	10,790	50	11,442	17	0.2%	11,907	436	69
White Flint	0	99	1,283	141	11.0%	5,077	6,556	121	8,129	98	1.2%	10,764	480	2,135
Metro Station Policy Areas	18,343	346	22,842	747	3.3%	43,015	114,234	547	121,346	804	0.7%	143,063	5,076	12,265
Bethesda/Chevy Chase	26,056	162	28,168	88	0.3%	30,543	43,605	488	49,955	152	0.3%	54,056	586	1,204
Silver Spring/Takoma Park	26,425	207	29,111	42	0.1%	30,253	16,176	373	21,026	44	0.2%	22,217	71	173
Kensington/Wheaton	31,103	89	32,261	74	0.2%	34,261	17,193	106	18,567	44	0.2%	19,757	302	273
Derwood	5,238	29	5,617	68	1.2%	7,442	17,121	244	20,297	192	0.9%	25,475	15	1,630
North Bethesda	12,910	89	14,068	68	0.5%	15,893	55,265	477	61,466	312	0.5%	69,893	1,436	6,384
Rockville City	15,561	233	18,584	248	1.3%	25,284	62,483	1,738	85,082	1,139	1.3%	115,828	4,239	31,236
Red Line Policy Areas	52,481	369	57,279	130	0.2%	60,796	59,781	862	70,981	196	0.3%	76,273	6,649	40,900
Aspen Hill	21,268	207	23,957	84	0.4%	26,237	7,417	64	8,243	12	0.1%	8,562	1,579	119
Cloverly	4,733	43	5,295	21	0.4%	5,852	1,009	31	1,417	4	0.3%	1,524	255	234
Fairland/White Oak	24,202	217	27,028	93	0.3%	29,533	27,782	287	31,517	329	1.0%	40,387	1,631	3,435
Olney	8,122	224	11,030	61	0.6%	12,690	6,190	73	7,136	11	0.2%	7,442	923	338
Montgomery Village/Airpark	15,970	186	18,382	22	0.1%	18,972	13,218	189	15,673	61	0.4%	17,309	178	680
Potomac	14,753	148	16,682	81	0.5%	18,877	10,761	123	12,361	24	0.2%	13,014	412	249
North Potomac	6,598	163	8,714	49	0.6%	10,044	1,264	52	1,939	11	0.5%	2,223	368	35
Lower-Growth Suburban	95,646	1,188	111,088	412	0.4%	122,205	67,641	819	78,287	451	0.6%	90,461	5,346	5,090
Clarksburg	561	80	1,607	393	24.5%	12,222	2,644	147	4,559	362	7.9%	14,338	6,563	3,819
R & D Village	889	156	2,913	124	4.3%	6,263	9,133	480	15,374	410	2.7%	26,445	1,013	19,014
Gaithersburg City	16,531	387	21,560	311	1.4%	29,949	38,134	1,207	53,829	532	1.0%	68,184	2,412	11,919
Germantown East	4,008	279	7,636	69	0.9%	9,505	4,124	338	8,521	337	4.0%	17,611	43	10,731
Germantown Town Center	2	29	381	70	18.5%	2,281	2,799	49	3,440	142	4.1%	7,281	1,165	1,403
Germantown West	13,056	502	19,583	142	0.7%	23,428	6,459	322	10,645	225	2.1%	16,725	1,603	9,302
Higher-Growth Suburban	35,047	1,433	53,679	1,110	2.1%	83,648	63,293	2,544	96,368	2,008	2.1%	150,584	12,799	56,188
Darnestown/Travilah	2,474	86	3,586	65	1.8%	5,346	767	30	1,151	1	0.1%	1,185		
Poolsville	2,368	49	3,000	20	0.7%	3,540	1,793	38	2,287	4	0.2%	2,395		
Damascus	2,943	33	3,371	33	1.0%	4,261	1,740	72	2,673	4	0.1%	2,772	338	140
Goshen	4,033	79	5,056	65	1.3%	6,811	1,173	31	1,582	3	0.2%	1,669		
Patuxent	2,566	43	3,122	44	1.4%	4,309	2,493	17	2,708	12	0.4%	3,022		
Rock Creek	1,287	53	1,982	45	2.3%	3,189	993	93	2,206	15	0.7%	2,623		
Rural	15,671	342	20,116	272	1.4%	27,456	8,959	281	12,606	39	0.3%	13,666	2,745	1,123
Montgomery County Total	282,000	4,118	335,533	3,128	0.9%	420,000	465,970	7,618	565,000	5,185	0.9%	705,000	32,203	115,317

Geography 6

7 Subareas: TPRII Districts

Policy Areas	1990 Total Households	Avg. Annual Growth	2000 Total Households	Avg. Annual Growth	Avg. Annual Growth Rate	2030 Total Households
Bethesda/Chevy Chase	26,056	162	28,168	88	0.3%	30,543
Silver Spring/Takoma Park	26,425	207	29,111	42	0.1%	30,253
Bethesda CBD	5,036	99	6,326	91	1.4%	8,771
Friendship Heights	3,168	12	3,325	39	1.2%	4,375
Silver Spring CBD	4,317	80	5,352	162	3.0%	9,723
Inside the Beltway	65,002	5,778	440,252	4,663	1.1%	566,141
Aspen Hill	21,268	207	23,957	84	0.4%	26,237
Glenmont	1,047	2	1,067	55	5.2%	2,557
Wheaton CBD	1,815	17	2,033	75	3.7%	4,062
Kensington/Wheaton	31,103	89	32,261	74	0.2%	34,261
Georgia Avenue	55,233	314	59,318	289	0.5%	67,117
Cloverly	4,733	43	5,295	21	0.4%	5,852
Fairland/White Oak	24,202	217	27,028	93	0.3%	29,533
Eastern Montgomery Co.	28,935	261	32,323	113	0.4%	35,385
Clarksburg	561	80	1,607	393	24.5%	12,222
Germantown East	4,008	279	7,636	69	0.9%	9,505
Germantown Town Center	2	29	381	70	18.5%	2,281
Germantown West	13,056	502	19,583	142	0.7%	23,428
Clarksburg - Germantown	17,627	891	29,206	675	2.3%	47,436
Derwood	5,238	29	5,617	68	1.2%	7,442
Shady Grove	335	1	347	74	21.3%	2,347
Gaithersburg City	16,531	387	21,560	311	1.4%	29,949
North Potomac	6,598	163	8,714	49	0.6%	10,044
Montgomery Village/Airpark	15,970	186	18,382	22	0.1%	18,972
R & D Village	889	156	2,913	124	4.3%	6,263
N. Potomac/Derwood/G'burg	45,561	921	57,533	648	1.1%	75,017
Grosvenor	2,622	37	3,107	70	2.3%	4,998
Twinbrook	3	0	3	41	1360.5%	1,105
White Flint	0	99	1,283	141	11.0%	5,077
North Bethesda	12,910	89	14,068	68	0.5%	15,893
Rockville City	15,561	233	18,584	248	1.3%	25,284
Potomac	14,753	148	16,682	81	0.5%	18,877
Potomac/N. Bethesda/Rockville	45,849	606	53,726	648	1.2%	71,234
Olney	8,122	224	11,030	61	0.6%	12,690
Darnestown/Travilah	2,474	86	3,586	65	1.8%	5,346
Poolesville	2,368	49	3,000	20	0.7%	3,540
Damascus	2,943	33	3,371	33	1.0%	4,261
Goshen	4,033	79	5,056	65	1.3%	6,811
Patuxent	2,566	43	3,122	44	1.4%	4,309
Rock Creek	1,287	53	1,982	45	2.3%	3,189
Rural	15,671	342	20,116	272	1.4%	27,456
Montgomery County Total	302,813	9,372	724,795	7,421	0.9%	925,171

1990 Total	Avg. Annual Growth	2003 Total Jobs	Avg. Annual Growth	Avg. Annual Growth Rate	2030 Total Jobs
43,605	488	49,955	152	0.3%	54,056
16,176	373	21,026	44	0.2%	22,217
37,386	175	39,666	256	0.6%	46,575
9,270	18	9,505	104	1.1%	12,318
34,204	80	35,248	273	0.8%	42,610
612,943	11,910	771,470	8,600	1.1%	1,003,671
7,417	64	8,243	12	0.1%	8,562
878	6	955	1	0.1%	971
10,790	50	11,442	17	0.2%	11,907
17,193	106	18,567	44	0.2%	19,757
36,278	225	39,208	74	0.2%	41,197
1,009	31	1,417	4	0.3%	1,524
27,782	287	31,517	329	1.0%	40,387
28,791	319	32,934	332	1.0%	41,911
2,644	147	4,559	362	7.9%	14,338
4,124	338	8,521	337	4.0%	17,611
2,799	49	3,440	142	4.1%	7,281
6,459	322	10,645	225	2.1%	16,725
16,026	857	27,164	1,066	3.9%	55,955
17,121	244	20,297	192	0.9%	25,475
3,786	40	4,302	19	0.4%	4,824
38,134	1,207	53,829	532	1.0%	68,184
1,264	52	1,939	11	0.5%	2,223
13,218	189	15,673	61	0.4%	17,309
9,133	480	15,374	410	2.7%	26,445
82,656	1,928	111,414	1,224	1.1%	144,459
521	9	644	1	0.1%	668
10,843	47	11,453	36	0.3%	12,426
6,556	121	8,129	98	1.2%	10,764
55,265	477	61,466	312	0.5%	69,893
62,483	1,738	85,082	1,139	1.3%	115,828
10,761	123	12,361	24	0.2%	13,014
146,429	2,516	179,135	1,610	0	222,594
6,190	73	7,136	11	0.2%	7,442
767	30	1,151	1	0.1%	1,185
1,793	38	2,287	4	0.2%	2,395
1,740	72	2,673	4	0.1%	2,772
1,173	31	1,582	3	0.2%	1,669
2,493	17	2,708	12	0.4%	3,022
993	93	2,206	15	0.7%	2,623
8,959	281	12,606	39	0.3%	13,666
960,873	18,355	1,206,868	13,278	0.9%	1,565,366

Residential Pipeline	Jobs Pipeline
586	1,204
71	173
1,237	1,880
1,106	3,111
835	4,128
48,645	207,099
1,579	119
122	17
436	69
302	273
2,439	478
255	234
1,631	3,435
1,886	3,669
6,563	3,819
43	10,731
1,165	1,403
1,603	9,302
9,374	25,255
15	1,630
0	213
2,412	11,919
368	35
178	680
1,013	19,014
3,986	33,491
860	52
0	660
480	2,135
1,436	6,384
4,239	31,236
412	249
7,427	40,716
923	338
338	140
2,745	1,123
78,388	315,500