



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

Date: December 7, 2017

To: Montgomery County Planning Board

Via: Gwen Wright, Planning Director *AW*

From: Paul Mortensen, Senior Urban Designer

Subject: Planning Board Briefing on CR Zones Incentive Density Guidelines

RECOMMENDATION

Approve first group of enhancements to the CR Zones Incentive Density Guidelines

BACKGROUND

In 2012, the Planning Board approved the CR Zones Incentive Density Implementation Guidelines. These guidelines were created to assist in the implementation of Section 4.7. (Optional Method Public Benefits) of the Zoning Code.

The Guidelines have been in place now for approximately five years and have guided Board action on many regulatory cases. There have been many "lessons learned" and staff feels it is an appropriate time for an assessment the effectiveness of the Guidelines.

On November 12, 2015, Lee Quill FAIA, a noted regional architect, gave a presentation to the Board titled "Design Excellence and the Review Process in Montgomery County". The Planning Department had hired Mr. Quill to provide an outside evaluation of the current CR Zones Incentive Density Guidelines and the overall Design Review Process.

Part of that presentation focused on the opportunities that early dialogue has in the Concept Plan review process. The Planning Department is currently offering Concept Plan review to all applicants and this tool has been used for many projects from small to large – including very large projects such as the Viva White Oak project that recently came before the Board.

Mr. Quill also strongly suggested a Director's Design Advisory Panel to assist Staff, the Director and the Board on the architectural and urban design components of projects. He explained how these types of advisory panels had been very successful in Alexandria where he had participated in a couple of them. The Board has recently initiated the Bethesda Downtown Design Advisory Panel and that group has been convened and has met several times.

Finally, Mr. Quill compared the CR Sketch Plan Optional Method Process with the former CBD Optional Method. He compared two specific projects: the Chevy Chase/Capital One Bank Building in Bethesda and the Saul Centers project in White Flint. In this comparison, it became clear that our current public benefits process uses a very quantitative process that sometimes limits the ability to get the best possible package of public benefits. In particular, exceptional design is typically not requested as a benefit in the Optional Method. The current process is very quantitative and results in projects working towards a point total rather than looking holistically at how to accomplish the best set of amenities to

meet the public needs and goals highlighted in individual plan areas. Mr. Quill suggested making adjustments to the point system to reinforce high quality design.

PLAN FOR REVIEW

With the Concept Plan and Design Advisory Panel recommendations being implemented, staff has turned attention to looking at the CR Zones Incentive Density Guidelines.

We are recommending that the CR Incentive Density Implementation Guidelines be reviewed in three phases with a series of initiatives that we believe will add to the clarity of the Guidelines and will improve the dialogue and outcomes of this process.

We are proposing a three-phased discussion:

1. **Short-Term:** This first presentation (today) will be a relatively straightforward proposal to bring greater clarity to the existing guidelines without changing their purpose or basic structure. This effort includes new intent statements and captioned photos to better explain what the written guideline is proposing. The revised draft of the guidelines is attached to this memo and staff is requesting Board approval of the revised document.
2. **Mid-Term:** The second presentation (coming forward in Spring 2018) will be an evaluation taking into consideration the new Bethesda Overlay Zone. This presentation will be to suggest substantive modifications to the Incentive Guidelines, which are reflected in the Bethesda Overlay Zone and the Bethesda Implementation Guidelines, so as to better synchronize the planning goals and incentive points in Bethesda.
3. **Long-Term:** The final presentation (date to be determined) will present a long-term game plan to propose larger changes to the incentive guidelines in light of changing County goals and needs, which will address County Council and Planning Board comments over the past couple of years. These changes will also be based on data from past projects indicating which individual guidelines and policies were effective or not within the overall incentive guideline package. We will suggest additions, deletions and modifications to individual guidelines and point allocations at this presentation. Amendments to the Section 4.7. of the Zoning Ordinance will also be necessary.

CURRENT ENHANCEMENTS TO GUIDELINES

Staff has taken the existing CR Incentive Density Guidelines and added Intent Statements to each individual topic. From staff discussions with applicants, and through Lee Quill's evaluation, it was clear that some did not understand why certain topics and incentive points were being offered through this process. It was also clear that applicants and staff sometimes had different understandings for each topic. These new intent statements will provide background, clarity and guidance to the applicant on the importance of each topic within the rural, suburban and urban context.

Staff discussions with applicants also identified the need for more relevant and real-life photo examples of buildings and settings that illustrate guideline topic intents and goals. Relevant examples and captions can help applicants clearly understand how to achieve bonus points. These changes to the Guideline booklet should add clarity to applicants' decision process and provide a better understanding of Guideline points for staff and applicant discussions.

CONCLUSION

Staff is requesting your approval of the first phase of enhancements to the CR Incentive Density Guidelines. In addition, staff would like your approval of our three phase approach to looking holistically at the Guidelines.