



THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION
Planning Department, Montgomery County, Maryland
8787 Georgia Avenue Silver Spring, Maryland 20910

MCPB Date: 11/1/18
Agenda Item # 5

MEMORANDUM

DATE: October 29, 2018
TO: Montgomery County Planning Board
VIA: Gwen Wright, Planning Director *GW*
Tanya Stern, Deputy Director of Planning
Robert Kronenberg, Acting Deputy Director of Planning
FROM: Karen Warnick, Division Chief, Management Services *KAW*
Anjali Sood, Budget Manager, Management Services
SUBJECT: Worksession #2 - Planning Department FY20 Operating Budget

STAFF RECOMMENDATION:

Follow-up discussion of Planning Department – General Plan Update Support and Archiving.

BACKGROUND:

At its October 18 meeting, the Planning Board discussed the Planning Department's request to prepare the FY20 operating budget at the base budget plus new initiative level. At that meeting, the Planning Board supported the Department's proposed work program generally but asked the Planning Department to "sharpen our pencils" to provide a more detailed justification of the FY20 request for \$300,000 in consultant funding for the General Plan Update. The following is Staff's expanded proposal that details the status of the project; comparable examples of recent general plan update expenditures by other jurisdictions; and the proposed scope for work to be conducted in FY20, including the use of consultant and other resources the FY20 request would support.

General Plan Update Support - \$300,000 – One-Time (Revised)

The General Plan Update project was launched in FY19 as part of the Department's FY19 Adopted Master Plan and Major Projects workplan. The FY20 request is for the approval of additional funding for the next phase of the project that will take place in FY20.

Status - FY19 Phase: Pre-Planning

During FY19, the Planning Department is conducting pre-planning to lay the groundwork for this major effort to update this long-range countywide policy document with a time horizon of multiple decades and to more concretely define the scope of the General Plan Update to guide the Planning Department's technical and outreach work in FY20 and FY21.

At the end of FY18, the Department hired Rhodeside & Harwell to develop a strategic framework for the plan update and a comprehensive communication strategy to gather input at the local, county and regional level. To date, the consultant, along with Planning staff, has conducted 23 individual and group interviews with more than 75 leaders in the Montgomery County government, the County Council, Planning Board, academic institutions, and regional entities (WSSC, MWCOG) about their views regarding big picture trends; demographic, cultural, and technological changes and game changers; uncertainties and threats that could shape the future of the county and the region; and strengths of the county that might help us address these challenges.

What is emerging from these interviews is a high-level assessment of the issues, trends and challenges we should consider in the General Plan Update. We have heard concerns about maintaining the county's competitive edge, equity/affordability issues in a changing economy, sustainability in the face of climate change affecting health, resiliency, and other related threats, the impacts of cyber technology, and the quality of life issues such as education, accessibility, walkability, and protection of existing assets and resources.

Staff will continue to work with this consultant to refine these findings and help develop a conceptual approach to the update that will guide the work of the staff team working on the General Plan Update in 2019 and beyond. This consultant's work to develop the strategic framework for the update and the comprehensive communication strategy is expected to be completed by the end December 2018.

Also, the Department intends to use FY19 funds to hire a transportation consultant to prepare a white paper to define the indicators that should be used to conduct a countywide transportation network analysis appropriate for the General Plan Update during the next phase of the project in FY20. The white paper will first define what questions this transportation analysis should answer, e.g. how to use the current network's footprint more efficiently using the future technologies and resources to achieve the desired outcomes. It will need to define or develop new metrics in addition to the typical transportation metrics such as total trips, vehicle miles traveled (VMT), jobs accessible within certain travel time by mode, trip duration by mode, etc.

Other Jurisdictions' General Plan Consultant Costs

Staff has researched other jurisdictions to get some sense of their approach and how much they spent on outside help for their general plan updates. A general plan update is a complex, multi-year effort and consultant costs vary depending upon the nature of the plan, the size of the jurisdiction, the scope of the contract and the in-house staff's expertise and availability. Consultant contract costs may include labor, materials production, and outreach and engagement implementation. A full-service contract may range in cost from \$800K to a few million dollars. Several of the comparable examples below had significant in-house staff time dedicated to these projects in addition to consultant resources, even for larger contracts. The total consultant costs expended also typically have occurred over multiple fiscal years.

The Planning Staff's request for \$300,000 is only for FY20; there may be other new costs or continuation of some of the tasks in subsequent years.

Comparable Examples:

DC Region

- **Loudoun County, VA** hired a prime consultant for their general plan update for a multi-year effort for \$1.65 million (still underway)
- **Washington, DC** hired a prime consultant and several subconsultants for multiple tasks for its multi-year Comprehensive Plan update (still underway) and has spent \$795K, including \$40,000 for targeted WMATA advertising and \$20,000 in print advertising.
- **Prince George's County** hired three different consultants for \$100K. Two of the contracts were for community outreach tasks. The full amount spent in these contracts (environmental impact statement, community outreach, economic analyses, e.g.) is hard to ascertain because of post-plan staff changes and difficulty to get detailed records.

Other Jurisdictions

- **City of Sacramento** spent about \$4 million on its plan update.
- **Ontario, Canada** spent \$3 million.
- **City of Santa Monica, CA** spent \$2.3 million.
- **Austin, Texas** hired a prime consultant for \$1.34 million.
- **Seattle, Washington** hired a consultant for only an Environmental Impact Statement for \$340K.

The Need for Consultant Support and Additional Funding in FY20

While working with Rhodeside & Harwell in FY19, staff has started to define the next steps of the project, including: 1) strategies for community outreach and engagement; and 2) staffing and consultant support needed to conduct a thorough and deep exploration of the major substantive issues for Montgomery County that the updated General Plan will address, such as the economy; sustainability and resiliency; accessibility; technology; health; arts and culture; parks and recreation; housing; and community identity. In FY20, Planning staff will be fully immersed in visioning and community outreach as well as detailed analyses of issues that will arise from the community input and dialogue with experts in practice and academia on some of these issues.

While the Planning Department has talented staff in-house in communications, engagement and analysis, a General Plan is a project unlike a typical master plan or functional plan in both scale and scope in very significant ways that will require additional support—both in outreach and consultant resources—that are beyond the available capacity of this department to conduct. The Department will need FY20 funding to:

1. Develop and implement a wide variety of outreach materials, such as communications materials and advertising, on multiple platforms, that will need to be distributed across the county, along with tools and other resources to scale up the Department's engagement efforts; and
2. Utilize consultant technical analysis of some major issues for the update to complement staff capacity and expertise.

With this in mind, the Planning Department is requesting \$300,000 in FY20 for consulting and other project resources to support the General Plan Update for the following purposes:

- 1. Support the Department's countywide visioning and community outreach and engagement efforts – approximately \$75,000.**

The community outreach for this project will be at a scale significantly greater than what we undertake in master plans or countywide functional plans. We will need to develop, purchase and distribute countywide advertising and marketing materials to promote the General Plan update and purchase interactive software and other engagement resources to gather input from stakeholders at a large scale beyond our current capabilities. These costs will be primarily for materials and technological resources to support the outreach efforts rather than on additional labor. Planning staff will lead the outreach efforts.

- 2. Conduct data and policy research to support the update of the critical elements of the General Plan, including on major issues and drivers that will affect the county's development and growth in the next 30 years – approximately \$225,000.**

Consultant support to conduct transportation and economic competitiveness analyses for the General Plan update is necessary to supplement constrained staff capacity given competing workloads and the desire to leverage specialized expertise. Nearly all master plans currently use some form of outside assistance to support transportation, economic or environmental analysis.

SUMMARY:

At the Board's request, the Planning Department has "sharpened our pencils" and provided a more detailed justification of the FY20 request for \$300,000 in consultant funding for the General Plan Update. Further details on the proposed scopes for the outreach and technical analysis support that would be funded with the FY20 request are included in Attachment 1.

**Attachment 1
FY20 Request for General Plan Update
October 25, 2018**

The FY20 request of \$300,000 is needed to transition the existing General Plan Update project from pre-planning in FY19 to a critical phase in FY20 of community outreach and issue analysis to inform the development of a responsive General Plan Update that will guide the county's growth and development over the coming decades. Implementation of the tasks described below and related expenditures may occur over multiple fiscal years. Staff's estimate of \$300,000 for the tasks described below is preliminary and will be refined as we move forward. Actual costs may vary, and it is possible that the total cumulative cost of all tasks listed here may exceed \$300,000. If that happens, staff will have to prioritize which tasks should be done in FY20 and which ones could be done in FY21. One option may be to split the cost of a task over two years (continue community engagement into FY21 with FY21 funds). Or, since the Department will also be working on the Subdivision Staging Policy (SSP) in FY20, and there could be some overlap between the transportation analysis for the SSP and the transportation analysis for the General Plan Update, as described in the Transportation Analysis section below. We may be able to use the overlap between the two projects to combine the funds and achieve some savings.

I. Funding Need to Support Community Outreach and Engagement - \$75,000

A major element of the General Plan Update effort will be an inclusive outreach program to gather input at the local, county and regional level. A comprehensive list of stakeholders will target all stakeholders including local civic and homeowners' associations, umbrella and countywide civic groups, business groups, religious institutions, ethnic and social activist groups, development entities, parents' associations, and all others who are concerned about the future of the county.

We will use Department staff to lead this effort. Given the countywide scale, we will need additional resources to support advertising, meeting materials, innovative use of technology, supplemental meeting coordination, etc. This effort to produce high quality community outreach is both labor intensive and requires an investment in marketing and advertising channels. For example, as noted above, Washington, DC expended \$60K just for targeted WMATA and print advertising to market its Comprehensive Plan update and launch public engagement. *We anticipate spending \$30,000 for this type of advertising and marketing in FY20.*

Engagement activities may require new software and/or online tools and external assistance to conduct community workshops and special events to solicit advice from the community and other stakeholders. Many of the jurisdictions we talked to have used more innovative software tools for surveys or other inputs specifically designed for such purposes. *These new technologies could cost \$40-50,000* depending upon the scale and complexity of the task. Instead of training in-house staff for one-time use, it will likely be worth hiring an outside entity to conduct a countywide survey or other mechanism to get community input using an electronic medium. Staff also is planning to engage regional and national experts and thought leaders to enrich our understanding of the most critical challenges of the future and how the county should position itself to achieve its vision of a desirable community. Some of the funding might be used for this kind of engagement, which may occur in the form of individual outreach, seminars, roundtables or workshops.

II. Funding for Consultant Technical Analysis of Major General Plan Issues - \$225,000

In addition to support for General Plan Update outreach and engagement, the Planning Department intends to use approximately \$225,000 of the \$300,000 request in FY20 to procure consultant support to supplement staff capacity for the following technical analyses:

- 1) An analysis of the county's transportation network and its regional context, and its ability to provide the most desirable and adequate accessibility/mobility choices to support a desirable land use pattern in the future – approximately \$150,000;
- 2) An economic competitiveness analysis focusing on one or more specific components, such as sharing economy, the changing nature of employment in an interconnected world, other trends and game changers that may require a more in-depth analysis – approximately \$50,000; and

- 3) Other topics and issues that may arise from the pre-planning currently underway that will define the focus of the General Plan Update and a need for tasks that may require outside expert help – **approximately \$25,000**. It is also likely that some of these yet-undefined tasks will be done in FY21.

Transportation Analysis

While the transportation analysis for the General Plan will not be as detailed as for a typical area master plan, it will need to cover a much larger area and will be a different kind of analysis than typically conducted for a master plan that is based on the regulatory criteria of LATR.

Although the full extent of the transportation analysis in FY20 will not be defined until the transportation white paper (described in **FY19 Phase: Pre-Planning** earlier in this document) is completed in the next 4-6 months, staff expects this transportation analysis to paint a comprehensive picture of the network to support our land use narrative. It should tell us what the capacity of the existing network—roads, transit, BRT, bikeways, etc.—is today, how it interacts with the regional network, and how it will serve us for the next 30-40 years. This analysis may tell us that it may serve us well at its maximum efficiency and adaptability (however that is defined) for the currently planned growth for the next 15-20 years, but not for a much longer time frame, and how we should prepare for the impact of future technologies, such as ride-hailing services, autonomous vehicles, decrease in car ownership, and other changes on the horizon. The transportation network analysis should also explore how the network will respond to different alternatives—transportation demand management, transit priority and other mobility options, a combination of one or more of these—that could help us best achieve the most desirable future.

Based on conversations with some of our transportation consultants who have worked with the Planning Department in the past, staff estimates the cost for consultant assistance to support the **transportation analysis described above could range between \$150,000 - \$250,000**. This assumes that some of the work will be done by in-house staff. The need for consultant support is driven by both the specialized expertise needed for this analysis and the fact that the transportation staff are at capacity because they will also be working on other plans including the SSP in FY20. The General Plan transportation analyses that will be performed in FY20 may have some overlap with the transportation analyses that will be performed in support of other planning projects (particularly the SSP). This overlap could be mutually beneficial to these planning efforts. The General Plan Update being a new kind of unique and complex planning effort by the Department, staff believes that a subsequent analysis could be needed in FY21 depending upon the results of the first analysis in FY20 and input from various stakeholders and experts during the early stages of plan development. As a reference, transportation analysis on individual master plans usually ranges around \$80K.

Economic Competitiveness Analysis

Although staff has already done significant work on demographic and economic conditions, consulting funding may be needed for issues such as an economic forecast for the county or deeper dives into specific topical areas such as the sharing economy or telecommuting. Our on-call bench of economic consultants can provide additional expertise not held by staff (and not needed regularly enough to hire staff with that expertise.)