



MCPB Item #9
April 15, 2021

MEMORANDUM

DATE: April 8, 2021

TO: Montgomery County Planning Board

VIA: Michael F. Riley, Director of Parks *mr*
Miti Figueredo, Deputy Director, Administration *mf*
Andrew Frank, Division Chief, Park Development Division (PDD) *af*

FROM: Carl Morgan, CIP Manager, Park Development Division *cm*

SUBJECT: Strategy for Preparing the FY23-28 Parks Capital Improvements Program

STAFF RECOMMENDATION

Obtain guidance and feedback from the Planning Board on evaluation criteria, goals and priorities for the Parks FY23-28 Capital Improvements Program (CIP).

APPROACH AND OBJECTIVES

This is the first session of the FY23-28 Capital Improvements Program. In this strategy session Parks Department staff is requesting feedback about the prioritizing criteria for the CIP as we continue to review capital work programs and capital projects for the next six years. As part of this kick-off for the new CIP, we will present some general information about the current CIP, review milestones, explore factors and conditions that will shape the new CIP, and lastly visit the prioritizing criteria and strategy for the current CIP and any potential changes for the new CIP.

BACKGROUND

State law requires that the Montgomery County Council approve the CIP for the Montgomery County side of the Maryland-National Capital Park and Planning Commission.¹ It also requires that the Commission submit a new CIP to the County Government every odd-numbered year by November 1, which is about six months before the County Council adopts the County-wide CIP in May. In the year prior to the submission, the Department works with staff, the Planning Board and the public to gather project needs, prioritize them, and program them into a working CIP. Once adopted, the CIP serves as the plan or roadmap for how the Commission will fund park development and park acquisitions in the next the six years.

¹ Md. LAND USE Code Ann. § 18-112

Here are some key facts about the CIP:

- While it is created biennially (every two years), it is reviewed annually
- It sets the capital budget for each upcoming fiscal year
- The capital budget is the aggregate of all appropriation requests for a fiscal year
- The capital budget must be consistent with the CIP at all times; if it is amended, the CIP is typically amended as well
- Projects in the CIP are described on Project Description Forms (PDFs), of which there are two main types:
 - Stand-alone projects – there is a beginning and end to the project (e.g. construction of a new park or a major park renovation)
 - Level-of-effort (LOE) projects– a project that continues indefinitely and supports various sub-projects that form an ongoing capital program (e.g. trail renovations, ballfield improvements, ADA improvements, or stream restoration).
- Projects or sub-projects in a level-of-effort (LOE) project must be \$30,000 or more with a life expectancy of at least 15 years²

The Current CIP, FY21-26

A summary of our Current CIP is attached on **page ©1**.

A Roadmap for the Next CIP, FY23-28

The CIP process is complex and lengthy, requiring the Department to begin about a year-and-a-half prior to the CIP going into effect. Some of the major milestones include:

- Gathering project requests (winter/spring 2021)
- Strategy and prioritization (spring/summer 2021)
- Scenario building (summer 2021)
- Work sessions, adoption and preparation of the submission (late summer/fall 2021)
- County Executive and County Council review (winter 2021/spring 2022)

We discuss the milestones in more detail in this report on **page ©5**, however, the primary purpose of this session with the Board is to obtain feedback and guidance regarding the CIP strategy and the project prioritization process (the second bullet), including addressing equity. Understanding the Board's strategy and priorities now will help the Department as we work through the CIP process and present CIP recommendations throughout the CIP season (this spring, summer, and fall).

Sessions and public meetings with the Planning Board will include:

- Strategy Session #1
 - April 15, 2021
 - Kick off the FY23-28 CIP process
 - Review and affirm the Planning Board's overall CIP Strategy and criteria for prioritizing projects
- Public Forum and Open Town Hall
 - June 2021

² If the project is under \$30,000 it is funded by the operating budget. Projects over \$5,000 but less than \$30,000 are considered Major Maintenance.

- An opportunity to receive direct feedback from the public
- Strategy Session #2
 - July 2021
 - Review public feedback
 - Key components of the CIP: opportunities and constraints
 - Fiscal outlook
 - Department progress and next steps
- Work Sessions
 - September 2021
 - Spending Affordability Guidelines (SAG)
 - Two sessions - Review of funding scenarios for CIP projects
 - Local park funding sources
 - Non-local park funding sources
- Adoption Session
 - October 2021
 - Adopting a final scenario to prepare to transmit to Montgomery County Government by November 1, 2021

New Directions

While we typically expect conditions to change between CIP cycles, the conditions today are very different than they were two years ago. The most profound change, of course, has been related to the COVID-19 pandemic, which has affected every aspect of the parks department's work and reinforced the importance of park services and infrastructure. Fortunately, the department's pre-pandemic efforts to shift toward a digital, paperless workplace and adopt online meeting technology and tools have been helpful in adapting to the rapid changes that were implemented at the outset of the pandemic. In addition, Commission planning efforts in both the Parks Department and the Planning Department have been shaping how we address the emerging needs of county residents and how we target and prioritize funding for the right parks in the right places.

Working in a Pandemic

As the county began to shut down in March 2020 and people began adopting social distancing safety measures, Parks did not skip a beat. Some facilities needed to be closed. Other activities ceased. To meet the need for safe outdoor recreation and social connection, we began activating the parks in new ways. As many staff began teleworking, we used our digital tools and technology to enable online meetings and virtual teamwork. Staff who continued working onsite were put on schedule rotations in order to facilitate social distancing. Despite these changes, we have been able to keep most capital projects moving while providing badly needed opportunities for park users to exercise outdoors, enjoy nature, and connect with one another. It became apparent early on that while social distancing was helpful from an epidemiological perspective, it was taking its toll on the physical and mental health of residents. People simply needed places to get out, find a change of scenery, breathe in fresh air and heal.

Those who contemplate the beauty of the earth find reserves of strength that will endure as long as life lasts. There is something infinitely healing in the repeated refrains of nature -- the assurance that dawn comes after night, and spring after winter. – Rachel Carson, Silent Spring

While those words echo from Montgomery County's own Rachel Carson in 1962, they are even more meaningful today. It would be fair to say that during this past year many people have gained a renewed appreciation for the County's parks and especially those who laid the foundations of a park system that we benefit from today.

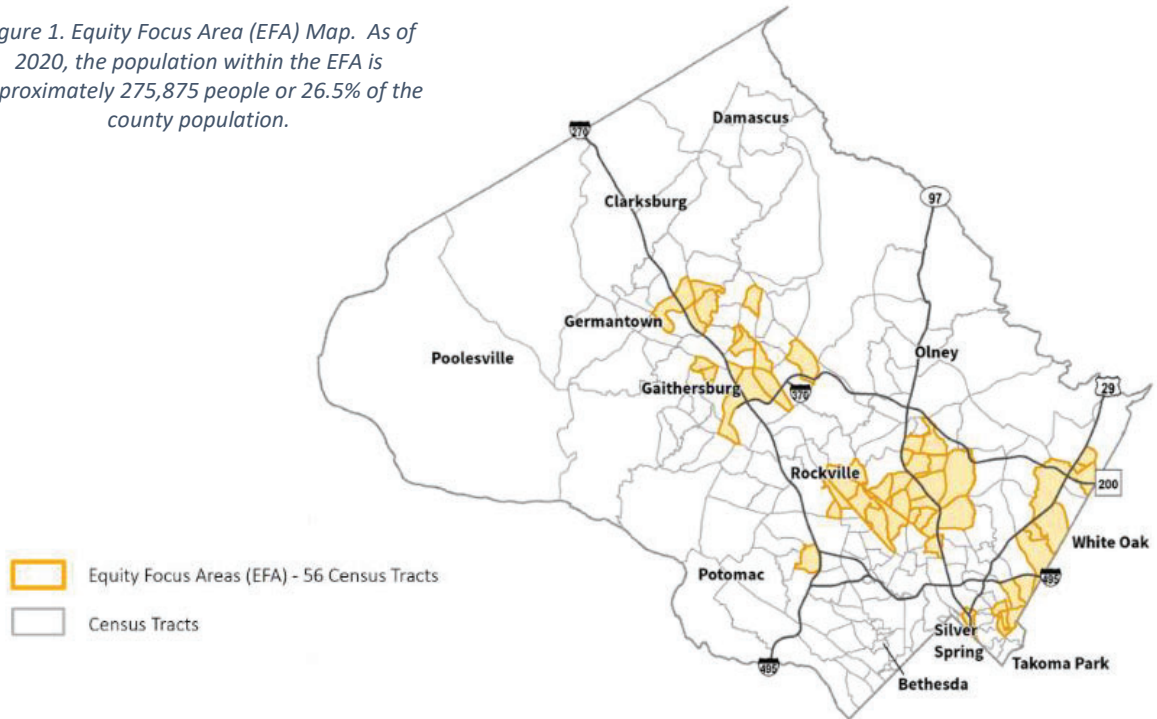


Equity

The quality and accessibility of urban parks is a basic component of equity in the delivery of public services. Parks are so integral to what makes a community desirable and healthy that ensuring equity in decisions about developing capital budgets for park and recreation facilities is essential to achieving our goals for racial and socioeconomic justice. The Parks Department has made major strides in recent years in incorporating quantitative measures of equity in its capital budget recommendations, and we're committed to continuing to ensure that parks and recreation opportunities are accessible and equitably distributed.

A tool that will be utilized in this CIP process will be the Equity Focus Area tool created by a team that included Park staff and was led by the Research and Technology Division of the Planning Department. A pre-cursor of this tool was demonstrated to the Planning Board during the last CIP review. This tool identifies parts of Montgomery County that are characterized by high concentrations of lower-income people of color, who may also speak English less than very well. This data-driven tool will allow us to assess potential racial and social inequities in our CIP program.

Figure 1. Equity Focus Area (EFA) Map. As of 2020, the population within the EFA is approximately 275,875 people or 26.5% of the county population.



Additionally, the Department has recently created and is currently filling the position of a new Equity Analyst. The person in this newly created position will initiate and manage an equity strategy for the Department of Parks. They will also help guide the Department's efforts to better achieve inclusion in all aspects of park programs, operations, and management, including the CIP.

Active, Urban, Social, and Contemporary Planning

The collective works of Commission planners in both the Parks Department and Planning Department are forward looking and anticipate the needs of Montgomery County's increasingly urban and diverse population. This work includes a variety of plans and studies that when implemented will help foster, among other things, a park system that is active, socially engaging, and equitable.

One of the most significant efforts underway during this past CIP cycle is *Thrive Montgomery 2050*, a comprehensive reimagination and modernization of the county's visionary general plan, *On Wedges and Corridors* (1964). For more than five decades, under the former plan, Montgomery County has become one of the most desirable places to live and work in the United States with

- An award-winning park system
- High-quality schools
- Forward-thinking approaches to farmland preservation
- The emergence of sophisticated urban centers and mass transit, and
- Attractive neighborhoods

Thrive Montgomery 2050 builds on this with three overarching objectives:

- Economic competitiveness,
- Racial and social equity, and
- Environmental sustainability



Parks play a significant role in achieving all three objectives. The revised plan envisions parks taking on new roles:

- Serve residents of downtowns, town centers, and other intensively developed areas
- Focus on social engagement and community building as a central role of parks and recreation
- Encourage vigorous physical activity for people of all ages, abilities, and culture
- Focus on creating high quality urban parks
- Use park and recreation facilities/programs to promote active lifestyles
- Ensure that parks and recreation opportunities are accessible and equitably distributed
- Update park facility standards and acquisition strategies to align with infill development and adaptive reuse
- Maintain high standards of environmental stewardship in park management and operations
- Integrate parks/recreation/public spaces into economic development strategies and land use planning to attract employers and workers, build social connections, encourage healthy lifestyles, and create vibrant places, especially as part of complete communities

Parks Specific Planning Efforts

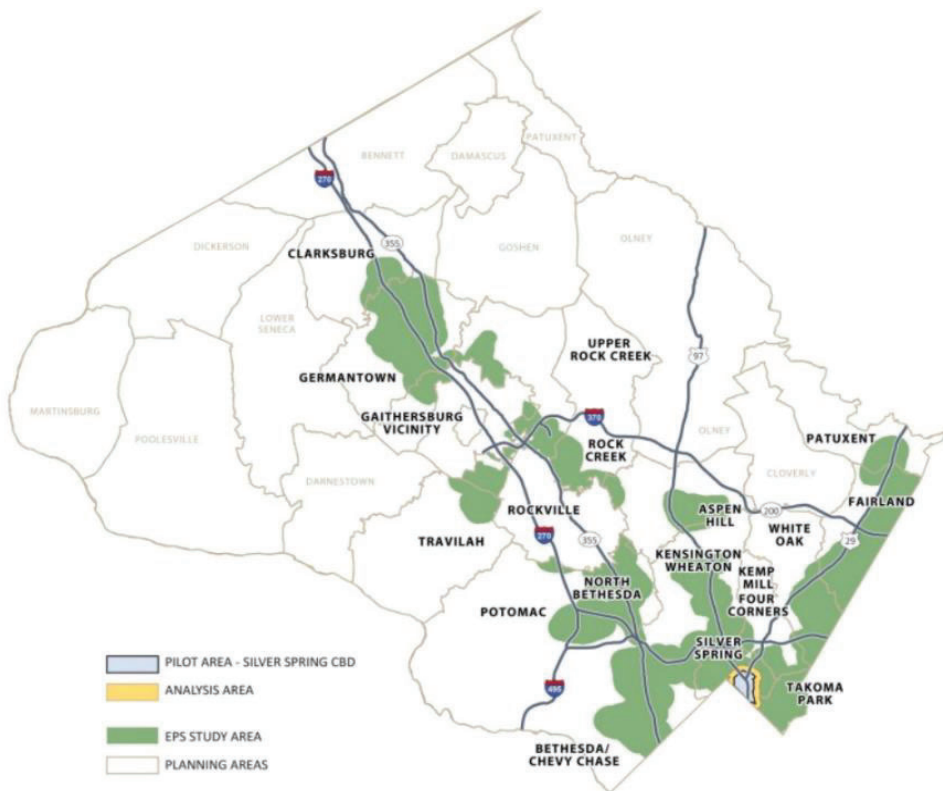


Figure 2 - Map of the EPS Study Area and Pilot Area

Complementing the broad array of general plans, area master plans, functional plans, special studies, and planning initiatives, the Parks Department has continued to lead in efforts specific to parks. This includes countywide plans, park master plans, trails plans, and other studies and initiatives.

Two recent efforts that focus on creating active, urban, and social parks include:

- *Energized Public Spaces (EPS) Functional Master Plan (2018) and EPS Design Guidelines (2019)* – The EPS methodology helps to identify and prioritize public space and park needs in relation to population and

the existing supply of park amenities. The plan is helping Montgomery Parks better identify needs, anticipate trends, and promote important goals such as health and social equity. It also provides tools to make recommendations on parks and public spaces for areas not undergoing a master plan process. In the long-term, an interactive inventory of accessible public spaces and mapping of the areas with the highest needs will help Parks staff better prioritize scarce park resources.

- *Parks, Recreation, and Open Space Master Plan (2017)* – The Department is just beginning an update to this plan for 2022. Reviewed every five years, this plan is vital to Parks for several reasons including:
 - It becomes part of the state’s five-year *Land Planning, Preservation, and Recreation Plan (LPPRP)*
 - It is a pre-requisite for the state to grant M-NCPPC Program Open Space funding that supports roughly 20% of the CIP
 - It provides the basis for park and recreation recommendations in area and park master plans
 - It guides policies and priorities for park acquisition, renovation and development, recreation facility needs, natural and historic resources, and local agricultural land preservation programs

Themes of the current plan include:

- Optimize Existing Parks and Facilities - Utilize existing park and recreation facilities and lands more efficiently
- Create Great, Activated Parks to Equitably Serve the County - Provide spaces and programs that bring people together
- Steward and Interpret our Natural and Cultural Resources - Prioritize the management and protection of natural and cultural resources

CIP Strategy and Evaluation Criteria for the CIP

Within this larger planning context, the CIP is an implementation tool for achieving the goals outlined in these plans. One of the fundamental components of the Department’s work in preparing the CIP is understanding the Planning Board’s prioritizing criteria for projects and strategy. With a park system of this size and age, there are always more worthy candidate projects than limited funding and resources will allow. This requires an increasingly sophisticated process for prioritizing and allocating funds so that we can get the right parks in the right places for all residents in Montgomery County.

The version of the *CIP Strategy and Evaluation Criteria* that the Board approved in 2019 for the FY21-26 CIP is attached on **page ©11**.

RECOMMENDATION

Going into the new CIP cycle for FY23-28, staff have reviewed the strategy and criteria considering the new directions discussed earlier. Below you will find the revised evaluation criteria recommended by the Department.

Immediacy and Efficiency – the project:

- Addresses public health, safety, and welfare
- Prevents degradation of existing facilities and avoids costly future repairs
- Preserves natural, cultural, or historic resources that are under threat
- Achieves compliance with code requirements and/or laws
- Needs to be timed with related projects by other agencies
- Increases revenue, achieves cost savings, and/or improves operational efficiency
- Leverages an opportunity, such as a partnership, donation, or grant

Equity and Need – the project:

- Promotes racial equity and social justice by improving park access, services, or facilities in Equity Focus Areas (EFAs)
- Provides facilities to an under-served geographic area or population group
- Implements recommendations of adopted plans (e.g. Thrive 2050, PROS, Energized Public Spaces Functional Master Plan, park master plans, area and sector plans, functional plans)

Project Priorities – the project:

- Renovates or expands both natural and hard surface trail systems
- Improves availability and quality of ballfields
- Activates and improves Urban Parks, focusing on urban areas with older infrastructure and limited open space

Acquisitions and Access - acquisitions will:

- Target urban park needs and high-density areas
- Provide opportunities for natural resource-based recreation
- Improve connections between parks and expand trail networks
- Protect, restore, or enhance natural resources

Project Delivery – increased focus on:

- Park Refreshers rather than large-scale park redevelopments
- Utilizing level-of-effort projects to maintain what we have and more quickly implement park modifications to meet changing community needs
- Use of in-house staff resources and interdepartmental partnerships
- Simplified Facility Planning that allows flexibility to adapt to changing needs through project development

CONCLUSION

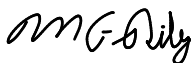
The Department will continue to review and evaluate new and existing CIP requests. This review is being performed within the context of the issues outlined above and described in the attachments. We will return to the Board in July to continue discussions on CIP strategy. In addition to any other topics identified in today's discussion, Staff would propose discussing topics that include:

- The County's fiscal outlook
- Funding sources in the CIP and their status, including funding from the State, the County and the Commission
- What is in the current CIP that will roll over to FY23-28
- Adjustments to existing Level-of-effort and Stand-alone projects
- Potential new projects

Attachments

Strategy Session #1 Supporting Documents

- The Current FY21-26 CIP, Page ©1
- Milestones in the FY23-28 CIP, Page ©5
- CIP Strategy and Evaluation Criteria FY21-26, Page ©11
- Prioritization: EAM and Facility Planning, Page ©13



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Strategy Session #1 Supporting Documents

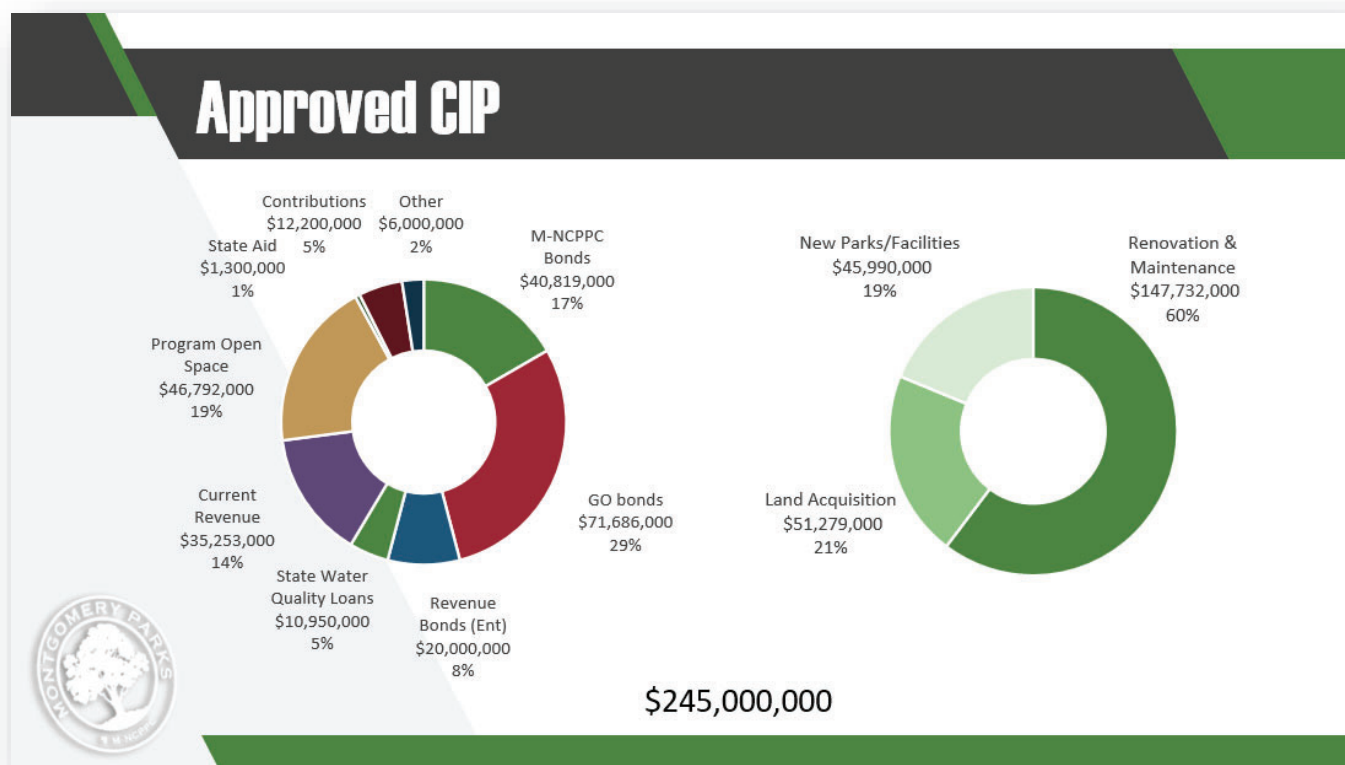
The Current FY21-26 CIP



Summary of the Approved FY21-26 CIP

The approved FY21-26 CIP is \$245 million, a 4.4% increase above the prior FY19-24 CIP at \$234.69 million

Funding Sources



Funding comes from various sources. Montgomery County Bonds (GO Bonds) and Current Revenue (cash) fund larger parks and system-wide improvements while M-NCPPC Bonds and Current Revenue fund local parks. Program Open Space is a significant funding source from the State of Maryland's transfer tax. This CIP also features some revenue and long-term financing supported by the Water Quality Protection Charge to county residents and property owners. In addition, we receive funds from a myriad of other sources that include grants, contributions, enterprise revenues, and federal aid.

Categories

The Parks' CIP projects generally fit in one of the following categories:

- Renovation and Maintenance – repair, renovation, and lifecycle replacement of existing park facilities and supporting infrastructure. This includes natural, cultural, and historical resources on parkland.
- New Parks and Park Facilities – responding to unmet park and recreation needs.
- Land Acquisition – continued commitment to preservation of parkland through Legacy Open Space and park acquisition programs.

Category	Amount	Percentage of Six-Year CIP
Renovation and Maintenance	\$147,732,000	60%
Land Acquisition	\$51,279,000	21%
New Parks and Park Facilities	\$45,990,000	19%
TOTAL	\$245,000,000	100%

The highest percentage of the CIP “pie” is dedicated to maintenance and renovation. The primary focus of the CIP is to optimize what we have currently in the park system. The Department continues to invest more on maintenance and renovation projects as they tend to alleviate our operating budget of substantial maintenance costs. While new parks and park facilities are necessary to keep up with a growing population and increased demand on the parks, these parks and facilities create operating budget impacts (OBI). Because of the tight fiscal climate, the Department has focused on ways to keep OBI as low as possible. However, we cannot entirely forego funding for new parks as the Parks, Recreation and Open Space (PROS 2017) Plan, and other planning guidance continue to identify park needs across the County that should be addressed. This means that the Department must be conscious about designing and developing new facilities by finding innovative methods to reduce OBI, without compromising their historical/cultural integrity or environmental best management practices and mandates.

Funding for maintenance and renovation should generally increase from one CIP cycle to the next as existing infrastructure continues to deteriorate and more parks and amenities are added to our park system. Also, as the Department and the County government are programmed to the top of their spending affordability guidelines, it is difficult to propose new parks and large-scale renovations of existing parks which adds to the demands for renovation and maintenance funding. Higher priority should be given to renovation and maintenance projects when evaluating new projects for the FY23-28 CIP.

FY21-26 CIP Program by Expenditure Category

Council Adopted September 15, 2020

PDF #	Project (PDF)	Six Year Total	FY21	FY22	FY23	FY24	FY25	FY26
LAND ACQUISITION								
<i>Continued commitment to preservation of parkland through Legacy Open Space and park acquisition programs</i>								
767828	Acquisition: Local Parks	5,300	1,050	1,650	650	650	650	650
998798	Acquisition: Non-Local Parks	4,450	700	750	750	750	750	750
727007	ALARP: M-NCPPC	6,000	1,000	1,000	1,000	1,000	1,000	1,000
872002	Bethesda Park Impact Payment	5,000	2,500	2,500	0	0	0	0
018710	Legacy Open Space	12,529	1,036	2,578	2,650	2,600	2,465	1,200
872104	Legacy Urban Space	18,000	3,000	3,000	3,000	3,000	3,000	3,000
	Category Total	51,279	9,286	11,478	8,050	8,000	7,865	6,600
NEW PARKS & PARK FACILITIES								
<i>Responding to unmet park and recreation needs</i>								
P872101	Black Hill Regional Park: SEED Classroom	650	400	250	0	0	0	0
998773	Enterprise Facilities' Improvements	20,000	0	20,000	0	0	0	0
998799	Minor New Construction - Local Parks	2,305	400	450	360	364	365	366
998763	Minor New Construction - Non-Local Parks	4,470	620	700	750	800	800	800
871541	North Branch Trail	1,152	0	200	952	0	0	0
118704	Northwest Branch Recreational Park-Athletic Area	620	0	0	0	0	0	620
	Ovid Hazen Wells RP	7,524	300	2,000	2,250	2,100	874	0
058755	<i>Small Grant/Donor-Assisted Capital Improvements (50%)*</i>	3,275	525	550	550	550	550	550
	South Germantown RP Cricket Field	3,118	0	0	195	1,036	1,530	357
768673	Trails: Hard Surface Design & Construction	1,800	300	300	300	300	300	300
871540	<i>Urban Park Elements (50%)*</i>	1,076	250	300	148	138	118	122
	Category Total	45,990	2,795	24,750	5,505	5,288	4,537	3,115
MAINTENANCE & RENOVATION								
<i>Repair, renovation, and lifecycle replacement of existing park facilities and supporting infrastructure</i>								
128701	ADA Compliance: Local Parks	4,850	760	860	880	800	800	750
128702	ADA Compliance: Non-Local Parks	5,950	950	1,000	1,000	1,000	1,000	1,000
008720	Ballfield Initiatives	13,050	1,550	2,300	2,300	2,300	2,300	2,300
872105	Blair HS Field Renovation and Lights	2,900	0	1,400	1,500	0	0	0
078702	Brookside Gardens Master Plan Implementation	1,700	0	250	950	500	0	0
977748	Cost Sharing: Local Parks	450	75	75	75	75	75	75
761682	Cost Sharing: Non-Local Parks	300	50	50	50	50	50	50
998773	Enterprise Facilities' Improvements	3,450	2,550	400	0	0	500	0
957775	Facility Planning: Local Parks	2,300	300	400	400	400	400	400
958776	Facility Planning: Non-Local Parks	1,750	250	300	300	300	300	300
	Hillandale Local Park	3,000	2,500	500	0	0	0	0
967754	PLAR - LP	20,945	4,190	3,790	3,266	3,318	3,183	3,198
871902	Park Refreshers	20,340	3,300	3,900	3,504	3,438	3,326	2,872
968755	PLAR - NL	27,900	4,010	4,778	4,778	4,778	4,778	4,778
058755	<i>Small Grant/Donor-Assisted Capital Improvements (50%)*</i>	3,275	525	550	550	550	550	550
888754	Trails: Hard Surface Renovation	4,345	645	700	700	700	800	800
858710	Trails: Natural Surface & Resource-based Recreation	3,300	800	500	500	500	500	500
871540	<i>Urban Park Elements (50%)*</i>	1,076	250	300	148	138	118	122
87904	Wheaton Regional Park Improvements	3,000	0	0	0	250	470	2,280
871905	Vision Zero	3,400	700	700	500	500	500	500
871552	Josiah Henson Special Park	1,012	1,012	0	0	0	0	0
808494	Restoration Of Historic Structures	3,220	450	500	500	500	635	635
998710	Energy Conservation - Local Parks	629	150	150	70	83	86	90
998711	Energy Conservation - Non-Local Parks	790	90	100	100	150	150	200
078701	Pollution Prevention and Repairs to Ponds & Lakes	6,750	950	1,000	1,200	1,200	1,200	1,200
818571	Stream Protection: SVP	8,050	2,900	1,350	950	950	950	950
	Category Total	147,732	28,957	25,853	24,221	22,480	22,671	23,550
	GRAND TOTAL	245,000	41,038	62,081	37,776	35,768	35,072	33,265

The chart to the left is a summary, grouped by expenditure category, of the current Adopted FY21-26 CIP.

Below you will also find a summary of past CIP requests, recommendations and final approvals by CIP cycle.

	FY09-14	FY11-16	FY 13-18	FY15-20	FY17-22	FY19-24	FY21-26	Biennial FY21-26
Planning Board Proposed	208.0	203.5	178.8	194.7	194.4	239.1	253.3	227.5
CE Recommended	192.9	161.5	166.0	168.6	166.0	231.1	231.6	222.6
Council Adopted	196.4	166.1	178.8	178.2	184.2	236.9	245.0	TBD

Amounts in Millions

Milestones in the FY23-28 CIP



The CIP Process is a complex process that involves various players and groups. However, all activities fall into at least five major milestones or phases:

- Gathering Project Requests (winter/spring 2020/2021)
- Strategy and Prioritization (spring/summer 2021)
- Scenario Building (summer 2021)
- Work Sessions, Adoption and Preparation of the Submission (late summer/fall 2021)
- County Review (winter 2019/spring 2022)

Gathering Project Requests (winter/spring 2018/2019)

Project needs come from various sources. They include public planning efforts, Department staff, citizens, public officials, and other opportunities. Department staff gather project ideas year-round from these sources and enter them into a project database in the Commission's Enterprise Asset Management (EAM) System where they are annually reviewed and prioritized for inclusion in the CIP. More information about the review and prioritization process is included in the Strategy and Prioritization section of the report.

Public Planning Efforts - Vision 2030, PROS, Master Plans and Other Studies:

There are a number of planning and strategic initiatives that regularly come out of the Commission's Planning Department, as well as from planners within the Parks Department. These forward-looking documents take inventory of existing conditions and resources; consider future trends, growth and needs; and make recommendations to guide growth. Some are county-wide, while others are focused on specific areas, locations or certain functional topics. Here are various strategic and master plans that will provide guidance to the CIP:

- **Thrive Montgomery 2050** – A re-write of the county's General Plan (in progress). For more information see p. 5 of the main body of the staff report.
- **Energized Public Spaces Functional Master Plan** – This Plan was approved and adopted in March 2018 and is a countywide functional master plan that defines a program to create more parks and public spaces to serve areas of the County most in need. The plan provides a comprehensive approach to how and where we create parks and public spaces in the parts of the county where more people live and work. It also introduces a new methodology to identify and prioritize public space and park needs in relationship to population and the existing supply of park amenities. A key element of the methodology evaluates walkable access to all public spaces to measure the relative supply of parks and public spaces. Park design, maintenance, and safety are taken into consideration, as well as measures of social equity. The Plan will help Montgomery Parks better identify needs, anticipate trends, and promote important goals such as health and social equity. This Plan also provides tools to make recommendations on parks and public spaces for areas not

undergoing a master plan process. In the long-term, an interactive inventory of accessible public spaces and mapping of the areas with the highest needs will result in better prioritization of scarce park resources.

- **Vision 2030** – This Strategic Plan for Parks and Recreation adopted in 2011 provides guidance on general areas of greatest overall facility needs based on Level of Services (LOS) areas, as well as guidance on what facilities should be increased, decreased, or repurposed (some countywide, some linked to the four LOS areas).
- **2017 Park, Recreation and Open Space (PROS) Plan** – Parks, recreation, and open spaces are essential to the high quality of life for Montgomery County residents. The greatest challenge for the park and recreation system in Montgomery County is to equitably provide enough of the “right” parks and recreation in the “right” places for a growing population of residents and employees. Founded on principles in the Vision 2030 Strategic Plan for Parks and Recreation, the 2017 PROS Plan gives guidance on equitably activated, central community spaces, while meeting recreational needs and protecting and managing natural and cultural resources for future generations. The plan also serves as the County’s Land Planning, Preservation and Recreation Plan (LPPRP). Created every 5 years, the LPPRP also qualifies the County to receive Program Open Space funding, a significant source of CIP funding from the State specifically for acquiring open space and developing parks. The Plan’s recommendations effectively:
 - Create service delivery strategies to have the right park in the right place
 - Renovate and repurpose existing parkland and facilities
 - Implement new guidelines for urban parks
 - Apply new plans to manage natural areas throughout the park system
 - Manage and interpret historic and archaeological resources per cultural resources asset inventory database
 - Create an implementation plan to distribute needed facilities equitably

In addition, the 2017 PROS Plan recommends prioritizing our investments according to three clear overarching themes:

- 1) Optimize existing parks and facilities
- 2) Create great, activated parks to equitably serve the County
- 3) Steward and interpret our natural and cultural resources

To the degree practicable, Staff have been using all the above criteria to develop our project priorities.

- **Area Master Plans** – Guidance on parkland acquisition, the role and type of each park or trail within a recommended open space system, suggested facilities for each park, and, sometimes, mechanisms for implementation
- **Site Selection Studies** – Guidance on location of specific facilities (in priority order), i.e., dog parks, skate parks

- **Park Master Plans** – Guidance on what facilities should be included in a specific park

Projects Originating from the Department

Department staff, particularly those in the field, make regular condition assessments of the existing park infrastructure, amenities, and natural resources. Based on their observations, assessments, analyses, and feedback from users and officials, they recommend capital projects to renovate and maintain the existing park system as well as enhancement projects that meet new demand and growth in the parks.

Citizen Ideas

The park system is the largest single amenity for residents of Montgomery County. As such, the Department is always looking for new ways to engage residents and listen to their feedback and ideas for improvements to the park system. This feedback comes from a variety of sources that may include:

- Campaigns – concerted efforts to reach out to the public and solicit their feedback through surveys, presentations, events and activities. The Department seeks to engage members of the community who traditionally have not participated in park development initiatives. The PROS plan includes a statistically valid survey that solicits information from residents about their park-related needs and preferences.
- Social Media – providing content to engage and inform county residents and to give residents a venue for responding on topics that are important or of value to county residents.
- Public hearings and forums – most planning and development efforts incorporate outreach to local residents affected to get their reaction, input and ideas on the effort.
 - Parks and Recreation Forum – The CIP process includes a Parks and Recreation Forum before the Planning Board and the Countywide Parks and Recreation Advisory Board where residents can address both bodies with written and/or spoken comments about things they would like to see in the county-wide park system.
 - Montgomery County CIP forums – During the CIP cycle, Montgomery County Government also holds a series of CIP forums hosted by each of its Citizen Advisory Boards (CAB) to obtain feedback from citizens on the county-wide CIP for all departments and agencies. Park Staff attends each forum to serve as a resource for answering questions about Parks projects and our agency's CIP. After the Forum Series, each CAB will submit a letter to the County Executive outlining their interests, issues and priorities in the CIP. These are usually held in late June or early July. However for the FY23-28 CIP, the County Executive held these earlier than normal in October of 2020.
- Specific requests made to the department, letters, emails, calls, etc.

Input from Elected Officials

Residents of the County elect officials in all levels of government from the local level to state and federal government to represent their interests in government. From time to time, the Department hears from these officials about projects or initiatives where their constituents have interests or concerns or where the representative is leading an initiative or project in his or her respective district to improve the quality of life. Also, the Department coordinates annually with state representatives on opportunities to secure state funding for projects that allow limited County and Commission funding to be used on other projects. As a Department,

we enter specific requests that come through elected officials into the mix of potential CIP projects where they can be reviewed and prioritized among other candidates. Currently, Montgomery County legislators in the General Assembly have sponsored seven Bond Bill projects across seven districts for a total of \$1.425 million that include:

CIP Project/PDF	Legislative District	Project	Description	Requested Amount	Approved by State
Ballfield Initiatives (P008720)	14	Damascus Recreational Park	Athletic field lighting installed at Field 3 or 4	\$225,000	\$225,000
PLAR NL: Minor Renovations (P998708)	15	South Germantown Recreational Park	Recreational Park upgrade including the installation of a parking lot at the bike skills area with ADA enhancements	\$150,000	\$150,000
Legacy Urban Space (872104)	16	Willet Branch Greenway	Acquire land to create the planned Willett Branch Greenway in the Westbard community.	\$350,000	\$550,000
Trails Hard Surface: Renovation (P888754)	18	Randolph Hills Local Park	Replace trail bridge and renovate the hard surface trail connector from Randolph Hills LP to Rock Creek Trail	\$150,000	\$150,000
Trails Hard Surface: Renovation (P888754)	19	Wheaton Regional Park Trail Renovation	Renovate the hard surface trail from Narin Road to the dog park access road	\$200,000	\$100,000
PLAR NL: Minor Renovations (P998708)	20	Long Branch/Domer Ave Signature Bridge	Replace existing trail bridge with a new signature bridge at Long Branch Trail near Domer Avenue with trail head	\$200,000	\$100,000
PLAR: LP - Play Equipment (P998703)	39	Fox Chapel Neighborhood Park	Playground replacement and ADA improvements, removal of rubber surfacing.	\$150,000	\$150,000
			Total	\$1,425,000	\$1,425,000

Other Opportunities

The Department often learns of additional opportunities that arise out of the interests of groups or individuals who propose and fund projects such as the recent plaza on the Capital Crescent Trail or the new Greenhouse in the Plant Propagation area at Brookside Gardens. Other times, the Department may receive funding for projects from developers that were identified in a master plan or site plan approval of the developer's project. Sometimes, developers may construct parks as part of a development project and either dedicated them to the public or provide an easement that allows the public to use them as privately owned public spaces (POPS). The Department has also facilitated land acquisitions that were donated to the Commission.

Strategy and Prioritization (spring 2021)

Once candidate capital projects are entered into the EAM they go through a “sifting” process of multiple stages. When new projects come in, they are vetted and aggregated out to a candidate list respective to each of the current CIP projects, or in the case of newly proposed projects that would warrant a new stand-alone capital project, they are added to the candidate list for facility planning. From there, the Department uses various tools, guidance and feedback to prioritize the projects. Over the years this has included:

- *Planning Board's CIP Strategy* – Refer to **page ©12**. How well the projects meet the Board's evaluation criteria and CIP strategy, including racial equity
- *Chair and Director Priorities* – Leadership has identified three main goals of maintaining and enhancing our Athletic Fields, Urban Parks, and Trail Systems. Leadership has emphasized the importance of aligning the CIP with the PROs Plan.
- *New Projects versus Renovation Projects* – currently, as per the Board and the Director's direction projects that focus on maintaining the existing park system are higher priority than new parks and new development.
- *Project justification and Facility Planning Evaluation Matrices* – projects entered into the CIP and Major Maintenance request database, discussed earlier, are evaluated against each other and existing projects in the CIP (refer to **page ©14**). Projects that are candidates for facility planning are also prioritized relative to other existing or proposed projects (refer to **page ©15**). This is a starting point only as Department Staff consider the other criteria mentioned above as well as priorities assigned by Park Operations Staff and priorities assigned by the CIP Evaluation Committee
- *Conditions Assessments* – Parks Staff implement periodic inspection and evaluation programs for several groups of infrastructure/amenities (e.g. trails, bridges, playgrounds, bleachers, etc.) to ensure public safety and prioritize renovation/replacement projects.
- *Priorities Recommended by Park Operations Staff* – Park Operations staff are acutely aware of the needs in the park system since they are out in the field making observations first-hand. Their feedback is a valuable tool to assist the Department in fine tuning the prioritization of the projects mentioned above. They provide their feedback to the Division Chiefs who are part of the CIP Evaluation Committee.
- *Coordination with the CIP Evaluation Committee* – This committee consists of the Department leadership and division chiefs. Before convening, members are provided backlog lists of the projects in each LOE PDF to review. They look at how the current funding levels are meeting or not meeting the needs and priorities of the park system as set forth by the Planning Board and department leadership, identify any additional priorities, and make recommendations about funding requests to better meet the needs of the park system. The Evaluation Committee is typically active during the summer as CIP scenarios are being developed.

Scenario Building (summer 2021)

One of the biggest challenges in the CIP cycle is how to balance needs and the park system's future with affordability. While the "sifting" process mentioned earlier is ongoing, the Department's CIP staff will also engage staff from the Montgomery County Office of Management and Budget to understand what fiscal constraints the County Executive will request of various funding sources. The CIP staff will work closely with the Parks Director's office to create scenarios that consider not only the Board's CIP strategy, but also what will fit within the constraints of the fiscal situation of the County.

Work Sessions, Adoption and Preparation of the Submission (fall 2021)

In September 2021, once the final scenario or scenarios are complete, the Department will engage the Planning Board again in work sessions where we will present funding and timing recommendations for all CIP projects. We generally focus one session on local park projects that are primarily funded with the Commission's own bonds ("M-NCPPC Bonds") and Program Open Space funding, with the other session being devoted primarily to capital projects in non-local parks that are funded by the County's GO bonds and other funding.

At the beginning of October, staff follows up with the Board on any remaining issues and presents the final scenario to the Board for adoption. Once that action is taken, staff prepare the CIP for submission to the County as per their checklist and electronic submission requirements and formally transmit the submission on or before November 1, 2021 as required by State statute.

County Review (winter/spring 2021/2022)

The County Executive and County Council review the CIP according to the following schedule:

- County Executive review of the Parks CIP (November – December 2021)
- County Executive submits his recommended, County-wide CIP, including his recommendations for the M-NCPPC CIP, to the County Council (January 15, 2022, as per County Law)
- County Council holds public hearings for the FY21-26 CIP, typically three days (early February 2022)
- County Council Committee review of the Parks CIP, primarily by the Planning, Housing and Economic Development (PHED) Committee (February/March 2022)
- County Executive submits his recommended, County-wide Operating budget (often times with additional CIP amendments), including his recommendations for the M-NCPPC, to the County Council (March 15, 2022, as per County Law)
- County Council Committee review of the Parks Operating Budget (and any additional CIP amendments), primarily by the Planning, Housing and Economic Development (PHED) Committee (April 2022)
- Council approval of the CIP and the FY21 Capital Budget (May 2022)

CIP Strategy and Evaluation Criteria FY21-26



These criteria and areas of focus guide the evaluation and prioritization of projects for the Capital Improvements Program for FY21-26

Immediacy

- The project repairs or replaces facilities necessary to protect public health, safety, and welfare.
- The project preserves natural, cultural or historic resources that might otherwise be lost or degraded if prompt action is not taken.
- The project upgrades facilities to comply with current code requirements and laws.
- The timing of the project is dependent on coordination with related projects of other County agencies or interest groups.
- The project is included in the first phase of a master plan.

Need

- The project is already programmed in the CIP and is therefore already promised to a community.
- The project provides facilities to an under-served geographic area.
- The project provides facilities to an under-served population group.
- The geographic distribution of proposed projects is equitable.
- The project provides facilities to serve unmet needs countywide.
- The project serves a need identified by the surrounding community.

Efficiency

- The project increases revenue, results in cost savings, and/or improves operational efficiency.
- The project leverages an opportunity, such as a partnership, contribution, donation or grant.
- The project has a high cost/benefit ratio by serving a large number of people for a reasonable cost.
- The project prevents further degradation of existing facilities which could be costly to repair later.

Equity

- The project provides services or facilities to communities where there is a predominance or majority of racial or ethnic minorities
- The project provides services or facilities to higher populations of lower income residents with low levels of access to parks
- Tools that may be used to determine Equity include Park Equity scores as per the 2017 PROS Plan, the methodologies in the Energized Public Spaces Functional Master Plan for Parks in Mixed Use & Higher Density Residential Areas (EPS FMP), and M-NCPPC

	maps for Racial and Ethnic Predominance and Percent Area Median Income
New vs. Renovation	<ul style="list-style-type: none"> • The predominant emphasis in the CIP should be on maintaining the current system and infrastructure
Public Access to Natural Areas	<ul style="list-style-type: none"> • Serves park users and protects natural resources • Improves and expands trail networks • Provides natural resource-based recreation opportunities
Trails	<ul style="list-style-type: none"> • Increasing trail construction and renovation efforts, both natural and hard surface
Ballfields	<ul style="list-style-type: none"> • Making ballfields available and convenient to a growing park constituency
Urban Parks	<ul style="list-style-type: none"> • Increasing focus on activations and improvements • Focusing more on urban areas where infrastructure is often older and open space is limited. • Addressing changing needs and interests of urban populations
Acquisitions	<ul style="list-style-type: none"> • Targeting urban parks and high-density areas • Seeking potential for natural resource-based recreation as well as enhancing the natural environment
Project Delivery	<ul style="list-style-type: none"> • Fewer large-scale renovations • More targeted, phased renovations of park components by utilizing level-of-effort projects • Using in-house staff resources where possible • Taking advantage of interdepartmental partnerships • Focusing on Level-of-efforts on maintaining what we have and Implementing improvements to parks quickly
Facility Planning	<ul style="list-style-type: none"> • Activating urban parks • Focusing on smaller projects and studies

Prioritization: EAM and Facility Planning



Prioritization: EAM

Projects entered into the CIP and Major Maintenance request database in the Enterprise Asset Management (EAM) system are assigned a score which serve as an initial prioritization tool to compare new requests against each other and existing projects in the CIP. The database utilizes an automated rating system that is based on several different evaluation criteria generally reflecting those approved by the Planning Board. Each criterion is weighted, points are added up, and a justification score is assigned to each project request making it easier to prioritize them within the CIP. This provides an initial prioritization that is then fine-tuned using the CIP Strategy approved by the Board. The criteria used by the database include:

Renovates Aging Infrastructure	<i>Reduces unexpected capital, operating or maintenance expenses of existing infrastructure</i>
Required by Mandates	<i>Federal/State/Local regulations (ADA, NPDES, other environmental regulations, etc.)</i>
Protects Natural or Cultural Resources	<i>Protects environmentally or culturally significant sites</i>
Supports Plans or Studies	<i>Supported by approved plans, including park/area master plans, surveys, condition or need assessment studies, LPPRP, etc.</i>
Meets Public Request	<i>Requested by public through testimony, C-tracks, letters, etc.</i>
Generates Revenue	<i>User fees, permits, admission fees, etc.</i>
Enhances Safety	<i>Eliminates hazard; repairs deteriorated condition thus reducing Commission's liabilities</i>
Operating Budget Impact	<i>Project requires increased staff, supplies/materials, capital outlay or utility costs.</i>

Prioritization: Facility Planning

Before projects can become a Stand-alone capital project or be included in the Park Refresher program, they must first go through facility planning that:

- ☐ **Completes 15-30% design for projects that will have significant capital investment through the “Park Refresher” or “Stand-alone” project requests**
- ☐ **Establishes:**
 - Program of Requirements
 - Preliminary Design
 - Determination of Regulatory Feasibility (Prelim. Permits)
 - Accurate Cost Estimate for Design and Construction
 - Includes Community Participation & Planning Board Approval
- ☐ **Completed for projects with significant capital investment and/or where design and construction costs cannot otherwise be accurately estimated**
- ☐ **Basis for requesting CIP funding from Planning Board & County Council to implement project**

Facility Planning Projects are prioritized as follows:

Master Plan Guidance for Park or Project	<ul style="list-style-type: none"> • <i>Area Master Plan</i> • <i>Park Master Plan</i> • <i>2017 PROS Plan</i> • <i>Vision 2030 Level of Service Area</i>
Park Equity Area (from PROS 2017)	<i>High concentration of lower income households with low walkable access to park entrances and trailheads (established by population density, median household income as a percent of area median income, and walking distance to parks and trailheads)</i>
Immediacy	<ul style="list-style-type: none"> ▪ <i>Protects public health safety and welfare</i> ▪ <i>Preserves natural, cultural or historic resources</i> ▪ <i>Upgrades facilities to comply with current codes</i> ▪ <i>Timing is dependent on related projects of outside groups</i>
Need	<ul style="list-style-type: none"> ▪ <i>Already programmed in CIP or promised to a community</i> ▪ <i>Provides facilities to under-served geographic area or group</i> ▪ <i>Provides facilities to serve unmet countywide needs</i> ▪ <i>Serves a need identified by the surrounding community</i>
Efficiency	<ul style="list-style-type: none"> ▪ <i>Increases revenue, results in cost savings or operational efficiency</i> ▪ <i>Leverages partnership, contribution, donation or grant</i> ▪ <i>High cost/benefit ratio, serves large numbers for reasonable cost</i> ▪ <i>Prevents damage from becoming worse, more costly to repair later</i>
Public Requests	<i>Community groups have requested project in one or more CIP cycles</i>