

PLANNING DEPARTMENT FY25 OPERATING BUDGET DISCUSSION

Description

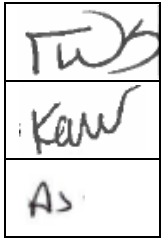
Seeking approval to prepare the FY25 Planning Department's operating budget at the Base Budget plus New Initiatives level.

Completed: 10-12-2023

MCPB
Item No. 4
10-19-2023

Montgomery County
Planning Board
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Summary:

- The Planning Department is seeking approval to prepare the FY25 Planning Department's operating budget at the Base Budget plus New Initiatives level.
- The Preliminary FY25 Operating Budget request is \$27,039,154, which is an increase of \$2,094,413, or 8.4%, over the FY24 Adjusted Adopted budget.

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SECTION 1: BACKGROUND

BACKGROUND

At its September 21st meeting, the Planning Board received a presentation from the Commission's Department of Human Resources and Management (DHRM) on the FY25 budget process including key trends and the budget outlook, strategy, and timeline.

DHRM reported that the Montgomery County Office of Management and Budget estimates that the assessable base will grow by 3.2% in FY25. The preliminary projections provided by DHRM require a tax rate increase in FY25 for the Administration Fund, prior to the inclusion of new initiatives/critical needs. The leading drivers for the increase in projections are estimated increases in Other Post-Employment Benefits (OPEB) of 7.6%, health benefits of 7.9%, and retirement expenses of 1.9%. Any changes to retirement expenses will be refined in November when the updated actuarial report is released.

The Planning Department's work program has expanded and evolved over the last several years while our position count has stayed the same since 2011. Now that the Thrive Montgomery 2050 General Plan update has been adopted, and we have had a year to assess our work program and staffing complement, the Planning Department prepared our FY25 budget request including new initiatives and critical new positions we believe are essential to planning for the future of Montgomery County.

To prepare for the October 19th Planning Board meeting, Planning staff worked diligently over the past several months identifying two new master plans and projects to be started in FY25 and elements of our current work program that are inadequately funded. We looked at emerging trends in the County to determine the future needs to prepare strategic and forward-thinking planning and development guidance.

PRELIMINARY FY25 OPERATING BUDGET REQUEST

MONTGOMERY COUNTY PLANNING DEPARTMENT PRELIMINARY FY25 OPERATING BUDGET REQUEST			% Change
FY25 BASE BUDGET CHANGES	FY24 Adopted	Adjusted Budget	
		24,944,741	
	Salaries and Benefits *	477,056	1.91%
	CPI Increase for Contracts and Supplies	84,788	
	Adjustment - Legal Chargeback, Risk Management, Long Term Disability	36,967	
	Major Known Commitments	(25,000)	
	Chargebacks to Development Review - Special Revenue Account	TBD	
	Adjustments in Departmental Chargebacks to CIO and Commission Wide IT	60,444	
	Subtotal - Base Budget Changes	<u>634,255</u>	<u>2.54%</u>
Less: FY24 One Time consulting funding		<u>(90,000)</u>	<u>-0.36%</u>
New Initiatives/New Funding Request for FY25 (One Time)			
	Georgia Avenue Corridor Plan	\$155,000	
	Friendship Heights Sector Plan	\$50,000	
	Mapping Segregation Phase 2	\$150,000	
	Burial Sites Context Study	\$65,000	
	Regional Travel Demand Model Update and Validation	\$100,000	
	Climate Assessment Quantitative Tool Update	\$20,000	
	Parking Lot Design Study	\$125,000	
	Subtotal - Proposed One Time Changes	<u>\$665,000</u>	<u>2.67%</u>
New Initiatives/New Funding Request for FY25 (On Going)			
	Placemaking Expansion	\$37,000	
	Seasonal Staff - Learning Management System (LMS) Administrator	\$37,000	
	Convert Part Time Position to Full Time Position - Planner III - Adequate Public Facilities	\$23,584	
	New Positions		
	Funding and Workyear - Planner I – Transportation Network	\$111,176	
	Position, Funding and Workyear - Planning Supervisor - Upcounty Planning	\$163,316	
	Position, Funding and Workyear - Planner I - Upcounty Planning	\$111,176	
	Position, Funding and Workyear - Planner I – Intake Reviewer	\$111,176	
	Position, Funding and Workyear - Planner IV – Climate Initiatives	\$150,739	
	Position, Funding and Workyear - Planner III –Placemaking, Design & Implementation Specialist	\$139,991	
	Subtotal - Proposed - On Going	<u>\$885,158</u>	<u>3.55%</u>
Total New Initiatives/New Funding Request for FY25		<u>\$1,550,158</u>	<u>6.21%</u>
Net Change from FY24 Adopted to FY25 Proposed Budget		<u>\$2,094,413</u>	<u>8.40%</u>
		*FY25 Proposed Budget	<u>\$27,039,154</u>
Notes:			
* Salary and Benefits total does not include compensation marker, OPEB PayGo and OPEB prefunding. They are budgeted in the Administration Fund's non-departmental account. Any changes to retirement expenses will be refined in November when the updated actuarial report is released.			

Detailed information is on each line item is provided in this report.

SECTION 2: FY25 MASTER PLANS AND MAJOR PROJECTS

MASTER PLANS

In terms of master plans, our recommended FY25 work program follows closely with the work program that was approved for FY24. Several of the plans that were approved in previous fiscal years **will begin or carry over into FY25** – these include:

1. Great Seneca Plan: Connecting Life and Sciences	Council Review Commission Adoption
2. Master Plan of Highways and Transitways Technical Update	Council Review Commission Adoption
3. University Boulevard Corridor Plan	Planning Board Review Council Review Commission Adoption
4. Clarksburg Master Plan Amendment	Planning Board Review Council Review Commission Adoption
5. Eastern Silver Spring Communities Plan (formerly Silver Spring Communities Master Plan)	Staff Work Planning Board Review Council Review

Two new master plans are being proposed to begin in FY25 and are being identified for the first time in this budget discussion is:

1. Georgia Avenue Corridor Plan
2. Friendship Heights Sector Plan

Detailed information on these new master plan and major project efforts is included in Section 3 – FY25 New Plans and New Initiatives.

A draft of the FY25 Proposed Master Plan and Major Projects Schedule is included in Section 5.

MAJOR PROJECTS

The Planning Department’s recommended FY24 work program **carries forward** several projects that were approved in previous fiscal years and will continue into FY25. These include:

- | | |
|---|---|
| 1. Growth and Infrastructure Policy | Council Review |
| 2. Attainable Housing Strategies Initiative | Council Review |
| 3. Germantown Employment Corridor Check In | Staff Work
Planning Board Review
Council Review |
| 4. Update Incentive Density Implementation Guidelines – CR and Employment Zones | Planning Board Review
Council Review |
| 5. Thrive Montgomery 2050 Plan Implementation Metrics | Staff Work |
| 6. Randolph Road Corridor Study | Staff Work
Planning Board Review
Council Review |

New major projects that are being proposed for the FY25 budget discussion include:

1. Mapping Segregation Phase II
2. Burial Sites Context Study
3. Regional Travel Demand Model Update and Validation
4. Climate Assessment Quantitative Tool Update
5. Parking Lot Design Study

Detailed information on these new master plan and major project efforts is included in Section 3 – FY25 New Plans and New Initiatives.

A draft of the FY25 Proposed Master Plan and Major Projects Schedule is included in Section 5.

SECTION 3: FY25 NEW PLANS AND NEW INITIATIVES

FY25 NEW PLANS

Two new plans are proposed to begin in FY25.

Georgia Avenue Corridor Plan

With planned growth at the Wheaton and Glenmont Metrorail Station areas, the Georgia Avenue Corridor Plan seeks to enhance community equity and further economic competitiveness along Georgia Avenue. It will evaluate land use along segments of Georgia Avenue and identify opportunities to further environmental resilience in the corridor and celebrate connections among parks and stream valleys. Further, the plan will seek to improve multimodal safety along the Georgia Avenue corridor.

This corridor plan seeks to build on the analysis and findings of the 2008 Georgia Avenue Study, 2013 Countywide Transit Corridors Functional Master Plan, Thrive Montgomery 2050, and the Randolph Road Corridor Study to develop comprehensive master plan recommendations for the Georgia Avenue Corridor.

Friendship Heights Sector Plan

Once a regional luxury retail destination, Friendship Heights is acutely feeling the impacts of the post-COVID economy on both sides of the Maryland-DC border. The Friendship Heights Sector Plan will engage community stakeholders to update the 1998 Friendship Heights CBD (Central Business District) Sector Plan to envision the next chapter of this unique cross-jurisdictional urban community. To build on the momentum and findings of the Friendship Heights Urban Design Study and the DC Office of Planning's Wisconsin Avenue Planning Framework, staff expects to begin initial work on the sector plan in late spring of FY24 using existing resources. Additional support is being requested for FY25. The sector plan will assess and address the area economy, demographics, land use, parks and open space, transportation, the environment and more.

FY25 NEW INITIATIVES

The Acting Planning Director and Deputy Planning Director reviewed each division's potential new initiatives and narrowed them down to those that addressed the top priorities of the Department. Many of these initiatives are in direct support of the proposed work program for a new master plan and is essential to complete the work program. Other initiatives are studies that would further our work program efforts, help support Thrive Montgomery 2050 implementation, and the Planning Department's Equity Agenda for Planning. In addition, the Planning Department is seeking additional staff resources to address a sustained pattern of increased workload and to expedite the Development Review process.

For the five years prior to the pandemic (FY16-FY20), the Planning Department's one-time initiatives annual budget averaged \$700,000 per year ranging between \$425,000-\$835,000 (2% to 4% of the total budget). Most of the one-time initiatives funding requests are for consultant studies/services to support new initiatives proposed for the Department's work program. In many cases, consultants supplement Planning Department staff resources who produce much of the work for a master plan or planning initiative. Contracts are used for short-term specialized technical assistance for planning initiatives or

for bringing on consultants who have a breadth of knowledge regarding emerging subject areas in ever more complex planning areas. The past four years have been very lean regarding one-time new initiatives due to the pandemic. The approved amount for one-time initiatives averaged \$325,000 per year and ranged between \$640,000 (2.7%) in FY23 to \$90,000 (0.4%) this past year in FY24.

The Planning Department works closely with the M-NCPPC's Central Administrative Services (CAS) Purchasing Division in hiring consultants by making the most efficient and effective use of our on-call contracts, the continuation of contracts already in place, or contracts for studies similar to ones already completed such that we only need to modify the scope work for the request for proposals.

Since FY11, the Planning Department has been operating with 151 approved career positions. FY11 was a particularly difficult year when the Planning Department's budget was reduced almost 14%, 31 career positions were eliminated, and seven additional positions were defunded. Since that time, six of the unfunded positions have been re-funded and none of the 31 abolished positions have been restored. Through careful personnel management, strategic reallocation of staff, and hiring unbudgeted seasonal and temporary employees, the Planning Department has successfully managed to carry out our work program. However, over the past several years, the workload has increased to an unsustainable level due to receiving/reviewing a historically higher number of regulatory applications, coupled with increased mandates regarding equity, sustainability, climate initiatives, forest conservation, and more. The Planning Department shifted staff internally as much as possible to address these new mandates while waiting for Thrive Montgomery 2050 to be approved to understand how it would impact our work program and what the staffing needs would be to implement the updated General Plan. Since the adoption of Thrive Montgomery 2050 in fall 2022 and in response to limited new resources provided in FY24, the Planning Department has continued to rely on existing staff resources to meet increased workload and other priorities. However, this approach is not sustainable and poses risks for the Department's ability to effectively accomplish its work program while also expediting processes.

For FY25, the Planning Department is requesting funding for the one remaining unfunded position and for five new full-time positions to address:

1. The **on-going work program need** currently filled by unbudgeted temporary staff.
2. **Rightsizing divisions with a growing work program** due to increased development applications and to support expediting the Development Review process.
3. Support the department's growing work program related to **addressing climate change and placemaking initiatives.**

These new positions will bring the department's personnel complement to 156, which is 26 below the FY10 staffing level. In addition, the Planning Department is requesting to convert a career part-time position to a full-time position and to increase seasonal salaries to assist with our staff development program.

For FY25, the new one-time and on-going requests total \$1,550,158. The new one-time initiatives request is \$665,000. The new on-going initiatives request is \$37,000 for consultant funding plus \$848,158 for personnel for a total of \$885,158. These new initiatives focus on ways to reimagine and reinvigorate our master planning activities, to address an increased workload and staffing deficiencies, and to support streamlining the Development Review process.

FY25 New Initiatives – TOTAL \$1,550,158			
One-Time Initiatives - \$665,000			
1. Georgia Avenue Corridor Plan			\$155,000
2. Friendship Heights Sector Plan			\$50,000
3. Mapping Segregation Phase 2			\$150,000
4. Burial Sites Context Study			\$65,000
5. Regional Travel Demand Model Update & Validation			\$100,000
6. Climate Assessment Quantitative Tool Update			\$20,000
7. Parking Lot Design Study			\$125,000
Sub-Total – One-Time Initiatives			\$665,000
On-going Consulting, On-going Positions and Workyears - \$885,158 6 positions 6.95 wys			
8. Placemaking Expansion			\$37,000
	Position	Work Year	
Personnel to address the on-going work program need currently filled by unbudgeted temporary staff.			
9. Seasonal Staff - Learning Management System Administrator		0.75 wy	\$37,000
10. Convert PT position to FT Position - Planner III – Adequate Public Facilities		0.2 wy	\$23,584
11. Unfunded position: allocate Workyear and Funding - Planner I – Transportation Network - Countywide Planning & Policy		1.0 wy	\$111,176
Personnel to address rightsizing divisions with a growing work program due to increased development applications and to support expediting the Development Review process.			
12. New Position, Workyear, Funding - Planning Supervisor - Upcounty Planning	1	1.0 wy	\$163,316
13. New Position, Workyear, Funding - Planner I - Upcounty Planning	1	1.0 wy	\$111,176
14. New Position, Workyear, Funding - Planner I – Intake Reviewer - Intake & Regulatory Coordination	1	1.0 wy	\$111,176
Personnel to support the department’s growing work program related to addressing climate change and placemaking initiatives.			
15. New Position, Workyear, Funding - Planner IV – Climate Initiatives – Countywide Planning & Policy	1	1.0 wy	\$150,739
16. New Position, Workyear, Funding - Planner III –Placemaking Design and Implementation - Director’s Office	1	1.0 wy	\$139,991
Sub-Total – On-going Initiatives			\$885,158
TOTAL \$ – One-Time and On-going Initiatives			\$1,550,158

NEW INITIATIVES IN FY25 – ONE-TIME

1. **Georgia Avenue Corridor Plan: \$155,000 – one-time**

(Request includes \$125,000 to Midcounty Planning and \$30,000 to Support Services)

Description

With planned growth at the Wheaton and Glenmont Metrorail Station areas, the Georgia Avenue Corridor Plan seeks to enhance community equity and further economic competitiveness along Georgia Avenue. It will evaluate land use along segments of Georgia Avenue and identify opportunities to further environmental resilience in the corridor and celebrate connections among parks and stream valleys. Further, the plan will seek to improve multimodal safety along the Georgia Avenue corridor.

This corridor plan seeks to build on the analysis and findings of the 2008 Georgia Avenue Study, 2013 Countywide Transit Corridors Functional Master Plan, Thrive Montgomery 2050, and the Randolph Road Corridor Study to develop comprehensive master plan recommendations for the Georgia Avenue Corridor.

Funding will go toward assistance to apply the regulations, policies, and tools necessary to achieve corridor-focused growth and multimodal safety along Georgia Avenue, as well as technical analysis necessary to further the department's goals for Vision Zero, equity and climate resilience. It will also assist with continued outreach and engagement to meet residents and other stakeholders where they are.

What Objectives/Metrics/Equity Goals Will Be Achieved?

Georgia Avenue travels through many of the county's Equity Focus Areas, is included in the county's High Injury Network and connects many of the county's important centers of activity. The Georgia Avenue Corridor Plan provides an opportunity to evaluate land use along segments of the corridor, advance the County's Vision Zero goals, improve community connectivity, encourage economic growth, and support the provision of housing for all Montgomery County residents. The plan process will be open, accessible, and transparent, and the recommendations will implement the goals of Thrive Montgomery 2050 in the context of the Georgia Avenue community.

Project Resources

Planning staff will manage the project and provide technical expertise and recommendations for land use and zoning, urban design, environment, transportation, parks and open space, schools, housing, historic preservation, GIS (Geographic Information Systems) research and analysis, demographics, and market analysis. Staff will coordinate all public engagement and communications.

Consultants will provide detailed transportation modeling scenarios with road rightsizing to accommodate a complete street that provides safety for all roadway users (\$75,000). There will be public utility analysis associated with corridor planning, including cost estimate development (\$50,000).

Funds are also requested for translation services for equitable community engagement events, including neighborhood meetings, door to door engagement, written materials, and virtual meetings (\$30,000 - included in Support Services).

Without consultant funding, we will be unable to fully analyze roadway safety improvements and the accommodation of all modes of transportation on the roadway due to a lack of transportation modeling. Without the utility analysis, there is less information about the needs for the future corridor and the space needs for the utilities, which reduces space for the other pressing needs, such as the provision of additional housing types and roadway safety improvements. Without translation services, we will be unable to reach people who speak English less than very well, which will negatively impact equitable community engagement on the project.

What Measure of Success will be Achieved?

The success of the planning process will be measured by the number and diversity of people participating, and their confidence that their contributions have been duly considered and addressed. The success of the recommendations will be measured over time with new and improved buildings, housing, public spaces, transportation infrastructure, and more.

2. **Friendship Heights Sector Plan: \$50,000 – one-time**

Description

Once a regional luxury retail destination, Friendship Heights is acutely feeling the impacts of the post-COVID economy on both sides of the Maryland-DC border. The Friendship Heights Sector Plan will engage community stakeholders to update the 1998 Friendship Heights CBD Sector Plan to envision the next chapter of this unique cross-jurisdictional urban community. To build on the momentum and findings of the Friendship Heights Urban Design Study, and the DC Office of Planning’s Wisconsin Avenue Planning Framework, staff expects to begin initial work on the sector plan in late spring of FY24. The sector plan will assess and address the area economy, demographics, land use, parks and open space, transportation, the environment and more. The Planning Department is requesting \$50,000 in consultant funds for enhanced engagement event support (\$38,000) and design guideline graphic support (\$12,000).

What Objectives/Metrics/Equity Goals Will Be Achieved?

It has been 25 years since the Friendship Heights Sector Plan was last updated. Much has changed in that time, including departmental and county commitments to combating climate change, promoting racial equity and social justice, and focusing on safe and welcoming environments for all residents and visitors. The Friendship Heights Sector Plan process will be open, accessible, and transparent, and the recommendations will implement the goals of Thrive Montgomery 2050 in the context of the Friendship Heights community.

Project Resources

Planning Department staff will manage the project and provide technical expertise and recommendations for land use and zoning, urban design, environment, transportation, parks and open space, schools, housing, historic preservation, GIS research and analysis, demographics, and market analysis. Staff will coordinate all public engagement and communications.

The consultant engagement event funding will enable the department to use engagement consultants to help facilitate two anticipated visioning workshops (\$24,000), four focus groups (\$5,000), and additional engagement strategy and support for other events (\$9,000). Public engagement specialists are a growing field and professional facilitation provides unique dedicated experience and insight into getting the most from each of these types of engagement events, some of which are newer to the department. Engagement consultants work with a wide variety of communities, and collaborating with them allows staff to expand its expertise for projects moving forward. Additionally, professional facilitation of these workshops and focus groups can help them to run more efficiently. Without the engagement event support funding, the visioning workshops will be managed with available staff, and we would likely not have focus groups.

The design guideline graphic support will enable us to hire a 3-D rendering consultant to produce two to three professional-quality renderings comparable to those produced for the Silver Spring Downtown and Adjacent Communities Plan. These professional renderings literally paint an evocative picture of how the plan recommendations could be realized and are very useful both for the public and potential development partners. Without funding for a professional renderer, planning staff would produce renderings as workload and staffing permit.

What Measure of Success will be Achieved?

The success of the planning process will be measured by the number and diversity of people participating, and their confidence that their contributions have been duly considered and addressed. The success of the recommendations will be measured over time with new and improved buildings, public spaces, transportation infrastructure, and more.

3. **Mapping Segregation Phase 2: \$150,000 – one-time**

Description

Phase 2 of this project will extend the deed and plat research to selected areas of the county outside of the Capital Beltway. Work will include deed, plat, census, demographic, and other historical research and analysis to identify discriminatory land use and real estate practices and determine how this discrimination impacted the racial makeup and geographic distribution of households headed by racial minorities. Additionally, the project will include a historical analysis, to be produced in house with existing staff resources, researching the history of land use, civil rights activism, school desegregation, and other events and practices that led to the passage of the county’s Fair Housing and Public Accommodations laws in the 1960s, and then describing impacts of the law’s implementation from 1968-1980.

Further geographic mapping of the racial covenants addresses the public's interest in knowing about these covenants in their own neighborhoods so they can be removed (this is a common theme when we present to communities). The research also helps to promote community history and reconciliation.

What Objectives/Metrics/Equity Goals Will Be Achieved?

The mapping tool and accompanying research will help the Department better understand neighborhood history and composition which is relevant for master planning efforts and help to

educate the county on past racial injustices while also elevating the stories of civil rights pioneers who fought these inequities.

Project Resources

Planning staff do not have the capacity to take on the extensive deed research effort in-house without additional resources, so the deed and plat research would not proceed without funding for contractual assistance. Planning staff will supervise contractors hired to research and log the deed language. Staff will also produce the white paper analysis for this project phase.

What Measure of Success will be Achieved?

Mapping Segregation Phase 2 will continue the Phase 1 research that has been promoted and shared widely within the DC Metro Region. Phase 1 work was featured prominently in the Washington Post, numerous local media outlets, and was the subject of a museum exhibit at the Capital Jewish Museum. Staff have been asked to present the research at conferences, neighborhood meetings, and at several webinars for local governments and trade associations since the data release in December 2022.

Phase 2 will expand this research beyond the Beltway into the Midcounty including the cities of Rockville and Gaithersburg. This additional data and research will 1) enable the department to discuss this research with the majority of the county's residents, 2) expand our historical understanding of inequities in historical land use and development to the benefit of our master planning efforts, and 3) provide new case study data to understand better the interactions between municipal growth and racially concentrated development. The work will also enable more communities to become better educated about their own histories and will provide them with the tools to strike these covenants from their deeds.

4. Burial Sites Context Study: \$65,000 – one-time

Description

This project will result in a historic context study for sites listed in the Burial Sites Inventory, which does not contain information about the significance of the county's burial sites and cemeteries. This lack of a comparative analysis and evaluation of significance prevents Historic Preservation staff from evaluating these properties for listing to the Master Plan for Historic Preservation. The project will discern periods of significance and important themes and trends to identify sites that are significant and warrant inclusion in the National Register and the Master Plan for Historic Preservation. Designating cemeteries was a goal of cemetery advocates who urged the Council to create the Inventory as designated sites are protected under local law from alterations under Section 24A with review required by the HPC (Historic Preservation Commission).

What Objectives/Metrics/Equity Goals Will Be Achieved?

One major project goal would be to designate burial sites associated with under-represented communities such as African American and Native American burial sites. Researching, designating, protecting, and advocating for the protection of historically designated sites raises awareness about these fragile resources, and can be a source of pride and action from descendent communities.

Project Resources

Planning staff do not have the capacity or expertise to conduct this in a timely manner, necessitating consultant assistance to perform much of the investigative research. Planning staff will supervise the consultants, provide the base survey data and other information from our files, and arrange access to private sites for survey work. Staff will edit and review the final product.

What Measure of Success will be Achieved?

The project will provide a sound methodology and survey that will categorize and identify the significance of burial sites. The results of the study will classify burial sites by type, time period, cultural associations, geography, and other factors to identify sites worthy of designation to the Master Plan for Historic Preservation.

5. **Regional Travel Demand Model Update and Validation: \$100,000 – one-time**

Description

The Travel/4 regional travel demand forecasting model, adopted from the Metropolitan Washington Council of Governments/Transportation Planning Board (MWCOG) regional model, is the tool that the Planning Department uses to conduct the master plan transportation adequacy evaluations required by the County Council. To provide relevant results, from time to time the “base year” traffic volume forecasts must be checked against observed traffic data. The Travel/4 model was last validated for the county in 2014 for the base year of 2010 by a consultant firm. It is time to validate the model again to a more recent year so that the public, the Planning Board, and the County Council can have confidence in the results. Due to a lag in data availability, it would be possible at this point to validate the model to actual traffic data from 2020. However, it would not be appropriate to validate the model to COVID traffic volumes. Alternatively, MWCOG chose to validate its model to 2018 actuals, therefore Montgomery Planning proposes doing the same to remain consistent with the regional model.

Additionally, it is anticipated that MWCOG’s Gen 3 regional travel demand model will be released by the end of 2023. This version will be an activity-based model, which would more accurately reflect travel behavior and non-auto modes of travel. It is important for the county to understand the implications of transitioning to this type of model. A second purpose of this project would therefore be to research the benefits and challenges such a transition would pose to Montgomery County and our modeling efforts.

What Objectives/Metrics/Equity Goals Will Be Achieved?

This effort would indirectly help to achieve the objectives/metrics in Thrive Montgomery 2050, the Climate Action Plan, and the Vision Zero Action Plan as it is a master plan requirement.

Project Resources

The Planning Department does not have sufficient staffing to update the model while maintaining and running the current version of the model. Planning staff will oversee this consultant effort, will assist in compiling data for the project, and will provide feedback on all project tasks.

If funding for this is not received, the Planning Department would continue to rely on a model base year that reflects travel conditions from 2010 rather than 2018. Furthermore, without the funding the Department will not understand the implications of transitioning to an activity-based model.

What Measure of Success will be Achieved?

When completed, the county will be able to employ a travel demand model with a validated base year of 2018 and residents, development stakeholders and county officials will have more confidence in the model outputs. Additionally, the county will be better prepared to transition to a preferred activity-based model by having a white paper that details the potential implications to Montgomery County of such a transition.

6. Climate Assessment Quantitative Tool Update: \$20,000 – one-time

Description

Bill 3-22, “Climate Assessments” requires the Office of Legislative Oversight (OLO) to conduct a climate assessment of introduced county bills starting January 1, 2023, and the Planning Board to conduct a climate assessment of proposed zoning text amendments (ZTAs), and master plans and master plan amendments (collectively called master plans) starting March 1, 2023. The purpose of the climate assessments is to evaluate the anticipated impact of bills, master plans and ZTAs on the county’s contribution to addressing climate change.

Bill 3-22 requires the OLO and the Planning Board to develop and publish online a climate assessment template to guide the development of climate assessments for bills, ZTAs and master plans. To conduct these assessments, the Planning Department has developed a tool to conduct quantitative assessments of master plans and ZTAs, where appropriate. This quantitative assessment is incorporated into the Planning Department’s template used to summarize the climate assessment results.

Bill 3-22 also requires that, at least every two years, OLO and the Planning Board must review the template and update the template as needed. This funding request is for a consultant with specialized expertise in greenhouse gas emissions and sequestration modeling to update the Planning Department’s quantitative tool, as needed, based on staff experience with using the quantitative tool for two years and identifying areas that may need to be updated.

What Objectives/Metrics/Equity Goals Will Be Achieved?

An updated quantitative tool will provide the County Council with a better understanding of the potential climate impacts and implications of proposed master plans and ZTAs on greenhouse gas emissions and carbon sequestration. And it will help planners develop more refined land use recommendations in master plans to support implementation of the county’s Climate Action Plan and Thrive Montgomery 2050.

Project Resources

Based on the Planning Department’s experience in using the quantitative tools for about two years, Planning staff will conduct the review of the overall climate assessment methodology and the template used for master plans and zoning text amendments (ZTAs) and identify any changes that should be made to the template, including any revisions/updates of the quantitative tool. Based on this feedback, the consultant will update the quantitative tool.

As mentioned above, the quantitative tool is a very specialized spreadsheet model. The Planning Department staff does not have the expertise and the knowledge needed to analyze the model and make any adjustments or revisions to the spreadsheet. If this one-time funding request is not approved, the Planning Department would not be able to update the quantitative tool and the related templates, as required by Bill 3-22.

What Measure of Success will be Achieved?

The proposed update of the quantitative tool will satisfy the requirement of Bill 3-22, and it will provide a more accurate assessment of potential impacts of climate change on greenhouse gas emissions and carbon sequestration.

7. **Parking Lot Design Study: \$125,000 – one-time**

Description

This effort would update parking lot design standards to ensure new or rebuilt lots prioritize safety and provide convenient, accessible parking for people with disabilities, bikes, and micromobility. The project would guide the county to transform hazardous parking lots into multimodal spaces with pedestrian pathways, better lighting, space for bikes and micromobility devices, and fewer pedestrian conflicts. Safety benefits extend to all users, including pedestrians, bicyclists, transit users, drivers, and passengers.

The Planning Department has applied for a federal Safe Streets for All planning grant to fund this project. We expect to learn if we are awarded the grant in October 2023, in which case this request would be moot. Nevertheless, we would like to include it for the time being in our request in case the grant does not materialize.

What Objectives/Metrics/Equity Goals Will Be Achieved?

The project is recommended in the Vision Zero 2030 Action Plan (Action T-9) and is a recommendation in the Council approved Pedestrian Master Plan (Key Action P3a). This effort will help to reduce the number of fatalities and severe injuries in parking lots, which account for up to 20% of pedestrian-involved severe injuries and fatalities. Black and brown community members in Montgomery County are disproportionately victims of transportation-related fatalities and severe injuries. An analysis of pedestrian deaths nationwide by Smart Growth America found that Black people were struck and killed by drivers at an 82 percent higher rate than White, non-Hispanic Americans.

Project Resources

A consultant would lead all aspects of the project. Planning Staff would jointly manage the project, review all deliverables, and provide guidance on all tasks. Montgomery Planning does not have the staffing to conduct this substantial effort, which also requires unique expertise. Therefore, the project would not advance without consultant assistance.

What Measure of Success will be Achieved?

A long-term reduction in transportation-related fatalities and severe injuries in parking lots.

NEW INITIATIVES IN FY25 – ON-GOING

8. **Placemaking Expansion: \$37,000 – on-going**

Description

Placemaking activities enable the Planning Department to physically enhance the communities we serve and demonstrate the positive impact of planning recommendations in a tangible way. Each placemaking project undertaken over the past five years has been overwhelmingly appreciated by the residents and has resulted in permanent, long-term upgrades through public and private investment. From installing the Pike District Connector to providing safe access to local parks and regional trails during the pandemic, to transforming underutilized parking lots in Burtonsville and Fairland Briggs Chaney into hubs that celebrate the cultures of our diverse communities, each placemaking effort improved the quality of life for our residents in powerful ways.

The department's annual placemaking budget was reduced from \$100,000 to \$83,300 in FY22. This \$37,000 request will increase the total to \$120,300. The rising cost of building materials and general inflation has limited the features that can be incorporated into the Department's placemaking efforts each successive year. To receive competitive bids, the Planning Department established an on-call bench for placemaking services comprising of local vendors and national experts. Despite this induced competition, recent bids for proposals for FY24 efforts from multiple consultants were over the maximum annual budget by at least 30%.

At the same time, the Department has seen an increase in requests for implementing placemaking projects in various communities. To address this growing demand, streamline implementation, and ensure equitable investment in placemaking activities, the Planning Department is developing a Placemaking Strategic Plan that will guide our staff to do more placemaking activities and cover a broader range of improvements and programming, thereby serving a larger share of our residents each year.

An increase in funding would enable the Planning Department to do more than one placemaking effort each year and ensure that our placemaking efforts include the elements desired by community members. The ability to invest in multiple efforts will also allow the Planning Department to form partnerships with public and private entities and build capacity in these groups to do more placemaking. Lastly, the ability to do more projects will allow us to better serve residents living within Equity Focus Areas each year.

The funding is needed to keep up with rising costs of materials, fabrication, and general inflation. Consultant services are critically needed for placemaking efforts to ensure that quality and safety standards are met during the installation process. Planning staff will continue to focus on community engagement and volunteering during placemaking efforts to complement the consultant's work and minimize the overall project cost.

Without the increased funding, the Planning Department cannot implement placemaking activities without significant costs incurred by community groups. This constraint will further diminish the ability of residents living in Equity Focus Areas to benefit from placemaking activities. We will not be able to execute more than one project each year and the waiting list for community requests will continue to grow.

What Objectives/Metrics/Equity Goals Will Be Achieved?

Increased funding will enable the Planning Department to implement the Placemaking Strategic Plan recommendations and do more than one each year. It will expand the types of placemaking projects delivered and build capacity in public and private groups to independently do more placemaking throughout the county. Lastly, it will enable the Planning Department to do more placemaking activities within Equity Focus Areas.

What Measure of Success will be Achieved?

The Planning Department delivers more than one placemaking project each year. More placemaking projects are implemented within Equity Focus Areas. Placemaking projects continue to catalyze long term upgrades through public and private investment.

NEW INITIATIVES IN FY25 – POSITIONS – ON-GOING

For FY25, the Planning Department is requesting funding for a) seasonal staff, b) converting one part-time position to full-time, c) one unfunded position and d) five new full-time positions to address:

1. The **on-going work program need** currently filled by unbudgeted temporary staff.
2. **Rightsizing divisions with a growing work program** due to increased development applications and to support expediting the Development Review process.
3. Support the department’s growing work program related to **addressing climate change and placemaking initiatives**.

*Initiatives #9-11 address the **on-going work program need** currently filled by unbudgeted temporary staff.*

9. **Learning Management System Administrator - Management Services Division - Seasonal 0.75wy - \$37,000 - on-going**

Description

Employee development and continuing education opportunities expose both young and experienced professionals to new ideas, solidify their knowledge, and increase their expertise in their field. In today’s employment environment, it is imperative to invest in continuing education to retain staff and prepare them to be our future leaders.

For the past several years, the Planning Department has achieved success in utilizing unbudgeted interns and volunteers to manage the department’s day to day training program to create flyers and advertise trainings, maintain our training classes in the Commission’s training calendar, monitor registration and attendance, coordinate/set up the audio-visual for the training, upload recorded training videos and class materials for future use, and send out post-class surveys and tally the results. However, due to the nature of interns and volunteers coming and going, we are regularly spending time to bring inexperienced staff up to date on managing our training program.

In early 2024, the Commission is launching a new learning management system called Learning Central. Learning Central is a software application for the administration, documentation, tracking, reporting, automation, and delivery of educational courses, training programs, materials or learning and development programs. This software application will help our training program to be a very intentional and robust program.

The Planning Department is requesting \$37,000 for a seasonal staff (0.75 wy) to be the system administrator and subject matter expert for Learning Central. In addition to being the system administrator, this staff member will create and promote training packages from LinkedIn Learning, research best practices and trends in training, liaison with the training specialists in the other departments, coordinate with other departments to share the cost of trainings and ensure that the department is providing equitable and diverse trainings for all staff.

What Objectives/Metrics/Equity Goals Will Be Achieved?

This seasonal staff member will further the efforts of the Department's Equity Agenda for Planning which requires equity training annually for Montgomery Planning employees through intentional equity and diversity training and programs to teach our staff to advocate and plan for equitable opportunities for all.

What Measure of Success will be Achieved?

Through consistent oversight of our training program, staff will be offered technical, leadership, and career development classes tailored to meet their needs.

10. **Convert PT position to FT Position – Planner III – Adequate Public Facilities - Countywide Planning & Policy - 0.2 wys – \$23,584 – on-going**

Description

The Planning Department currently has a part-time (0.8 wy) Planner III position dedicated to schools' adequate public facilities and master planning efforts. This position serves as a liaison between our master plan teams and Montgomery County Public Schools (MCPS), prepares the annual school test and school utilization report in conformance with the Growth and Infrastructure Policy (GIP), works on updates to the GIP and the annual school test guidelines, regularly updates and analyzes changes in student generation rates, impact taxes and Utilization Premium Payments, and implements the schools element of the GIP through development review. This position prepares the schools-related element of each area master plan position as a member of every master plan team across all three area divisions. Other responsibilities include an annual review of the school Capital Improvements Program and maintaining a productive relationship with MCPS staff. The Planning Department is requesting to convert this position to full-time to comprehensively address these growing needs.

What Objectives/Metrics/Equity Goals Will Be Achieved?

Converting this position to full-time ensures that the requirements of the GIP are completed on time and consistently. It would also ensure that additional analysis envisioned by the GIP can be completed to better understand the relationship between enrollment and development and therefore better inform policy initiatives. Additional staff time would also allow us to explore innovative approaches to incorporating schools in master plans.

Equity is a significant concern as it pertains to the adequacy of schools. In the past, adequacy has been solely measured based on student capacity. But a growing concern is the adequacy of schools from an amenity and physical conditions perspective. With additional staff capacity, the Planning Department can work with MCPS to focus more on some of these other measures of adequacy.

What Measure of Success will be Achieved?

We produce all our deliverables on time and are able to expand our efforts to be more comprehensive in our review of school adequacy.

11. **Workyear and Funding - Planner I – Transportation Network – Countywide Planning & Policy - Grade 20 - 1.0wy - \$111,176 – on-going**

Description

For the past three years, the Planning Department has had an unbudgeted temporary employee transportation planning technician support the department's Travel Forecasting and Monitoring Team, by managing and analyzing state, regional and local transportation data. This position assists with updating and maintaining the Planning Department's highway and transit network geodatabase, in support of the department's regional travel demand forecasting model, which is used to understand the potential impacts of master plan recommendations and other policy considerations. The network is a temporal database that captures the transportation network for modeling and analysis at different points in time -- in the past and future. Maintenance of the network is extensive and time-consuming.

The Planning Department has been unable to identify alternatives to completing the position's job functions. The Department is requesting a full-time position. Continuing the unbudgeted temporary position for a longer period is untenable and undesirable given the known on-going need for the transportation planning work.

The main task of this position is to keep the Planning Department's extensive travel demand forecasting network – which captures the changing characteristics of our roadways and transit networks across numerous time periods – up to date. Maintaining a complete network database ensures that we can appropriately evaluate the transportation adequacy of master plans.

What Objectives/Metrics/Equity Goals Will Be Achieved?

This position indirectly helps to achieve the objectives and metrics in Thrive Montgomery 2050, the Climate Action Plan, and the Vision Zero Action Plan as it allows us to complete the master plan requirement of assessing transportation system adequacy.

What Measure of Success will be Achieved?

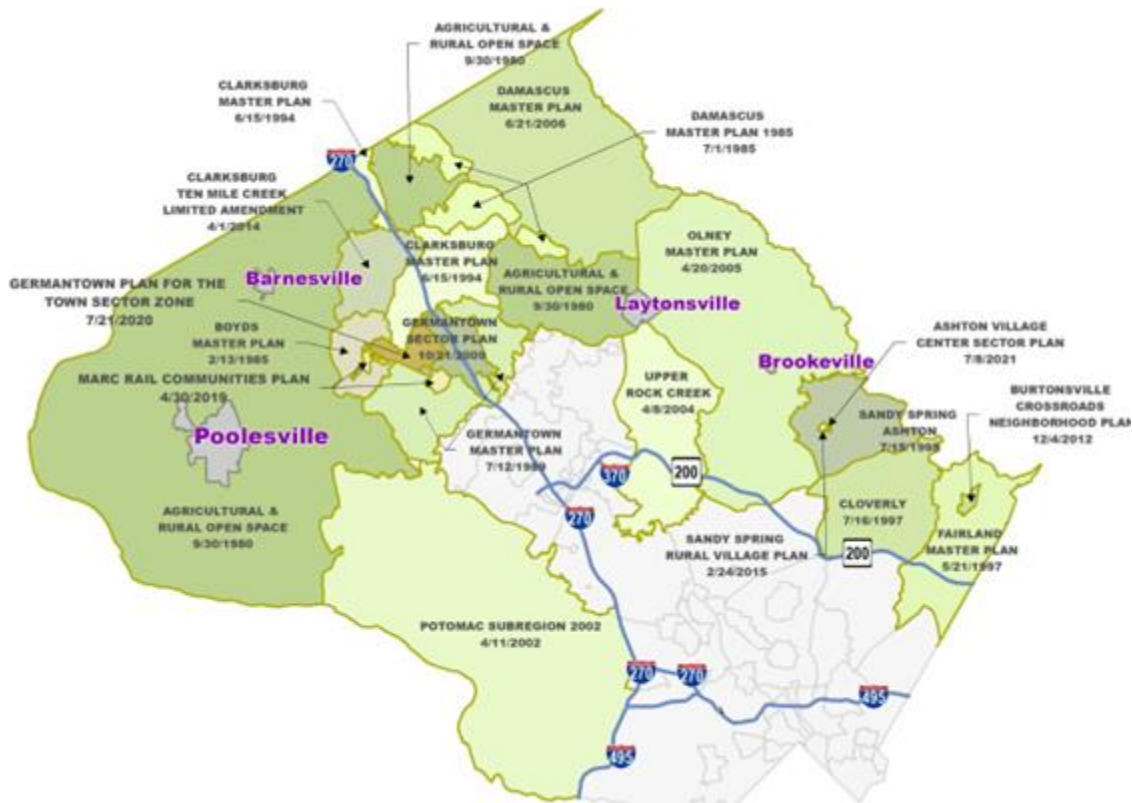
Continued maintenance of the county's highway and transit network geodatabase and production of transportation impact analyses for master plans.

Initiatives #12-14 address **rightsizing divisions with a growing work program** due to increased development applications and to support expediting the Development Review process.

12. **New Position, Workyear and Funding – Planning Supervisor – Grade 32 – Upcounty Planning - \$163,316 – 1.0wy – on-going**

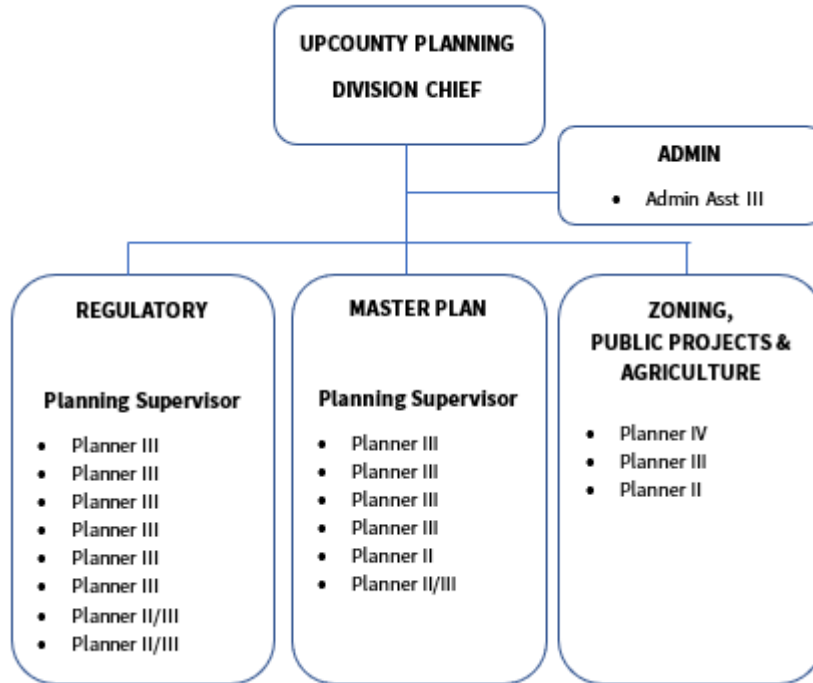
Description

The Upcounty Planning division oversees planning for approximately two-thirds of the land area in Montgomery County and is comprised of the Agricultural Reserve and multiple communities and rural areas. This makes Upcounty unique from Midcounty and Downcounty and requires a slightly different structure than the other divisions to best respond to the work program needs of Upcounty.

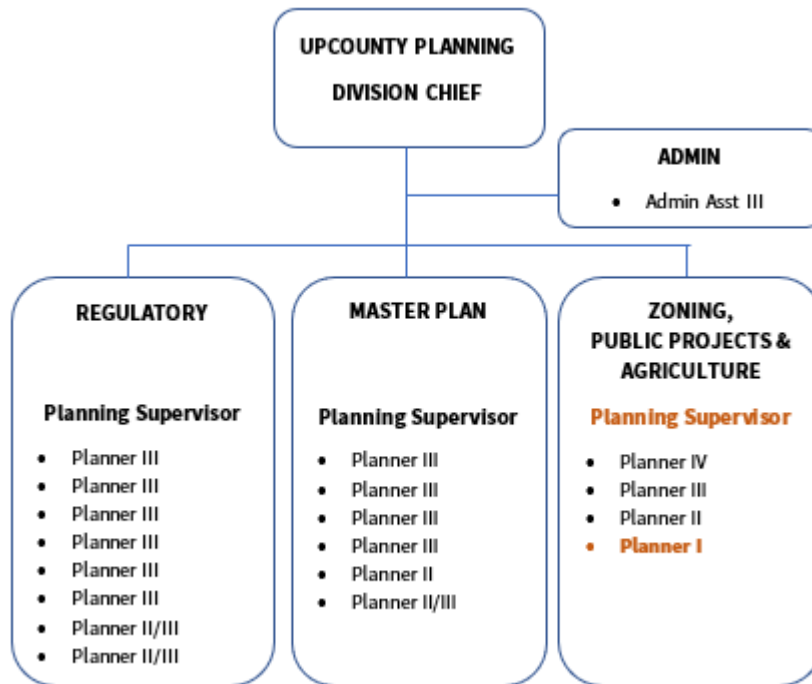


Map of Upcounty Planning Division

Current Upcounty Division Organizational Chart



Proposed Upcounty Division Organizational Chart
New Proposed Supervisor and Planner I Positions in Orange



Last year, the Upcounty Planning Division was restructured to better address the work program and capacity issues. The restructuring partly addressed the work program issues, but as evidenced by the data recently obtained from the Information Technology & Innovation (ITI) division, the workload capacity issue persists.

Upcounty has processed more regulatory and zoning applications than any other division for the past 10 years. In that time, the Planning Department processed a total of just over 6,000 applications, with Upcounty responsible for over 3,000 of those applications, approximately half. Upcounty consistently handles significantly more Subdivision and Environmental Plans than the other divisions. In that time, Upcounty has led:

	Led by Upcounty Planning	Total in Planning Department	% Led by Upcounty Planning
Preliminary Plans	284	571	50%
Administrative Subdivision Plans	52	102	51%
Pre-Preliminary Plans	44	51	86%
Record Plat Plans	472	1,007	47%
NRI/FSDs	474	785	60%
Forest Conservation Exemptions	969	1,701	57%
Stand Alone Forest Conservation Plans	39	64	61%
Sediment Control Plans	136	200	68%
Park Plans	20	30	67%

Although more evenly distributed, Upcounty also led the most Mandatory Referrals and Conditional Uses in that time.

The Intake & Regulatory Coordination (IRC) division has reported that the Planning Department currently has over 120 cases in intake review, a historic high, and that Upcounty will be receiving over 70 of those cases. Additionally, Upcounty has witnessed a surge in zoning applications, particularly in Conditional Uses over the past three years, and that trend does not show any signs of slowing with Upcounty alone currently handling more applications than the Planning Department typically reviews on average per year.

For at least a decade, Upcounty has been responsible for over half of the application reviews for the entire department. Based on historic and current metrics, the Planning Department is requesting two new positions. The department has assessed the possibility of reallocating internal resources, however, with the increase in applications, the department has determined that the Midcounty and Downcounty divisions are appropriately staffed to meet the workload. The Planning Department is requesting two additional positions to alleviate the high level of workload and burnout concerns from current and former Upcounty employees, which is supported by the data in the chart above.

What Objectives/Metrics/Equity Goals Will Be Achieved, and What Measure of Success will be Achieved?

East County and Upcounty residents often feel they do not get the same level of attention and resources as their Midcounty and Downcounty neighbors. In addition to the significant Regulatory and Master Plan work programs, Upcounty has an equally significant workload in terms of zoning applications (conditional uses and rezonings), mandatory referrals (public projects), and a multitude of agricultural initiatives. Currently, the Upcounty Chief performs the majority of the supervision of these areas of the work program, due to the tremendous workload and the number of staff under the Regulatory and Master Plan Supervisors.

A new supervisor position in Upcounty that oversees zoning, mandatory referrals, and agricultural initiatives, would allow the Chief and Planning Department to better distribute the workload and better oversee the entire division work program, as less time would be required from the Chief on the day-to-day supervision of this portion of the work program. In turn, this would result in improved service for East County and Upcounty residents in terms of communication and coordination efforts with East County, agricultural, and rural communities; shortened application processing timelines; implementation of Agritourism Initiatives; better support and responsiveness to County Council, staff, and their constituents.

13. **New Position, Workyear and Funding – Planner I – Grade 20 – Upcounty Planning - \$111,176/1.0wy – on-going**

Description

As stated above, Upcounty oversees planning for approximately two-thirds of the land area in Montgomery County and is comprised of the Agricultural Reserve and multiple communities and rural areas. This makes Upcounty unique from Midcounty and Downcounty and requires a slightly different structure than the other divisions to best respond to the work program needs of Upcounty planning area.

As shown in the chart in #13 above, Upcounty handles the majority of all regulatory applications for the Planning Department, particularly environmental reviews. This position would be an additional environmental reviewer assigned to the Zoning, Public Projects, and Agricultural Initiatives Team, while also supporting the Regulatory Team as needed. The past and current trend shows no sign of changing any time soon.

What Objectives/Metrics/Equity Goals Will Be Achieved, and What Measure of Success will be Achieved?

East County and Upcounty residents often feel they do not get the same level of attention and resources as their Midcounty and Downcounty neighbors. This environmental position will improve the staff-to-caseload ratios in Upcounty and bring Upcounty more in alignment with Midcounty and Downcounty staff-to-caseload ratios. This will result in improved service for East County and Upcounty residents in terms of communication and coordination efforts with East County, agricultural, and rural communities; shortened application processing timelines; implementation of Agritourism Initiatives; better support and responsiveness to County Council, staff, and their constituents.

14. New Position, Workyear and Funding – Intake Reviewer - Planner I – Grade 20 – IRC - 111,176 - 1.0wy – on-going

Description

An Intake Reviewer reviews all applications that come to the Planning Department for completeness before the application and plans are sent to area teams for review. The Planning Department has received the highest number of applications in the summer of 2023 than it has ever received. There is no sign of slowing down and the current team of three reviewers are not able to keep up with the increase. Additionally, the average intake time of an application in FY22 took 36 days for sketch plans, 56 days for Site Plans, and 39 days for Preliminary Plans. The Development Review Workgroup has emphasized the necessity of making the intake process move faster. Although internal processes have been improved to increase efficiency, the team of three reviewers cannot handle the increased number of applications and also decrease review times.

What Objectives/Metrics/Equity Goals Will Be Achieved?

Another Intake Reviewer will enable the intake team to decrease review times and move applications to the area teams for review quicker. This achieves the overall County goal of streamlining the Development Review process making it more reliable for applicants.

What Measure of Success will be Achieved?

Quicker intake review times and the ability to absorb the increased number of applications.

*Initiatives #15-16 address supporting the department’s growing work program related to **addressing climate change and placemaking initiatives.***

15. New Position, Workyear and Funding – Climate Initiatives - Planner IV – Grade 30 – Countywide Planning & Policy - \$150,739 - 1.0wy – on-going

Description

Climate change is an existential threat to the planet but efforts to address it and adapt to it to ensure resiliency must occur at all community levels, including the local level. As the department tasked with planning the future growth and development of the county, it is imperative that we employ an expert on the planning industry's response to climate change to ensure we are incorporating the best viable solutions in our plans and policies.

This position/funding would be to hire a climate specialist to ensure climate-related initiatives and recommendations are integrated throughout the development of every master plan. This position would also be responsible for conducting the climate assessments as required under Section 2-81D of County Code for all zoning text amendments and master plans. As an expert in the field of climate change and how planning efforts can respond to it, this position would also lead the Planning Department’s climate change resiliency and vulnerability efforts in support of Thrive Montgomery 2050 and the county’s Climate Action Plan. The position would serve as a liaison to other county agencies and their related efforts and support and supplement the Planning Department’s environmental staff who have a high level of workload and their on-going regulatory, streetscape design and heat island efforts.

What Objectives/Metrics/Equity Goals Will Be Achieved?

The position would be responsible for coordinating the Department's climate-related initiatives and completing the quarterly Climate Action Plan updates. This position would be tasked with implementing the department's climate assessment responsibilities under county code to ensure they are completed in a consistent and thorough fashion. The effects of climate change and our community's resilience to it and other natural disasters certainly present equity disparities that could be a focus of this new staff member's work.

What Measure of Success will be Achieved?

Climate discussions are consistently integrated throughout our master planning efforts. The resiliency of our communities is a central focus of our planning efforts.

16. New Position, Workyear and Funding - Placemaking, Design & Implementation Specialist – Planner III- Grade 28 – Director's Office - \$139,991 - 1.0wy – on-going

Description

The Director's Office has several on-going projects currently being managed by the Assistant to the Deputy Director including the Incentive Zoning Update Study and the Strategic Placemaking Plan. The Incentive Zoning Update Study is a comprehensive evaluation of the Public Benefits Point System for CR (Commercial Residential) and Employment zones. The Planning Department anticipates a council briefing in winter 2024 (FY25), with significant follow-up to implement the approved recommendations via ZTA's and other regulatory updates. The Placemaking Strategic Plan is currently being drafted by the Planning Department as well and seeks to expand placemaking efforts by doing more placemaking projects each year, pursuing grants and funding opportunities, and building capacity in groups to independently do more placemaking.

Both projects require a planning professional with strong project management skills, related work experience, and the ability to guide interdepartmental coordination to execute the day-to-day tasks with guidance from a supervisor. These projects have been staffed by interim internships and seasonal part-time workers. A permanent, more experienced position is needed to work on these efforts through critical stages in FY25 and to provide staffing continuity for the implementation of the approved recommendations in subsequent years.

Beyond FY25, this position would continue to support several projects across the Department by working on critical work program items focused on placemaking, urban design and post approval implementation of various plans and studies. These efforts would include supporting area teams to develop objective, form-based design standards for corridor plans, maximizing the impact of the department's placemaking investments by pursuing additional grants and organizing capacity building workshops, assisting area teams with the regulatory review of applications with a focus on Design Excellence for economic competitiveness and leading interagency collaborative efforts to amend regulations to implement Thrive Montgomery 2050's recommendations including the concept of Complete Communities.

What Objectives/Metrics/Equity Goals Will Be Achieved?

This position will ensure the successful completion and implementation of two critical on-going initiatives - the Incentive Zoning Update Study and the Strategic Placemaking Plan. This position will also ensure that area planning teams receive adequate support to incorporate objective, form-based standards for corridor plans, a key recommendation of Thrive Montgomery 2050. This position will monitor the implementation of the department’s annual placemaking efforts with a focus on serving communities within Equity Focus Areas. This position will support the streamlined design review of development applications and ensure Design Excellence principles are incorporated to create economically competitive projects across the county.

What Measure of Success will be Achieved?

Successful completion and annual implementation of the Incentive Zoning Update Study and the Strategic Placemaking Plan recommendations. The integration of objective form-based standards in future corridor plans. The successful implementation of placemaking projects in Equity Focus Areas. The timely and constructive design review of development applications with a focus on Design Excellence for economic competitiveness.

SECTION 4: FY25 BASE BUDGET PLUS MAJOR KNOWN COMMITMENTS (MKC)

KNOWN OPERATING COMMITMENTS

The preliminary known increases and decreases in the Planning Department budget for salaries, benefits, retirement, and other post-employment benefits (OPEB) were presented by DHRM at the September 21 meeting.

Information regarding the known operating commitments, mandated, contractual, and inflationary increases, and chargeback adjustments for the operations of the Planning Department are shown below.

Known Operating Commitments	
Salaries and Benefits *	477,056
CPI increase for Contracts and Supplies	84,788
Adjustment - Risk Management, Long-Term Disability and Legal Chargeback	36,967
Major Known Commitments	(-\$25,000)
Chargeback to Development Review – Special Revenue Account	TBD
Adjustment - Departmental Chargebacks to CIO and CWIT	\$60,444
Total of Known Operating Commitments – 2.5% increase over FY24	\$634,255

SALARIES AND BENEFITS* - \$477,056

Personnel costs are adjusted based on changes in current staffing, annualization of previous year's merit and COLA increases, retirement estimate, and benefit cost increases.

- * The salary and benefits number does not include the FY25 compensation marker, OPEB PayGo and OPEB prefunding as these are included in the Administration Fund's non-departmental account. Any changes to retirement expenses will be refined in November when the updated actuarial report is released.

CPI INCREASE FOR CONTRACTS AND SUPPLIES - \$84,788

The Planning Department is requesting to increase the contracts and supplies budget by \$84,788 over the FY24 Adopted Budget to keep up with inflation.

ADJUSTMENT – RISK MANAGEMENT, LONG-TERM DISABILITY & LEGAL CHARGEBACK - \$36,967

Risk Management - \$27,200, Long-Term Disability - \$1,100, and Legal Department Chargebacks - \$8,667 adjusted based on actual expenses on behalf of the Planning Department.

MAJOR KNOWN COMMITMENTS (MKC) – (-\$25,000)

- MKC #1 – FY24 One-time Major Known Commitment Expenses – (\$200,000) - every three years
GIS Base Map Update was done in FY24, and the funding is removed from the FY25 budget. It is a one-time expense every three years.
- MKC #2 - Biennial Traffic Monitoring Report - \$100,000 – one-time - every other year
The Pedestrian Master Plan requires a comprehensive pedestrian and bicycle survey be conducted every two years to better understand the effects of Pedestrian Master Plan implementation.
- MKC #3 – Switches, routers, firewall replacements - \$75,000 – on-going

DEVELOPMENT REVIEW SPECIAL REVENUE ACCOUNT (DR-SRA) - CHARGEBACK FROM ADMIN FUND TO DR-SRA

Special Revenue Funds account for the proceeds from specific revenue sources restricted for a designated purpose. The Development Review Special Revenue Account (DR-SRA) was created to collect fees generated from the submission of development applications.)

Staff time spent on reviewing development applications is charged back from the Administration Fund to the special revenue fund. The revenues generated from development applications can be highly volatile. The Planning Department is still analyzing the special revenue fund projections, especially in light of the Development Review Work Group, and will present the changes in the chargebacks at the Planning Board's next budget Worksession on November 16.

DR-SRA CHAREBACK FROM LEGAL AND FINANCE DEPARTMENTS, AND CORPORATE IT (CIO)

Although this memo addresses the Planning Department’s operating budget (we will present the special revenue fund request at the November 16 Planning Board meeting), we did want to mention additional chargebacks to the Development Review Special Revenue Account from the Legal Department, Finance Department and Corporate IT.

Chargebacks to the Development Review Special Revenue Account				
Department	FY24 Budget	FY25 Proposed	\$ Increase/ Decrease	% Increase/ Decrease
Legal	\$194,849	\$210,437	\$15,588	8.0%
Finance	\$40,260	\$53,830	\$13,570	33.7%
Corporate IT (CIO)	\$22,109	\$20,687	(\$1,422)	-6.4%
Bank Fees	-	\$250	\$250	0.0%
Combined Total	\$257,218	\$285,204	\$27,986	10.9%

The Legal Department, Finance Department and CIO will discuss the changes in chargebacks/ allocations in their budget presentations.

OFFICE OF THE CHIEF INFORMATION OFFICER (CIO) BASE BUDGET REQUEST

The Office of the Chief Information Officer proposed changes to Montgomery Planning’s base budget as shown in the chart below. These changes will be discussed at the Planning Board meeting on October 19 during the CIO’s budget presentation.

For the CIO and Commission-wide IT initiatives (CWIT) internal service funds (ISF), the Planning Department’s operating budget (Admin Fund) contributes to both their new initiatives and their base budget via a chargeback. The breakdown is as follows:

Chargebacks to the CIO ISF and CWIT ISF Budget				
	FY24 Budget	FY25 Proposed	\$ Increase/ Decrease	% Increase/ Decrease
CIO - ISF	\$491,284	\$552,724	\$61,440	12.5%
CWIT – ISF	\$64,030	\$63,034	(\$996)	-1.6%
TOTAL	\$555,314	\$615,758	\$60,444	10.9%

