

## PLANNING DEPARTMENT FY26 OPERATING BUDGET DISCUSSION

### Description






Seeking approval to prepare the FY26 Planning Department's operating budget at the Base Budget plus New Initiatives level.

Completed: 10-18-2024

MCPB  
Item No. 11  
10-24-2024

Montgomery County  
Planning Board  
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### Summary:

- The Planning Department is seeking approval to prepare the FY26 Planning Department's operating budget at the Base Budget plus New Initiatives level.
- The Preliminary FY26 Operating Budget request is \$28,203,913 which is an increase of \$1,639,044, or 6.1%, over the FY25 Adjusted Adopted budget.

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## SECTION 1: BACKGROUND

### BACKGROUND

At its September 26 meeting, the Planning Board received a presentation from the Commission's Department of Human Resources and Management (DHRM) on the FY26 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%** in FY26. With this estimated increase, preliminary projections provided by DHRM indicated that the Administration Fund would not need a tax rate increase in FY26 to meet the known increases. The leading drivers for the known increases are estimated increases in health benefits and retirement. A tax rate increase would be needed, however, to cover the inclusion of new initiatives/critical needs. Also, any changes to retirement expenses or other post-employment benefits (OPEB) will be included 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 largely stayed the same since 2011. With the approval and adoption of *Thrive Montgomery 2050 (Thrive)* in 2022, the department has been focused on implementing the long-range direction and recommendations found in the updated General Plan, seeking the outcomes of economic health, community equity and environmental resilience through the work program. Now, after months of engagement with internal and external stakeholders, Montgomery Planning has a new five-year strategic plan, Montgomery Planning's FY 2025 – 2030 Strategic Plan, which is the near-term roadmap for how the department will advance the recommendations in *Thrive*. The strategic plan defines the values, priorities, and strategies that will guide our organization. This internal plan has external impacts because it includes suggestions for the work program including direction for strengthening internal capacity and identifying activities to focus on to advance the recommendations in *Thrive*.

The Planning Department prepared an FY26 budget request that includes new initiatives and critical new positions we believe are essential to planning for the future of Montgomery County, and that reflects the department's new strategic plan.

Planning staff worked diligently over the past several months to prepare for the October 24 budget work session with the Planning Board. We looked at guidance from *Thrive* and the department's new strategic plan to determine the future needs to prepare strategic and forward-thinking planning and development guidance. Department staff initially identified three new master plans, 13 one-time initiatives, and 10 full-time positions, one part-time to full-time conversion, and one seasonal position that met the critical criteria. Senior leadership, after careful consideration, narrowed the list to **two new master plans, four projects, two full-time career positions, and one part-time to full-time conversion** to include in our **FY26 proposed budget request**.

PRELIMINARY FY26 OPERATING BUDGET REQUEST

<b>MONTGOMERY COUNTY PLANNING DEPARTMENT PRELIMINARY FY26 OPERATING BUDGET REQUEST</b>			
<b>FY25 ADOPTED ADJUSTED BUDGET</b>		<b>\$ 26,708,279</b>	
<b>FY26 BASE BUDGET CHANGES</b>			
	Salaries and Benefits *	\$398,380	
	CPI Increase for Contracts and Supplies	98,600	
Adjustment – Risk Management, Long Term Disability, Unemployment, and Legal Chargeback		6,573	
	Major Known Commitments	300,000	
Chargebacks to Development Review – Special Revenue Account (DR-SRA)		-	
Adjustments in Departmental Chargebacks to CIO and Commission Wide IT		45,322	
	<b>Subtotal – Base Budget Changes</b>	<b>\$ 848,875</b>	<b>+3.2%</b>
<b>ONGOING INITIATIVES – NEW</b>			
<b>FY26 Ongoing Master Plan Support</b>		<b>300,000</b>	
<b>FY26 Ongoing New Positions</b>		<b>288,869</b>	
	Full-time Position – Climate Initiatives – Planner IV	156,645	
	Full-time Position – Organizational Development – Admin Specialist III	126,499	
	Convert Part-Time Position to Full-Time Position – Visual Media and Imaging Specialist I	5,725	
	<b>Subtotal – New Ongoing Initiatives</b>	<b>\$ 588,869</b>	<b>+2.2%</b>
<b>ONE-TIME WORK PROGRAM INITIATIVES – NET CHANGE</b>			
<b>Less: FY25 One-Time Work Program Initiatives</b>		<b>(418,700)</b>	
<b>FY26 One-Time Work Program Initiatives/New Funding Requests</b>		<b>620,000</b>	
	Housing Needs Assessment and Preferences (HNAP)	200,000	
	Shaping Corridor Focused Growth	250,000	
	Retail Market Analysis and Strategy Update	90,000	
	Green Streets Guidelines	80,000	
	<b>Subtotal – One-Time Work Program Initiatives</b>	<b>\$ 201,300</b>	<b>+0.8%</b>
<b>NET CHANGE FROM FY25 ADOPTED TO FY26 PROPOSED BUDGET</b>		<b>\$ 1,639,044</b>	<b>+6.1%</b>
<b>FY26 PROPOSED BUDGET</b>		<b>\$ 28,347,323</b>	
<b>TRANSFER INCREASE FROM ADMINISTRATION FUND TO DR-SRA**</b>		<b>\$ 550,000</b>	
<b>Notes:</b>			
* Salary and Benefits total does not include compensation marker or OPEB. 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.			
** Increase transfer from Admin Fund to DR-SRA of \$550,000 for base budget increase bringing the total transfer request to \$1.5M.			

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

## SECTION 2: FY26 MASTER PLANS AND MAJOR PROJECTS

### MASTER PLANS

In terms of master plans, our recommended FY26 work program follows closely with the work program that was approved for FY25. Several of the plans that were approved in previous fiscal years **will begin or carry over into FY26** – these include:

1. Master Plan for Historic Preservation Amendment – Timberlawn <i>Countywide Planning and Policy – HP</i>	Council Review
2. University Boulevard Corridor Plan <i>Midcounty Planning</i>	Council Review Commission Adoption
3. Clarksburg Gateway Sector Plan <i>Upcounty Planning</i>	Council Review Commission Adoption
4. Master Plan for Historic Preservation Amendment – 18583 Brooke Road <i>Countywide Planning and Policy – HP</i>	Staff Work Planning Board Review Council Review Commission Adoption
5. Friendship Heights Sector Plan <i>Downcounty Planning</i>	Staff Work Planning Board Review Council Review
6. Eastern Silver Spring Communities Plan <i>Downcounty Planning</i>	Staff Work
7. Georgia Avenue Corridor Plan <i>Midcounty Planning</i>	Staff Work

In addition, later this fall the Planning Department intends to ask the County Council to add the Germantown Sector Plan Amendment to our work program and for a supplemental FY25 budget appropriation. If approved, the plan will move very quickly and will include:

8. Germantown Sector Plan Amendment <i>Upcounty Planning</i>	Staff Work Planning Board Review Council Review Commission Adoption
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**Two new master plans** proposed to begin in FY26 are being identified for the first time in this budget discussion. If approved, the Planning Department will work on a total of ten master plans in FY26.

9. Kensington Sector Plan Amendment <i>Midcounty Planning</i>
10. Burtonsville Minor Master Plan Amendment <i>Upcounty Planning</i>

Detailed information on these new master plan and major project efforts is included in [Section 3 – FY26 New Plans and New Initiatives](#) and the [Appendix](#).

A draft of the FY26 Proposed Master Plan and Major Projects Schedule is included in [Section 5](#).

## MAJOR PROJECTS

The Planning Department's recommended FY26 work program **carries forward** four projects that were approved in previous fiscal years and will continue into FY26. These include:

1. Parking Lot Design Study <i>Countywide Planning and Policy</i>	Staff Work Planning Board Review Council Review
2. Burial Sites Context Study <i>Countywide Planning and Policy – HP</i>	Staff Work Planning Board Review Council Review
3. Mapping Segregation Phase 2 <i>Countywide Planning and Policy – HP</i>	Staff Work Planning Board Review Council Review
4. Curbside Management <i>Countywide Planning and Policy</i>	Staff Work Planning Board Review

**New major projects** that are being proposed for the FY26 budget discussion. If approved, the Planning Department will work on nine major projects in FY26.

5. Housing Needs Assessment and Preferences (HNAP) <i>Countywide Planning and Policy</i>
6. Shaping Corridor-Focused Growth <i>Director's Office</i>
7. Retail Market Analysis and Strategy Update <i>Research and Strategic Projects</i>
8. Green Streets Guidelines <i>Countywide Planning and Policy</i>
9. Locational Atlas Update <i>Countywide Planning and Policy – HP</i>

Detailed information on these new master plan and major project efforts is included in [Section 3 – FY26 New Plans and New Initiatives](#) and the [Appendix](#).

A draft of the FY26 Proposed Master Plan and Major Projects Schedule is included in [Section 5](#).

## SECTION 3: FY26 NEW PLANS AND NEW INITIATIVES

### FY26 NEW PLANS

One sector plan and one minor master plan amendment are being proposed to being in FY26.

#### KENSINGTON SECTOR PLAN AMENDMENT

At the crossroads of two growth corridors and served by MARC Rail, the Town of Kensington is a small center with a combination of commercial services and amenities, as well as historic resources. This Sector Plan Amendment seeks to refine the vision and recommendations of the 2012 Sector Plan in alignment with *Thrive* and other recent policies, such as the Vision Zero Action Plan. This Sector Plan Amendment will evaluate opportunities for increased housing diversity through compact, corridor-focused growth within the Town Center and near the MARC Rail Station; explore options to improve longstanding stormwater management issues and further environmental resilience, evaluate multimodal connectivity and safety; and explore the opportunities and limitations of compact growth in proximity to Kensington's historic resources.

This Sector Plan Amendment will integrate recent policy guidance, as well as ongoing initiatives including the Montgomery County Department of Transportation's Summit Avenue Extended Project, and the Town of Kensington's interests in pursuing additional amenities and services, including improved connections across the CSX Rail tracks, publicly accessible open space, and opportunities for consolidated or shared parking. This Amendment will also explore land uses and develop right-of-way recommendations for University Boulevard from Kensington to the 2012 Wheaton Central Business and Vicinity Sector Plan.

The Kensington Sector Plan Amendment aligns with the department's strategic plan, specifically with a focus on the "Prioritize corridor focused planning efforts" strategy.

#### BURTONSVILLE EMPLOYMENT AREA MINOR MASTER PLAN AMENDMENT

The Burtonsville Employment Area, within the 1997 Fairland Master Plan, has not materialized as envisioned. The Burtonsville Employment Area Minor Master Plan Amendment will assess the state of the plan area relative to the recommendations of the 1997 Master Plan and other policies, particularly regarding the ability to provide additional housing and to attract new employment, planned roadway improvements, urban design, planned transit service changes, and achievement of public benefits under the Optional Method of Development. The Plan Amendment will include community outreach and engagement, an employment and economic analysis, and scenario modeling of potential alternative futures for this important activity center along US 29. Revised recommendations will seek to address what, if any, interventions may be needed to support the Plan in the years to come.

Plan Amendments and future development will implement several objectives in *Thrive*, will better implement the vision, and allow for more modern and relevant employment generating uses in the state and the region, will allow for mobility improvements through development by delivering on recommendations of the Vision Zero Action Plan and Bicycle Master Plan.



This plan amendment will better allow for more employment and residential uses within the US 29 corridor area in east county, and redevelopment will provide much needed multi-modal mobility improvements in the area.

The Burtonsville Employment Area Minor Master Plan Amendment aligns with the department's strategic plan, specifically the "focus on historically underinvested regions" with special attention to the east county area as identified in *Thrive*.

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## FY26 WORK PROGRAM INITIATIVES

The Planning Director and Deputy Planning Directors reviewed each division's potential new work program initiatives and narrowed them down to those that addressed the top priorities of the Department.

The requested new initiatives are in direct support of the department's strategic plan, which builds on guidance from *Thrive* and furthers the department's work on advancing the Equity Agenda for Planning. In addition, the Planning Department is seeking additional staff resources to address a sustained pattern of increased workload.

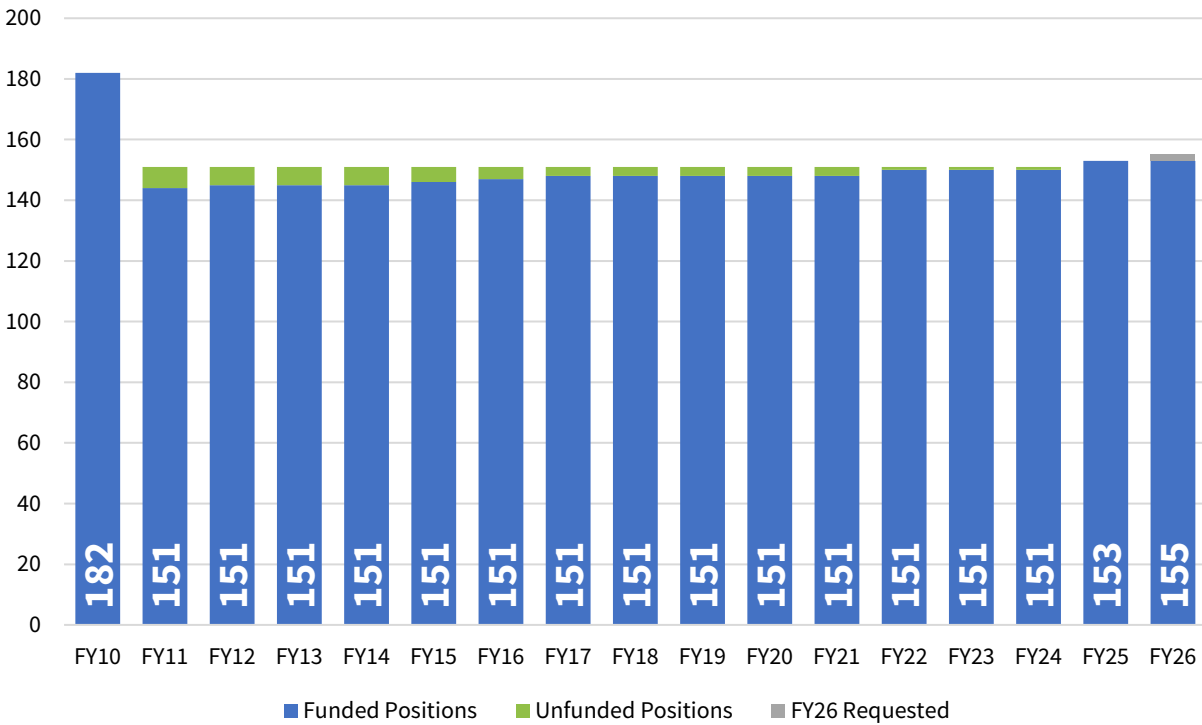
For the five years prior to the pandemic (FY16-FY20), the Planning Department's one-time initiatives annual budget averaged \$700,000 per year ranging between \$425,000-\$835,000 (2% to 4% of the total budget). Most of the one-time initiatives funding requests are for consultant studies/services to support 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 five years have been very lean regarding one-time new initiatives due to the pandemic and aftermath. 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%) in FY24. In FY25, the one-time initiatives total was \$418,700 which included \$235,000 for consultant funding requested by the Planning Department and \$183,700 for the added Planning Academy initiative.

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.

From FY11-24, the Planning Department operated 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, the seven unfunded positions have been re-funded and two positions were added in FY25 to help address an overburdened workload. The Planning Department now has 153 career positions, still 29 positions, or 16%, short of the 182 positions in FY10.

## Montgomery Planning Positions



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, new mandates regarding equity, sustainability, climate initiatives, forest conservation, and more have placed a strain on our staff. The Planning Department shifted staff internally as much as possible to address these new mandates while waiting for *Thrive* 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* in fall 2022 and in response to limited new resources provided in FY25, 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 FY26, the Planning Department is requesting two new full-time positions to address:

1. **Climate Initiatives**
2. **Organizational Development**

These two new positions were identified as top priorities during the strategic planning process. The first position is needed to adhere to county requirements of meeting the county’s climate goals. The second position was overwhelmingly requested by staff and identified in the strategic plan as a significant need to build internal capacity, provide training and support to manage staff training and learning.

These new positions will bring the department’s personnel complement to 155, which is still 27 below the FY10 staffing level.

In addition, the Planning Department is requesting to convert the part-time Visual Media and Imaging Specialist I position to a full-time position to provide the mandated audio/visual (A/V) support to run the live broadcast video stream at Commission-related meetings and other events. This request is in alignment with the department’s strategic plan, specifically the strategy focused on engagement: “Increase transparency with residents throughout the planning process.”

For FY26, the Planning Department’s **new ongoing initiatives** request is **\$300,000 for consultant funding** for master plans plus **\$288,869 for personnel** for a total of \$588,869. The **new one-time work program initiatives** request is **\$620,000**. These new initiatives focus on ways to reimagine and reinvigorate our master planning activities, to address an increased workload and staffing deficiencies, and to be in alignment with the department’s strategic plan.

<b>FY26 Work Program Initiatives</b>			
<b>Ongoing Consulting, Ongoing Positions and Work Years (2 Positions, 2.2 WYs)</b>			<b>\$588,869</b>
1. Master Plan Support			\$300,000
2. Climate Initiatives Planner IV Full-time Position Countywide Planning and Policy Division	1 pos	1.0 WY	\$156,645
3. Organizational Development Specialist Full-time Position Management Services Division	1 pos	1.0 WY	\$126,499
4. Visual Media and Imaging Specialist I Convert PT position (0.8 WY) to FT position (1.0 WY) Communications Division		0.2 WY	\$5,725
<b>One-Time Work Program Initiatives</b>			<b>\$620,000</b>
5. Housing Needs Assessment and Preferences (HNAP)			\$200,000
6. Shaping Corridor-Focused Growth			\$250,000
7. Retail Market Analysis and Strategy Update			\$90,000
8. Green Streets Guidelines			\$80,000
9. Locational Atlas Update			\$0

The Planning Department is requesting four new ongoing initiatives, including funding for master plan support, two new positions, and the conversion of a part-time position to full-time. The Planning Department is also requesting five new one-time work program initiatives, only four of which include budget requests.

Descriptions, objectives, and measures of success for each new on-going and one-time work program are provided in the [Appendix](#).

## SECTION 4: FY26 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 26 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.

<b>Known Operating Commitments</b>	
Salaries and Benefits <sup>1</sup>	\$398,380
CPI increase for Contracts and Supplies	\$98,600
Adjustment - Risk Mgmt, Long-Term Disability, Unemployment, Legal Chargeback	\$6,573
Major Known Commitments	\$300,000
Chargeback to Development Review – Special Revenue Account	-
Adjustment - Departmental Chargebacks to CIO and CWIT	\$45,322
<b>Total of Known Operating Commitments – 3.2% increase over FY25</b>	<b>\$848,875</b>

#### SALARIES AND BENEFITS<sup>1</sup> – \$398,380

Personnel costs are adjusted based on changes in current staffing, annualization of previous year’s merit and COLA increases, lapse, retirement, and benefit cost increases. The Planning Department is still analyzing the personnel projections and will present any changes at the Planning Board’s next budget work session on November 21.

#### CPI INCREASE FOR CONTRACTS AND SUPPLIES – \$98,600

The Planning Department is requesting to increase the contracts and supplies budget by \$98,600 over the FY25 Adopted Budget to keep up with inflation.

#### ADJUSTMENTS TO CHARGEBACKS – \$6,573

The following adjustments are proposed based on actual expenses paid on behalf of the Planning Department:

Risk Management – (\$2,400)	Unemployment – (\$1,000)
Long-Term Disability – \$612	Legal Department Chargebacks – \$9,361

<sup>1</sup> The salary and benefits number does not include the FY26 compensation marker, OPEB PayGo and OPEB prefunding as these are included in the Administration Fund's non-departmental account. Also, there is a marker increase for retirement expenses included in this memo which will be updated in November when the next actuarial report is released.

## MAJOR KNOWN COMMITMENTS (MKC) – \$300,000

The Planning Department requests an increase of \$300,000 over FY25 for four major known commitments.

- **MKC #1 – GIS Base Map Update - \$150,000 one-time – every three years**  
Countywide GIS data updates occur on a three-year basis for planimetric data as dictated by the County GIS strategic plan. Various county agencies rely on the M-NCPPC planimetric GIS data including using the data to inform e911 public safety and the DEP water quality protection charge.
- **MKC #2 – ProjectDox Regulatory System - \$110,000 on-going**  
On-going funding is requested for the migration of the Planning Department's ProjectDox regulatory system into the vendor's cloud. The ProjectDox system is a critical tool that allows the department to coordinate the approval process between hundreds of applicants and reviewers in a timely manner. All future ProjectDox versions are required to be migrated to the cloud by the software vendor and the Planning Department must migrate the system to the cloud as a SaaS (software as a service) upgrade to remain in support. Document viewing software components of the older system have been retired and are out of support. Additionally, migrating the application to the cloud will improve the reliability of the system and alleviate a many server lifecycle and security issues that require a great deal of Information Technology staff time.
- **MKC #3 – Master Plan Transportation Monitoring - \$15,000 on-going**  
As master plan recommendations are implemented, development proceeds, and public facilities and amenities are provided, the Planning Board, County Council, and County Executive will use this information to make decisions about public expenditures and future development. This request reflects the costs associated with collecting traffic counts that are needed to satisfy requirements in the Bethesda Downtown Plan and the White Flint Sector Plan.
- **MKC #4 – On-Call Travel Demand Model Maintenance - \$25,000 on-going**  
The Planning Department is required to conduct transportation adequacy analyses for each master plan. The tool that the department uses to conduct these analyses is the Travel / 4 regional travel demand forecasting model. Maintaining the model requires highly technical skill sets and requires external consulting assistance to maintain the tool.

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

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 and will present the changes in the chargebacks at the Planning Board's next budget work session on November 21.

## DR-SRA CHARGEBACKS FROM LEGAL DEPARTMENT, FINANCE DEPARTMENT, AND CORPORATE IT

Although this memo addresses the Planning Department’s operating budget (we will present the special revenue fund request at the November 21 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	FY25 Budget	FY26 Proposed	\$ Increase/ Decrease	% Increase/ Decrease
Legal	\$210,437	\$227,272	\$16,835	8.0%
Finance	\$53,830	\$57,750	\$3,920	7.3%
Corporate IT (CIO)	\$20,687	\$25,347	\$4,660	22.5%
Bank Fees	\$250	\$550	\$300	120.0%
TOTAL	\$285,204	\$310,919	\$25,715	9.0%

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

## OFFICE OF THE CHIEF INFORMATION OFFICER BASE BUDGET REQUEST

The Office of the Chief Information Officer (CIO) proposed changes to Montgomery Planning’s base budget as shown in the chart below. These changes were discussed at the Planning Board meeting on October 10 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				
	FY25 Budget	FY26 Proposed	\$ Increase/ Decrease	% Increase/ Decrease
CIO – ISF	\$552,724	\$598,046	\$45,322	8.2%
CWIT – ISF	\$8,634	\$8,634	\$0	0.0%
TOTAL	\$561,358	\$606,680	\$45,322	8.1%



**APPENDIX: DESCRIPTIONS FOR ON-GOING AND ONE-TIME WORK PROGRAM INITIATIVES**

**FY26 ON-GOING WORK PROGRAM INITIATIVES**

FY26 On-Going Work Program Initiative	
1. MASTER PLAN SUPPORT	
Director's Office	
<b>Budget Request</b>	\$300,000
<b>Description</b>	<p>The Planning Department is requesting a new process for how funds are allocated for ongoing master plan work beginning with the FY26 budget request to reflect a more efficient, flexible, and equitable approach that also recognizes master planning as a core function of the department.</p> <p>Montgomery Planning is committed to advancing its Equity Agenda for Planning in master planning (and all areas of our work program). For equitable engagement and appropriate technical analyses to occur during the master planning process, there must be a deep understanding of an area's existing conditions and stakeholder demographics. Historically, the request to fund master plans occurs a year or more ahead of staff work. Oftentimes, staff realize that more or different types of engagement and analyses are needed once staff begins working on existing conditions and communications strategies. An audience-centric approach, data analysis, and a commitment to equity must be combined with best practices for a lasting impact.</p> <p>We have embraced an engagement approach to reach our community members where they are, so they feel welcomed and heard in the planning process. This includes interpretation and translation of presentations; meetings held at locations accessible by public transportation and at convenient times for the community; culturally responsive facilitation; opportunities for written and oral input; hybrid participation; and much more.</p> <p>To meet timelines to deliver master plans to the County Council, consultants for engagement, translation, transportation modeling, retail and economic studies often are contracted.</p> <p>Instead of a yearly request for basic work program items for master plan support to fund engagement and outreach, translation, transportation modeling and economic analysis, the change in approach would include an ongoing \$300,000 fund to support master plan activities for the fiscal year. This would allow flexibility for the department to adjust engagement and special studies needed for each master plan as determined through the master plan process.</p>
<b>Objectives Achieved</b>	An ongoing fund for master planning efforts would allow the department to have deeper and more meaningful engagement with residents and audiences. The flexibility in the fund would allow staff to try new outreach methods and ideas while at the same time building trust with the community. This new funding approach would also allow the department to be nimbler to allocate funds across the department if bids came in lower or higher than anticipated.



<p><b>Project Resources</b></p>	<p>For FY26, the \$300,000 would be used for the new plans for Kensington and Burtonsville, as well as other needs that may arise for plans carrying forward from FY25, including Georgia Avenue, Friendship Heights, and Eastern Silver Spring. For Kensington, consultant funding is anticipated to be needed for an historic survey and analyses of historical resources, parking planning expertise to evaluate the feasibility of parking structure(s) for a “park once community,” engineering expertise for storm water management issues, and community engagement. For Burtonsville, consultant funding will be needed for community outreach and engagement, an employment and economic analysis, and scenario modeling of potential alternative futures for Burtonsville activity centers along US 29.</p> <p>Without this new funding approach, the master plans might not have the exact support that is needed for audience-centric engagement and for the studies and modeling work. It is a main strategy of the department’s strategic plan to “increase transparency with residents through the planning process” and this new approach to funding master plans will allow the department to further this strategy.</p>
<p><b>Measures of Success</b></p>	<p>Using guidance from <i>Thrive</i> and the department’s new strategic plan, the success of this new approach will be measured by the department being nimble in using a variety of master plan related activities, including engagement, transportation studies, historical analyses, engineering expertise, etc., to be more efficient, flexible, equitable, and responsive to the needs of each individual master plan area in a strategic and forward-thinking manner.</p>

FY26 On-Going Work Program Initiative

**2. CLIMATE INITIATIVES PLANNER IV**  
Countywide Planning & Policy Division

<b>Budget Request</b>	\$156,645 (Grade 30, 1.0 WY) (mid-point + 10% plus benefits – based on specialized expertise required for this position and department hiring trends at this level)
<b>Description</b>	<p>Climate change is an existential threat to the planet but efforts to address and adapt 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.</p> <p>This climate specialist position would ensure climate-related initiatives and recommendations are integrated throughout the department’s work program, including the development of climate policies and master plans. It 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.</p> <p>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 <i>Thrive</i> 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. Specific work products and responsibilities would include:</p> <ul style="list-style-type: none"> <li>• Conducting the climate assessments as required under Section 2-81D of County Code for all zoning text amendments and master plans.</li> <li>• Leading a climate and resilience study review.</li> <li>• Preparing a Resilience Functional Master Plan.</li> <li>• Conducting an Area Climate Change Vulnerability Study.</li> <li>• Coordinating with county agencies on Climate Action Plan efforts.</li> </ul>
<b>Objectives Achieved</b>	<p>This position will lead the department’s climate initiatives, including the development of climate policies and studies, implementing the department’s climate assessment responsibilities under county code to ensure they are completed in a consistent and thorough manner, and ensuring climate recommendations are integrated throughout each master plan.</p> <p>Climate change affects everyone, but disproportionately affects people of color, vulnerable populations, and low-income households. This position will have a focus on delivering climate policies and programs that achieve equitable outcomes.</p>
<b>Measures of Success</b>	<p>The success of the planning process will be measured by climate discussions being consistently integrated throughout master planning efforts, and community resilience will be a central focus of the department’s planning efforts.</p> <p>This position request is in alignment with the Planning Department’s strategic plan, specifically, the strategy, “Serve as independent advisor on land use decisions and policies to implement <i>Thrive</i>.” One of the main outcomes of <i>Thrive</i> is environmental resilience. By dedicating one position to lead the department’s coordination on climate initiatives and policy efforts, we will be advancing the department’s work to reach the climate goals of the county.</p>

FY26 On-Going Work Program Initiative

**3. ORGANIZATIONAL DEVELOPMENT ADMINISTRATIVE SPECIALIST III**  
 Management Services Division

<b>Budget Request</b>	\$126,499 (Grade 26, 1.0 WY) (mid-point plus benefits)
<b>Description</b>	<p>Through employee engagement conducted in drafting the department’s strategic plan, staff identified five categories as the top priorities to move the department forward. “Employees” was the first category on the list. The feedback from the strategic plan committee and the staff regarding “Employees” include things that impact all the other categories. The priorities and strategies for the Employees category include:</p> <ul style="list-style-type: none"> <li>• Foster a sense of belonging and joy in the workplace.</li> <li>• Increase staff capacity through training.</li> <li>• Create and promote pathways for professional growth and career advancement.</li> <li>• Build a diverse workforce at all levels of the Department.</li> <li>• Promote pride in public service.</li> </ul> <p>Four work areas have been targeted to fulfill the priorities and strategies of the Employees category: 1) Training, 2) Mentoring, 3) Succession Planning, and 4) Employee Resource Groups. In 2023-2024, the Planning Department held a Leadership Institute for current and rising leaders. Participants also identified mentoring, succession planning, and employee resource groups as priorities. They researched how to successfully implement such programs and recommended dedicating a staff person to coordinate them. Additionally, over the past 10 years or so, the department has rolled out successful pilot programs in each of these areas, but without a dedicated staff to focus on them, they have not realized their full and lasting potential.</p> <p>This Organizational Development Specialist position would build on the successful groundwork that has been laid and will grow the programs to benefit the depart through continuous development, improved efficiency, better communication, enhanced collaboration, improved employee morale and organizational culture, and better adaption to change.</p> <p><b>Training</b></p> <p>As the department’s work program expands with limited resources, it is critical to cross train staff increase work capacity. In 2023, the Commission launched a robust learning management system that, in addition to allowing staff to register and track trainings attended, it can be used to create curriculums and individual development plans (IDPs) and assign training to guide staff in their professional growth. In addition, it will allow the department to evaluate the return on investment regarding which trainings to offer to be more strategic, cost effective and to meet staff needs. This robust new system requires a dedicated staff to effectively maximize the functionality of the system and to use it as designed. Currently, the department is only using the system to register and track training attendance as we do not have the capacity to expand our training program.</p> <p><b>Mentoring</b></p> <p>The data from various studies prove that mentoring programs benefit the employee and employer and has a positive impact on employee morale. Mentoring can create a culture of learning and growth, which can improve retention, foster inclusion, develop leadership, and lead to increased productivity, improved performance, higher job satisfaction, and</p>

	<p>the creation of a stronger workplace culture. Using the information from the pilot program and research gathered by the Leadership Institute, this Organizational Development Specialist would develop an ongoing mentoring program to foster a sense of belonging in the workplace.</p> <p><b>Succession Planning</b>  Succession Planning is critical for 1) the department as employees nearing retirement and 2) for employees looking for a clear career path. Currently, twenty to twenty-five percent of the Planning Department’s staff are eligible for retirement. Succession planning helps ensure a smooth transition from one leader to the next, so that qualified leaders are ready to take over when current leaders leave, thereby minimizing disruptions and risks. For employees looking for a clear career path, as mentioned above in the Training section, cross training/succession planning is critical not only to increase work capacity but also to reduce the risk of key person dependency, which occurs when one staff member is solely responsible for an essential skill. Succession planning can help the department to anticipate future needs by identifying the most qualified rising leaders and preparing them for future roles. This Organizational Development Specialist would create Succession Planning programs both for employees nearing retirement and for employees looking for a clear career path which would meet the strategic plan criteria to create and promote pathways for professional growth and career advancement.</p> <p><b>Employee Resource Groups (ERGs)</b>  Employee Resources Groups (ERGs) are voluntary groups of employees who share a common interest, background, or characteristic and are led by employees. ERGs can help create a more inclusive and diverse workplace and can benefit both employees and the department.</p> <ul style="list-style-type: none"> <li>• Research from the Center for Talent Innovation shows that employees who are part of ERGs are 50% more likely to be engaged and 80% more likely to stay with their organizations.</li> <li>• A report by Glassdoor found that 67% of job seekers consider workplace diversity an important factor in their decision to apply for a job. Companies with strong ERGs are often viewed more favorably in this regard.</li> <li>• Data from the SHRM Foundation highlights that companies with ERGs experience improved community relations and employee connections, leading to a stronger organizational culture.</li> <li>• According to McKinsey’s research, companies in the top quartile for gender diversity on executive teams are 25% more likely to have above-average profitability. ERGs play a crucial role in promoting diverse talent within organizations.</li> </ul> <p>ERGs contribute to higher engagement, retention, diversity, innovation, and overall company performance. They are essential for creating a more inclusive and supportive workplace environment. This Organizational Development Specialist would work with employees to develop and maintain effective ERGs.</p>
<p><b>Objectives Achieved</b></p>	<p>This Organizational Development Specialist will create, develop, and implement the four work areas that have been targeted to fulfill the priorities and strategies of the “Employees” category of the Strategic Plan. These priorities and strategies were brought forth by the Planning Department staff during the creation of the strategic plan. These priorities and strategies are key components to the success of the department.</p>

<b>Measures of Success</b>	<p>This Organizational Development Specialist will play a crucial role in enhancing the overall effectiveness and efficiency of the Planning Department by improving processes, managing change, developing leaders, and fostering a positive organizational culture. This position will help ensure that the department can achieve its goals and adapt effectively to evolving challenges and opportunities. The success of the programs will be measured via employee satisfaction surveys, measuring retention rates, increased diversity in higher level positions, measuring mentoring goals achievement, measuring increased ERG participation and activities, tracking promotion of mentees and ERG members, and evaluating how often the succession plans are utilized during actual transitions.</p> <p>This position is in alignment with the department’s strategic plan, specifically, the strategy, “increase staff capacity through training.” The need for this position was identified consistently throughout the strategic planning process with staff. As stated in the strategic plan, “increasing our impact starts with investing in the development and advancement of our current and future teams.” Our department must intentionally and thoughtfully create a welcoming environment for staff to learn, grow, and develop their talents. We recognize that when we create a healthy and inclusive workplace environment, we will attract and retain a more diverse workforce.</p> <p>Through a focus on employee experience, we will create a stronger Planning Department more reflective and with increased understanding of the communities we serve.</p>
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FY26 On-Going Work Program Initiative

**4. VISUAL MEDIA AND IMAGING SPECIALIST I**

Communications Division

<b>Budget Request</b>	<b>\$5,725 (Grade H18, conversion from 0.8 WY to 1.0 WY)</b>
<b>Description</b>	<p>The Planning Department’s Communications Division oversees the broadcast and audio-visual (A/V) operation for all official meetings and special events taking place in the Wheaton Headquarters (WHQ) for Montgomery County Parks and Planning and M-NCPPC. Regularly scheduled meetings include the Planning Board, Historic Preservation Committee (HPC), Development Review Committee (DRC) and M-NCPPC Full Commission meetings. The M-NCPPC WHQ auditorium is also available for other agencies and the public to rent for meetings and special events. Often Planning Board meetings exceed eight hours and operate into the evening. HPC meetings operate exclusively outside of regular office hours and most rentals occur outside of regular business hours.</p> <p>The Planning Department currently has a part-time (0.8 WY) Visual Media and Imaging Specialist I position dedicated to being present whenever A/V use is requested in the auditorium to avoid A/V disruptions in meetings or damage to the room’s equipment. Since FY23, this part-time position has performed the critical task of running the live broadcast video stream at Commission-related meetings which is mandated by Maryland state law and has provided audio-visual support for special event rental reservations of the auditorium. This position also assists in furthering the department’s commitment to equitable engagement including assisting with Americans with Disabilities Act (ADA) considerations, producing video content, covering community storytelling and event coverage.</p> <p>The Planning Department is requesting to convert this position to full-time as the need for this support has often exceeded the part-time work hours. The work years for this position in FY25 budget was 0.8 wys while the funding was budgeted for a higher-grade position. As a result, this request is to increase the workyears by 0.2 wys and the funding by \$5,725 to bring the position to the full-time work years and funding.</p>
<b>Objectives Achieved</b>	<p>Due to the Maryland Open Meetings Act, there is a mandate to live stream all public meetings from WHQ. This means that we must follow the law and deliver a reliable and consistent production for every public meeting. The conversion of the part-time to full-time position would help to ensure that there is coverage and no interruption in the high-quality service community members and stakeholders have come to expect from our video productions.</p>
<b>Measures of Success</b>	<p>This position would ensure that the M-NCPPC meetings and events, along with outside rental events have continuity and deliver high-quality live streamed videos that our stakeholders expect from our agency.</p> <p>This request is in alignment with the department’s strategic plan, specifically the strategy focused on engagement: “Increase transparency with residents throughout the planning process.” By making this position full time, the department can continue to deliver high-quality video productions to invite as many people into the planning process as possible.</p>

FY26 One-Time Work Program Initiative	
5. HOUSING NEEDS ASSESSMENT AND PREFERENCES (HNAP)	
Countywide Planning & Policy Division	
<b>Budget Request</b>	<b>\$200,000 – One-time</b>
<b>Description</b>	<p>Montgomery County is experiencing a serious housing shortage. The county has over one million residents and is expected to add 200,000 more people over the next 25 years, but we are not building enough housing fast enough to keep up with this growth. Housing prices and rents have skyrocketed in recent years, forcing current residents and prospective residents to look elsewhere to live. This trend puts the county at an economic disadvantage in the Washington, DC region due to losses in tax revenue and prospective workforce talent.</p> <p>Over the past few years, the county has taken meaningful steps to address the housing crisis, including:</p> <ul style="list-style-type: none"> <li>• Changes to the zoning code to permit Accessory Dwelling Units as a limited use.</li> <li>• Creation of the Housing Production Fund.</li> <li>• Updates to the Moderately Priced Dwelling Units (MPDU) program.</li> <li>• Removal of parking minimums near transit.</li> <li>• Permitting institutional properties to build affordable housing through conditional uses.</li> </ul> <p>Ongoing efforts including the Attainable Housing Initiative, the Local Housing Targets projects, and the quadrennial update of the Growth and Infrastructure Policy have the potential to increase options for property owners to build more housing types in the county. With a number of initiatives advancing, it is time to take stock of the progress that has been made to date and to lay out a path to achieve <i>Thrive’s</i> “Housing for All: More of Everything” vision.</p> <p>In FY 26, the Planning Department proposes to conduct two assessments to evaluate the housing market and to lay the groundwork for preparing the county’s first Housing Functional Plan:</p> <p><b>Housing Preference Survey:</b> This effort will identify housing preferences and current and future housing needs in the County. The survey will produce statistically valid results for population groups including low-income households, people of color, persons with disabilities, and seniors.</p> <p><b>Housing Needs Assessment:</b> This effort will incorporate the results from the housing needs survey, the most recent American Community Survey data, other data sources such as CoStar and SDAT, data from existing County studies and plans, and other sources to provide an overview of existing conditions and observable trends and analysis of housing need for distinct segments of the population. It will identify the demographics of residents of the county and develop distinct profiles for housing needs. As a Housing Needs Assessment was completed in 2020</p>

	<p>using 2018 ACS data in support of <i>Thrive</i>, to the extent possible, the updated Housing Needs Assessment revisits many of the pertinent findings from the 2020 HNA and capture many of the housing trends post-COVID. The HNA will also focus on highlighting gaps in housing related to various price points and types.</p> <p>Upon completion of these assessments, Planning staff will consider whether to recommend adding a Housing Functional Plan to the department’s work program. This plan would provide measurable housing goals and strategies for different market segments in Montgomery County as well as an analysis of affordability gaps and impediments to the housing supply.</p>
<b>Objectives Achieved</b>	<p>Using the policies and practices identified in <i>Thrive</i> as a guide for the scope of the Housing Needs Assessment and Preferences, this project can help provide data and metrics to support changes to housing policy.</p> <p>The Housing Needs Assessment and Preference Survey would communicate housing needs, gaps, and preferences that help create a sound foundation to inform future housing policy work, including a future Housing Functional Plan and implementing the vision of <i>Thrive’s</i> “Housing for All” chapter.</p> <p>Special attention will be given to findings and preferences related to low-income households, persons of color, persons with disabilities, and seniors. The preferences survey will use mixed modes of data collection to reach and engage with populations that have been historically hard to reach.</p>
<b>Project Resources</b>	<p>The consultant funding will provide analysis and production of demographic, real estate, forecasting, and other relevant housing data for the Housing Needs Assessment. The consultant will also develop and administer the Housing Preference Survey. Planning staff will manage the contract and review the methodology to evaluate the findings. This project cannot be completed without consultant assistance.</p>
<b>Measures of Success</b>	<p>A successful Housing Needs Assessment and Preference Survey will provide a solid foundation that informs future housing policy work of the Planning Department, the Executive Branch, the Planning Board, and the County Council. The foundation would also support future work program items, including a Housing Functional Plan and implementation actions from the <i>Thrive</i> white papers.</p> <p>The Housing Needs Assessment is in alignment with the department’s new strategic plan, specifically, the result, “accessible options for housing, employment, recreation, transportation, and services.” The Housing Needs Assessment also supports the strategic plan’s strategy of “serve as independent advisor on land use decisions and policies to implement <i>Thrive</i>,” which includes the Housing for All chapter in the approved and adopted plan.</p>



FY26 One-Time Work Program Initiative

**6. SHAPING CORRIDOR-FOCUSED GROWTH**

Director's Office

<b>Budget Request</b>	<b>\$250,000 – One-time</b>
<b>Description</b>	<p><i>Thrive</i> places great emphasis on corridor planning so that future growth can be primarily concentrated along our Growth Corridors within a built form that creates Complete Communities and provides a high quality of life. Planning staff's initial research suggest that few jurisdictions have sought to introduce infill development and redevelopment along corridors largely built in the decades following World War II, characterized by irregular block patterns, detached residential and small commercial properties with fragmented ownership, and a lack of existing street hierarchy. This project aims to create ground-breaking planning tools and introduce new practices into the planning lexicon for corridors.</p> <p>While this policy directive will be incrementally implemented through various corridor plans in the coming years, its successful realization requires that we first develop a strategic approach and identify/create tools needed to plan for and implement corridor-focused growth.</p> <p>This project will develop two key deliverables.</p> <ol style="list-style-type: none"> <li>a. A strategic plan that identifies and begins to implement the actions needed for achieving corridor focused growth. Potential topics include: 1) changes to processes, policies, regulations and standards needed to support corridor-focused growth, 2) new tools to facilitate corridor plan implementation and stakeholder engagement, 3) new metrics and forms of analysis that respond to corridor issues and priorities, 4) the degree of public sector intervention, and associated actions needed to achieve corridor-focused growth, and 5) incentives to encourage property assembly and delivery of infrastructure improvements.</li> <li>b. The creation of form base zones that can be applied along the various Growth Corridors through comprehensive long-range plans. This effort will build upon the work done thus far on initiatives like the Centers and Corridor Segment Typologies and incorporate lessons learned from projects like the Veirs Mill Corridor Master Plan, the Fairland and Briggs Chaney Master Plan, and the University Boulevard Corridor Plan. Staff and the consultant will build upon ongoing efforts to do a deep dive analysis of our existing zones and development standards and identify barriers to achieving corridor focused growth through flexible, form-based zoning. A robust community engagement process will be undertaken to engage stakeholders along the various growth corridors in a dialogue around the desired form for this new growth, based on lessons learned from engagement through recent and ongoing corridor plans.</li> </ol> <p>Finally, the zoning code and other parts of the county code will be amended to include these new form-based zones and development standards as tools for future corridor planning efforts. Having robust and flexible form-based zones will serve as a bridge between the vision outlined in <i>Thrive</i> and on the ground implementation through master plans and regulatory review.</p>

	<p>The work for both deliverables will be undertaken simultaneously by staff in partnership with consultants. We anticipate a 2- to 3-year timeline for developing these two deliverables. Staff anticipate more successive efforts in the following years to implement additional recommendations of the strategic plan.</p>
<p><b>Objectives Achieved</b></p>	<p>Form based zoning will provide flexibility for homeowners, small businesses, and developers to build new housing and commercial uses. A focus on form will ensure that the same quality of built environment is achieved in our Equity Focus Areas as other parts of the county.</p> <p><i>Thrive</i> specifically recommends the creation of form-based zones to accommodate future growth along our corridors. One of the key strategies in the department’s strategic plan is to “Prioritize corridor focused planning efforts.” This initiative would help to achieve this strategy.</p> <p>A focus on the built form and walkability will entice more people to walk, roll, and take transit, lowering greenhouse gas emissions from the county's transportation network, a key recommendation of the Climate Action Plan.</p>
<p><b>Project Resources</b></p>	<p>Planning Staff will perform the following tasks:</p> <ul style="list-style-type: none"> <li>● Collaborate with consultant to develop the contents of the strategic plan.</li> <li>● Prepare an inventory of existing conditions along the Growth Corridors.</li> <li>● Conduct community outreach among various neighborhoods along the Growth Corridors, raising awareness about the need for new form-based zoning standards and soliciting community input regarding important considerations.</li> <li>● Refine the form-based zones drafted by the consultant.</li> <li>● Convene working groups with partner agencies and private/public sector stakeholders, and resident representatives to help the consultant draft recommendations.</li> <li>● Produce the final package of the recommended zones.</li> <li>● Present recommendations alongside the consultant to elected officials and the public.</li> <li>● Draft legislation required to update various sections of the county code.</li> </ul> <p>Consultant funding will be used for the following tasks:</p> <ul style="list-style-type: none"> <li>● Collaborate with Planning Staff to develop the contents of the strategic plan.</li> <li>● Conduct an analysis to highlight the strengths and weaknesses of existing zones along growth corridors covering the built form, zoning, parking, transportation, environmental, infill development standards, building code, fire and rescue requirements, impact tax regulations and financial incentives.</li> <li>● Prepare cases studies highlighting national jurisdictions with successful form-based zones for infill development in residential and commercial areas, sharing key recommendations that the county could consider.</li> <li>● Participate in community engagement efforts, facilitating discussions and attending workshops, etc.</li> <li>● Provide drafts of form-based zones and development standards and present recommendations alongside Planning Staff to elected officials and the public.</li> <li>● Prepare renderings and illustrations showing the application of the recommended form-based zones along the various growth corridors.</li> </ul> <p>This is expected to be a multiyear intensive project that will greatly influence all future corridor plans. The lack of consultant support will likely add 1- to-2-years to the project</p>

	<p>timeline, delaying the Planning Department's ability to incorporate form-based zoning in upcoming corridor plans. In addition, without consultant assistance, the project's recommendations will not benefit from a peer jurisdiction review and the incorporation of national best practices. Certain practical challenges in implementing development under the new zones may be overlooked, limiting the positive impact of the recommendations, and the project will not benefit from an objective, outside professional expert, potentially minimizing the credibility of planning staff's recommendations.</p> <p>Based on initial staff research, few jurisdictions have sought to introduce infill development and redevelopment along corridors developed in the decades following World War II and characterized by irregular block patterns, detached residential properties with fragmented ownership, and a lack of existing street hierarchy. Consultant assistance is required to get this right and support the Planning Department's staff efforts to develop innovative tools and practices to achieve the vision of <i>Thrive</i>.</p>
<p><b>Measures of Success</b></p>	<p>The success of the Shaping Corridor Focused Growth initiative will be measured by successive Corridor Plans adopting form-based zones that deliver mixed use and mixed income Complete Communities along our growth corridors. Corridor focused growth creates economically competitive, equitable and sustainable communities across the county.</p> <p>This request is in alignment with the department's new strategic plan, specifically, the strategy, "prioritize corridor focused planning efforts."</p>

FY26 One-Time Work Program Initiative

**7. RETAIL MARKET ANALYSIS AND STRATEGY UPDATE**

Research & Strategic Projects Division

<b>Budget Request</b>	<b>\$90,000 – One-time</b>
<b>Description</b>	<p>In 2017, the Planning Department commissioned a consultant to conduct a detailed retail market study and strategy. The purpose of the study was to assess the strengths, challenges, and competitive position of retail in the County to develop strategies that will foster successful retail centers and keep them poised for the future. The results of the study have informed recommendations in master plans and development review to help ensure that we encourage the right kind of retail in the right places. Additionally, the recommendations led to follow up studies on retail in diverse communities, which has provided more detailed guidance on how to help support small, diverse businesses in communities like Wheaton and Silver Spring.</p> <p>So, why now request an update to this study? The pandemic created seismic shifts in how consumers shop and dine out, dramatically increasing the use of online shopping and food service deliveries. While those trends have abated a bit, the impacts are still long-lasting. Retailers have transformed larger parts of their stores into return centers. Dining rooms are shrinking as more restaurants rely on quick service and takeout. Yet stores and restaurants remain important anchors for the complete communities envisioned in <i>Thrive</i>, providing an amenity, service, and gathering place. Additionally, they provide an important sources of entry level employment and opportunities for entrepreneurs to start businesses. As we advance the implementation of <i>Thrive</i>, now is the time to take another look at the retail market in the county to assess its health and develop strategies for affirming its continued growth.</p>
<b>Objectives Achieved</b>	<p>This study will enable the Planning Department to assess the state of the retail industry in Montgomery County to understand how different kinds of retailers are faring, what their challenges are, and what opportunities exist for Montgomery Planning to better support the sector. It will help us look more specifically at the shifts in the industry since the pandemic and how retail spaces are being used, including the need for delivery storage facilities and services. The study will help the Planning Department develop better recommendations for retail in complete communities and along corridors, including identifying gaps in retail amenities in areas with disadvantaged populations as defined in the Community Equity Index.</p>
<b>Project Resources</b>	<p>Consultant funding will be used to conduct all research for the study. Planning staff will manage the contract, provide data available from the department, and coordinate with other stakeholders. As with the previous study, the expertise and feedback from stakeholders, such as Montgomery County Business Center, will be leveraged to ensure the study results in information and recommendations that are valuable to multiple organizations. The Planning Department staff does not have the expertise or the capacity to conduct this study in-house. Without consultant funding, this study will not be done.</p>
<b>Measures of Success</b>	<p>This work will measure the health of the retail market and identify opportunities for improvement. Having a better understanding of the state of this sector will help us advance the economic goals under <i>Thrive</i>. This study will provide a pulse on the current state of the retail market and new policy ideas for ensuring its continued success and adaptation to economic change.</p> <p>This request is in alignment with the department’s strategic plan, specifically the strategy, “strengthen collaboration with partner agencies.”</p>

FY26 One-Time Work Program Initiative

**8. GREEN STREETS GUIDELINES**

Countywide Planning & Policy Division

<b>Budget Request</b>	<b>\$80,000 – One-time</b>
<b>Description</b>	<p>Montgomery County’s Complete Streets Design Guide is the culmination of extensive collaboration between the Planning Department, Montgomery County Department of Transportation (MCDOT), Department of Permitting Services (DPS) and Department of Environmental Protection (DEP) to create nation-leading street design guidance. Since its original approval in 2021, the guide has served as an evolving framework for advancing street design principles in Montgomery County with subsequent enhancements including shared street guidelines and upcoming enhancements to include curbside management.</p> <p>The Green Streets Guidelines, to be jointly led with MCDOT, would overhaul the green streets chapter of the guide, building on recent success in developing the Silver Spring Streetscape Guidelines, which includes a substantial green streets component.</p> <p>This initiative will develop guidelines for green street design, helping to mitigate the impacts of climate change. It will establish clear expectations for capital projects and private development efforts, reducing review time and leading to greener streetscape design countywide. Importantly, it will maintain the collaborative partnership with MCDOT that was initiated in 2018 with the original Complete Streets Design Guide contract. This partnership has opened new channels of communication between the departments and benefitted other areas of the department’s work program.</p>
<b>Objectives Achieved</b>	<p>Completing this effort will provide advanced guidance on how to design new streets and retrofit existing streets to support goals in the Climate Action Plan, including A-7 (Green Spaces) and S-2 (Tree Canopy). Green Streets Guidelines will develop design parameters that county agencies can use to achieve equitable street design.</p>
<b>Project Resources</b>	<p>As green streets design is an emerging field, the Planning Department will benefit from experienced consultants to create recommendations that are appropriate for Montgomery County. The consultant will facilitate conversations between the Planning Department, MCDOT, DPS, DEP, and other stakeholders to develop consensus for enhancing the Green Streets chapter of the Complete Streets Design Guide. In addition, the consultant will prepare the Green Streets chapter, including all text and graphics. Planning Staff will manage the project collaboratively with MCDOT. The project would not occur without consultant funding.</p>
<b>Measures of Success</b>	<p>Successful implementation of this project will result in high-quality green streets design applied to development and capital projects. It will continue the collaborative partnership with MCDOT that has existent since 2018.</p> <p>This request is in alignment with the department’s strategic plan, specifically the strategy “continue to work with partners to implement clear, efficient, and consistent processes for planning.”</p>

FY26 One-Time Work Program Initiative

**9. LOCATIONAL ATLAS UPATE**  
Countywide Planning & Policy Division

<b>Budget Request</b>	<b>No funding requested.</b>
<b>Description</b>	The Locational Atlas and Index of Historic Sites was adopted by the Planning Board in 1976, almost 50 years ago. Properties listed in the Atlas are protected from demolition and substantial alterations until they can be evaluated for inclusion on the Master Plan for Historic Preservation (MHP). The Historic Preservation Office’s work program is charged with regularly evaluating properties on the Locational Atlas as part of area master plan amendments and as part of stand-alone MHP amendments for the County Council to determine whether a property qualifies for listing or whether it should be removed from the Locational Atlas entirely. There remain 130 individual properties and 16 districts on the Locational Atlas. This is a significant burden for properties owners. Since they do not have a final determination on their properties, they are required to go through regulatory building permit review with the Historic Preservation Office, but do not qualify for the tax credit benefits that properties listed in the MHP enjoy. These property owners have been waiting since 1976 for a determination on the status of their properties. The Planning Board and Historic Preservation Commission members and Chairs concurred at their Joint Meeting in 2023 that completing these surveys and determinations of the Locational Atlas properties should be a priority for the Historic Preservation Office’s work program.
<b>Objectives Achieved</b>	It meets one of the core programmatic goals for the Historic Preservation Office as stated in the Master Plan for Historic Preservation and recently affirmed by the HPC and Planning Board.  Completing the review of the remaining Locational Atlas individual properties and districts will bring certainty to these property owners as to the final determination on their properties. Many of these properties are associated with African American history and agricultural history. Completing this research will allow for new MHP amendments that will highlight these histories and allow for funding via tax credits and other programs for these property owners to assist in the preservation of their historic resources. It will also relieve the burden of regulatory review for property owners and the staff for all the properties that will be removed from the Locational Atlas at the conclusion of the project.
<b>Project Resources</b>	The project will utilize internal staff resources and will seek outside funding through grants as available.
<b>Measures of Success</b>	Locational Atlas sites and districts will all be surveyed and evaluated by the HPC, Planning Board, and County Council for inclusion in the MHP. Then the Locational Atlas will only exist as a truly temporary listing for properties recommended for listing by the Planning Board as they await final consideration by the County Council as part of future master plan amendments.