housing

Element of the General Plan

Approved and Adopted • April 2011

montgomery county planning department
M-NCPPC • MontgomeryPlanning.org

public hearing draft

housing element of the general plan

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ABSTRACT

This report contains text that amends the Housing Element of the 1993 General Plan Refinement. It also amends the General Plan (On Wedges and Corridors) for the Physical Development of the Maryland-Washington Regional District in Montgomery and Prince George's Counties, as amended.

This amendment makes recommendations for housing in Montgomery County and identifies policy objectives, regulatory reforms, and land use strategies needed to accomplish the recommendations.

SOURCE OF COPIES

The Maryland-National Capital Park and Planning Commission
8787 Georgia Avenue
Silver Spring, MD 20910-3760

Also available at www.montgomeryplanning.org/community/housing

Master and sector plans convey land use policy for defined geographic areas and should be interpreted together with relevant Countywide functional plans and County laws and regulations. Plan recommendations provide comprehensive guidelines for the use of public and private land and should be referred to by public officials and private individuals when making land use decisions. Public and private land use decisions that promote plan goals are essential to fulfilling a plan's vision.

Master and sector plans look ahead 20 years from the date of adoption, although they are intended to be revised every 10 to 15 years. Moreover, circumstances when a plan is adopted will change and the specifics of a plan may become less relevant over time. Plans do not specify all development possibilities. Their sketches are for illustrative purposes only, intended to convey a sense of desirable future character rather than a recommendation for a particular design.

Approved and Adopted

Housing Element of the General Plan

Prepared by the Montgomery County Planning Department
July 2009

Approved by the Montgomery County Council
April 2011

Adopted by the Maryland-National Capital Park and Planning Commission
May 2011

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

MCPB No. 11-29
M-NCPPC No. 11-04

RESOLUTION

WHEREAS, the Maryland-National Capital Park and Planning Commission, by virtue of Chapter 780 of the Laws of Maryland, 1959, as amended is authorized and empowered from time to time, to make and adopt, amend, extend, and add to a General Plan for the Physical Development of the Maryland-Washington Regional District; and

WHEREAS, THE Montgomery County Planning Board of The Maryland-National Capital Park and Planning Commission held a public hearing on May 21, 2009; and

WHEREAS, on July 30, 2009 the Montgomery County Planning Board transmitted to the County Executive and the County Council the Planning Board Draft of the Housing Element of the General Plan; and

WHEREAS, the Planning Board Draft of the Housing Element of the General Plan amends the Housing Element of the 1993 General Plan (on Wedges and Corridors) Refinement for the Physical Development of the Maryland-Washington Regional District in Montgomery and Prince George's Counties; and

WHEREAS, on September 29, 2009 the County Executive transmitted to the County Council his fiscal analysis of and suggested amendments to the Planning Board Draft of the Housing Element of the General Plan; and

WHEREAS, on December 1, 2009 the County Council held a public hearing regarding the Planning Board Draft of the Housing Element of the General Plan; and

WHEREAS, the County Council, after said public hearing, referred the Housing Element to the Planning, Housing, and Economic Development Committee for review and recommendation; and

WHEREAS, On January 20, March 7, March 14, March 15, and March 21, 2011 the Planning, Housing, and Economic Development Committee held worksessions to review the issues raised in connection with the Planning Board Draft of the Housing Element of the General Plan; and

WHEREAS, on March 29, 2011 the Montgomery County Council, sitting as the District Council for that portion of The Maryland-Washington Regional District lying within Montgomery County, approved the Final Draft Amendment of the Housing Element, with modifications and revisions as set forth in Council Resolution 17-78;

NOW, THEREFORE, BE IT RESOLVED that the Montgomery County Planning Board of the Maryland-National Capital Park and Planning Commission does hereby adopt said amendment of the Housing Element of the General Plan with modifications and revisions as set forth in Council Resolution 17-78.

BE IT FURTHER RESOLVED, that this Amendment be reflected on copies of the aforesaid Plan and that copies of such amended Plan shall be certified by the Maryland-National Capital Park and Planning Commission, and filed with the Clerks of the Circuit Court of each of Montgomery and Prince George's Counties, as required by law.

8787 Georgia Avenue, Silver Spring, Maryland 20910 Director's Office: 301.495-4500 Fax: 301.495-1310

www.MontgomeryPlanning.org

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This is to certify that the foregoing is a true and correct copy of a resolution adopted by the Montgomery County Planning Board of the Maryland-National Capital Park and Planning Commission, on motion of Commissioner Norman Dreyfuss, seconded by Commissioner Amy Presley, and unanimously approved at its regular meeting held on Thursday, May 12, 2011, in Silver Spring, Maryland.

Françoise M. Carrier, Chair
Montgomery County Planning Board

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This is to certify that the foregoing is a true and correct copy of a resolution adopted by the Maryland-National Capital Park and Planning Commission, on motion of Commissioner Carrier, and seconded by Commissioner Squire, with Commissioners Parker, Dreyfuss, Cavitt, Vaughns, and Alfandre voting in favor of the motion, and with Commissioners Wells-Harley, Clark, and Presley, being absent, at its regular meeting held on Wednesday, May 18, 2011, in Riverdale, Maryland.

Patricia Colihan Barney, Executive Director

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Housing values in Montgomery County are among the highest in the Washington Metropolitan area. This reflects both strong demand and the County's reputation for the high quality of services, environment, and neighborhoods. While the strength of the housing market has undergirded neighborhood stability and made a Montgomery home a sound investment, it has also produced a chronic shortage of housing that is affordable for much of the County's work force and other moderate and lower income households.

The County developed a landmark inclusionary zoning program, the Moderately Priced Dwelling Unit (MPDU) ordinance in the 1970s. This program was augmented in 2006 by a workforce housing program. The County has concurrently pursued an aggressive program to build publicly assisted housing. However, none of these efforts have been able to satisfactorily address the need for housing that a large segment of County residents and workers can afford.

The County population is forecast to exceed one million by 2013, and to add 172,000 residents between 2010 and 2030, which means that the County will need 75,500 additional housing units in the next 20 years. Due to declining household size, households will grow faster than the population and many existing households will change their housing requirements. The greatest needs will be for seniors, young households, large families, and people with special needs—disabled residents, homeless individuals, and families. There will be strong and growing demand for rental units.

Only four percent of the County land zoned for development remains undeveloped (14,000 acres). That acreage includes environmentally sensitive areas, and most of it is scattered with few large assemblies. It is clear that County housing needs cannot be met by traditional patterns of low-density development that pushed ever outward. As transportation costs grow, the cost of commuting can cancel out any reduction in housing costs, not to mention the effect of increased miles of travel on both air quality and roadway congestion. Moreover, growing concern for the environment and the need to reduce the carbon footprint of development are generating a major shift in both the supply and demand for housing. New housing must be developed by rethinking the future of the County's auto-oriented commercial strips, and its surface parking lots (most of them paved before modern stormwater management requirements existed), and by making the most of opportunities for housing near high quality transit service.

Thus, a combination of forces—a shrinking supply of developable land, higher land costs, rising energy prices, shifts in the County's demographic profile, and environmental constraints—direct us to housing policies that look inward rather than outward to accommodate the housing needs of the next generation for homes and communities that are balanced, convenient, and sustainable. Maintaining an overall balance of housing and jobs in the County is important to meeting affordable housing goals, providing opportunities for people who work in the County to live in the County, and encouraging transit use.

The following definitions are used in this element of the General Plan.

Affordable Housing—Housing is considered affordable when approximately 30 to 35 percent of a household's gross income (for households earning up to 120 percent of area median income) is spent on rent or principal, interest, condominium or homeowners association fees, property taxes, and private mortgage insurance.

Moderate Income—Households earning between 50 and 80 percent of area median income. (This is the U.S. Department of Housing and Urban Development's definition of low income.)

Low Income—Households earning up to 50 percent of area median income. (This is the U.S. Department of Housing and Urban Development's definition of very low income and the County's definition for Low Income included in Chapter 25B of the County Code.)

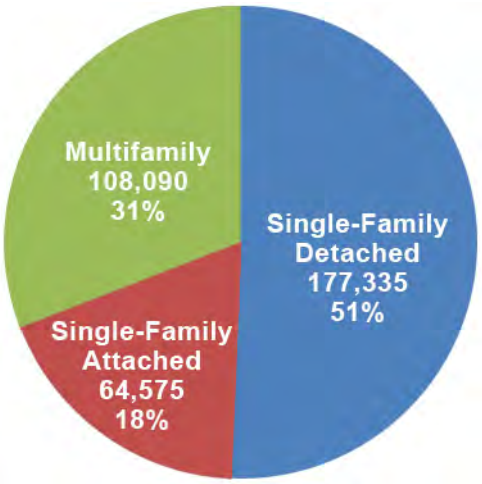
Middle Income—Households earning between 80 and 120 percent of area median income. (This definition includes the income range for the County's voluntary Workforce Housing program.)

goals

1. Conserve and care for existing neighborhoods and the existing housing stock.

In the 20-year period covered by this element of the General Plan, most County neighborhoods can expect to undergo normal turnover as homes change hands. But these small, incremental changes can, over time, produce significant impacts on the neighborhood as families with children replace empty nesters, renters replace owners, and newcomers need different services and facilities. Maintaining the quality of established neighborhoods is essential to sustaining the quality of their homes.

Older neighborhoods of modest single-family and townhomes or garden apartments are especially vulnerable to decline if services are not adapted and maintained, and housing and zoning codes are not enforced. They are also susceptible to tear-down and infill development because they are often well-located in down-County and mid-County areas near employment and shopping centers, services, and public transit routes. These neighborhoods also contain the bulk of housing affordable to households with moderate and middle incomes in Montgomery County—over 140,000 affordable units in 2009. This is double the number of affordable new units that can reasonably be expected to be added to the housing stock by 2030. Master plans, in particular, must devote special attention to protecting existing neighborhoods.



In 2005, about one-half of our households lived in single-family detached houses.

2. Concentrate new housing in mixed-use, transit-oriented areas.

Large scale housing subdivision is nearing its end in Montgomery County. Most of the new housing that will be built during the years covered by this element of the General Plan will be multifamily buildings in mixed-use centers served by public transportation and in redeveloped commercial strips and malls.

Higher densities and smaller units can combine with lower energy and transportation costs to bring the cost of living in the County within affordable ranges for many more residents, whether they are new to the area, acquiring a first home, or changing homes as their needs and circumstances change. Focusing growth in higher density, mixed-use, transit-oriented centers also meets other important planning objectives, including reducing the per capita carbon footprint of new growth, diversifying the housing stock, and creating vibrant pedestrian-oriented communities.

3. Encourage and maintain a wide choice of housing types and neighborhoods for people of all incomes, ages, lifestyles, and physical capabilities at appropriate locations and densities. Implement policies to bridge any housing affordability gaps.

Normal home value appreciation in a strong housing market such as Montgomery County's, the loss of some moderately priced units to redevelopment, and the loss of Moderately Priced Dwelling Units as their control period ends means that the gap between supply and demand of units affordable to low, moderate, and middle income households must be monitored to see if adjustments should be made to policies or programs.

Expected rates of new housing production cannot keep pace with price increases that remove existing units from the market and the need to provide housing to new residents of low and moderate incomes. In 2009, the County had a shortage of 43,000 units that were affordable for households earning less than $90,000 a year (just below the 2009 County median income for a family of four), but that number approaches 50,000 when household size is taken into account. In contrast, a surplus of units was available to those with more than $150,000 in annual household income. Projections completed in 2008, when housing prices were steadily appreciating, estimated that by 2030 it will be difficult for a household with an annual income of $120,000 (in constant 2009 dollars) to afford a home in much of Montgomery County. By then, the gap in affordable housing is estimated to reach 62,000 units. This Housing Element recommends a series of public policy actions that should be taken to reduce the affordability gap.

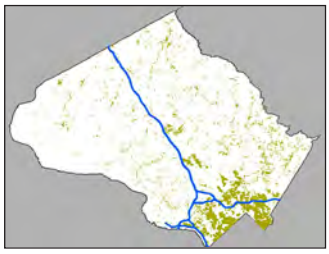
Housing Inventory 1920-2007

1920

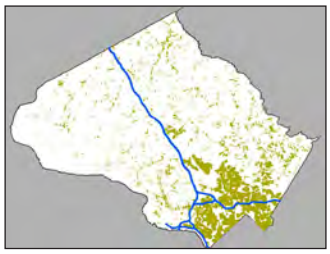
1930

1940

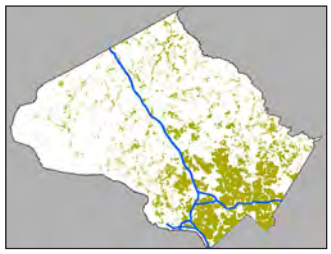
1950



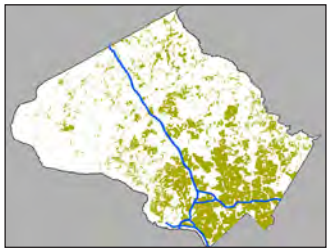
1960



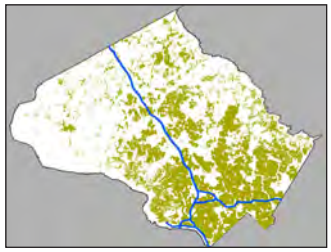
1970



1980

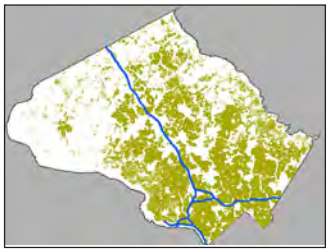


1990



2000

2007



A strategic framework for achieving these goals informs master planning, regulatory reform, public investments and expenditures, and engages the public, private, and independent sectors. It involves the following elements.

- The General Plan's **Wedges and Corridors** remains the framework for development in Montgomery County. This element of the General Plan expects all residential development to conform with Wedges and Corridors as refined by master plans and sector plans.
- **Master plans** must address existing and future housing needs with particular attention to protecting and enhancing neighborhoods that contain a substantial stock of affordable units and to increasing opportunities for a high jobs-housing ratio in areas served by public transportation. Housing should include units affordable to low, moderate, and middle income families.
- **Development regulations** should reflect the goals of providing housing near transit, jobs, and services; producing a wide and diverse range of affordable unit types and sizes; and reducing regulatory requirements and procedures that discourage production of affordable housing units. The Zoning Ordinance should be revised to clarify that housing affordable to low, moderate, and middle income households is a permitted use in all residential zones. Excessive or unnecessary barriers to providing affordable and special needs housing, such as parking or special exception requirements, should be removed. The regulatory system should link provision of housing to nonresidential development by encouraging mixed uses or a fee-in-lieu payment to the County's Housing Initiative Fund.
- **Sufficient revenue sources** are needed to maintain the Housing Initiative Fund and to provide for rental assistance programs. Capital programming must be monitored by the Planning Board, County Executive, and County Council to ensure that funding is available for neighborhood stabilization and improvements such as sidewalks, parks, and other facilities needed for high quality, non-auto mobility.
- **Surplus public properties suitable for affordable housing** should be made available to public and nonprofit agencies for assisted or below market housing. Projects involving the redevelopment of public land or facilities, such as parking facilities, must provide more low, moderate, and middle income affordable housing than the minimum requirement. Property designated as parkland is not considered surplus.
- **Public agencies should collaborate** with and provide technical and/or other forms of assistance to housing cooperatives, faith-based organizations, neighborhood housing groups, and employers to provide for the production and preservation of affordable housing.
- The Planning Board, Executive, and Council should **periodically review the supply and demand** for rental and for-sale housing to determine if adjustments in housing policies or programs are needed to meet the needs of County residents.

Together, these strategies move Montgomery County toward a more sustainable future. The housing stock will be more diverse, more of it will be affordable for people of modest means, and a higher proportion of it will be built in walkable, mixed-use communities that have lower environmental impacts and smaller carbon footprints.

objectives

1. **Housing and Neighborhood Connectivity:** Concentrate most new housing near public transportation and provide easy, multi-modal connections to jobs, schools, shopping, recreation, and other leisure activities.
2. **Diverse Housing and Neighborhoods:** Create diversity in the type and size of units, neighborhoods, facilities, and programs to accommodate current and future residents.
3. **Housing and the Environment:** Provide economically and environmentally sustainable housing and neighborhoods.
4. **Housing and Neighborhood Design:** Create more balanced, attractive, and walkable neighborhoods through regulatory reform of private developments and leadership in design of public projects.

Achieving each objective will require reinforcing current policies and establishing new policies.

Objective 1:

Housing and Neighborhood Connectivity

Concentrate most new housing near public transportation and provide easy, multi-modal connections to jobs, schools, shopping, recreation, and other leisure activities.

Policies

1.1 Build the majority of new housing in transit-oriented locations and near jobs and employment centers.

1.2 Increase infill housing opportunities in suburban office parks, shopping centers, and other underused properties.

1.3 Coordinate infrastructure investment in existing and new neighborhoods to create a high level of mobility options that connect people to where they live, work, shop, and play.

1.4 As older strip commercial areas and surface parking lots are redeveloped, include housing and improve non-vehicular connectivity through the most direct pedestrian and bike routes between homes, jobs, retail, recreation, schools, and public services.

Objective 2:

Diverse Housing and Neighborhoods

Create diversity in the type and size of units, neighborhoods, facilities, and programs to accommodate current and future residents.

Policies

2.1 Strengthen the stability of established neighborhoods through targeted programs that improve schools, parks, safety, and new or upgraded pedestrian and bicycling facilities.

2.2 Make housing affordable to low, moderate, and middle income households a priority in all parts of the County.

2.3 Encourage neighborhood diversity with a range of unit sizes, types, and occupancy (including rental and ownership options).

2.4 Ensure that infill development complements existing housing and neighborhoods.

2.5 Mix housing with other uses with special care in ways that promote compatibility and concern for residents' need for safety, privacy, and attractive neighborhoods.

2.6 Provide for appropriate redevelopment of residential property when conditions warrant.

2.7 Protect residential neighborhoods from excessive traffic and discourage spill-over parking from nonresidential areas.

2.8 Create mixed-use neighborhoods with local small retail businesses and basic services within walking distance of housing.

2.9 Use special care to plan uses at the edges of high-density centers that are compatible with existing neighborhoods.

2.10 Encourage shared parking facilities in high-density, transit-oriented, mixed-use developments to reduce parking and environmental costs in new housing construction. Encourage parking to be provided as a separately priced and purchased amenity in high-density areas.

2.11 Continue the partnership between Montgomery County and the Housing Opportunities Commission to acquire vacated properties for affordable and low, moderate, and middle income housing, including land donations from banks, grant programs, and other charitable groups.

2.12 Encourage housing cooperatives, faith-based organizations, neighborhood housing groups, and employers to use their existing property or to purchase land and buildings for the production and preservation of housing affordable to households with low and moderate incomes.

2.13 Provide underused and strategically located surplus public properties for housing, including units affordable to low and moderate income households, at a higher percentage than required in the MPDU program and using best design practices. Property that is designated as parkland is not considered surplus.

2.14 Encourage projects that mix condominiums and rental units, allowing income restricted units to avoid high condominium fees.

2.15 Promote full inclusion of all ages, stages of life, and physical abilities by encouraging design and construction that incorporate visit-ability and live-ability features in new construction and major renovations.

2.16 Promote efforts to make it easier for seniors to stay in their homes as long as they desire. Develop programs and partnerships to help small households and seniors find and occupy housing that is right-sized for their needs, so that oversized homes do not become a burden and so the existing housing stock is available for appropriately sized households.

2.17 Discourage deterioration of housing through enforcement of housing codes.

2.18 Enforce housing and zoning codes to prevent overcrowding.

2.19 Encourage licensed child and adult daycare facilities in mixed-use developments.

Objective 3:

Housing and the Environment

Provide economically and environmentally sustainable housing and neighborhoods.

Policies

3.1 Continue to adopt green and energy efficient building standards for new construction (such as the International Energy Conservation Code) and encourage the use of green and energy efficient design and materials in residential renovations and retrofits to create more sustainable housing, on-site energy production, and water conservation and re-use.

3.2 Reduce parking requirements for residential units near transit and within parking lot districts to decrease impervious surfaces and carbon emissions, and to increase affordability.

3.3 Consider appropriate incentives for the use of pervious pavers and other materials and strategies that reduce stormwater runoff. These techniques should mitigate the impact of allowable impervious surface rather than increase the footprint of development above what is currently permitted.

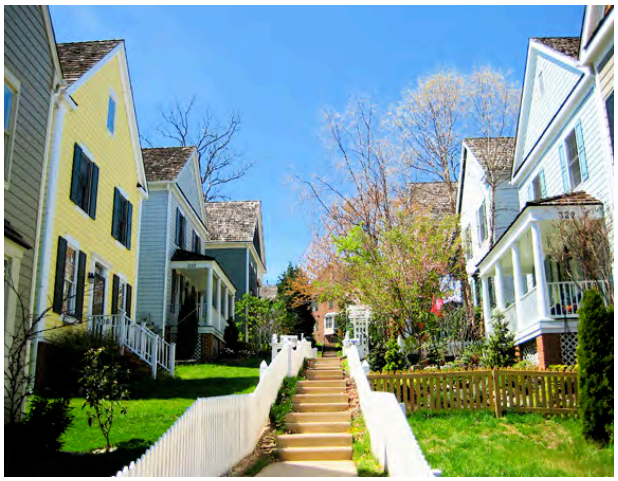
3.4 Encourage smaller housing units that can serve changing households and reduce energy costs.

3.5 Promote the use of federal, state, local, and private programs available for rehabilitating older housing units so that they are energy efficient and healthy.

3.6 Require best practices in stormwater management and gray water strategies, including green roofs, swales, and filtering combined with underground storage tanks for controlled release as well as reuse.

3.7 Require conservation of tree canopy and sustainable site design, including native plants and conservation landscaping techniques as well as soil decompaction strategies.

3.8 Invest in public infrastructure including transit, water and sewer, and stormwater management to keep neighborhoods healthy.



Objective 4.

Housing and Neighborhood Design

Create more balanced, attractive, and walkable neighborhoods through regulatory reform of private developments and leadership in design of public projects. Ensure that the regulatory process does not pose barriers to housing production, especially for housing affordable to low, moderate, and middle income households.

Policies

4.1 Plan for transit-oriented neighborhoods that provide a full range of housing opportunities for all residents, including the work force employed in the transit corridor.

4.2 Facilitate the production of attractive housing and neighborhoods with innovative design of the public realm and architecture, including creative building techniques, materials, and mix of unit types.

4.3 Create design guidelines to help define quality public spaces and walkable communities.

4.4 Create pedestrian-oriented public spaces to support the needs of a diverse population.

4.5 Include housing affordable to low, moderate, and middle income households in all suitable public building projects in appropriate locations throughout the County.

4.6 Encourage new and innovative construction techniques and products, such as green technologies and modular components.

4.7 Review whether uses that contribute to diversity in housing, and to walkable, transit-oriented communities, and that are currently approved by special exception should be allowed by right if appropriate conditions and standards are in place.

4.8 Expedite approval reviews for housing that meets the strategic objectives of affordability, environmental sustainability, and transit serviceability.

4.9 Continue efforts to consolidate sequential review and approval processes into one coordinated, concurrent process.

4.10 Ensure that all master plan and sector plan amendments address the need for housing for low, moderate, and middle income households, and promote specific strategies to meet that need including height and density incentives and flexibility.

Resolution No.: 17-78
Introduced: March 29, 2011
Adopted: March 29, 2011

COUNTY COUNCIL FOR MONTGOMERY COUNTY, MARYLAND SITTING AS A DISTRICT COUNCIL FOR THAT PORTION OF THE MARYLAND-WASHINGTON REGIONAL DISTRICT WITHIN MONTGOMERY COUNTY, MARYLAND

By: District Council

SUBJECT: Approval of Housing Element of the General Plan

Background

1. On July 30, 2009 the Montgomery County Planning Board transmitted to the County Executive and the County Council the Planning Board Draft of the Housing Element of the General Plan.

2. The Planning Board Draft Housing Element of the General Plan amends the Housing Element of the 1993 General Plan (on Wedges and Corridors) Refinement for the Physical Development of the Maryland-Washington Regional District in Montgomery and Prince George's Counties.

3. On September 29, 2009 the County Executive transmitted to the County Council his fiscal analysis of and suggested amendments to the Planning Board Draft of the Housing Element of the General Plan.

4. On December 1, 2009 the County Council held a public hearing regarding the Planning Board Draft of the Housing Element of the General Plan. The Housing Element was referred to the Planning, Housing, and Economic Committee for review and recommendation.

5. On January 20, March 7, March 14, March 15, and March 21, 2011 the Planning, Housing, and Economic Development Committee held worksessions to review the issues raised in connection with the Planning Board Draft of the Housing Element of the General Plan.

6. On March 29, 2011 the County Council reviewed the Planning Board Draft of the Housing Element of the General Plan and the recommendations of the Planning, Housing, and Economic Development Committee.

Action

The County Council for Montgomery County, Maryland, sitting as the District Council for that portion of the Maryland-Washington Regional District in Montgomery County, Maryland approves the following resolution:

The Planning Board Draft of the Housing Element to the General Plan dated July 2009 is approved with revisions. The County Council revises pages 6 through 18 of the Planning Board Draft as specified in the attachment to this resolution. Deletions to the text of the Housing Element are indicated by [brackets] and additions by underscoring.

The Council requests that the Implementation table that is included in pages 16 through 18 of the Planning Board Draft of the Housing Element and that is deleted as a part of the Council's revisions, be updated by the County Executive and included in his draft housing policy that he expects to transmit to the Council in the summer of 2011.

This is a correct copy of Council action.

Linda M. Lauer

Linda M. Lauer, Clerk of the Council

Challenges and Goals

Housing values in Montgomery County are among the highest in the Washington Metropolitan area. This reflects both strong demand and the County's reputation for providing a high quality of services, environment, and neighborhoods. While the strength of the housing market has under girded neighborhood stability and made a Montgomery home a sound investment, it has also produced a chronic shortage of housing that is affordable for much of the County's work force and other moderate and lower income households.

The County developed a landmark mandatory inclusionary zoning program, the Moderately Priced Dwelling Unit (MPDU) ordinance in the 1970s. This program was augmented in 2006 by a workforce housing program. The County has concurrently pursued an aggressive program to build publicly assisted housing. However, none of these efforts have been able to satisfactorily address the need for housing that a large segment of County residents and workers can afford.

The County population is forecasted to exceed one million by 2013 and to add 172,000 residents between 2010 and 2030, which means that the County will need 75,500 additional housing units in the next 20 years. Due to declining household size, households are expected to grow faster than the population, and many existing households will change their housing requirements. The greatest needs will be for seniors, young households, large families, and people with special needs—disabled residents, homeless individuals, and families. There will be strong and growing demand for rental units.

Only four percent of the County land zoned for development remains undeveloped (14,000 acres). That acreage includes environmentally sensitive areas, and most of it is scattered with few large assemblies. It is clear that County housing needs cannot be met by traditional patterns of low-density development that pushed ever outward. As transportation costs grow, the cost of commuting can cancel out any reduction in housing costs, not to mention the effect of increased travel miles on both air quality and roadway congestion. Moreover, growing concern for the environment and the need to reduce the carbon footprint of development are generating a major shift in both the supply and demand for housing. New housing must be developed by rethinking the future of the County's auto-oriented commercial strips and surface parking lots (most of them paved before modern stormwater management requirements existed), and by making the most of opportunities for housing near high quality transit service.

Thus, a combination of forces—a shrinking supply of developable land, higher land costs, rising energy prices, shifts in the County's demographic profile, and environmental constraints—direct us to housing policies that look inward rather than outward to accommodate the housing needs of the next generation for homes and communities that are balanced, convenient, and sustainable. Maintaining an overall balance of housing and jobs in the County is important to meeting affordable housing goals, providing opportunities for people who work in the County to live in the County, and encouraging transit use.

[challenges and goals

Housing values in Montgomery County are among the highest in the Washington Metropolitan area. This reflects both strong demand and the County's reputation for the high quality of services, environment, and neighborhoods. While the strength of the housing market has under girded neighborhood stability and made a Montgomery home a sound investment, it has also produced a chronic shortage of housing that is affordable for much of the County's work force and other moderate and lower income households.

- 91 percent of the County's residential zoning capacity has been reached.
- By 2015, the County will have more than one million residents.
- By 2030, the County will need about 72,000 new housing units.
- Since 1999, rising home values have priced 50,000 existing housing units beyond the financial capacity of moderate-income households.
- The current rate of affordable housing production cannot keep pace with price increases that are removing these units from the market.

Beginning in the 1970s, the County responded to this need with one of the nation's most successful and highly regarded inclusionary housing programs, the Moderately Priced Housing Unit (MPDU) ordinance, which required all new developments above a threshold number to provide a percentage of its units at prices affordable for households with incomes no greater than 60 percent of the area median. In 2005, the MPDU law was amended to lengthen to 99 years the period of time during which an MPDU home must remain available at a below market price when transferred to a new owner or tenant. In 2006, the County required that 10 percent of new market rate housing units built in areas served by Metro transit stations be available to "work force" households with incomes between 80 and 120 percent of the area median.

Neither of these programs, nor an aggressive program to build publicly assisted housing, have been able to meet the need for housing that a large segment of County residents and workers can afford within 30 percent of their annual household income.

- Affordable housing should cost no more than 30 percent of a household's gross annual income.
- The 2007 median income in Montgomery County for a household of four was $94,500, which would allow a $2,363 monthly mortgage payment on a house valued at about $346,500.

County population is forecast to exceed one million by 2015, and to add 155,000 residents and 72,000 households between 2010 and 2030. Due to declining household size, households will grow faster than the population and many existing households will change their housing requirements. The greatest needs will be for seniors, young households, large families, and people with special needs—disabled residents, homeless individuals, and families. There will be strong and growing demand for rental units.

Aside from licensed multifamily rental apartments, in Montgomery County
there are:
- 13,500 registered single-family rental units
- 5,742 registered condo rental units
- 211 registered single-family accessory apartments.

Ninety-one percent of the County's residentially zoned land had been developed or approved for development by 2009. Less than 14,000 acres remain in the development envelope for green field development. It is clear that County housing needs cannot be met by traditional patterns of low-density development that pushed ever outward. As transportation costs grow, the cost of commuting can cancel out any reduction in housing costs, not to mention the effect of increased miles of travel on both air quality and roadway congestion. Moreover, growing concern for the environment and the need to reduce the carbon footprint of development are generating a major shift in both the supply and demand for housing. New housing must be developed by rethinking the future of the County's 106 auto-oriented commercial strips, and its 8,000 acres of surface parking lots (most of them paved before modern stormwater management requirements existed), and by making the most of opportunities for housing near high quality transit service.

Thus, a combination of forces—a shrinking supply of developable land, higher land costs, rising energy prices, shifts in the County's demographic profile, and environmental constraints—direct us to housing policies that look inward rather than outward to accommodate the housing needs of the next generation for homes and communities that are balanced, convenient, and sustainable.]

Definitions

The following definitions are used in this element of the General Plan.

Affordable Housing – Housing is considered affordable when approximately 30%-35% of a household's gross income (for households earning up to 120% of area median income) is spent on rent or principal, interest, condominium or homeowners association fees, property taxes, and private mortgage insurance.

Moderate income – households earning between 50% and 80% of area median income (This is the United State's Department of Housing and Urban Development's definition of low income).

Low Income – households earning up to 50% of area median income (This is the United State's Department of Housing and Urban Development's definition of very low income and the County's definition for Low Income included in Chapter 25B of the County Code).

Middle Income – households earning between 80% and 120% of area median income. (This definition includes the income range for the County's voluntary Workforce Housing program.)

Goals

1. Conservation and care of existing neighborhoods and the existing housing stock.

[Conservation of the stable neighborhoods and the existing housing stock.]

In the 20-year period covered by this element of the General Plan most County neighborhoods can expect to undergo normal turnover as homes change hands. But these small, incremental changes can, over time, produce significant impacts on the neighborhood as families with children replace empty nesters, renters replace owners, and newcomers need different services and facilities. Maintaining the quality of established neighborhoods is essential to sustaining the quality of their homes. Older neighborhoods of modest single-family and townhomes or garden apartments are especially vulnerable to decline if services are not adapted and maintained, and housing and zoning codes are not enforced. They are also susceptible to tear-down and infill development because they are often well-located in down-County and mid-County areas near employment and shopping centers, services, and public transit routes. These neighborhoods also contain the bulk of housing affordable to households with moderate and middle incomes [affordable and workforce housing] in Montgomery County—over 140,000 affordable units in 2009. This is double the number of affordable new units that can reasonably be expected to be added to the housing stock by 2030. Master plans, in particular, must devote special attention to protecting existing neighborhoods.

In 2005, about one-half of our households lived in single-family detached houses.

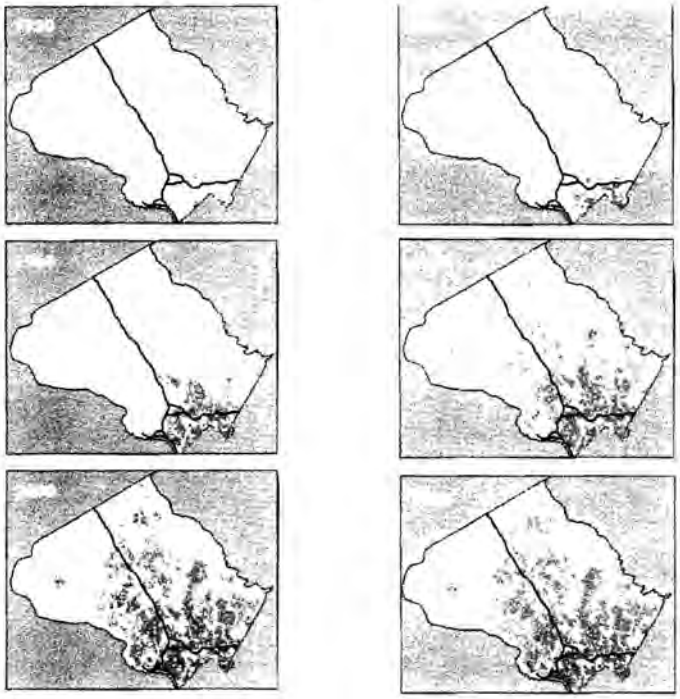
2. Concentrate new housing in mixed-use, transit-oriented areas.

Large scale housing subdivision is nearing its end in Montgomery County. Most of the new housing that will be built during the years covered by this element of the General Plan will be multifamily buildings in mixed-use centers served by public transportation and in redeveloped commercial strips and malls. Higher densities and smaller units can combine with lower energy and transportation costs to bring the cost of living in the County within affordable ranges for many more residents, whether they are new to the area, acquiring a first home, or changing homes as their needs and circumstances change. Focusing growth in higher density, mixed-use, transit-oriented centers also meets other important planning objectives, including reducing the per capita carbon footprint of new growth, diversifying the housing stock, and creating vibrant pedestrian-oriented communities.

3. Encourage and maintain a wide choice of housing types and neighborhoods for people of all incomes, ages, lifestyles, and physical capabilities at appropriate locations and densities. Implement policies to bridge any housing affordability gaps. [Close the housing affordability gap.]

Normal home value appreciation in a strong housing market such as Montgomery County's, loss of some moderately priced units to redevelopment, and loss of Moderately Priced Dwelling Units as their control period ends mean that the gap between supply and demand of units affordable to low, moderate, and middle income households must be monitored to see if adjustments should be made to policies or programs. [of others as their period of MPDU price management expires makes closing the gap between the demand and supply of affordable and workforce housing an urgent concern. From 1999 to 2009, rising values alone priced 50,000 units of the existing housing stock beyond the financial capacity of moderate income buyers and renters.] Expected rates of new housing production cannot keep pace with price increases that remove existing units from the market and the need to provide housing to new residents of low and moderate incomes. In 2009, the County had a shortage of 43,000 units that were affordable for households earning less than $90,000 a year (just below the 2009 County median income for a family of four), but that number approaches 50,000 when household size is taken into account. In contrast, a surplus of units was available to those with more than $150,000 in annual household income. [If current trends continue,] Projections completed in 2008 when housing prices were steadily appreciating estimated that by 2030 it will be difficult for a household with an annual income of $120,000 (in constant 2009 dollars) to afford a home in much of Montgomery County. By then, the gap in affordable housing is estimated to reach 62,000 units. This Housing Element recommends a series of public policy actions that should be taken to reduce the affordability gap.

Housing Inventory 1920-1970



A Strategic Framework

A strategic framework for achieving these goals informs master planning, regulatory reform, public investments and expenditures, and engages the public, private, and independent sectors. It involves the following elements:

- The General Plan's **Wedges and Corridors** remains the framework for development in Montgomery County. This element of the General Plan expects all residential development to conform with Wedges and Corridors as refined by master plans and sector plans.

- **Master plans** must address existing and future housing needs with particular attention to protecting and enhancing neighborhoods that contain a substantial stock of affordable units and to increasing opportunities for a high jobs-housing ratio [including affordable housing] in areas served by public transportation. Housing should include units affordable to low, moderate, and middle income households.

- **Development regulations** should [be revised to require provision of] reflect the goals of providing housing near transit, jobs, and services; [to provide incentives for] producing a wide and diverse range of affordable unit types and sizes; and [to reduce] reducing regulatory requirements and procedures that discourage production of affordable housing units. The Zoning Ordinance should be revised to clarify that housing affordable to low, moderate, and middle income households [affordable housing] is a permitted use in all residential zones. Excessive or unnecessary barriers to the provision of affordable and special needs housing, such as parking or special exception requirements, should be removed. The regulatory system should link provision of housing to nonresidential development by encouraging mixed uses or a fee-in-lieu payment to the County's Housing Initiative Fund.

- **[New] Sufficient revenue sources** are needed to maintain the Housing Initiative Fund, and to provide for rental assistance programs. Capital programming must be monitored by the Planning Board, [and the] County Executive, and the County Council to ensure that funding is available for neighborhood stabilization and improvements, such as sidewalks, parks, and other facilities needed for high quality, non-auto mobility.

- **[Appropriately located surplus public land] Surplus public properties suitable for affordable housing** should be made available to public and nonprofit agencies for assisted or below market housing. Projects involving the redevelopment of public land or facilities, such as parking facilities, must provide more low, moderate, and middle income affordable housing than the minimum requirement. Property that is designated as park land is not considered surplus.

- **Public agencies should collaborate** with and provide technical and/or other forms of assistance [and grants] to housing cooperatives, faith-based organizations, [and] neighborhood housing groups, and employers to provide for the production and preservation of affordable housing.

- The Planning Board, Executive, and Council should periodically review the supply and demand for rental and for-sale housing to determine if adjustments in housing policies or programs are needed to meet the needs of county residents.

Together, these strategies move Montgomery County toward a more sustainable future. The housing stock will be more diverse, more of it will be affordable for people of modest means, and a higher proportion of it will be built in walkable, mixed-use communities that have lower environmental impacts and smaller carbon footprints.

Objectives

1. **Housing and Neighborhood Connectivity**: Concentrate most new housing near public transportation and provide easy, multi-modal connections to jobs, schools, shopping, recreation, and other leisure activities.
2. **Diverse Housing and Neighborhoods:** Create diversity in the type and size of units, neighborhoods, facilities, and programs to accommodate current and future residents.
3. **Housing and the Environment:** Provide economically and environmentally sustainable housing and neighborhoods.
4. **Housing and Neighborhood Design:** Create more balanced, attractive, and walkable neighborhoods through regulatory reform of private developments and leadership in design of public projects.

Achieving each objective will require reinforcing current policies and establishing new policies.

Housing Strategies

Objective 1:
Housing and Neighborhood Connectivity

Concentrate most new housing near public transportation and provide easy, multi-modal connections to jobs, schools, shopping, recreation, and other leisure activities.

Policies

1.1 Build the majority of new housing in transit-oriented locations and near jobs and employment centers.

1.2 Increase infill housing opportunities in suburban office parks, shopping centers, and other underused properties.

1.3 Coordinate infrastructure investment in existing and new neighborhoods to create a high level of mobility options that connect people to where they live, work, shop, and play.

[1.4 Provide housing for County employees at or near their job sites, such as at schools, large parks, and other County facilities to reduce housing costs for employees as well as vehicle miles traveled.]

1.[5] 4 As older strip commercial areas and surface parking lots are redeveloped, include housing and improve non-vehicular connectivity through the most direct pedestrian and bike routes between homes, jobs, retail, recreation, schools, and public services.

Objective 2:

Diverse Housing and Neighborhoods

Create diversity in the type and size of units, neighborhoods, facilities, and programs to accommodate current and future residents.

Policies

2.1 Strengthen the stability of established neighborhoods through targeted programs that improve schools, parks, safety and [,] new or upgraded pedestrian and bicycling facilities.

2.2 Make housing affordable to low, moderate, and middle income households [affordable and workforce housing] a priority in all parts of the County.

2.3 Encourage neighborhood diversity with a range of unit sizes, types, and occupancy (including rental and ownership options).

2.4 Ensure that infill development complements existing houses and neighborhoods.

2.5 Mix housing with other uses with special care in ways that promote compatibility and concern for residents' need for safety, privacy, and attractive neighborhoods.

2.6 Provide for appropriate redevelopment of residential property when conditions warrant.

2.7 Protect residential neighborhoods from excessive traffic and discourage spill-over parking from non-residential areas.

[2.4 Allow accessory apartments in residential zones by-right under appropriate design standards and conditions.]

2.[5] 8 Create mixed-use neighborhoods with local small retail businesses and basic services within walking distance of housing.

2.9 Use special care to plan uses at the edges of high-density centers that are compatible with existing neighborhoods.

2.[6] 10 Encourage shared parking facilities in high-density, transit-oriented, mixed-use developments to reduce parking and environmental costs in new housing construction. Encourage parking to be provided as a separately priced and purchased amenity in high density areas.

[2.7 Encourage licensed child and adult daycare facilities in mixed-use developments; allow them by-right in appropriate high-density locations.]

[2.8 Provide tax relief for income-eligible seniors beyond the homeowner's property tax credit so they can afford to stay in their neighborhoods as long as they desire.]

2.[9] 11 [Create a] Continue the partnership between Montgomery County and the Housing Opportunities Commission to acquire vacated properties for affordable [and workforce] low, moderate, and middle housing, including land donations from banks, grant programs, and other charitable groups.

2.[10] 12 Encourage housing cooperatives, faith-based organizations, neighborhood housing groups, and employers to use their existing property or to purchase land and buildings for the production and

preservation of [affordable and workforce housing] housing affordable to households with low and moderate incomes.

2.13 Provide underused and strategically located surplus public properties for housing, including units affordable to low and moderate income households at a higher percentage than required in the MPDU program and using best design practices. Property that is designated as park land is not considered surplus.

2.[11] 14 [Amend housing policies to] Encourage projects that mix condominiums and rental units, allowing income restricted units to avoid high condominium fees.

2.[12] 15 Promote full inclusion of all ages, stages of life, and physical abilities by encouraging design and construction that incorporate visit-ability and live-ability features in new construction and major renovations. [using standard accessibility features in all new or renovated housing.]

2.[13] 16 Promote efforts to make it easier for seniors to stay in their homes as long as they desire. Develop programs and partnerships to help small households and seniors find and occupy housing that is right-sized for their needs, so that oversized homes do not become a burden and so the existing housing stock is available for appropriately sized households.

2.17 Discourage deterioration of housing through diligent enforcement of housing codes.

2.[14] 18 Enforce housing and zoning codes to prevent overcrowding.

2.19 Encourage licensed child and adult daycare in facilities in mixed-use developments.

Objective 3:

Housing and the Environment

Provide economically and environmentally sustainable housing and neighborhoods.

Policies

3.1 Continue to adopt green and energy efficient building standards for new construction (such as the International Energy Conservation Code) and encourage the use of green and energy efficient design and materials in residential renovations and retrofits to create more sustainable housing, on-site energy production, and water conservation and re-use.

[Require green and energy efficient design and materials to reduce operating and maintenance cost for residents and to create more sustainable housing by increasing the number of buildings and units built or retrofitted for energy efficiency, on-site energy production, and water conservation and reuse.]

3.2 Reduce parking requirements for residential units near transit and within parking lot districts to decrease impervious surfaces and carbon emissions and increase affordability.

3.3 [Provide stormwater management fee credits for] Consider appropriate incentives for the use of pervious pavers and other materials and strategies that reduce stormwater runoff. These techniques should mitigate the impact of allowable impervious surface rather than increase the footprint of development above what is currently permitted.

3.4 Encourage smaller housing units that can serve changing households and reduce energy costs.

3.5 [Provide tax credits] Promote the use of federal, state, local, and private programs available for rehabilitating older housing units so that they are energy efficient and healthy.

3.6 Require best practices in stormwater management and grey water strategies, including green roofs, swales, and filtering combined with underground storage tanks for controlled release as well as reuse.

3.7 Require [preservation] conservation of tree canopy and sustainable site design, including native plants and conservation landscaping techniques as well as soil decompactation strategies.

3.8 Invest in public infrastructure including transit, water and sewer, and stormwater management to keep neighborhoods healthy.

Objective 4.

Housing and Neighborhood Design

Create more balanced, attractive, and walkable neighborhoods through regulatory reform of private developments and leadership in design of public projects. Ensure that the regulatory process does not pose barriers to housing production, especially for housing affordable to low, moderate, and middle income households.

Policies

4.1 Plan for transit-oriented neighborhoods that provide a full range of housing opportunities for all residents, including the work force employed in the transit corridor.

4.2 Facilitate the production of attractive housing and neighborhoods with innovative design of the public realm and architecture, including creative building techniques, materials, and mix of unit types.

4.3 Create design guidelines to help define quality public spaces and walkable communities.

4.4 Create pedestrian-oriented public spaces to support the needs of a diverse population.

4.5 Include [affordable and workforce housing] housing affordable for low, moderate, and middle income households in all suitable public building projects in appropriate locations throughout the County.

[4.6 Provide underused and strategically located surplus public properties for housing, using best design practices to set higher standards and achieve design excellence.]

4.[7] 6 Encourage new and innovative construction techniques and products, such as green technologies and modular components.

4.7 Review whether uses that contribute to diversity in housing and walkable transit oriented communities and are currently approved by special exception should be allowed by right if appropriate conditions and standards are in place.

4.8 Expedite approval reviews for housing that meets the strategic objectives of affordability, environmental sustainability, and transit serviceability.

4.9 Continue efforts to consolidate sequential review and approval process into one coordinated, concurrent process.

4.10 Ensure that all master plan and sector plan amendments address the need for housing for low, moderate, and middle income households and promote specific strategies to meet that need including height and density incentives and flexibility.

[Implementation

The recommendations of this report will be implemented through various mechanism and processes by a number of different entities. These recommendations may become a formal part of a master plan or sector plan, and subsequently become the subject of a federal or State program or grant. The improvements may be funded by a mix of local, State, and federal funds, as well as donations from the private sector. The development community may be involved in any or all stages of design and construction.

Residential infill, for example, can take place in existing residential communities, suburban office parks, older commercial strip shopping center, and through residential conversion of non-residential buildings. The County, M-NCPPC, HOC, the development community (profit and not-for-profit developers), State and federal agencies, and utilities would all have varying degrees of involvement and responsibility in achieving infill developments. The following chart shows the anticipated coordination linkages in a general way. It identifies only the lead responsibility by different entities even though all would have some level of involvement and role in achieving these recommendations.

According to Section 26-5 (a) of the Montgomery County Code, every dwelling unit must contain at least 150 square feet of habitable floor area for the first occupant and at least 100 square feet of habitable floor area for every additional occupant.

Interagency Coordination Matrix	MC	M-NCPPC	HOC	Developers	State	Federal	Utilities	Financial & Insurers
Housing Goals								
1. Conserve stable neighborhoods and existing housing stock	✓	✓						
2. Concentrate new housing in mixed-use, transit-oriented areas.	✓			✓				
3. Close the affordability gap	✓		✓					
Objective 1: Housing and Neighborhood Connectivity								
1.1 Build most new housing in transit-oriented, mixed-used locations.		✓		✓				
1.2 Increase infill housing opportunities...		✓						
1.3 Coordinate infrastructure investment in existing and new neighborhoods...	✓				✓		✓	
1.4 Provide housing for County employees at or near their job sites...	✓							
1.5 As older strip commercial areas and surface parking lots are redeveloped, include housing and improve non-vehicular connectivity...	✓	✓						
Objective 2: Diverse Housing and Neighborhoods								
2.1 Strengthen the stability of established neighborhoods through targeted programs...	✓							
2.2 Make affordable housing a priority in all parts of the County.	✓							
2.3 Encourage neighborhood diversity through a range of unit sizes, types, and occupancy...		✓						
2.4 Allow accessory apartments in residential zones by-right under appropriate design standards and conditions.		✓						
2.5 Create mixed-use neighborhoods with small retail businesses/basic services in walking distance of housing.		✓		✓				
2.6 Encourage shared parking facilities in mixed-use developments ... Allow parking to be provided as a separately priced and purchased amenity.	✓	✓						
2.7 Encourage child and adult day care facilities in mixed-use developments; allow them by-right in appropriate high-density locations.		✓						
2.8 Provide tax relief for income-eligible seniors above and beyond the homeowner's property tax credit program...	✓				✓			
2.9 Create a partnership between Montgomery County and the Housing Opportunities Commission to acquire vacated properties for affordable housing...	✓		✓					
2.10 Encourage housing cooperatives, faith-based organizations, and neighborhood housing groups to use their existing property or to purchase land and buildings for the production and preservation of affordable housing.	✓							✓
2.11 Amend housing policies to encourage housing projects that mix condominiums and rental units...	✓							✓

Interagency Coordination Matrix	MC	M-NCPPC	HOC	Developers	State	Federal	Utilities	Financial & Insurers
2.12 Promote full inclusion of all ages, stages of life, and physical abilities by using standard accessibility features in all new or renovated housing.	✓		✓	✓				
2.13 Develop programs to help small households and seniors find and occupy housing that is right-sized for their needs...	✓					✓		
Objective 3: Housing and the **Environment**								
3.1 Require green and energy efficient design and materials ... increasing the number of buildings and units built or retrofitted for energy efficiency, onsite energy production, and water conservation and reuse.	✓	✓				✓		
3.2 Reduce parking requirements for residential units near transit and within parking lot districts...	✓							
3.3 Provide storm water management credits for pervious pavers and other materials and strategies that reduce storm water runoff...	✓							
3.4 Encourage smaller housing units/serve changing households/reduce energy costs.				✓				✓
3.5 Provide tax credits for rehabilitation of older housing units so that they are energy-efficient and healthy.	✓				✓	✓		
3.6 Require best practices in stormwater management and grey water strategies, including green roofs, swales, and filtering ...	✓	✓						
3.7 Require sustainable site design...	✓	✓						
3.8 Invest in public infrastructure ...to keep neighborhoods healthy.	✓				✓		✓	
Objective 4: Housing and Neighborhood **Design**								
4.1 Plan for transit-oriented neighborhoods that provide a full range of housing opportunities...		✓		✓				
4.2 Facilitate the production of attractive housing and neighborhoods with innovative design of the public realm and architecture...		✓		✓				
4.3 Create design guidelines to help define quality public spaces and walkable communities.		✓						
4.4 Create pedestrian-oriented public spaces to support the needs of a diverse population.	✓			✓				
4.5 Include affordable housing in all suitable public building projects...	✓				✓	✓		
4.6 Provide underused and strategically located surplus public properties for housing...	✓							
4.7 Encourage new/innovative construction techniques/products, such as green technologies and modular components.	✓						✓	

]

Appendix

Online at www.montgomeryplanning.org/community/housing/index.shtm

March 27, 2008

Review of County's Housing Policies

April 11, 2008

Housing Inventory Slide Show

April 17, 2008

Review of Housing Master Plans, Staff Report

The Housing Goals of the General Plan

May 15, 2008

Legislative Issues, Staff Report

The Affordable Housing Task Force Recommendations

Pro Forma Analysis of MPDU Bonus Density

MPDU Site Bonus Density

MPDU Site Design Guidelines

Affordable Housing Task Force Excerpt

May 29, 2008

Examination of Neighborhood Change, Staff Report

Examination of Neighborhood Change Using Indicators, PowerPoint presentation

June 2, 2008

Housing Supply & Demand, Staff Report

Demographic Analysis

Housing Supply Analysis

Housing Market Trends

Housing Supply & Demand Analysis

Housing Supply & Demand PowerPoint presentation

The website also includes links to the speakers and PowerPoint presentations that were part of the 2007-2008 Excellence in Planning speaker series.

A plan provides comprehensive recommendations for the use of public and private land. Each plan reflects a vision of the future that responds to the unique character of the local community within the context of a countywide perspective.
Together with relevant policies, plans should be referred to by public officials and private individuals when making land use decisions.

The Plan Process

The PUBLIC HEARING DRAFT PLAN is the formal proposal to amend an adopted master plan or sector plan. Its recommendations are not necessarily those of the Planning Board; it is prepared for the purpose of receiving public testimony. The Planning Board holds a public hearing and receives testimony, after which it holds public worksessions to review the testimony and revise the Public Hearing Draft Plan as appropriate. When the Planning Board's changes are made, the document becomes the Planning Board Draft Plan
The PLANNING BOARD DRAFT PLAN is the Board's recommended Plan and reflects their revisions to the Public Hearing Draft Plan. The Regional District Act requires the Planning Board to transmit a plan to the County Council with copies to the County Executive who must, within sixty days, prepare and transmit a fiscal impact analysis of the Planning Board Draft Plan to the County Council. The County Executive may also forward to the County Council other comments and recommendations.
After receiving the Executive's fiscal impact analysis and comments, the County Council holds a public hearing to receive public testimony. After the hearing record is closed, the Council's Planning, Housing, and Economic Development (PHED) Committee holds public worksessions to review the testimony and makes recommendations to the County Council. The Council holds its own worksessions, then adopts a resolution approving the Planning Board Draft Plan, as revised.
After Council approval the plan is forwarded to the Maryland-National Capital Park and Planning Commission for adoption. Once adopted by the Commission, the plan officially amends the master plans, functional plans, and sector plans cited in the Commission's adoption resolution.

Housing Element of the General Plan

Approved and Adopted

April 2011

Montgomery County Planning Department • M-NCPPC

www.MontgomeryPlanning.org

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