



Frederick County Planning Commission

AGENDA

Wednesday December 7, 2016

9:00 am

3rd Floor Meeting Room, Winchester Hall, 12 E Church St. Frederick, MD

APPROVED: _____

NOTICES AND REMINDERS

The County's lobbying ordinance (Chapter 1-7.2 of the code) requires the registration of individuals and entities that qualify as lobbyists. If you will be testifying before the Planning Commission, the ordinance may require that you register as a lobbyist. If you have a question as to the applicability of this ordinance, please contact the County Attorney's Office at (301) 600-1030.

Please turn off all cell phones and other electronic devices during planning commission meetings. If you must attend to business or engage in a private conversation, please exit the hearing room so as not to disrupt the meeting.

Agenda items will be reviewed in succession. It is the responsibility of the applicant and other persons of record to be prepared to discuss their agenda item during the respective session.

The Commission will break for lunch at approximately 12:00 or 12:30 pm if the meeting is expected to continue into the afternoon.

Providing Public Testimony

- Any individual who wishes to testify on an agenda item is required to be sworn in at the beginning of each agenda item.
- Individuals are allotted three (3) minutes and recognized organizations ten (10) minutes for each agenda item.
- Written comments must be submitted at least 72 hours in advance of the scheduled meeting to be considered by the Planning Commission.

Applicants

- All applicants and their representatives who testify are required to be sworn in at the beginning of each agenda item.
- Applicant presentations are allotted, typically fifteen (15) minutes with five (5) minute rebuttal following any public comments.
- Written comments must be submitted at least 72 hours in advance of the scheduled meeting to be considered by the Planning Commission.

Individuals requiring special accommodations for this meeting are requested to contact the Planning Office at 301-600-1138 (tty: use Maryland relay) to make the necessary arrangements no later than seven (7) working days prior to the meeting.

Any correspondence to the Planning Commission can be sent to: planningcommission@frederickcountymd.gov

Upcoming Planning Commission Meetings

Monday – December 12, 2016 @ 9:00 am

For more information contact

Dept. of Planning or Development Review
301-600-1138
www.FrederickCountyMD.gov/planning



Frederick County Planning Commission

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APPROVED: _____

1. PLEDGE OF ALLEGIANCE
2. MINUTES TO APPROVE
3. PLANNING COMMISSION COMMENTS
4. AGENCY COMMENTS / AGENDA BRIEFING
5. LIVABLE FREDERICK WORKSHOP
David Whitaker, Chief of Comprehensive Planning

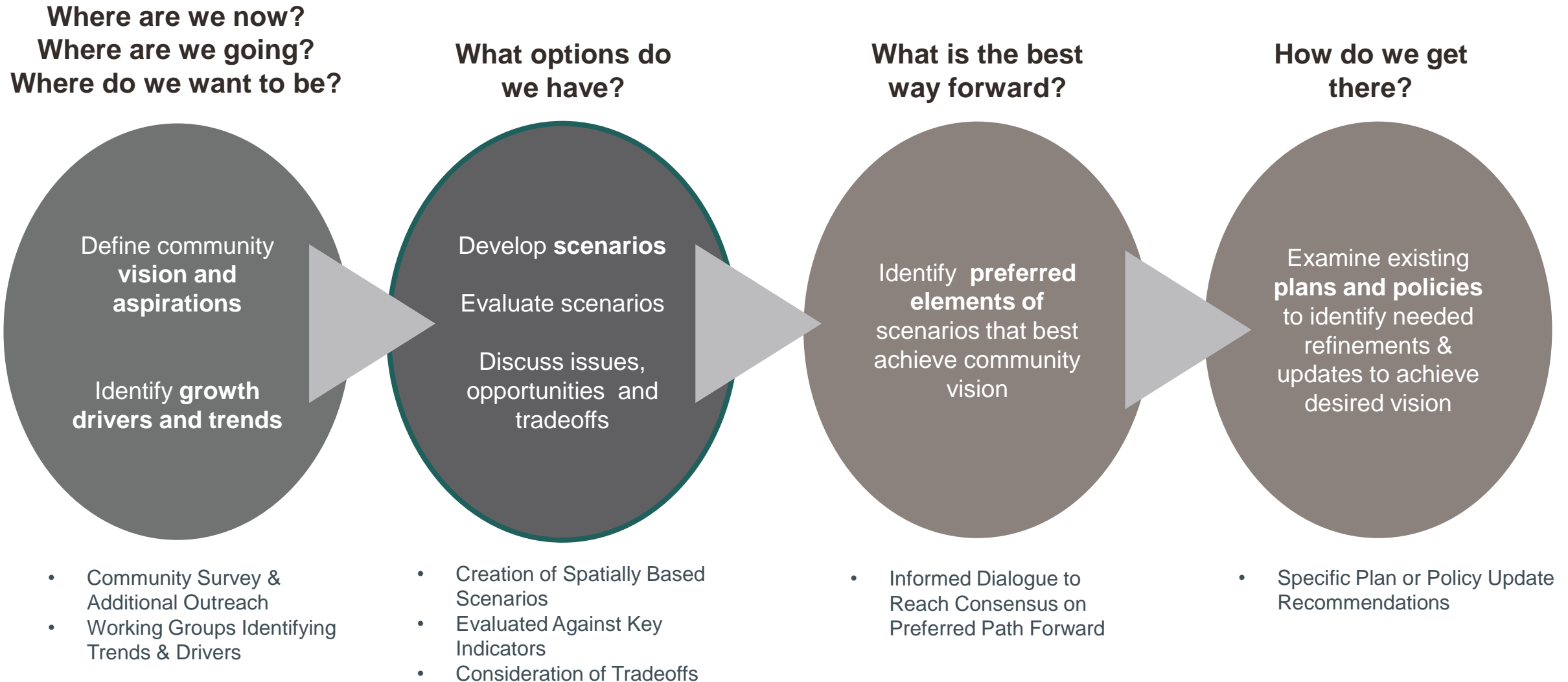
DECISION

INFORMATIONAL

INFORMATIONAL

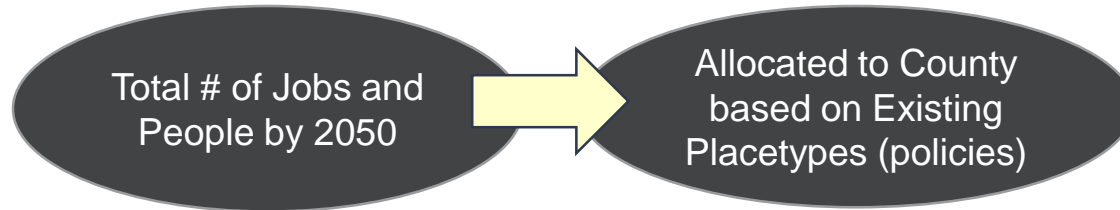
INFORMATIONAL

Vision, Scenarios and Comprehensive Plan Update



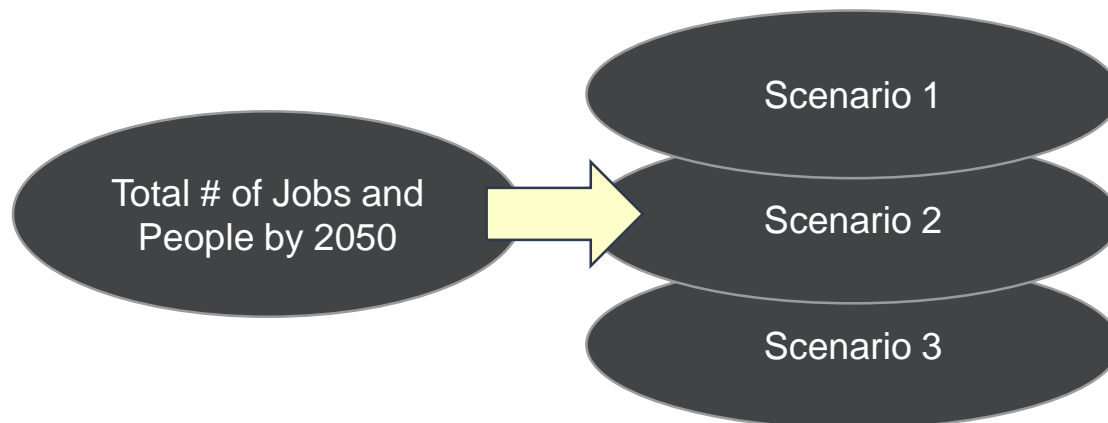
SCENARIO DEVELOPMENT

- Development of the **Trend Scenario**



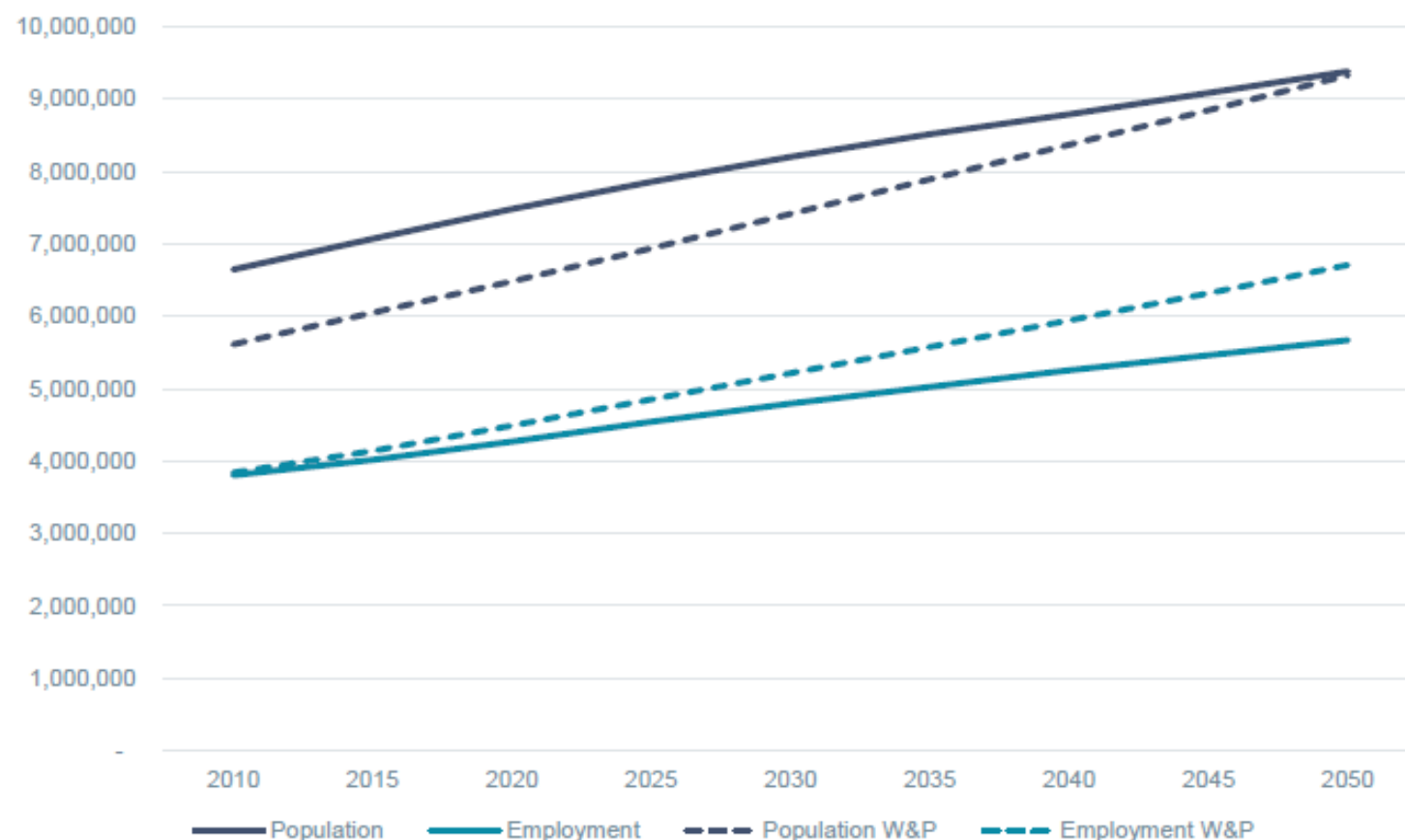
- Development of **Alternative Scenarios**

- What kind of job sectors are we trying to target and what kind of places do we want to create?
- What kind of development patterns best support our vision and desired quality of life?



REGIONAL TRENDS

How is the region expected to grow?



Total number of housing and jobs anticipated by 2050

People type (household type, income levels, market profile)

Job type (different industries)

Approximately **50,000 more jobs**, and **100,000 more people** by 2050

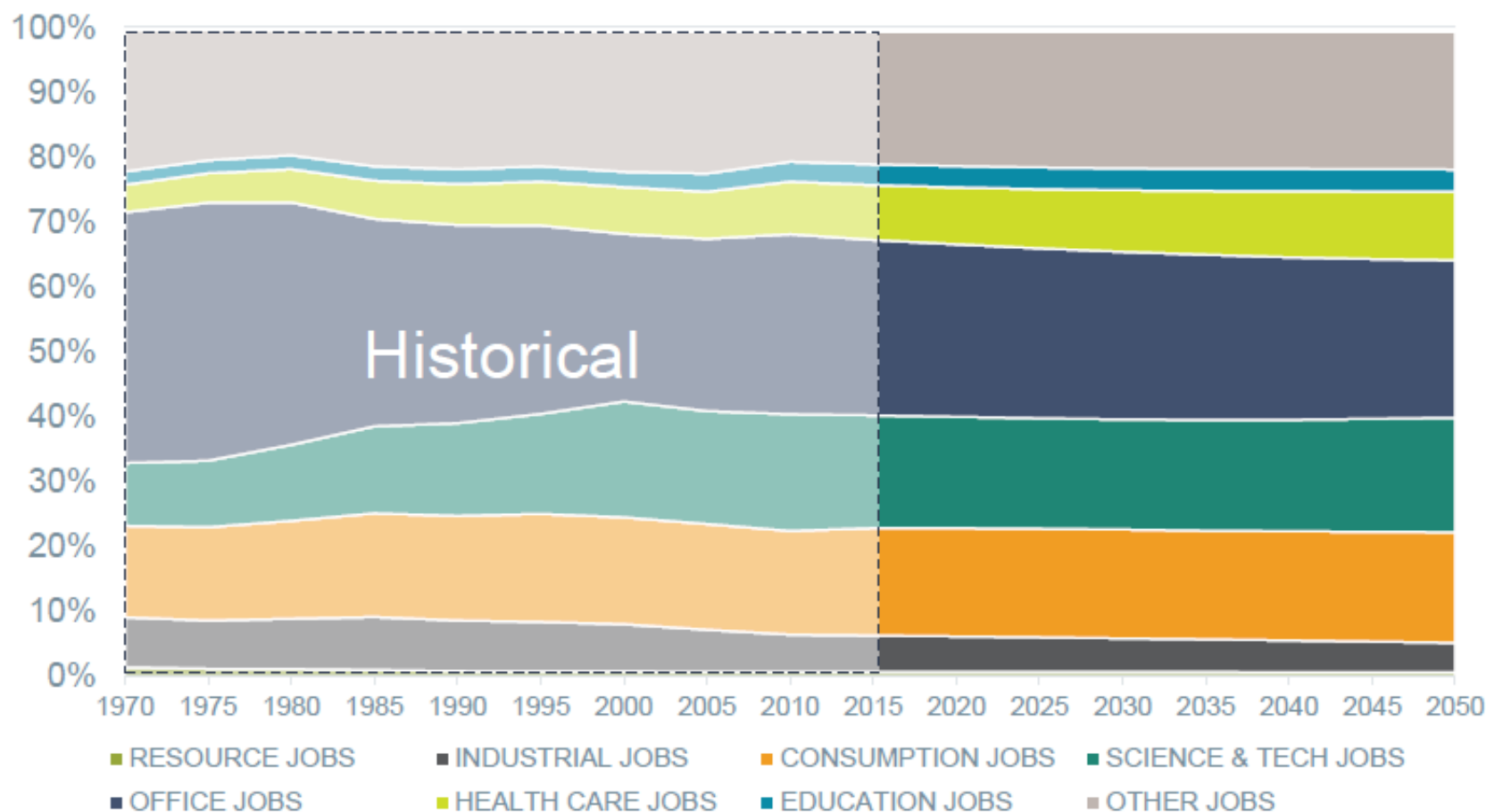
MWCOG projects steady growth through 2045*

Woods and Poole projects steady growth through 2050

- Population growth initially slower than MWCOG
- Employment growth forecasted at higher rate than MWCOG

REGIONAL TRENDS

Jobs By Industry

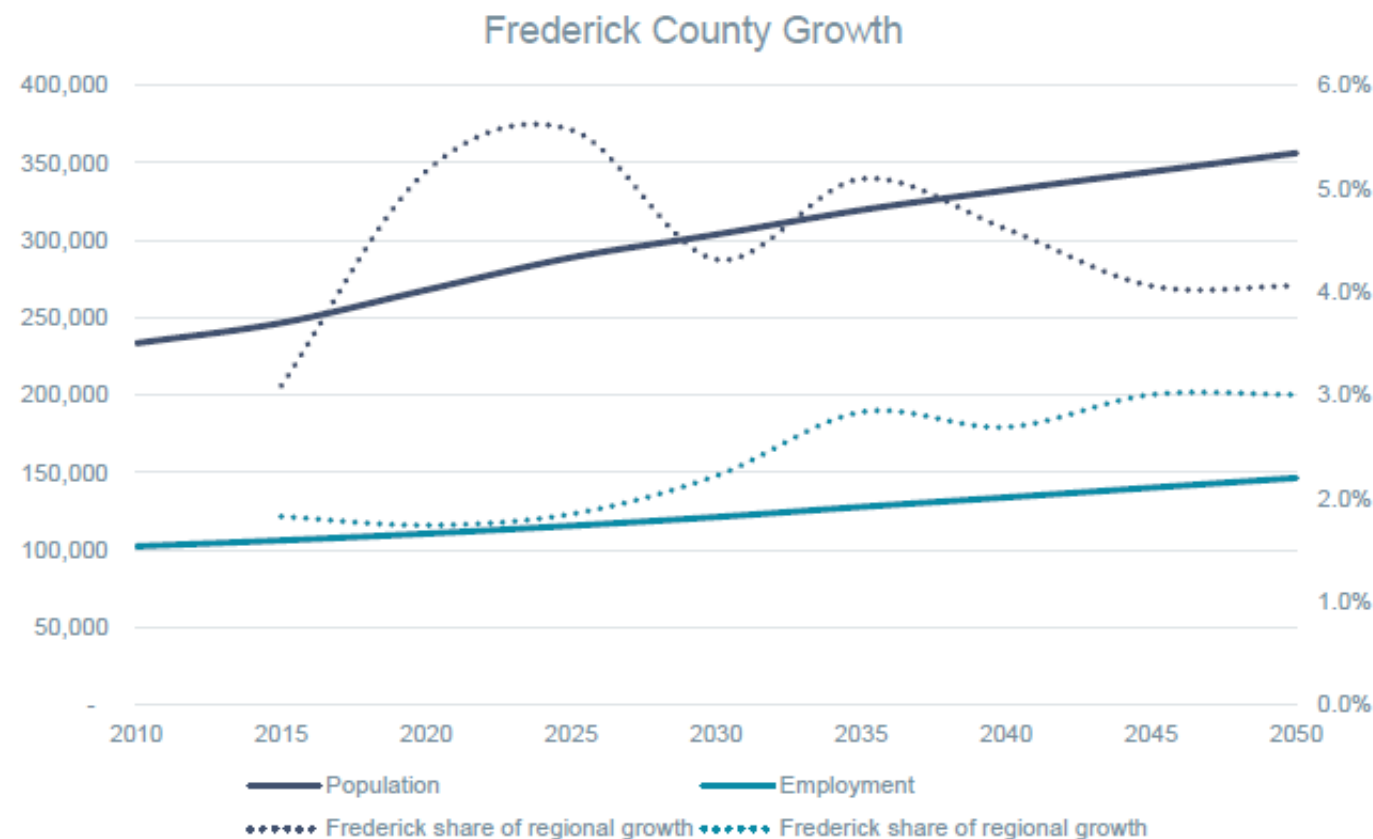


Composition of regional jobs **not expected to change much** over time:

- Sectors expecting to become more prominent:
 - Health care jobs
 - Science and tech jobs
- Sectors expecting to become less prominent:
 - Office jobs
 - Industrial jobs
 - Resource jobs

FREDERICK COUNTY TRENDS

Where does Frederick fit in?



Frederick County's share of regional growth is expected to increase

- Share of regional population growth accelerates in next 10-15 years, then stabilizes
- Share of regional job growth steadily increases over time

FREDERICK COUNTY TRENDS - ECONOMY

So what will Frederick's economy look like?

- *What if* Frederick's regional share of each industry stays the same?
- *What if* the Woods and Poole forecasts are right about the future mix of industries?
- *What if* recent changes in the region's and county's industry mix persist?
 - Regional growth effects inform how growth in the region might impact all industries in the local economy
 - Regional Industry mix effects describe how an industry's changing role in the region might impact the local economy
- *What if* we suppose changes in local competitiveness for each industry?

The industry's growth in Frederick will parallel its growth in the region.

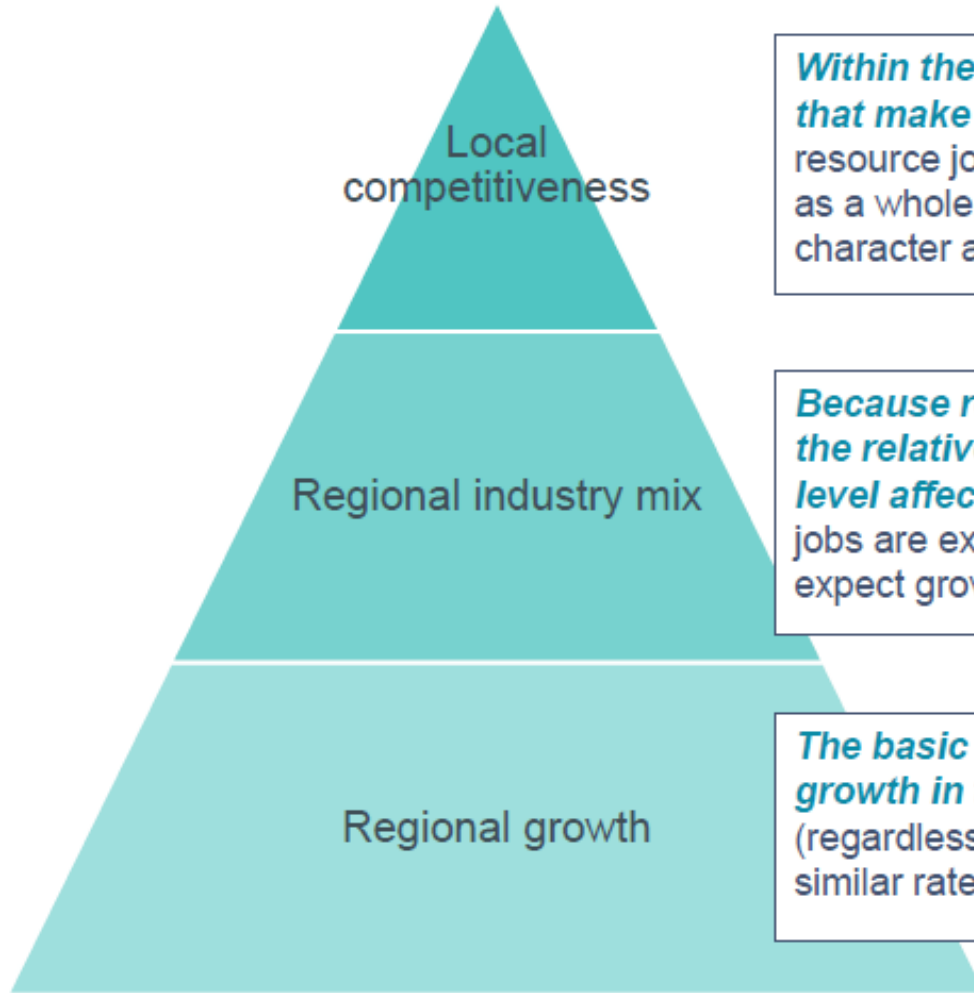
The industry's growth in Frederick will come directly from the W&P dataset.

The industry's growth in Frederick is determined by regional growth in all sectors, recent changes in regional jobs mix, and the county's current competitiveness for each industry

The industry's growth in Frederick is determined by regional growth in all sectors, expected changes in regional jobs mix, and the county's current competitiveness for each industry

The scenario planning team can propose alternative forecasts for analysis, impacting assumptions about regional growth, regional jobs mix, and/or local competitiveness for each industry

COMPONENTS OF ECONOMIC CHANGE



Within the region, Frederick County may have special competitive advantages that make it a strong candidate for high growth in a given industry. While resource jobs (agriculture, forestry, mining, etc.) are not growing rapidly in the region as a whole, they may grow relatively quickly in Frederick due to its agrarian character and regional position.

Because regional dynamics are so important in local economic development, the relative performance/competitiveness of different industries at the regional level affects which industries can be expected to grow locally. If science/tech jobs are expected to grow rapidly in the Washington DC region, Frederick County may expect growth in that sector that outpaces historical trends.

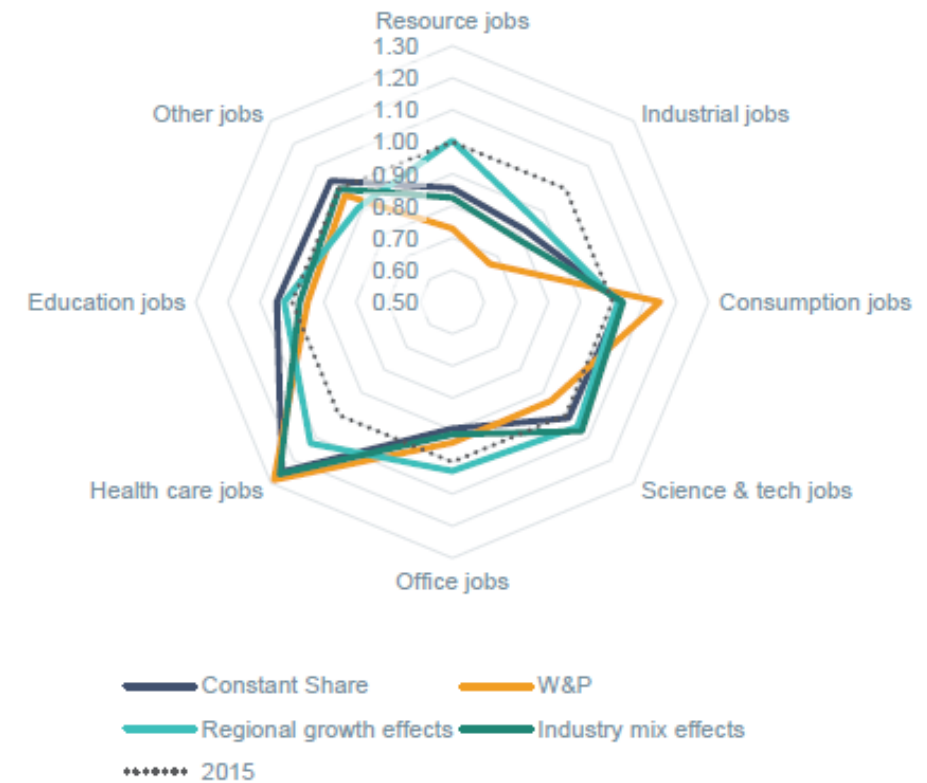
The basic driver of employment growth in Frederick County is employment growth in the region as a whole. The Washington DC region is adding jobs (regardless of type) at a rapid rate, and Frederick County is likely to add jobs at a similar rate just because it is part of the region.

FREDERICK COUNTY TRENDS - ECONOMY

JOBS IN 2050

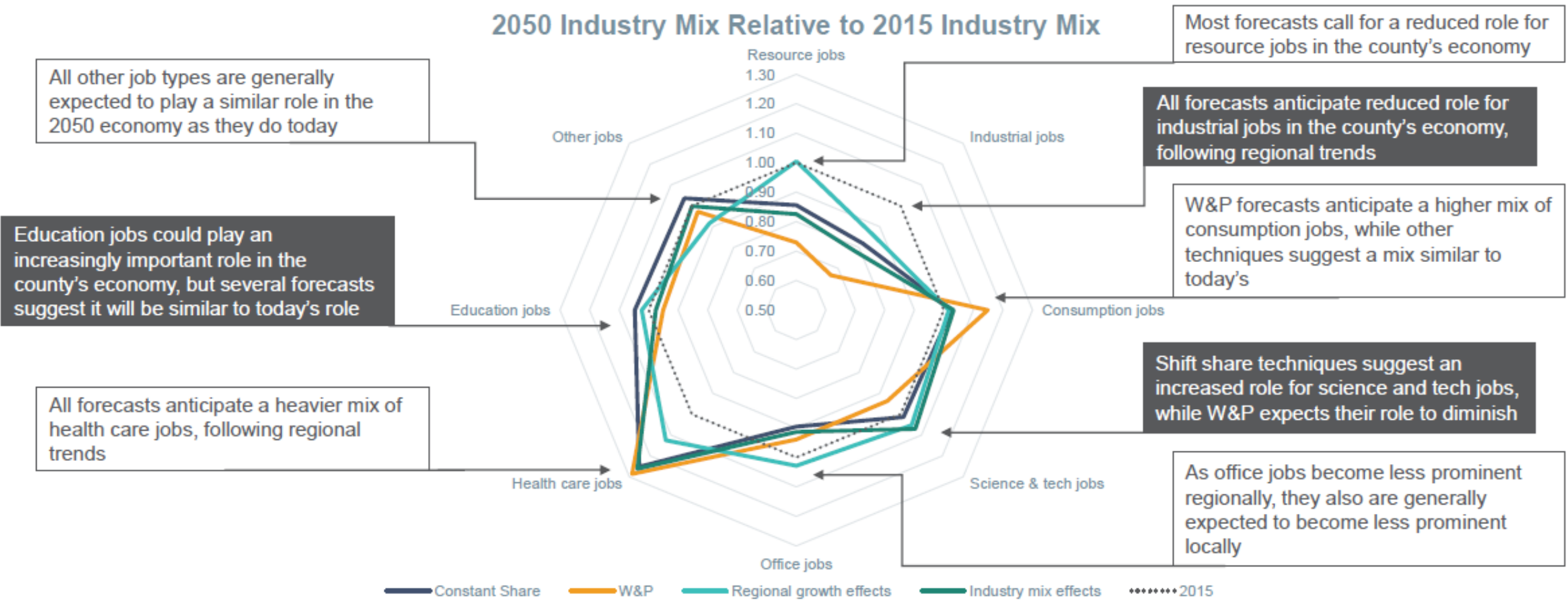
	Constant Share	W&P	Shift Share	
			Regional growth effects	Industry mix effects
TOTAL EMPLOYMENT	224,558	227,049	224,241	224,250
RESOURCE JOBS	3,185	2,746	3,736	3,069
INDUSTRIAL JOBS	14,916	12,275	15,712	14,217
CONSUMPTION JOBS	49,028	55,479	48,493	49,296
SCIENCE & TECH JOBS	26,737	24,986	27,731	28,202
OFFICE JOBS	46,698	49,525	53,548	47,565
HEALTH CARE JOBS	28,116	29,217	25,229	28,293
EDUCATION JOBS	5,042	4,628	4,922	4,691
OTHER JOBS	50,836	48,193	44,870	48,917

2050 Industry Mix Relative to 2015 Industry Mix



FREDERICK COUNTY TRENDS - ECONOMY

2050 Industry Mix Relative to 2015 Industry Mix



FREDERICK COUNTY INDUSTRY STRENGTH (Past Trends)



- Size of circle represents number of jobs gained or lost (lower left quadrant) from 2005 to 2015
- Competitive industries:
 - Office
 - Consumption
 - Health care
- Stable industries:
 - Science & tech
- Opportunity industries:
 - Resource
 - Education
- Declining industries:
 - Industrial
 - Other

RESIDENTIAL SCENARIOS

MARKET SEGMENTS IN 2050

	Jobs Mix Scenarios			
	Constant Share	W&P	Regional growth effects	Industry mix effects
TOTAL RESIDENTS	360,494	348,966	360,226	367,148
RETIREEES	19,470	21,249	18,257	19,538
LOW MOD INCOME SINGLES	27,137	28,429	25,364	27,229
MIDDLE INCOME URBAN NO KIDS	32,881	32,790	32,910	34,102
WEALTHY URBAN / SUBURBAN	204,732	189,866	207,746	213,872
MIDDLE INCOME SUBURBAN FAMILIES	45,603	47,820	50,508	45,174
LOW TO MIDDLE INCOME FAMILIES	30,671	28,812	25,442	27,233

2050 Market Segment Mix Relative to 2015 Market Segment Mix



FREDERICK COUNTY TRENDS – RESIDENTIAL MARKET SEGMENTS

2050 Market Segment Mix Relative to 2015 Market Segment Mix

All forecasts (especially W&P) call for an increased proportion of retirees in the county's future population. Retired persons are associated with consumption jobs (goods, services, and attractions), though the economic basis of the forecast is most tenuous for this market segment

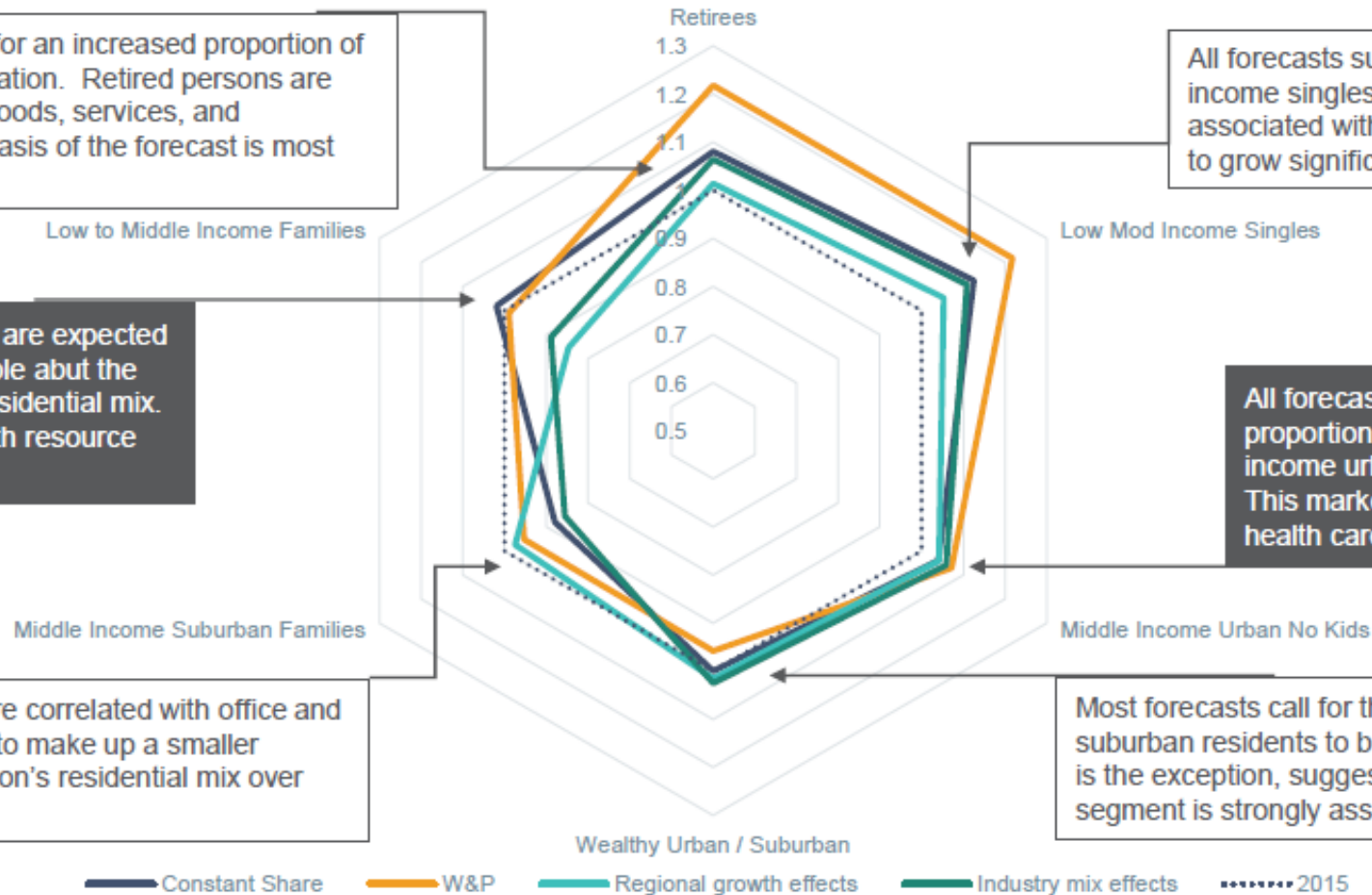
All forecasts suggest a higher mix of low to moderate income singles. This market segment is strongly associated with health care jobs, which are expected to grow significantly regionally and locally.

Low to middle income families are expected to be less prominent (or possible about the same) in the county's future residential mix. This segment is associated with resource and education jobs.

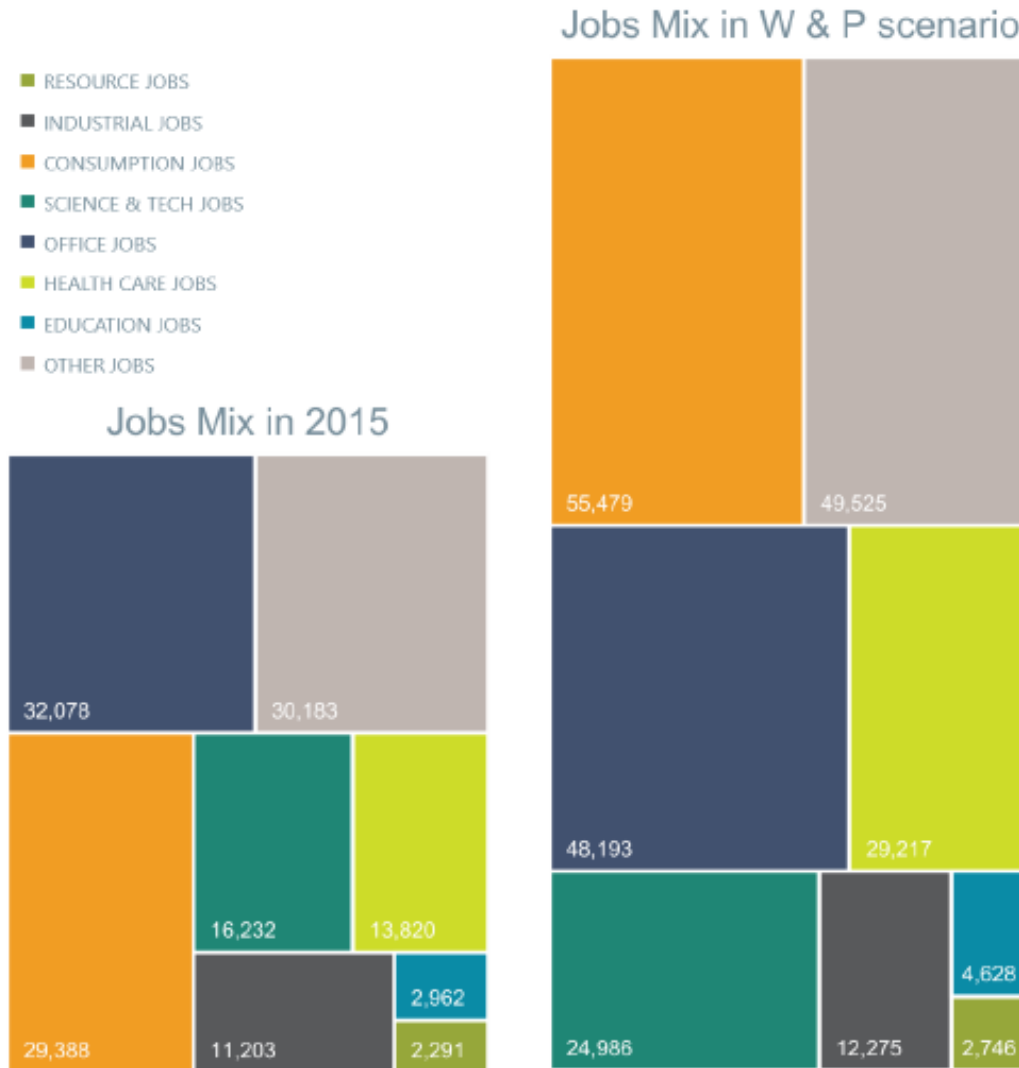
All forecasts suggest a slightly increased proportion of the population will be middle income urban households with no children. This market segment is associated with health care and science/ tech job.

Middle income suburban families are correlated with office and industrial jobs. They are expected to make up a smaller percentage of the county's and region's residential mix over time.

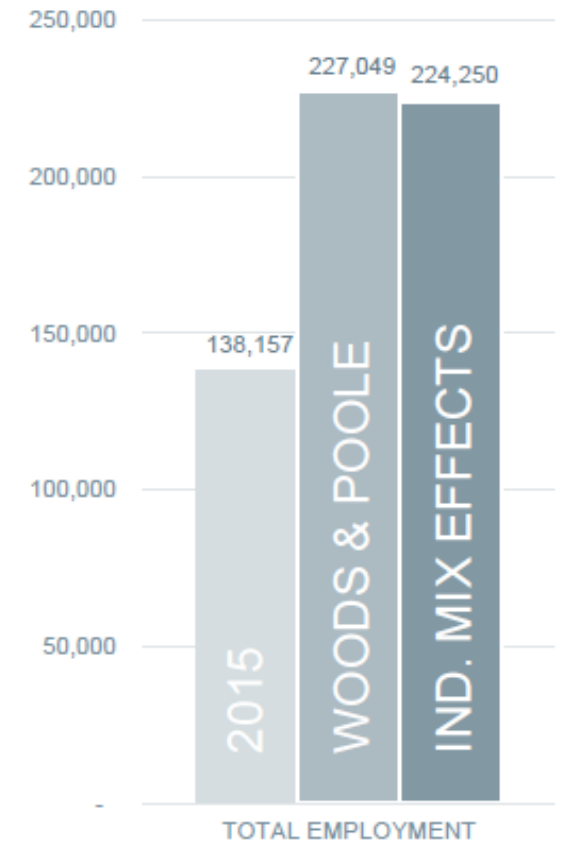
Most forecasts call for the future mix of wealthy urban and suburban residents to be roughly the same as it is today. W&P is the exception, suggesting a diminished role. This market segment is strongly associated with science and tech jobs.



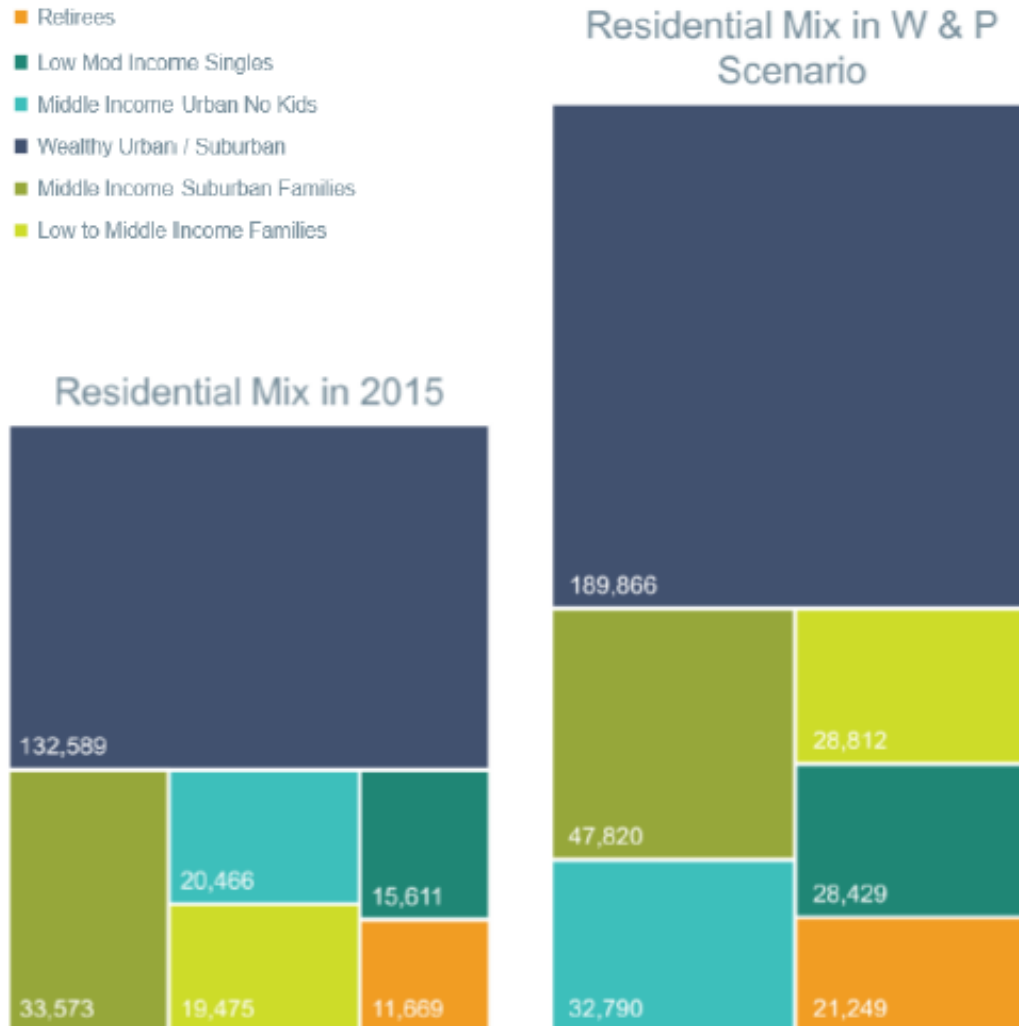
PROPOSED CONTROL TOTALS - JOBS



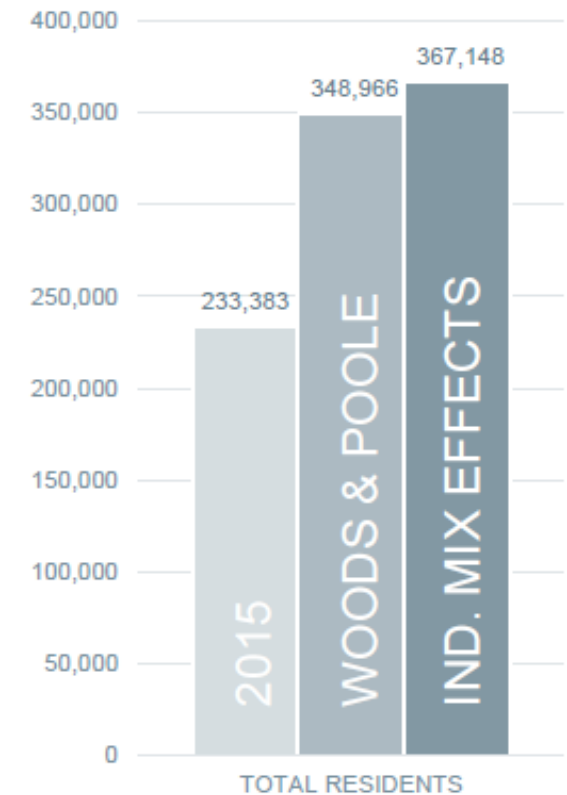
Frederick County Jobs Totals, 2015 and 2050



PROPOSED CONTROL TOTALS - RESIDENTS



Frederick County Residential Totals, 2015 and 2050



LOCATION PREFERENCES

- Key questions?
 - Where do particular industries and market segments want to be?
 - Local growth trends (“hot” areas)
 - Optimize accessibility
 - Suitable “place types”
 - Minimize costs
 - Generalized approach to assessing market attractiveness to industries
 - Growth controlled by policy represented by place types



LOCATION PREFERENCES

Generalized approach to market attractiveness

Trend growth

- Where has growth of a given activity occurred recently?
- Blend of general and specific growth rates, smoothed over areas

Accessibility

- Optimize access to economic activity (jobs)
- Mode and purpose emphasis varies by activity

Costs

- How much does it cost to move into an area?
- Blend of home values and contract rents, smoothed over areas

Place types

- Policies that define growth patterns (mix of uses, density, etc.)
- Different place types suitable to different activities

LOCATION PREFERENCES

Generalized approach to market attractiveness

- Calculation and relative importance of each “attractiveness driver” varies by activity
 - Industrial jobs: low land costs, suitable place types
 - Office jobs: regional accessibility, trend growth
 - Suburban families: suitable place types, trend growth, costs
- Professional judgment regarding the role each will play in determining location decisions, but this is also part of how scenarios may vary

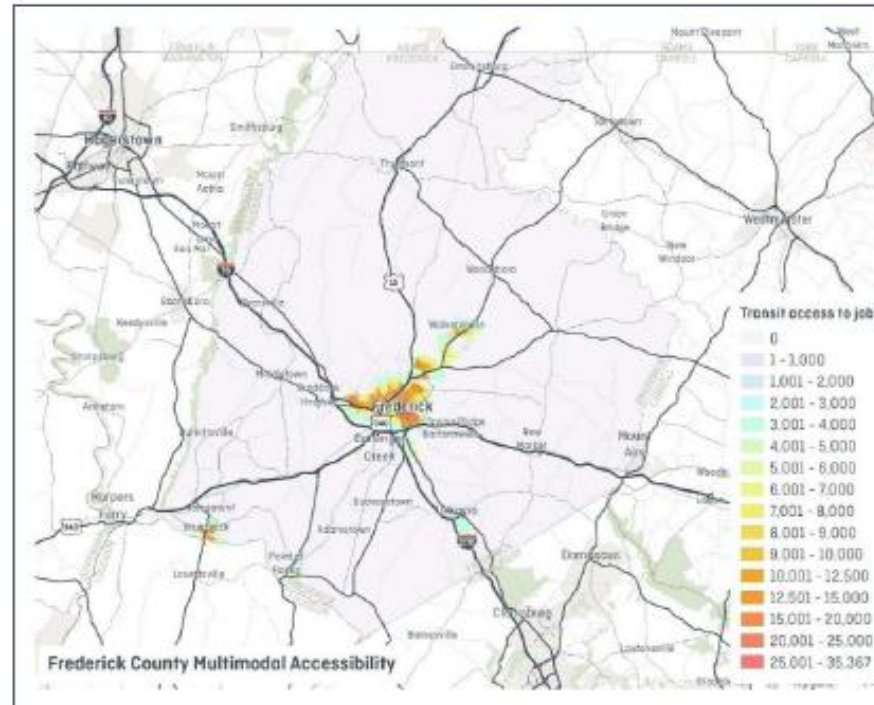
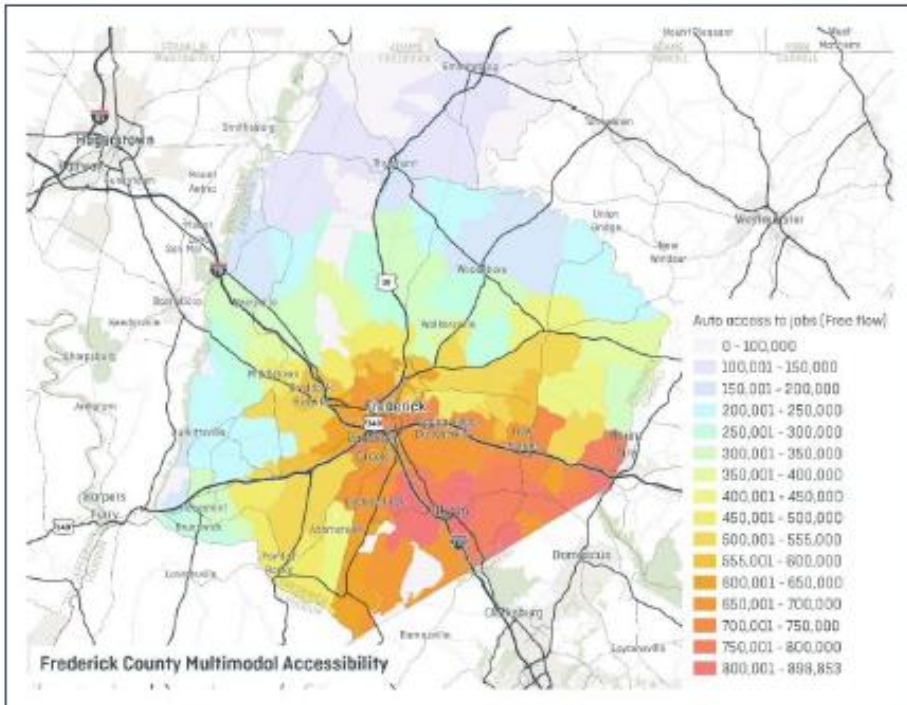
Trend growth

Accessibility

Costs

Place types

LOCATION PREFERENCES - ACCESSIBILITY

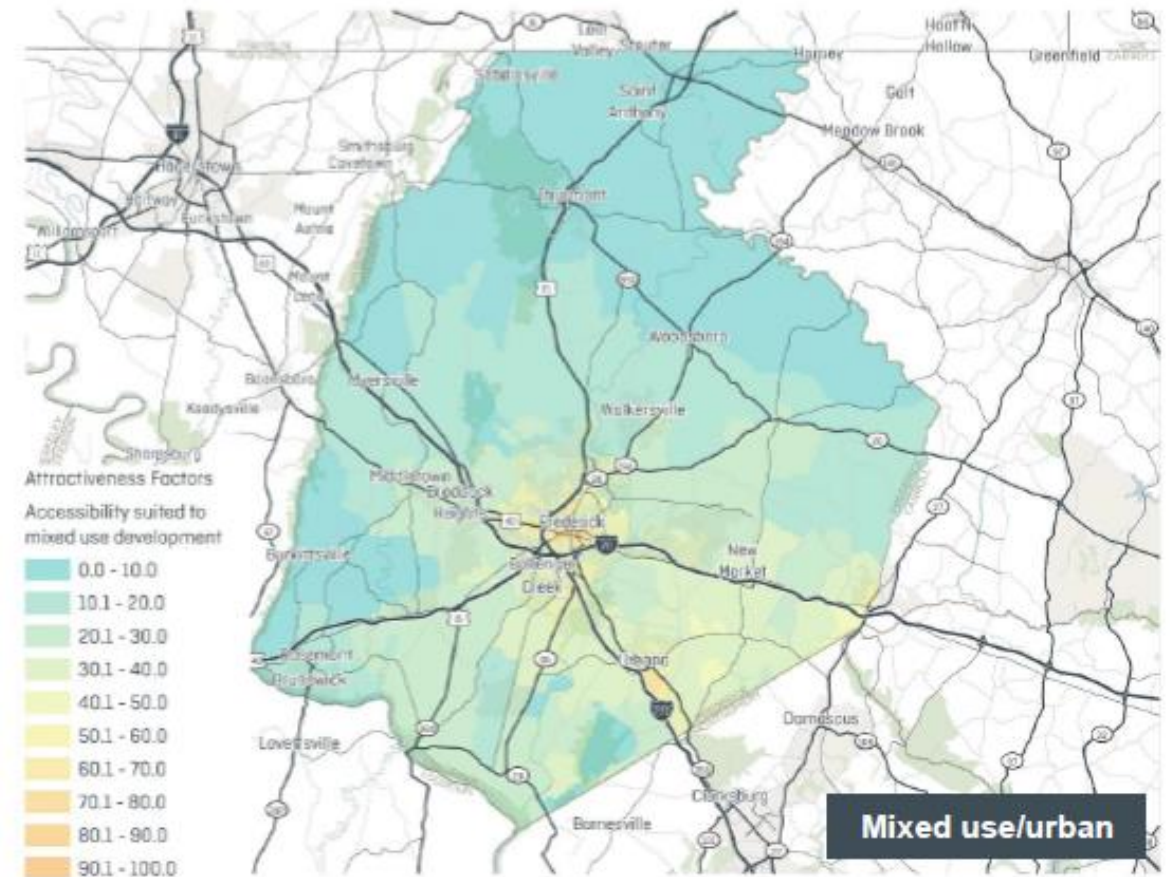
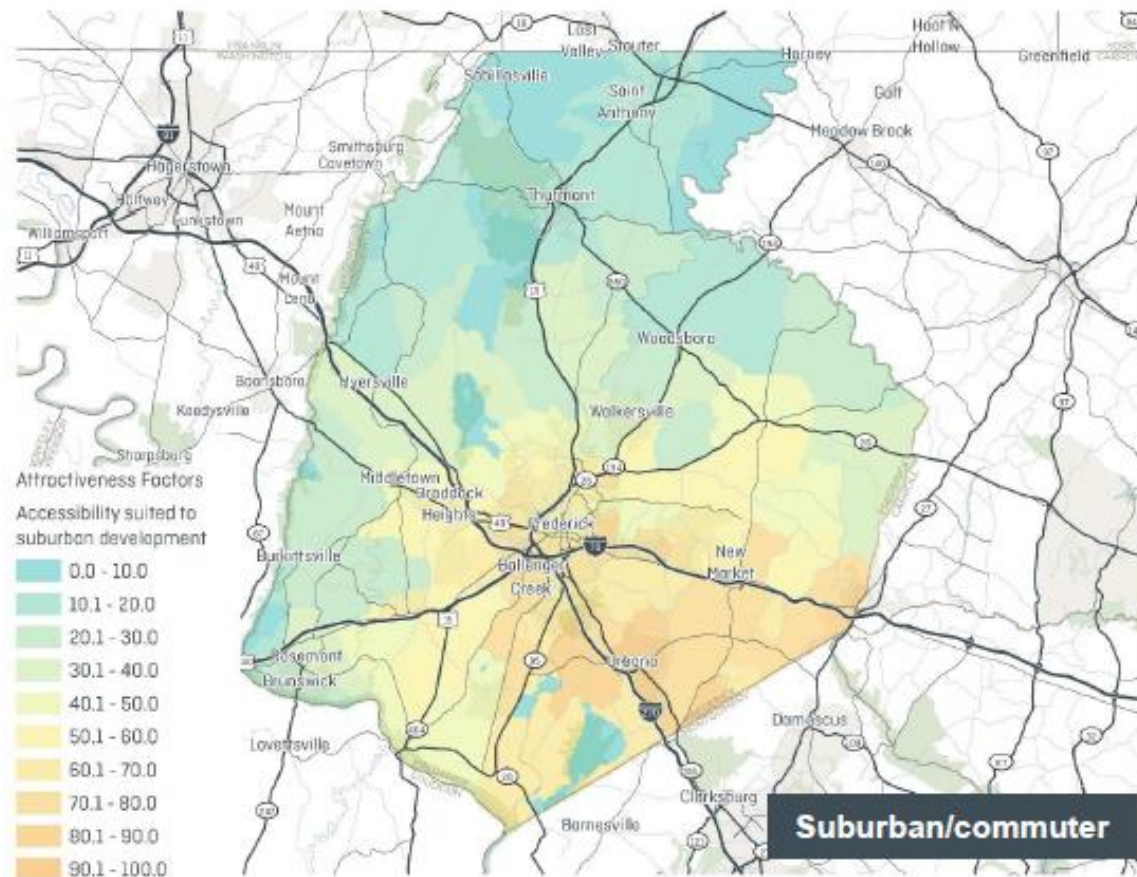


- Accessibility
 - Regional position
 - Multimodal options
 - Emphasis on commute versus non-work trips

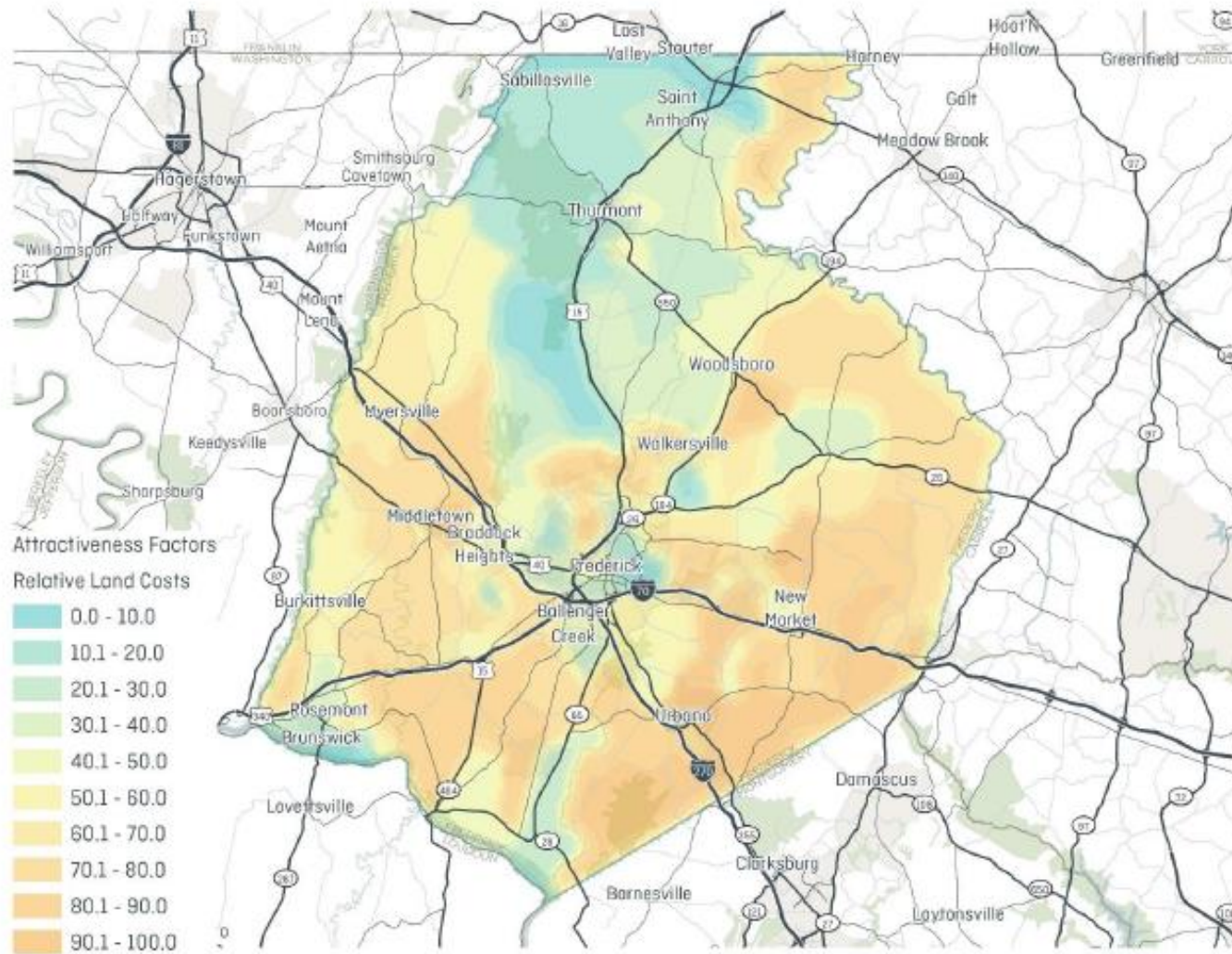
Multimodal Transportation Accessibility (Auto and transit accessibility mapping) to existing jobs – Frederick County, MD

LOCATION PREFERENCES - ACCESSIBILITY

- Accessibility profiles



LOCATION PREFERENCES - COSTS



- Relative expense of locating in a given area
- Based on home value and contract rents
- Different activities are more or less sensitive to costs when making location decisions

LOCATION PREFERENCES – PLACE TYPES



- Historic Downtown (Frederick)
- Residential Neighborhood (Frederick)
- Suburban Residential (Fredericktowne Village)
- Campus/Base Employment (Fort Detrick)
- Small Town Main Street Corridor (New Market)
- Small Town Crossroads (Middletown)
- Traditional Neighborhood Development Center (Urbana)
- Traditional Neighborhood Development Residential (Urbana)

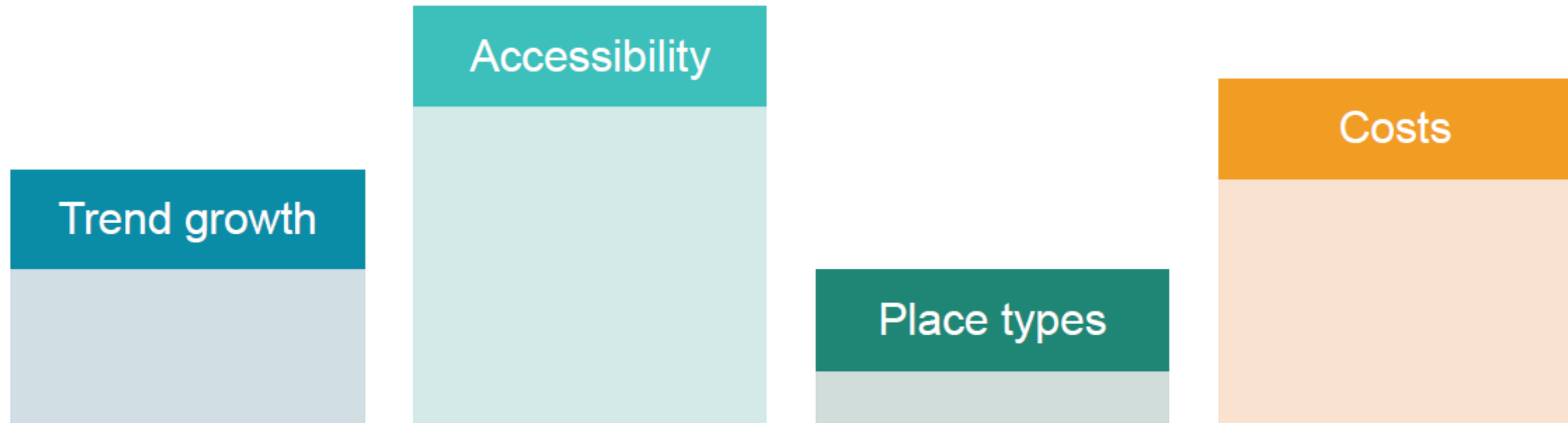


- Suburban Residential (Clover Hill)
- Suburban Office Park
- Agriculture and Working Landscapes
- Unprotected Open Space
- Village Crossroads (Graceham)
- Commuter Suburban (Kemptown)
- Village Crossroads (Unionville)

- Place types
 - Generalized development policy settings applied to areas throughout the county
 - Define the character of future development
 - Mix of uses
 - Development intensity
 - Parking and setback requirements
 - General building types
- Different qualities are attractive to different activities

LOCATION PREFERENCES

- For a given activity
 - Attractiveness drivers set up
 - Scores standardized (0-100)
 - Weights applied(0-100)



LOCATION PREFERENCES

	Trend growth	Accessibility	Place types	Costs
Retirees	100	40	30	80
Low to middle income singles	35	70	50	100
Middle income urban no kids	75	100	80	50
Wealthy urban	20	100	80	20
Wealthy suburban	100	40	100	20
Middle income suburban families	50	80	100	70
Low to middle income families	55	40	20	100

TREND SCENARIO INCREMENT OF GROWTH - 2050



An additional 134,000 people



An additional 86,000 jobs

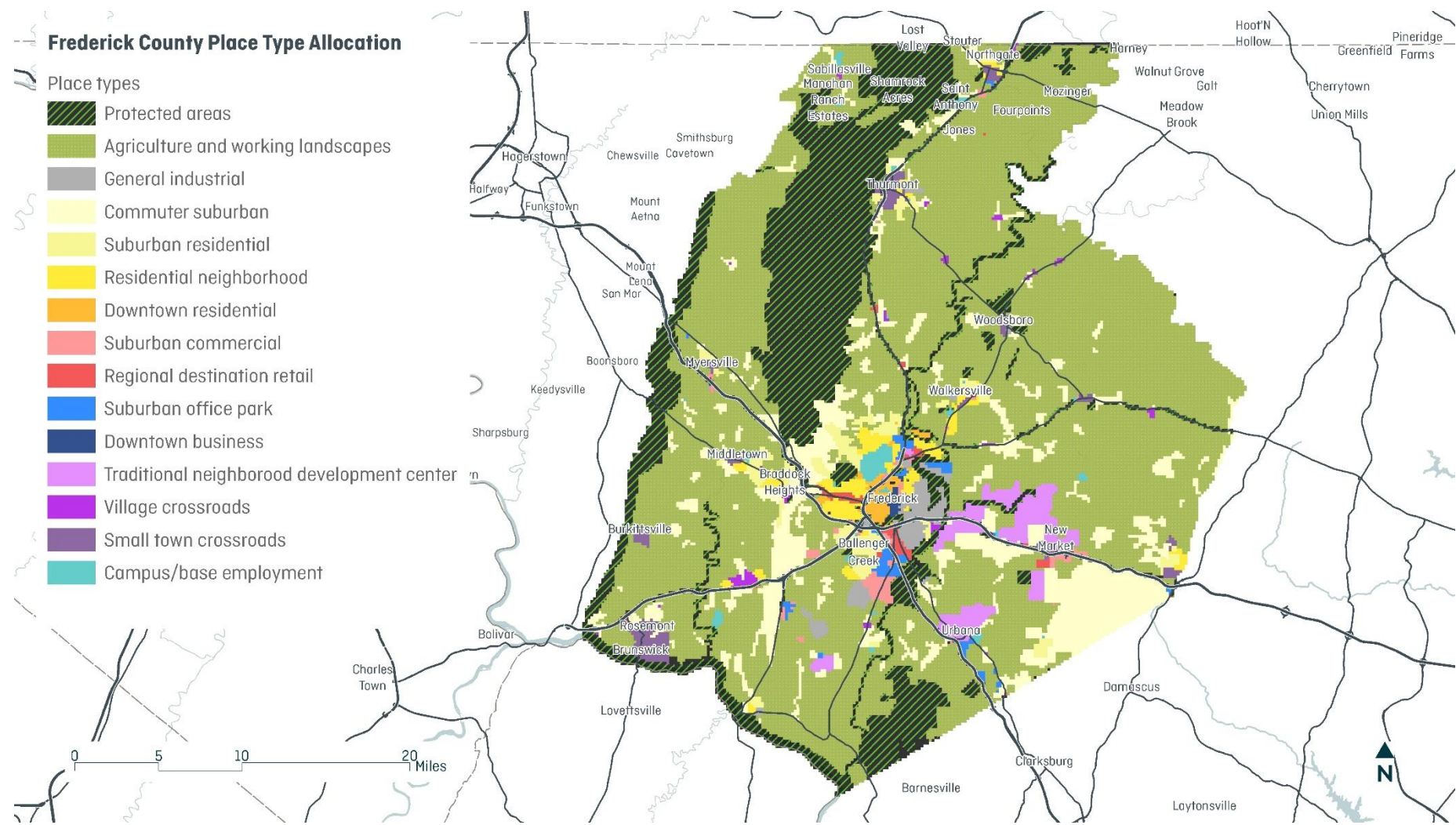


An additional 55,000 households jobs



An additional 35,000 acres of developed land

TREND ALLOCATION OF GROWTH - 2050



DRAFT SUMMARY OF TREND

- Transportation Indicators
- Attractiveness Indicators
- Diversity of households and placetypes
- Environmental Indicators

ALTERNATIVE SCENARIO DISCUSSION

- What kind of growth do we want?

Next Steps & Timeline

Planning Commission Meetings

- Trend Scenario Discussions; Confirmation of Alternative Scenario Direction
 - December 7th Presentation/Work session
- Trend Scenario Discussions; Confirmation of Alternative Scenario
 - December 12th Presentation/Work session
- Alternative Scenarios & Policy Implications
 - January 4th Presentation/Work session

Project Team, Staff & Steering Committee

- Finalizing place types
- Confirming growth assumptions
- Developing Livable Frederick Indicators