



Strategic Scan

City of Rockville • Maryland

2010



City of Rockville
Department of Community Planning and Development



City of Rockville, Maryland

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Introduction

The extent to which the City is able to act strategically relies on having a good understanding of current demographic, economic, and social conditions, as well as past and projected trends. This document is intended to serve as a “strategic scan” of some key trends and conditions that are relevant to City government and future policy decisions. While many of these trends and conditions are beyond the capacity of the City government to alter, they serve to describe the environment and context within which City policy is formed and municipal services are provided.

The data provided here represents only a fraction of available data, but it does present a baseline for discussion about Rockville’s future. The Strategic Scan focuses attention on the multidimensional implications of change and the interrelationships of population, household and employment growth, evolving demographics, economic conditions, land use and development, City revenues, the provision of City services, maintenance of public facilities and capital improvements.

The Strategic Scan is a source of data for the City-wide Comprehensive Master Plan (CMP), which is undergoing revision pursuant to state law. The CMP provides input to development decisions, and is a guide for planning capital improvements and municipal services.

Data and analysis of local and regional trends of importance to Rockville are organized in the Strategic Scan under the chapter headings of Demographics, Economy, Housing, Development Trends, Transportation, Water Resources, Public Safety and Civic Engagement. The intention is to update this report every two years. The next update will include information from the 2010 Census.

Data Collection and Analysis

In Spring 2009, the Long-Range Planning Division from the Department of Community Planning and Development Services (CPDS) reviewed the 2002 CMP to identify key data categories. Staff interviewed 15 City Staff members in various departments and the Executive Director of Rockville Economic Development, Inc. to learn what each of them saw as the most significant trends and issues facing the City, and to collect internally-produced studies and reports. Most data were collected in 2009 and through the first quarter of 2010. Staff concentrated data collection efforts towards those data sets that can be updated on a regular basis at little or no cost to the City. The Long-Range Planning Division analyzed and interpreted the collected data and identified major themes, in coordination with other departments.

Forecasts of population, households and employment were developed by CPDS staff in conjunction with the Metropolitan Washington Council of Governments (MWCOC) staff for its Round 8 projections exercise. (Information on the Cooperative Forecasting Program is available at: www.mwcog.org/planning/planning_trends). Future growth can vary widely from the projections, especially when projections cover several decades. Economic/market forces and development that occurs outside of the City are external factors that could alter the trajectory of future growth. Zoning changes and restrictions on development (i.e. APFO) are internally imposed factors, changes to which also could alter Rockville's future growth scenario. Forecasts are based on the best information available at the time. They take into consideration development projects with official approval, but also anticipate development for which there are not yet specific projects.

Major external sources included decennial Census data and sample data from the American Community Survey (ACS). Although it is relatively new, the ACS will provide regularly updated demographic and economic data at a level of geography previously achieved only by the decennial census. More information on COG forecasts, the Census, ACS and other data sources is provided at the end of this report.

Chapter 1: Demographics

Metropolitan Washington Council of Governments (MWCOC) Region



Population is increasing regionally.

Population in the Metropolitan Washington Council of Governments (MWCOC) region is projected to increase from an estimated 4,854,900 in 2010 to 6,143,500 in 2040, or by 27% during the 30-year period, according to the MWCOC Cooperative Round 8.0 forecasts, released in 2010. Rockville and Montgomery County are projected to receive some of this regional growth. The MWCOC is a regional organization of 21 Washington, DC area local governments.

	Population		
	2010	2040	% Change
Rockville	62,476	83,929	34%
Montgomery Co.	964,100	1,183,000	23%
MWCOC Region	4,854,900	6,143,500	27%

Source: U.S. Census, 2005-2007 ACS

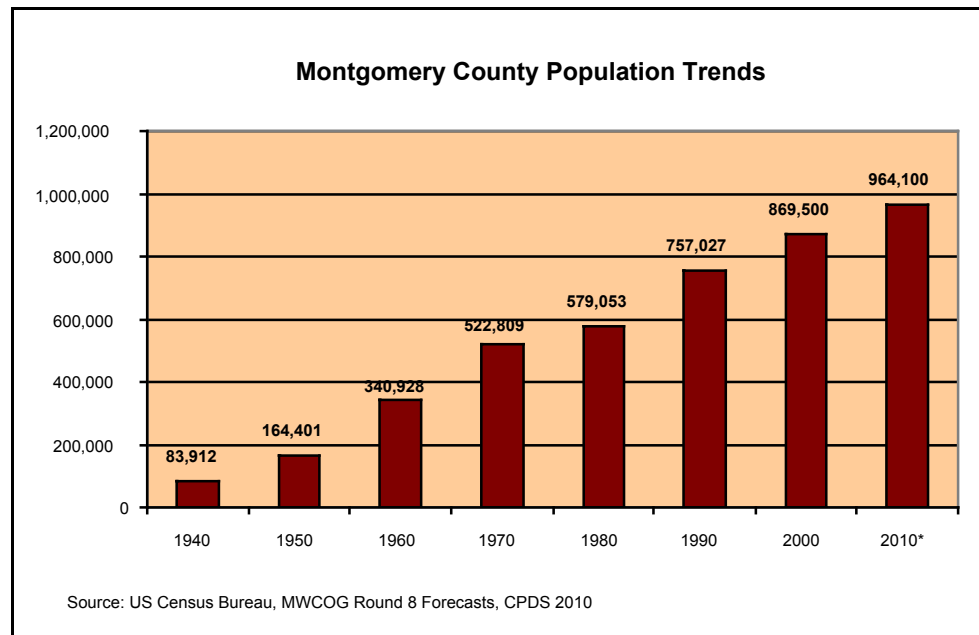
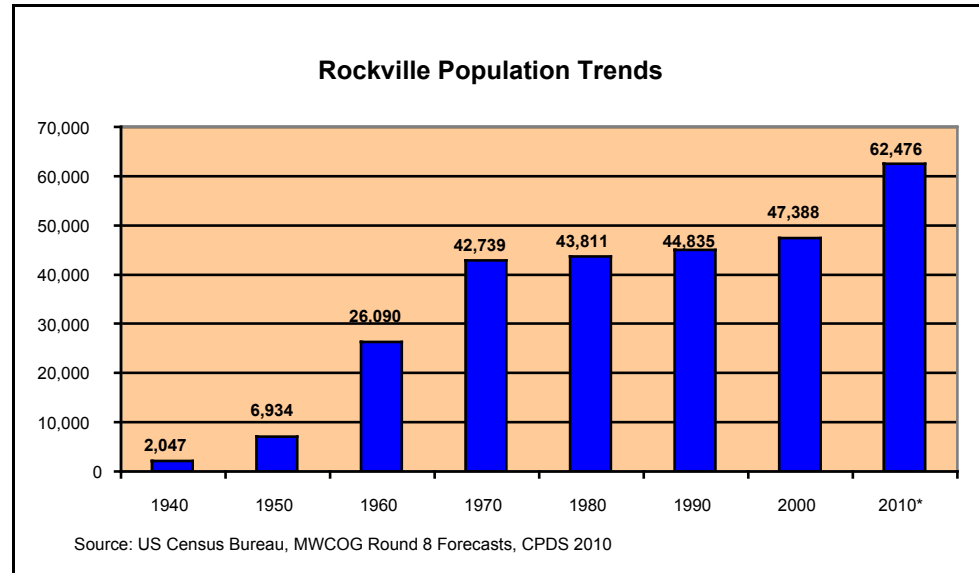
Rockville’s population growth accelerated between 2000 and 2010.

The City of Rockville had a 2008 estimated population of 60,734 and is the second-largest incorporated municipality in Maryland, behind Baltimore (636,919). The Cities of Frederick (59,219) and Gaithersburg (58,744) are the third and fourth largest in Maryland, respectively¹. Rockville’s population increased to an estimated 62,476 by 2010. This estimate will be adjusted by the 2010 Census.

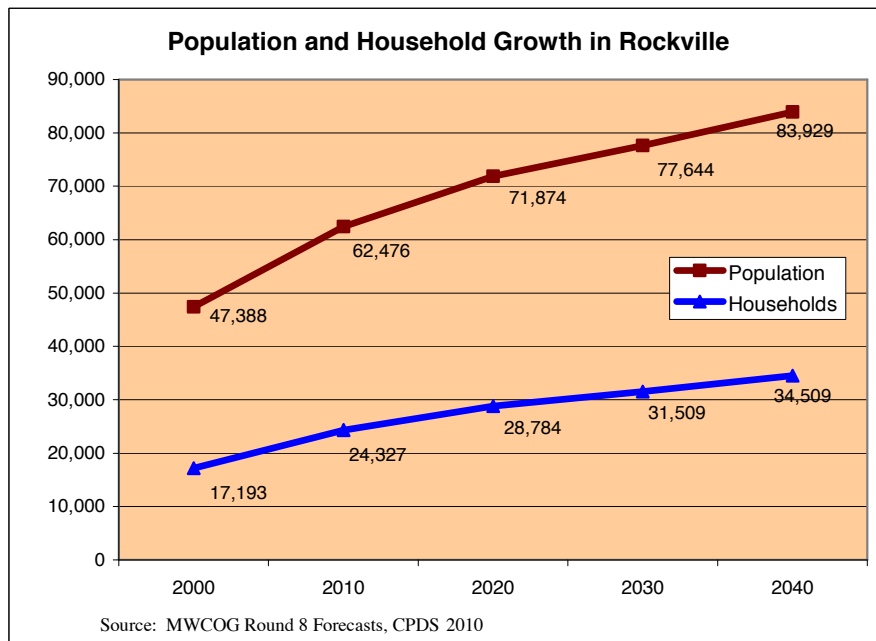
Rockville’s population grew by 276% in the 1950s. This extremely rapid rate of growth was a result of large annexations in 1949 and the post-war housing boom. Rockville grew more than two and a half times faster than Montgomery County during the 1950s even though the County’s population doubled.

The 1960s saw continued rapid growth, though the rate slowed. Rockville overtook Cumberland and Hagerstown during this decade to become Maryland’s second largest city. Rockville grew by 11% during the three-decade period 1970 – 2000. The City slipped from second to fifth largest in 2000, falling behind Frederick, Gaithersburg and Bowie. Interestingly, many of Rockville’s residential subdivisions west of I-270 were built during in this “slow-growth” period.

The former Thomas Farm was annexed into Rockville in 1993 and became the Falls Grove community. The former King Farm was annexed in 1995. The rate of population growth increased during the 2000-2010 decade to an estimated 32%. Mixed-use developments at these and other locations included a variety of housing types and contributed to the increased population. These communities were built at higher densities than was seen in earlier single-family detached and townhouse development patterns.



¹U.S. Census, Annual Estimates of the Resident Population for Incorporated Places in Maryland

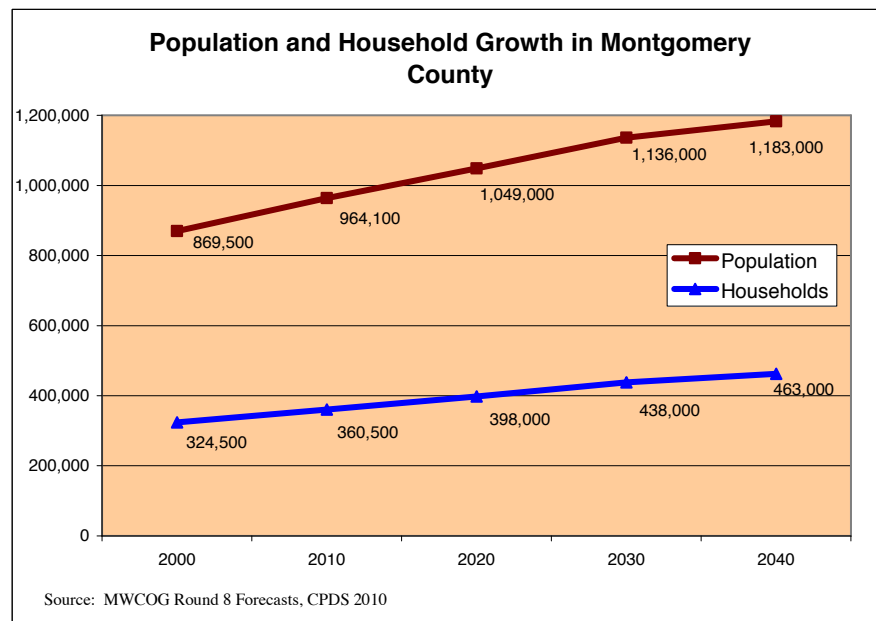


Rockville's population growth is projected to be slower over the next 30 years, compared to the 2000-2010 decade.

Between 2010 and 2040, Rockville's population is projected to increase by 34% from 62,476 to 83,929. This is a faster rate than experienced during the 1970-2000 period, but represents slower growth than has occurred since 2000. Slower growth is due largely to the limited availability of vacant land in Rockville.

The number of Rockville households is projected to increase by more than 10,000, from 24,327 to 34,509, between 2010 and 2040. This represents overall growth of 42%.

Rockville's rates of population and household growth are projected to be slightly faster than in Montgomery County. The county's population is projected to increase from 964,100 to 1,183,000, or by 23% between 2010 and 2040. The number of county households is projected to increase from 360,500 to 463,000, or by 28%.



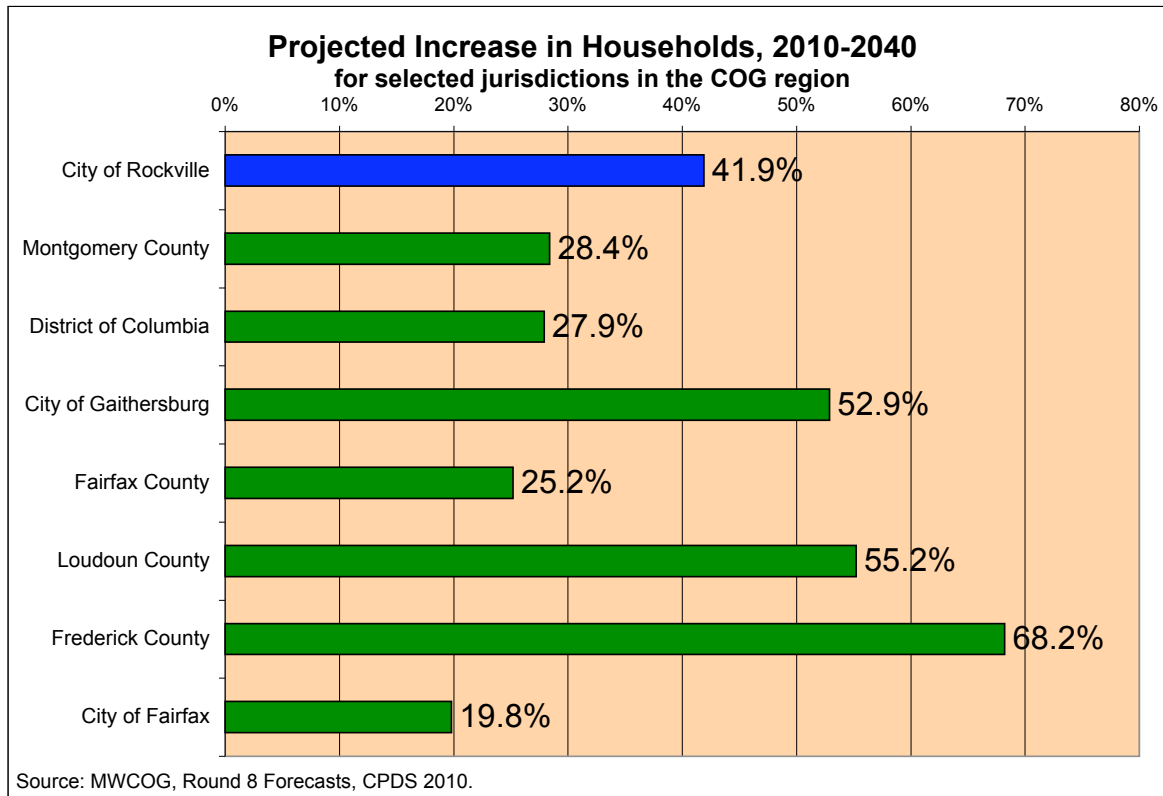
Household size is declining.

Paralleling a national trend, Rockville’s average household size has been declining. At 2.55 persons per household, it is currently less than two-thirds of what it was in 1960. In the past, Rockville households have been slightly larger than the national and county averages but this appears to be changing. The trend toward smaller household size is likely associated with broad societal trends, including a higher divorce rate, fewer births per household, aging of the population, more seniors living alone, more singles living alone, and an increase in households composed of unrelated individuals.



Year	Persons Per Household		
	Rockville	Montgomery Co.	U.S.
1950	3.69	3.55	3.37
1960	3.99	3.65	3.33
1970	3.59	3.30	3.14
1980	3.00	2.77	2.76
1990	2.77	2.65	2.63
2000	2.70	2.66	2.59
2007	2.55	2.70	2.60

Source: U.S. Census, 2005-2007 ACS



The number of households is projected to increase at a faster rate in Rockville than in the county.

Between 2010 and 2040, the number of households in the Metropolitan Washington Council of Governments (MWCOG) region is expected to increase by 31%, from 1,842,500 to 2,415,600. Within the region, Montgomery County is projected to gain the largest absolute net number of households (102,500) but experience a slower rate of growth (28%) than more outlying counties such as Frederick in Maryland and Loudoun in Virginia.

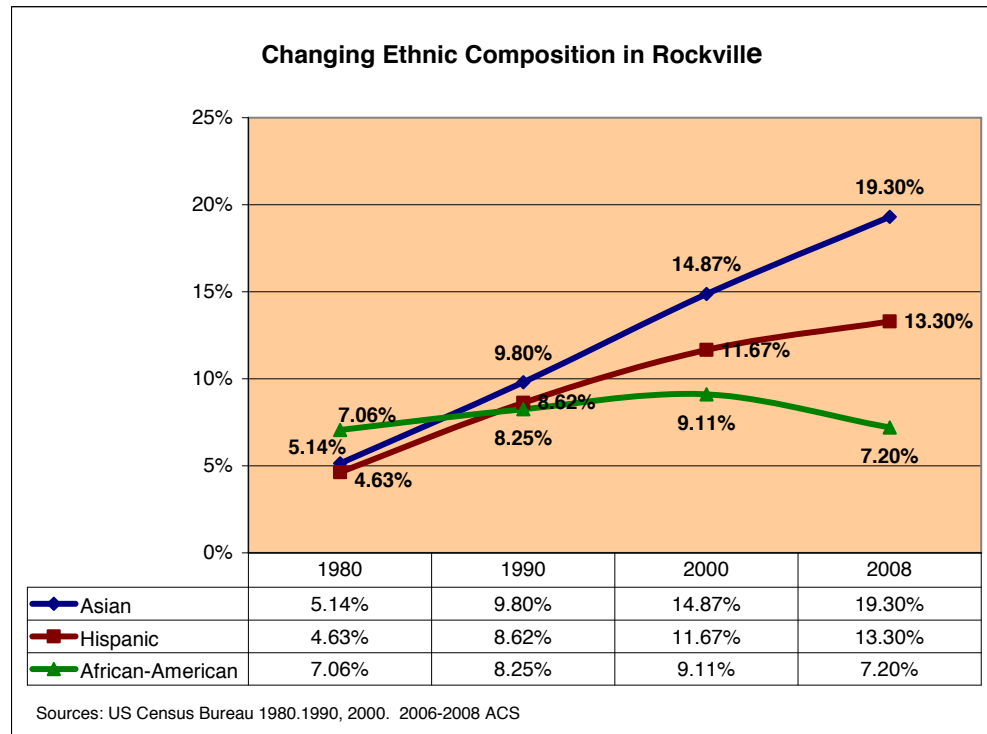
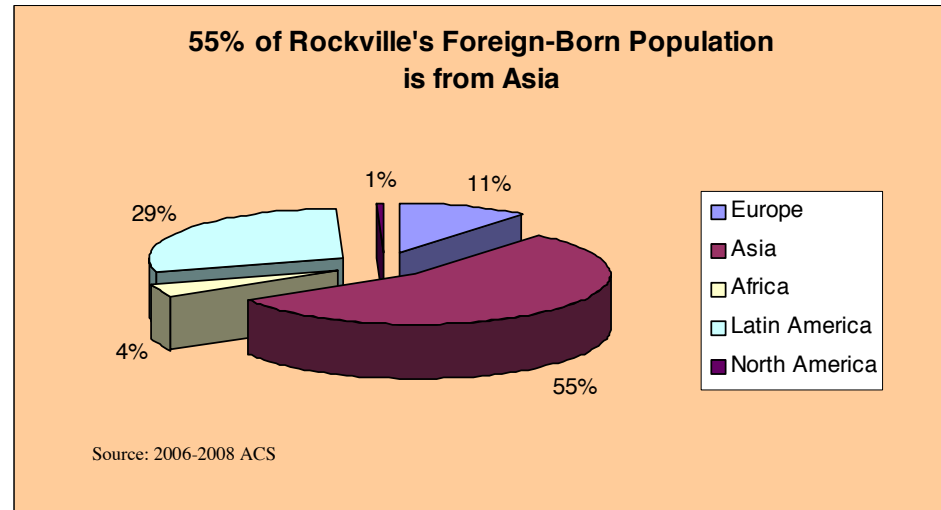
The number of households in Rockville is projected to increase from 24,327 to 34,509, or by 42%, between 2010 and 2040, faster than the projected rate of county growth. This represents a total increase of approximately 10,200 people during the 30-year period, or an average net increase of 340 households each year.

Household growth is a function of population growth and household size. As an example, given an average household size of 2.55 people, an increase of 10,000 households would equate to a population of 25,500.

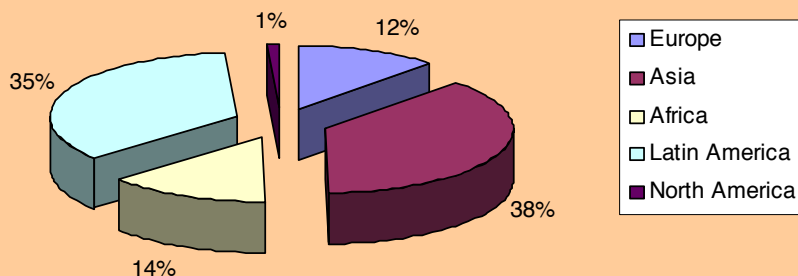
Ethnic and cultural diversity are increasing in Rockville.

- 34% of the City's population was born outside the U.S.
- 55% of the City's foreign-born were born in Asia
- 29% of the City's foreign-born were born in Latin America
- 57% of the City's foreign-born are not U.S. citizens
- 19% of Rockville residents are not U.S. citizens
- 37% of the City's foreign-born entered the U.S. in 2000 or later
- 41% of the City's population speak a language other than English at home; 47% of them speak English less than "very well."

Rockville's non-Hispanic white population represents 60.2% of the total population. Rockville's Asian population is the fastest growing group and represents 19.3% of the total. The Hispanic population is the second fastest growing group and accounts for 13.3%. Nationwide, the Hispanic population is the fastest growing and the largest minority group. Rockville's African-American population declined as a percentage of total population since the 2000 census.

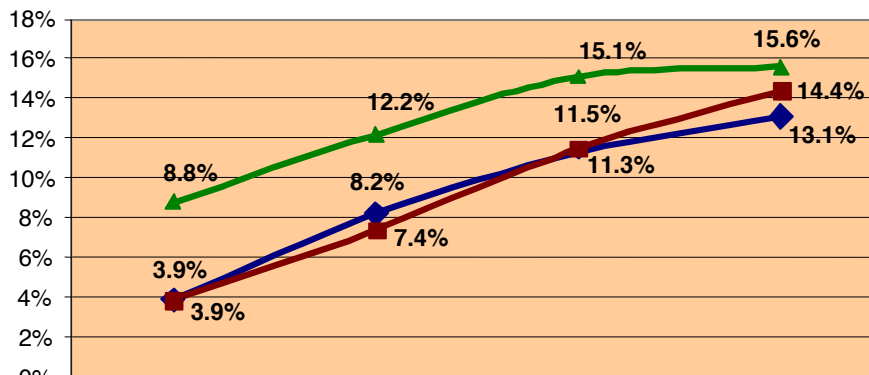


38% of Montgomery County's Foreign-Born Population is from Asia



Source: 2006-2008 ACS

Changing Ethnic Composition in Montgomery County



	1980	1990	2000	2008
Asian	3.9%	8.2%	11.3%	13.1%
Hispanic	3.9%	7.4%	11.5%	14.4%
African-American	8.8%	12.2%	15.1%	15.6%

Source: US Census Bureau-1980, 1990, 2000. 2006-2008 ACS

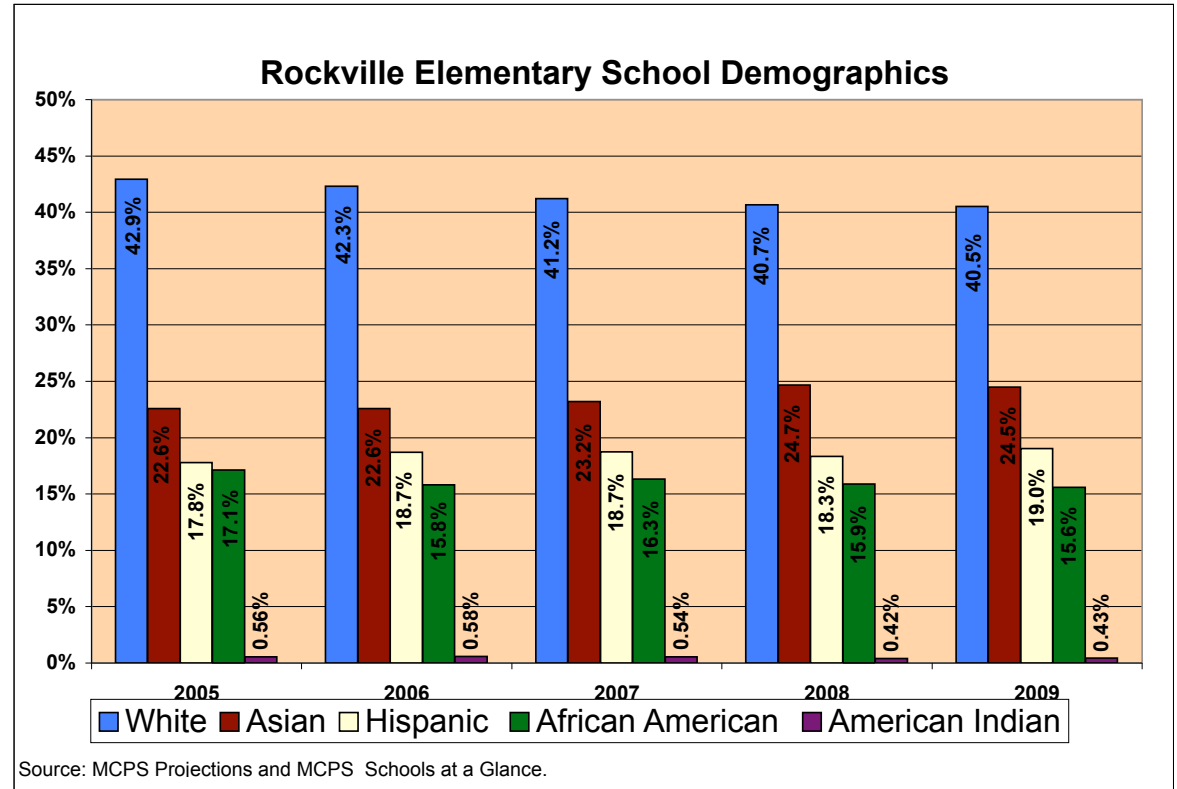
Rockville has a larger Asian population and smaller Hispanic and African-American populations than Montgomery County.

- 30% of the county's population was born outside the U.S.
- 38% of the county's foreign-born were born in Asia
- 35% of the county's foreign-born were born in Latin America
- 53% of the county's foreign-born are not U.S. citizens
- 16% of county residents are not U.S. citizens
- 31% of the county's foreign-born entered the U.S. in 2000 or later
- 36% of the county's population speak a language other than English at home; 41% of them speak English less than "very well."

Montgomery County's non-Hispanic white population represents 56.9% of the total population. African-Americans are the second-largest group and represent 15.6% of the total followed by Hispanics and Asians.

Elementary school demographic trends reflect an even more diverse population.

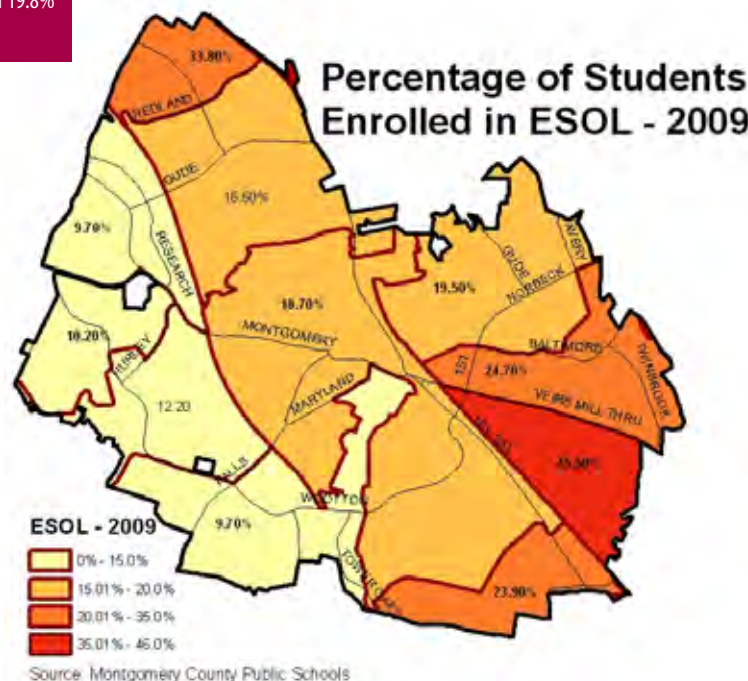
There is no majority population in the public elementary schools that serve Rockville. The percentage of non-Hispanic white students in Rockville elementary schools has declined over the last five years, from 42.9% to 40.5%. The percentage of Asian students has increased, from 22.6% in 2005 to 24.5% in 2009. Hispanic student enrollment also increased and African –American enrollment, as a percentage of total enrollment, declined slightly during the same period.



The demographic profile of all Montgomery County public schools (including elementary, middle and high schools) is 39% non-Hispanic white, 15.5% Asian, 22% Hispanic, 23.1% African-American and 0.29% American Indian.

		Rockville ESOL Rates				
School	Type	2005	2006	2007	2008	2009
Twinbrook	Elementary	20.8%	32.00%	38.1%	43.5%	45.5%
Meadow Hall	Elementary	12.5%	14.10%	12.9%	17.6%	24.7%
Maryvale	Elementary	9.0%	15.30%	16.7%	20.7%	19.5%
Beall	Elementary	17.0%	18.40%	25.5%	23.8%	18.7%
College Gardens	Elementary	9.9%	19.40%	18.4%	15.5%	16.5%
Fallsmead	Elementary	8.2%	9.70%	10.2%	11.0%	12.2%
Julius West	Middle	15.0%	14.50%	10.5%	13.3%	10.4%
Lakewood	Elementary	5.4%	6.60%	5.1%	9.7%	10.2%
Ritchie Park	Elementary	13.9%	13.10%	14.2%	13.3%	9.7%
Richard Montgomery	High	10.5%	7.10%	7.4%	7.7%	7.1%
Rockville	High	7.4%	5.30%	4.4%	4.6%	6.7%
Robert Frost	Middle	4.1%	2.50%	2.0%	3.6%	3.2%
Thomas Wootton	High	3.1%	2.20%	2.4%	2.1%	2.0%

Bold indicates above 2009 average County rate of 19.8%
 Source: Montgomery County Public Schools



ESOL rates are highest in elementary schools on the east side of Rockville.

Montgomery County Public Schools (MCPS) offers the English for Speakers of Other Languages (ESOL) program which is an indicator of immigration trends. The three elementary schools on the east side of Rockville – Twinbrook, Meadow Hall and Maryvale – had the highest percentages of students enrolled in ESOL programs in the City. According to the 2008 Needs Assessment produced by Rockville’s Community Services Division, the percentage of Hispanic students attending Twinbrook Elementary School (46.2%) is more than double the percentage of Hispanic elementary students in the county.

The ESOL participation rate has increased at all but one Rockville elementary school (Ritchie Park) since 2005. Between 2005 and 2009, ESOL rates declined at all middle and high schools in the City. Whether Rockville’s trends are indicative of demographic or programmatic changes is a potential area for further inquiry.

The map shows that the areas of highest ESOL participation are on the east side of the City and at the very northern portion. It should be noted that MCPS school boundaries do not match the City boundary. Some Rockville residents attend public schools located outside the City boundary and some students who live outside of Rockville attend school inside the City. For example, those who live north of Redland Road in King Farm are assigned to Rosemont Elementary School in the Gaithersburg cluster. Rosemont has an ESOL rate of 33.8%.

Rockville's population is aging.

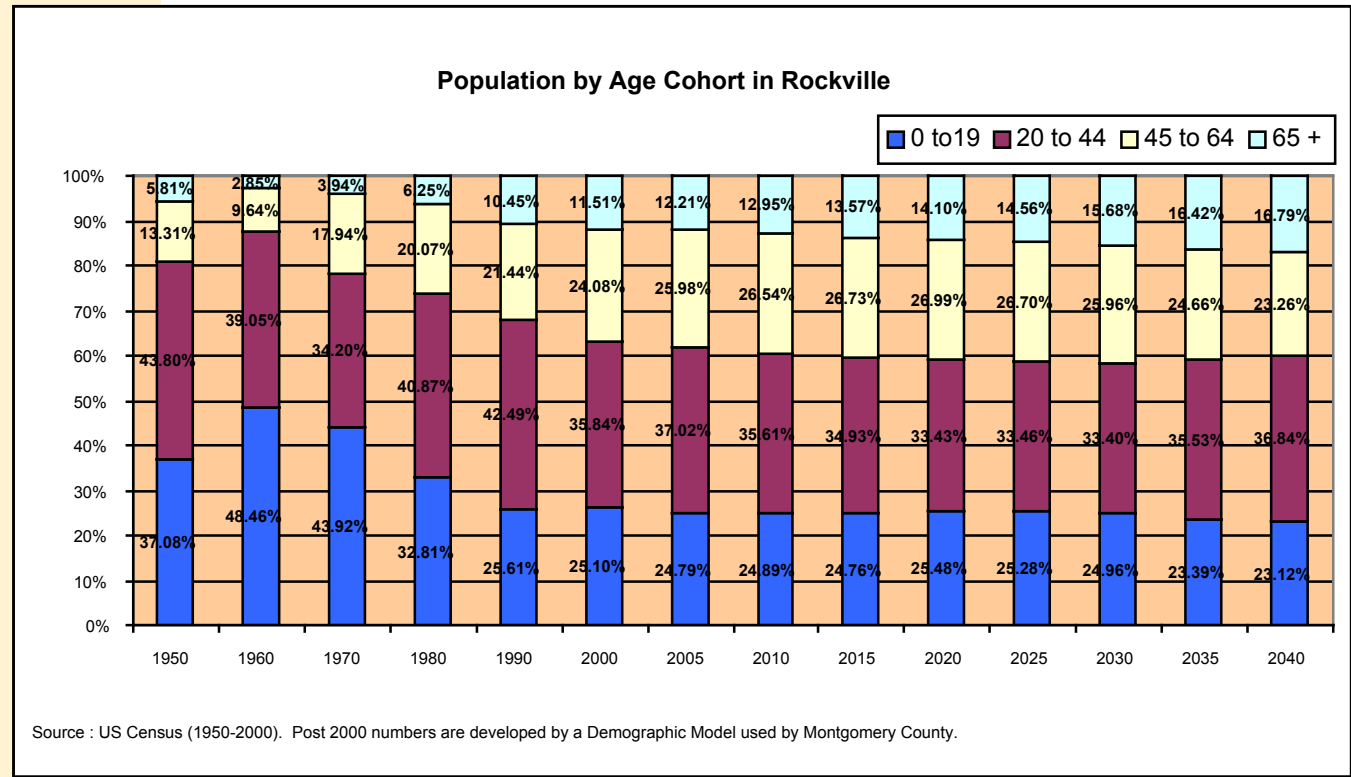
The median age in the U.S. is increasing as baby boomers grow older and average life spans increase. Rockville's median age of 40.2 is higher than county, state, regional and national averages.

As shown in the bottom chart, the number of residents age 65 and older is expected to continue increasing faster than other age groups over the next 30 years in Rockville, and is projected to represent 16.8% of total population in 2040. All age groups will continue to grow in number as the City's overall population increases, but the oldest age group will continue to steadily increase its percentage.

As an indication of how Rockville's population has aged during the past half century, 87.5% of the population was less than 45 years old in 1960. In 2005, the number was 62%, and it is projected to decline further, to 60% by 2040.

	U.S.	D.C. Region	Maryland	Montgomery Co.	Rockville
Median Age	36.8	36.9	37.7	38.8	40.2

Source: 2006-2008 ACS





Trends

Projections indicate that Rockville will add more than 10,000 households over the next 30 years, or an average increase of about 340 households per year.

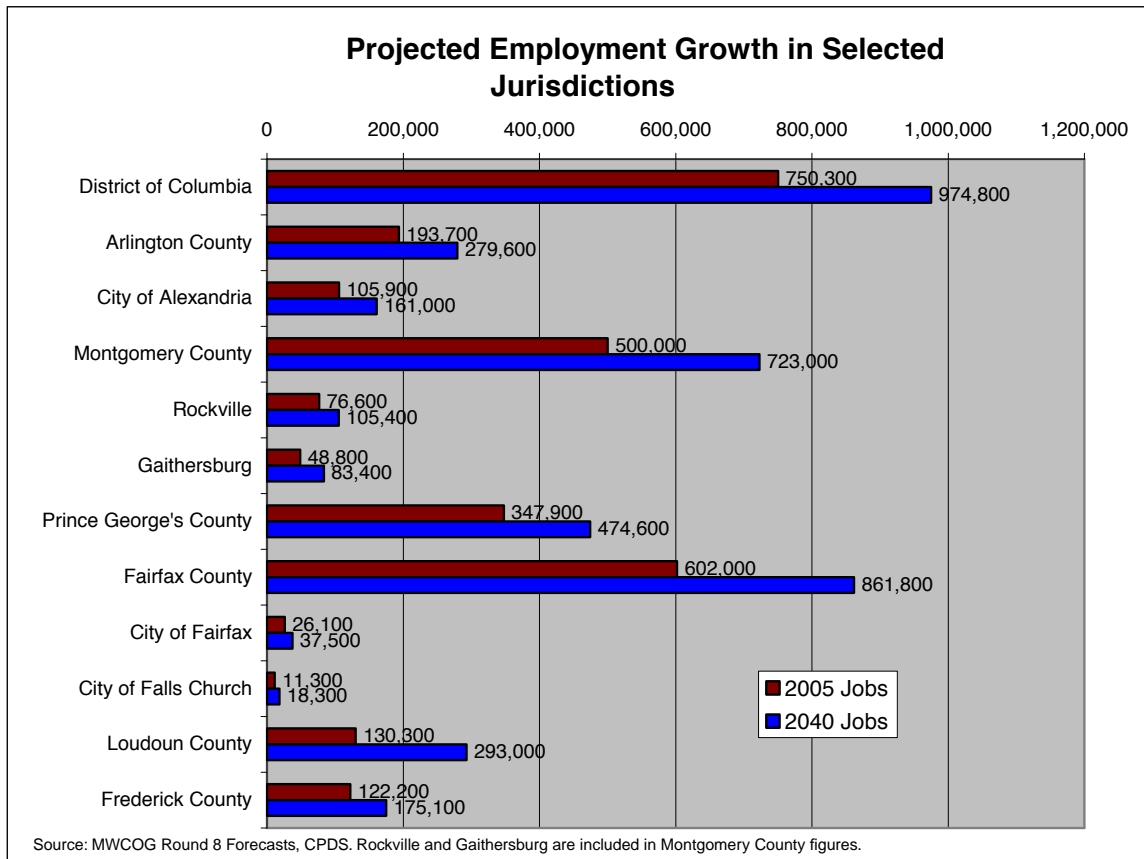
Average household size has been declining in Rockville for half a century and, at 2.55 persons per household, is currently smaller than Montgomery County and national averages.

An increase in the population who are age 65 and older is projected and may create more demand for multifamily and senior housing. The changing ethnic and age profile may increase demand for certain services and programs, especially in certain parts of the City, and will be relevant to Montgomery County school and senior service providers.

A challenge for Rockville will be how to adjust service delivery and infrastructure to accommodate growth, in cooperation with the county and state.

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Chapter 2: Economy



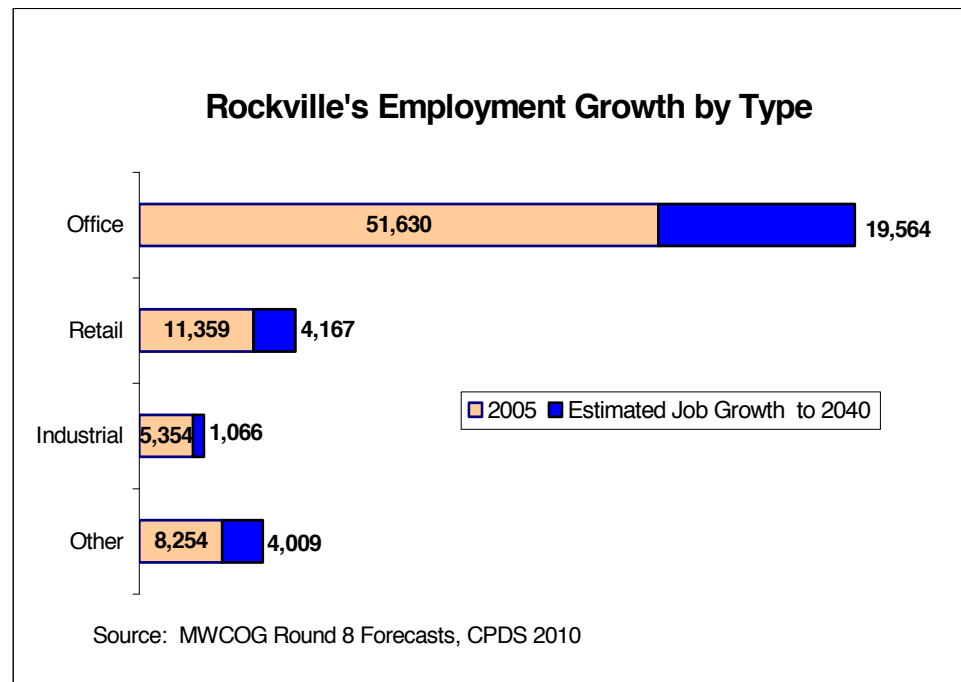
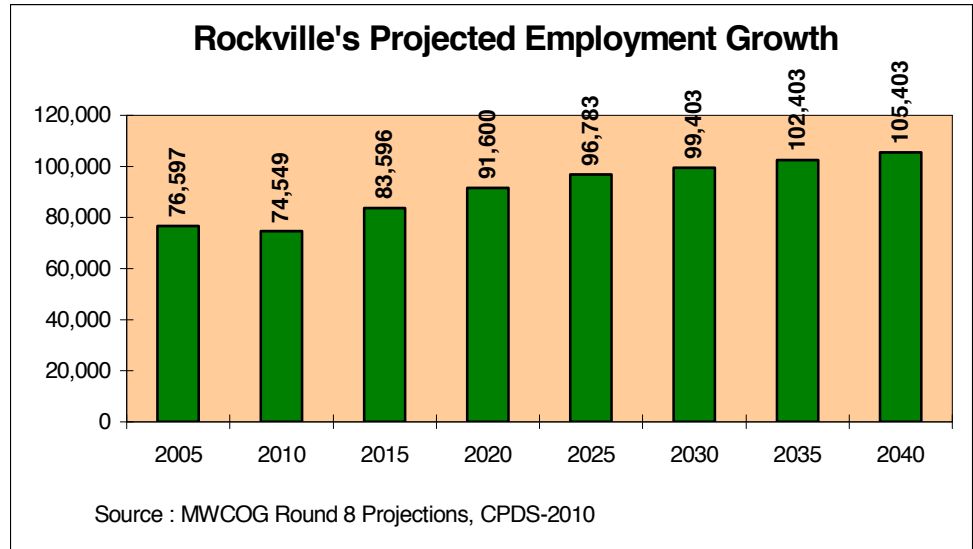
Regional employment growth will continue to be concentrated in central jurisdictions and inner suburbs, including Montgomery County.

Employment in the Metropolitan Washington Council of Governments (MWCOG) region is projected to grow 55% between 2005 and 2040, from 2,928,900 to 4,543,900 jobs, a net increase of 1.6 million. The inner suburbs (Montgomery, Prince George's and Fairfax Counties) and central jurisdictions (District of Columbia, Arlington County and City of Alexandria) will remain the region's primary employment locations. In 2040, 45% of the region's jobs will be in the inner suburbs; 30% will be in the central jurisdictions; and the remaining 25% will be in outer jurisdictions.

Total employment in Rockville was approximately 76,600 in 2005. There was a net loss of approximately 2,000 jobs between 2005 and 2010 due to the recession. Rockville is projected to gain 28,800 jobs between 2005 and 2040, indicating 38% employment growth over the period. Rockville's employment growth is projected to be slower than in Montgomery County (45%) and significantly slower than in the City of Gaithersburg (71%).

Forecasts indicate that most growth will be in office jobs.

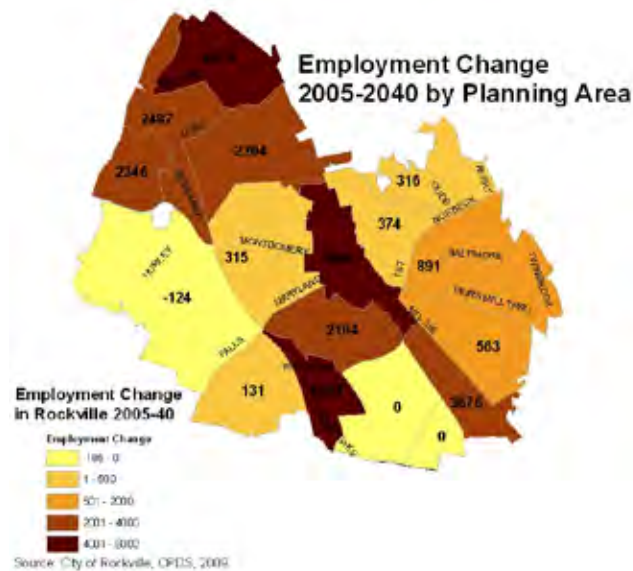
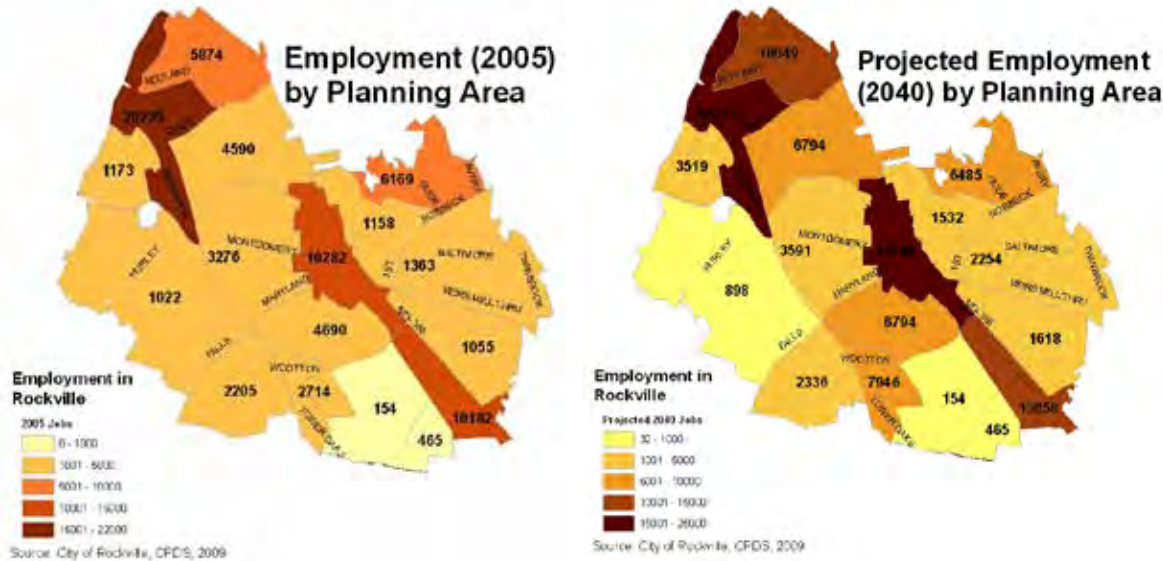
Two-thirds of Rockville's employment growth is projected to be in office jobs through 2040, reflecting the continued preponderance of professional, scientific, management, public administration and educational services jobs.



Employment growth will be concentrated along Rockville Pike, especially in Town Center and to the south; but employment will also increase significantly at Tower Oaks, King Farm and Fallsgrove.

As shown by the far left map, most of Rockville's current employment is concentrated along Rockville Pike and in the Research Boulevard area. Much of the City's remaining employment is located along the Pike and I-270 corridors and the industrial area along and near Gude Drive, north of Norbeck Road. Employment in the residential areas on the east and west sides of the City is dominated by neighborhood-serving retail jobs and jobs in schools.

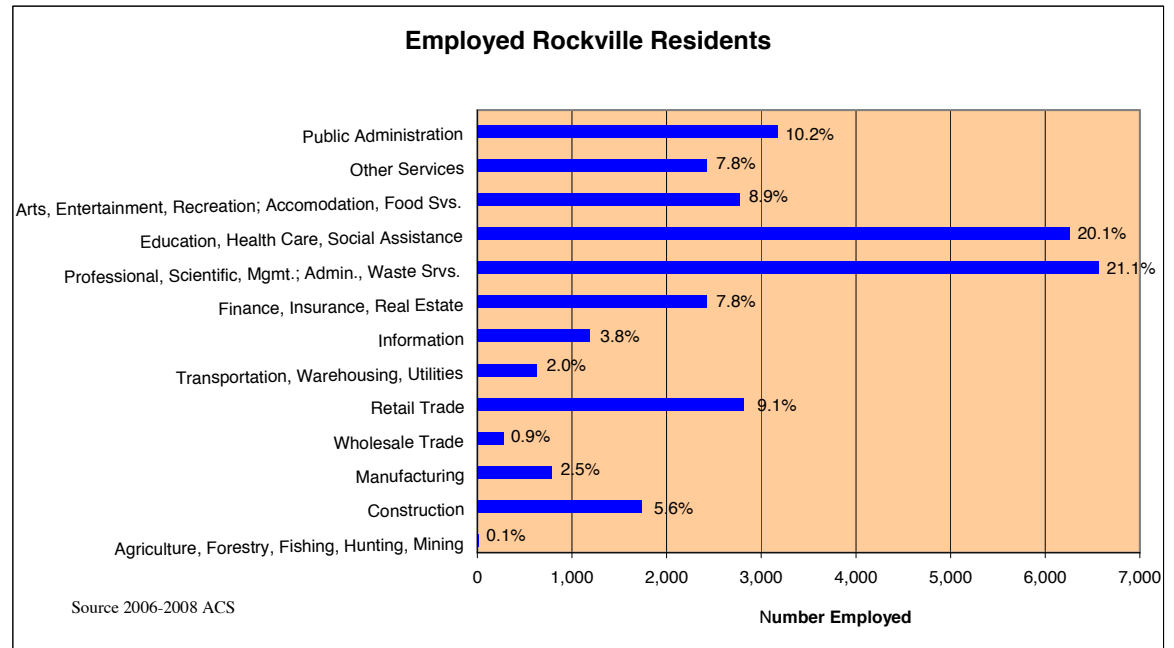
Employment is predicted to become even more heavily concentrated in the Rockville Pike corridor over the next 30 years, especially in and near the Town Center. This reflects the important roles Rockville Pike and the Metro red line stations play with regard to employment location. Tower Oaks, King Farm and Fallsgrove also are expected to receive a substantial number of the City's new jobs.



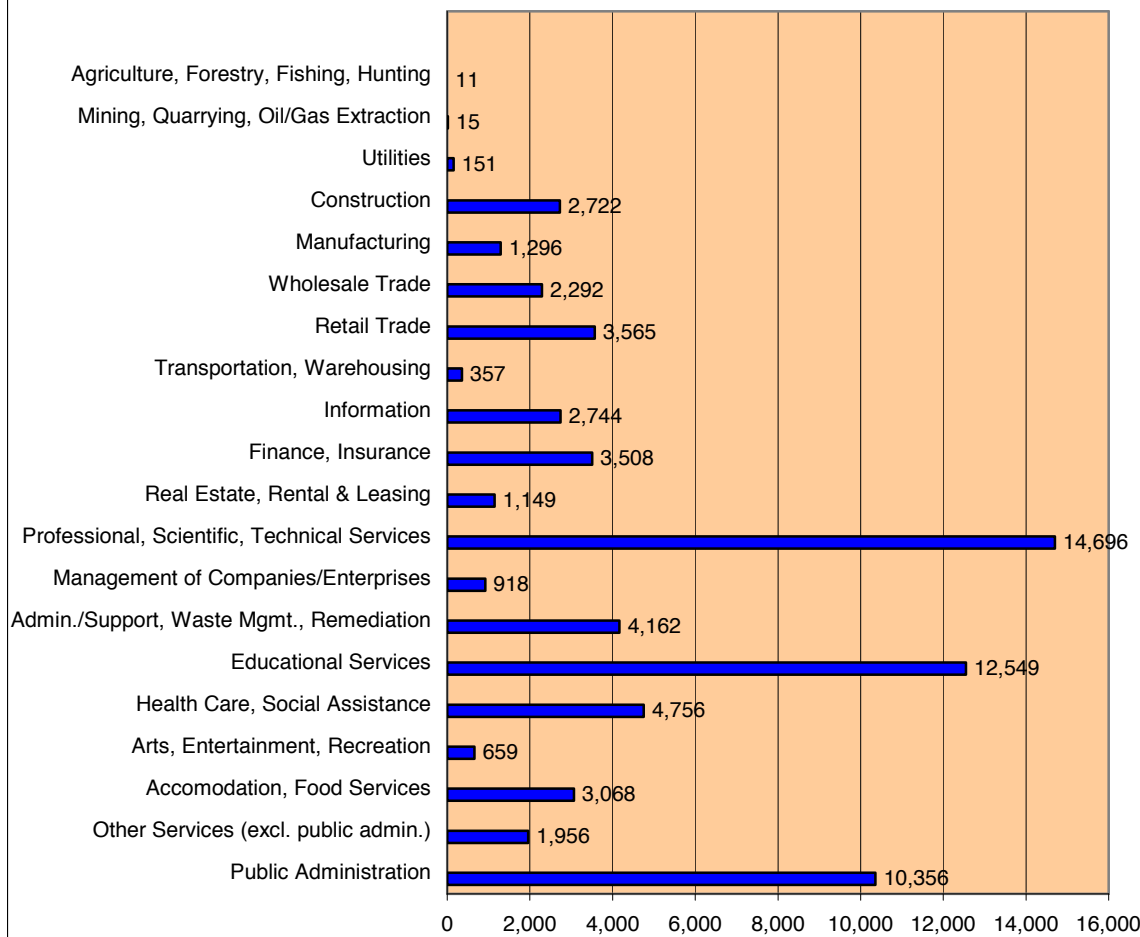
A large percentage of Rockville's employed residents work in professional, scientific and management jobs.

This employment category is associated with advanced education and relatively high salaries. According to American Community Survey (ACS) 2006-2008 data, more than half (57.6%) of Rockville residents, age 25 and older, have at least a Bachelor's degree and 32.4% have a graduate or professional degree. In comparison, 56.5% of Montgomery County residents have at least a Bachelor's degree and 29.2% have a graduate or professional degree.

More than 32,000 of Rockville's residents, or 71% of Rockville's population age 16 and older, were in the civilian labor force in 2006-2008. There are more than twice as many jobs in the City than there are residents in the labor force. This indicates that most people who work in Rockville live outside the City.



Jobs in Rockville by Industry Type



Source: U.S. Census Bureau, 2008

This data is from the U.S. Census Bureau's Local Employment Dynamics (LED) and groups employment sectors somewhat differently from ACS, so direct comparison between resident employment and at-place employment is difficult. Total jobs do not equal COG figures.

Jobs located in Rockville mirror those held by Rockville residents.

The adjacent graph illustrates employment by sector located within the City of Rockville. The top three employment sectors in the City are the same as those in which the largest numbers of City residents are employed: Professional, Scientific, and Technical Services; Educational Services; and Public Administration.

One-fifth of the jobs that are located in Rockville are in Professional, Scientific and Technical Services. When Administrative and Support, Waste Management and Remediation are added in to make the category comparable to resident employment, it represents one-quarter of all at-place employment.

Educational Services is the second largest job category. Rockville is the headquarters of Montgomery County Public Schools and the location of Montgomery College's largest campus.

Approximately 15% of jobs in Rockville are Public Administration jobs; not surprising given Rockville's proximity to the federal government, its status as the Montgomery County seat of government, and the fact that it has its own municipal government. The percentage of jobs in this category is higher than the percentage of Rockville residents employed in it.

Three of the largest employers in Rockville are in the public sector.

Montgomery County is the largest employer in the City. Other public sector employers, such as the U.S. Food and Drug Administration, are located just outside the City boundary. In addition, some of the largest private employers, such as Westat, Booz Allen Hamilton and Lockheed Martin, depend heavily on federal contracts.



Largest Employers in Greater Rockville

Employer	Rockville Employees
Montgomery County Government	12,729
<i>U.S. Food and Drug Administration</i>	9,300
Westat, Inc.	1,900
Montgomery College	1,427
Kaiser Permanente *	900
<i>Human Genome Sciences</i>	850
Community Services for Autistic Adults and Children	600
City of Rockville	520
Booz Allen Hamilton	500
Lockheed Martin Information Systems	500
Mann Bracken, LLC (Formerly Known As Wolpoff & Abramson, LLP)	500
<i>US Pharmacopeia</i>	470
<i>BioReliance Corporation</i>	447
EU Services	378
Banner Life Insurance Company	370
<i>Grunley Construction Co., Inc.</i>	350
Giant Food	326
<i>J. Craig Venter Institute</i>	326

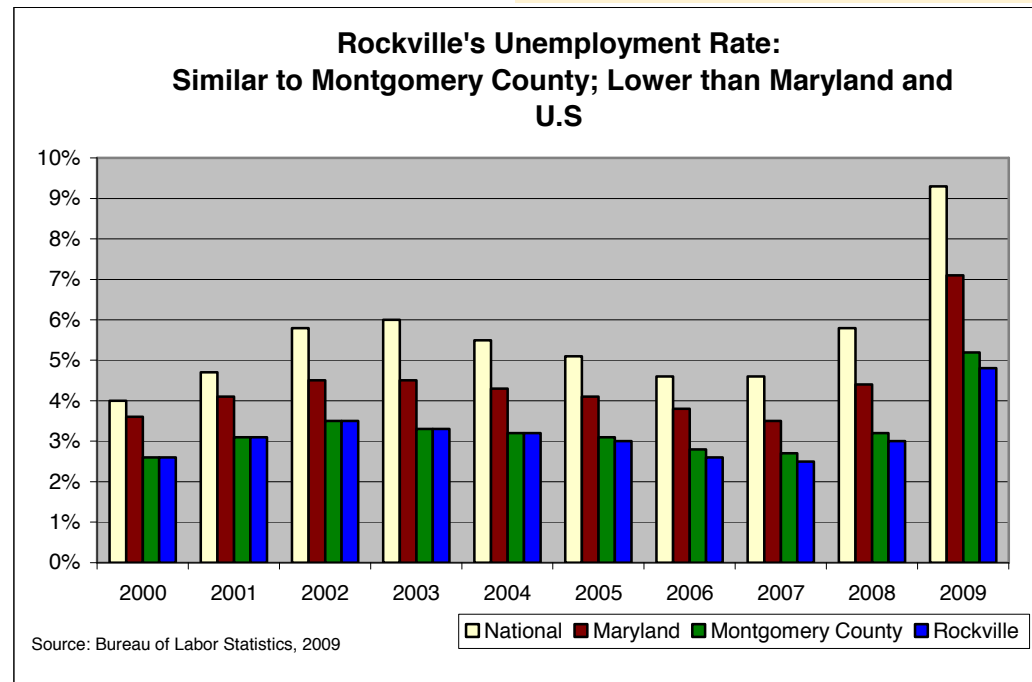
Source: REDI, Inc. October 2009
 Greater Rockville includes zip codes 20850, 20852 & 20854
 Italicized employers are located outside the City limits.
 * Kaiser Permanente represents two locations, one of which is outside the City.

Unemployment rates have risen in Rockville during the recession but continue to be relatively low.

Rockville's annual average unemployment rate ranged between 2.5% and 4.8% between 2000 and 2009. It has been equal to or lower than the Montgomery County rate and significantly lower than Maryland and U.S. rates. Unemployment rates increased significantly in all the jurisdictions between 2008 and 2009.



2009 Unemployment Rates	
Rockville	4.8%
Montgomery Co.	5.2%
Maryland	7.1%
U.S.	9.3%

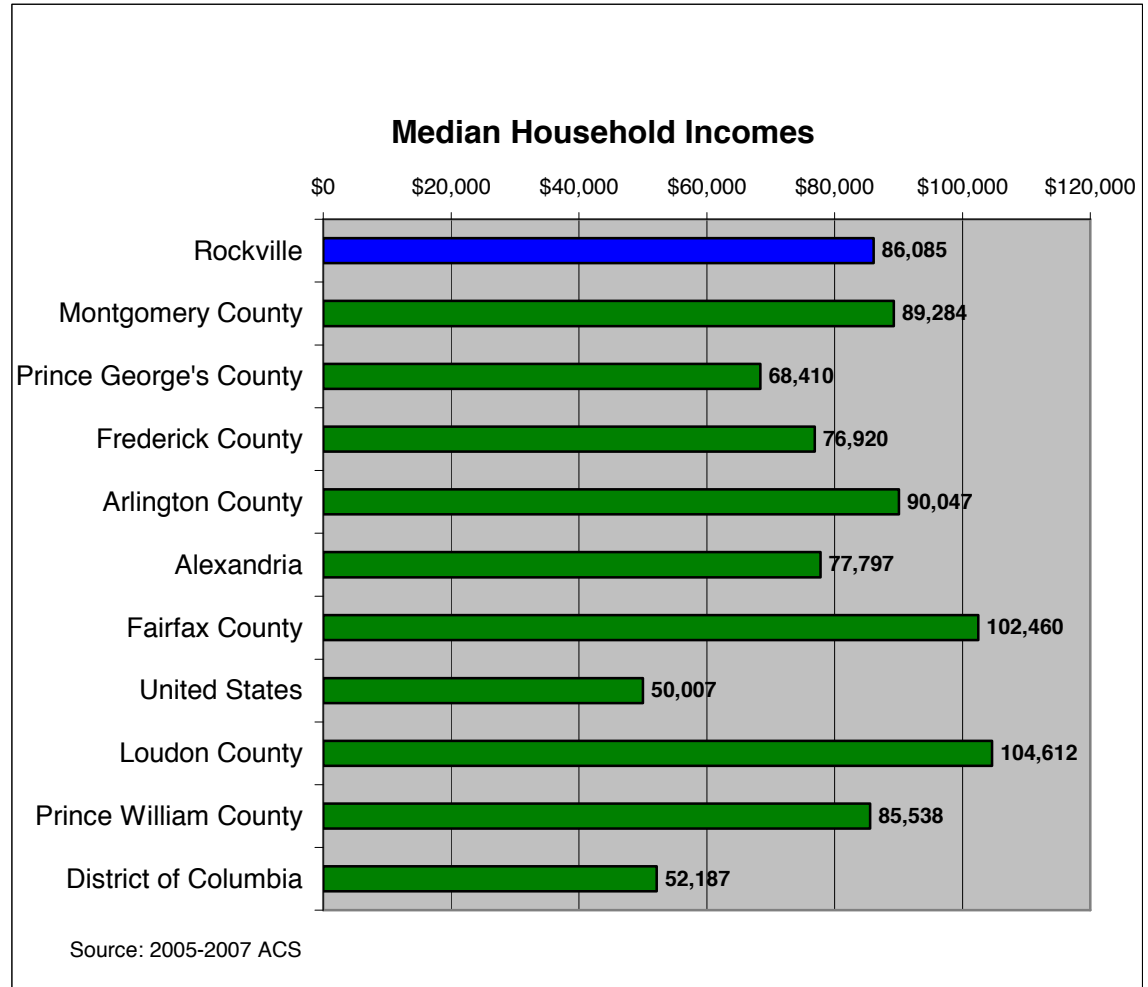


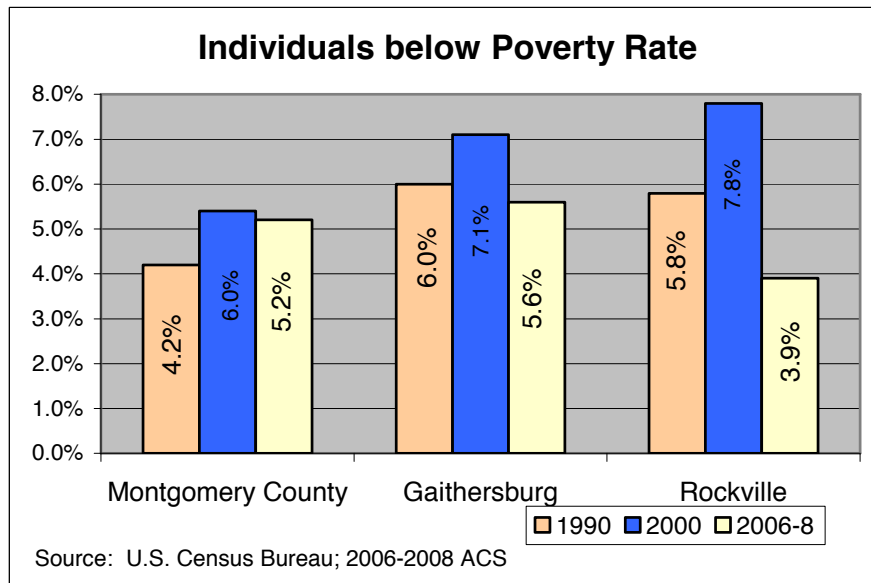
Rockville wages, salaries and median household income are higher than national averages.

Rockville's 2007 median household income (\$86,085) was 72% above the national average and just below the Montgomery County average of \$89,284.

According to "Economic Forces that Shape Montgomery County" published by the Maryland National Capital Park and Planning Commission (M-NCPPC) in 2006, the average salary paid by a job in Montgomery County was \$53,872 per year. Average pay in the private sector was \$50,544 compared to \$70,148 in the public sector.

There has been significant growth in income tax receipts in past years because of the City's continued population growth and robust economy. However, despite the relatively high incomes in the area, Rockville's income tax revenues may remain flat in the near future due to increased unemployment and reductions in capital gains associated with the recent recession.

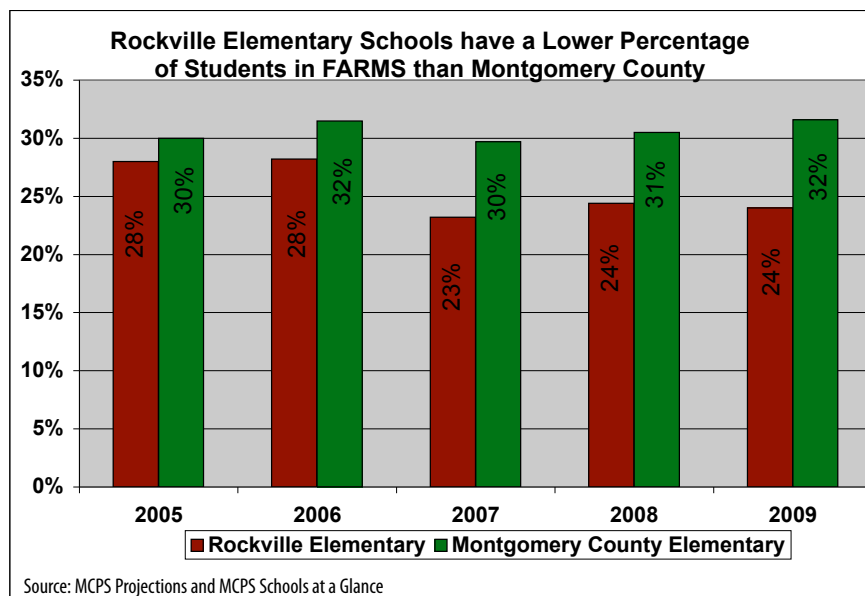




Overall, household economic stress is low for the City.

Rockville’s poverty rate was reportedly 3.9% in 2006-2008, lower than Gaithersburg and Montgomery County. However, there is some concern that this may be a statistical aberration of the ACS survey methodology since this was half the rate reported in the 2000 census.

Rockville elementary schools overall have a lower percentage of students in Free and Reduced Meals (FARMS) programs than Montgomery County. FARMS is a measure of household economic stress and, according to Rockville’s 2008 Social Needs Assessment, “Historically, schools with high FARMS rates have students and families in greater need of human services.”



Rockville FARMs rates are highest in elementary schools on the east side of the City.

Three of Rockville’s elementary schools - Twinbrook, Meadow Hall, and Maryvale - have FARMs rates higher than the county average rate of 33.1%. Almost two-thirds (63.5%) of Twinbrook Elementary School students are eligible for free or reduced meals. Twinbrook’s FARMs rate had been steadily declining from 2005 to 2008, but increased sharply in the 2008-2009 school year.

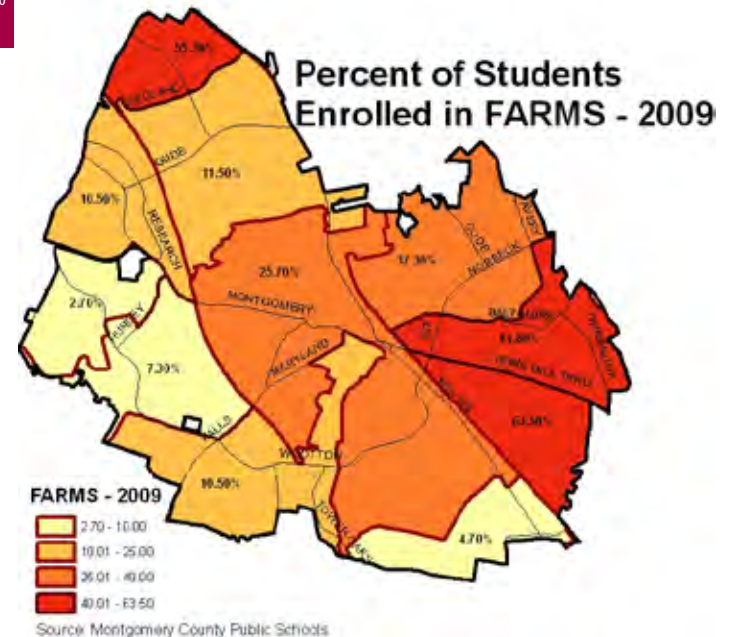
FARMs rates have declined at other schools in central and western Rockville, especially at Beall, Ritchie Park, and College Gardens Elementary Schools. Lakewood and Fallsmead Elementary Schools, Frost Middle School, and Wootton High School had the lowest FARMs rates in Rockville, all below 8% in 2009.

The adjacent map shows 2009 FARMs rates by area of the City for elementary, middle and high school students. It provides a view of where FARMs participation is highest in the City, which is one indicator of household economic stress. As noted in Chapter 1, some King Farm households are assigned to Rosemont Elementary School in the Gaithersburg cluster. Rosemont had a 2009 FARMs rate of 55.3%.

Rockville FARMs Rates Highest in Elementary Schools on East Side of the City

School	Type	2005	2006	2007	2008	2009
Twinbrook	Elementary	60.3%	59.3%	56.9%	55.9%	63.5%
Meadow Hall	Elementary	37.7%	42.9%	37.4%	37.0%	41.6%
Maryvale	Elementary	37.9%	37.8%	36.7%	37.8%	37.3%
Julius West	Middle	31.5%	30.7%	28.2%	27.9%	28.8%
Beall	Elementary	35.8%	33.7%	33.6%	30.2%	25.7%
Rockville	High	17.3%	19.3%	17.9%	19.1%	20.5%
Richard Montgomery	High	11.7%	16.3%	14.9%	16.3%	15.6%
College Gardens	Elementary	20.3%	17.1%	16.8%	15.0%	11.5%
Ritchie Park	Elementary	17.6%	18.8%	16.5%	13.3%	10.5%
Fallsmead	Elementary	6.4%	11.5%	6.4%	7.2%	7.3%
Robert Frost	Middle	3.9%	8.5%	3.3%	4.6%	5.3%
Thomas Wootton	High	4.0%	4.6%	3.7%	4.7%	4.2%
Lakewood	Elementary	3.5%	5.3%	1.9%	2.3%	2.7%

Bold indicates above 2009 County average of 33.1%
Source: Montgomery Co. Public Schools





Trends

Rockville has enjoyed a fundamentally healthy economy within the similarly healthy Montgomery County economy. Although Rockville and Montgomery County unemployment rates have risen during the recession, they have consistently been lower than state and national rates.

In the immediate future employment growth will be in office jobs concentrated in the Rockville Pike corridor, in and near Town Center, and close to transit and the MD 355 and I-270 corridors.

Rockville's median household income is slightly below that of the county, but both are well above the state and national averages. Montgomery County Public Schools FARMs rates indicate that economic stress is higher on the east side of Rockville than in the central area (between MD 355 and I-270) or the area west of I-270. Income tax revenues may remain flat in the near term as a result of increased unemployment and reductions in capital gains.

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Chapter 3: Housing

Rockville Housing Inventory 2010

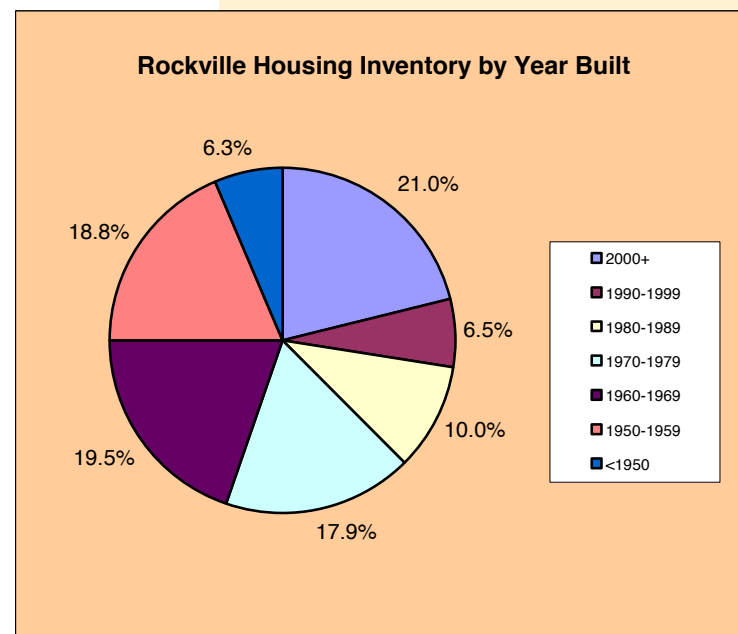
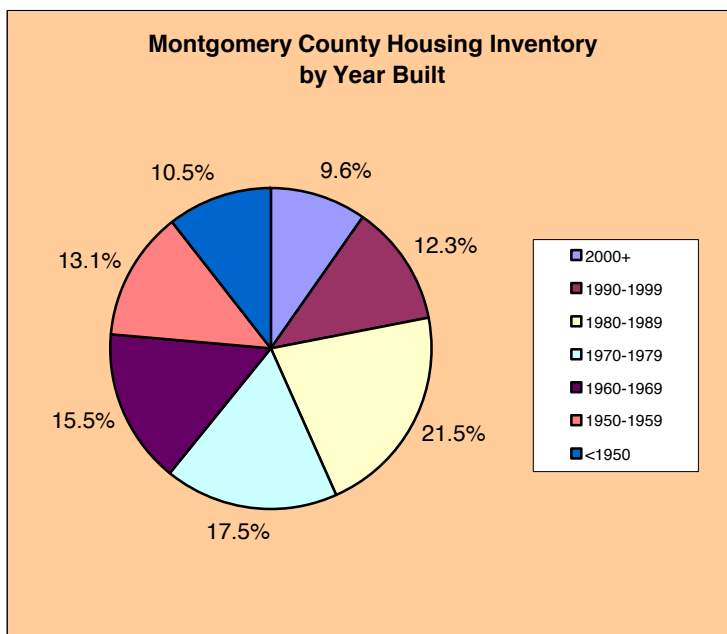
SF Detached		SF Attached (TH)		Multifamily		Total Units	
11,391	47%	3,440	14%	9,496	39%	24,327	100%

Source: MWCOC Round 8.0 forecasts, CPDS 2010

Approximately one-fifth of the City's housing was built since 2000.

The 2000-2010 decade represents the largest number of housing units built in the City in its history, 21% of the total. As a comparison, less than 10% of Montgomery County's housing inventory was built over the last ten years.

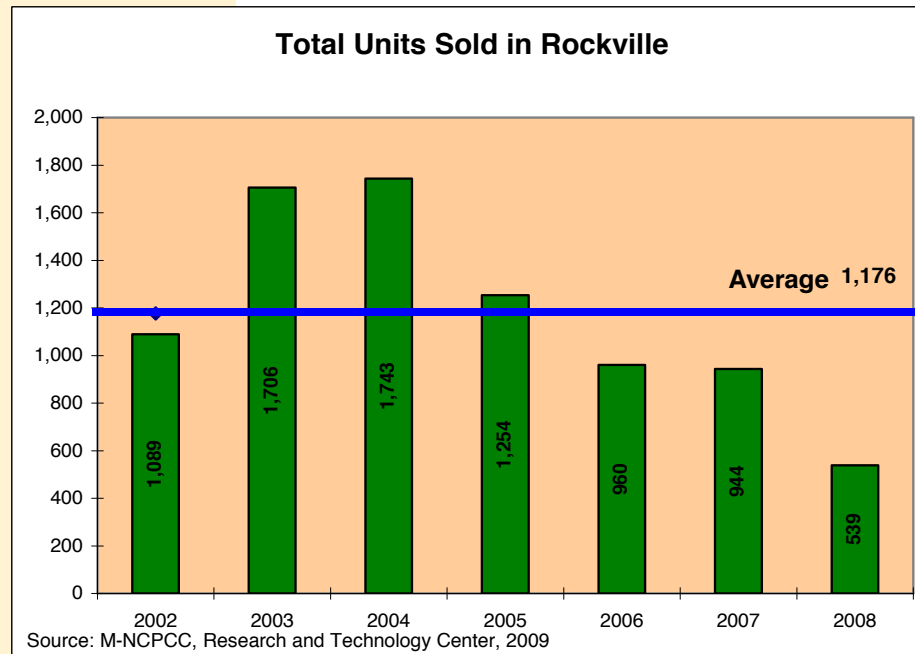
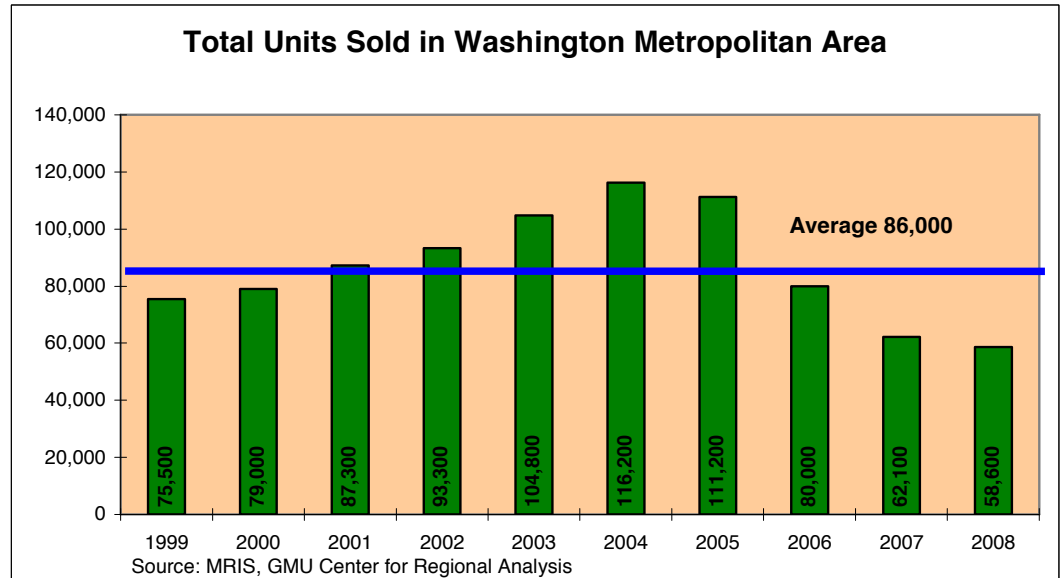
Single-family homes (attached and detached) currently represent 61% of the City's housing inventory and multifamily represents 39%.



Housing sales have declined in the region and in Rockville since 2004.

The housing market is an integral component of the economy and currently the focus of considerable public attention. The number of homes sold in the Washington, DC region dropped by 50% from the peak sales year of 2004 to 2008; from 116,200 to 58,600.

Rockville was no exception to this trend and home sales have declined in the City since 2004. The number of homes sold in Rockville fell by 69%, from 1,743 in 2004 to 539 in 2008. Sales of new homes in King Farm and Fallsgrove were major contributors to the spike in sales in 2003 and 2004.





Median sales prices of housing in Rockville have fluctuated in recent years.

Prices for most housing types in Rockville were lower in 2008 than they were in the years immediately prior when prices were peaking. Except for new single-family detached homes, however, prices were higher than they had been in 2002. The figures shown in the chart represent the median prices of homes that sold in the indicated year. The characteristics of the homes that sold, such as age, size and condition, may vary widely from year to year, making it difficult to draw conclusions about trends.

Median Sales Prices of Housing in Rockville

Year	Single-Family Detached Units (SFD)		Single-Family Attached Units (SFA)		All SF Units	Condominium Units		
	New	Existing	New	Existing		New	Existing	All Condo Units
2002	\$573,838	\$275,000	\$327,474	\$302,000	\$324,075	\$215,832	\$179,000	\$200,341
2003	\$670,853	\$366,383	\$392,632	\$354,219	\$376,390	\$94,991	\$244,000	\$228,625
2004	\$841,422	\$350,750	\$492,194	\$489,200	\$464,750	\$342,735	\$300,115	\$318,928
2005	\$997,756	\$430,300	\$592,431	\$572,450	\$525,000	\$443,963	\$376,200	\$387,450
2006	\$650,000	\$450,000	\$1,342,868	\$585,500	\$495,000	*	\$386,900	\$386,900
2007	\$650,000	\$462,500	\$992,930	\$550,000	\$520,000	\$964,435	\$386,900	\$401,000
2008	\$350,000	\$510,000	\$428,900	\$545,000	\$515,000	\$1,208,624	\$357,584	\$355,000

Source: M-NCPPC, Research and Technology Center, 2009. Data is compiled from Sales Transaction Automated Report (STAR) using data from the State Department of Assessment and Taxation (SDAT)

* fewer than 20 transactions. Some of the homes sold (including those priced over \$1 million) may have a Rockville mailing address but be located just outside of Rockville's corporate limits.

Rockville's median sales prices are similar to Montgomery County, and well above the Metropolitan Area median.

Prices fell in most jurisdictions in the region between 2007 and 2008, but Rockville's decline of less than 1% was less than Montgomery County and other counties experienced.



Median Sales Prices of Single-Family Homes by Jurisdiction

Area	2007	2008	Change	% Change
City of Rockville	\$520,000	\$515,000	(\$5,000)	-0.96%
Montgomery County	\$550,200	\$503,900	(\$46,300)	-8.40%
Prince George's County	\$331,100	\$290,200	(\$40,900)	-12.40%
District Of Columbia	\$537,400	\$543,500	\$6,100	1.10%
Arlington County	\$559,000	\$539,300	(\$19,700)	-3.50%
City of Alexandria	\$502,900	\$471,200	(\$31,700)	-6.30%
Fairfax County	\$542,000	\$445,900	(\$96,100)	-17.70%
Loudoun County	\$516,800	\$389,000	(\$127,800)	-24.70%
Prince William County	\$395,000	\$257,900	(\$137,100)	-34.70%
MD SUBURBS	\$435,800	\$400,400	(\$35,400)	-8.10%
VA SUBURBS	\$488,300	\$373,200	(\$115,100)	-23.60%
METRO AREA	\$468,700	\$394,700	(\$74,000)	-15.80%

Source: MRIS, GMU Center for Regional Analysis
 City of Rockville data is from MNCPPC, Research and Technology Center, 2009

Total Units Foreclosed May 2008-April 2009

Jurisdiction	Foreclosed*	Total Units	Percentage Of all Units
City of Rockville (April 08-March 09)	284	21,523	1.31%
Montgomery County	6,172	359,142	1.72%
Fairfax County	14,700	390,001	3.77%
Prince Georges County	12,434	317,273	3.92%
Loudoun County	5,457	97,790	5.58%
City of Alexandria	900	69,542	1.29%
Arlington County	1,015	98,995	1.03%
District of Columbia	4,512	282,411	1.60%

Source: RealtyTrac, June 2009.

*Foreclosures include default, auction and real estate owned (REO).

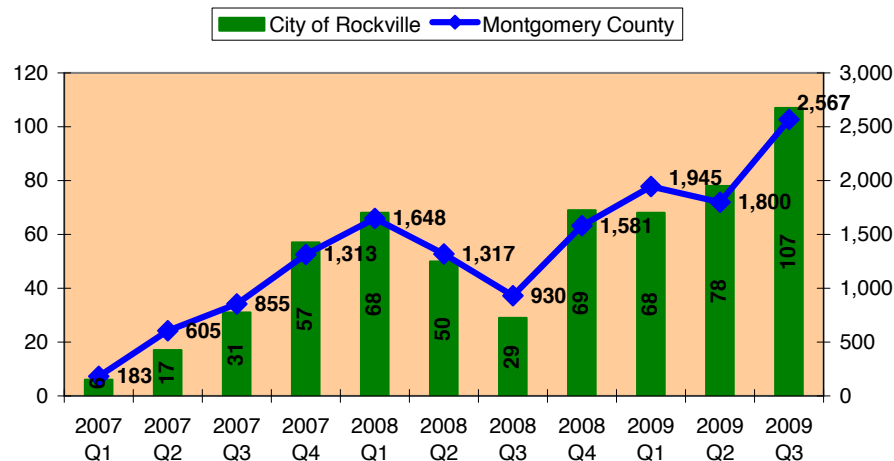
Foreclosures have increased.

More than three-quarters (77%) of Rockville’s owner-occupied units are mortgaged, according to American Community Survey (ACS) data. The median monthly housing costs for Rockville homeowners with a mortgage is more than \$2,500.

Like most of the country, the Washington, DC metropolitan area has suffered an increase in housing foreclosures. The increase in foreclosures is attributed to a number of causes, including the proliferation of subprime mortgages, falling home prices, declining homeowner equity, increased unemployment and declining incomes. Rockville has also experienced an increase in foreclosures, but the City had one of the lowest foreclosure rates in the region over a recent twelve-month period.

Housing foreclosures in Rockville increased steadily through 2007 and into the first quarter of 2008 before declining briefly through mid-2008. The number of foreclosures climbed again in late 2008 and 2009 and was recently at its highest level since Rockville began tracking it in 2007. Rockville’s foreclosure trends have closely matched Montgomery County trends.

Properties in the Foreclosure Process in the City of Rockville and Montgomery County

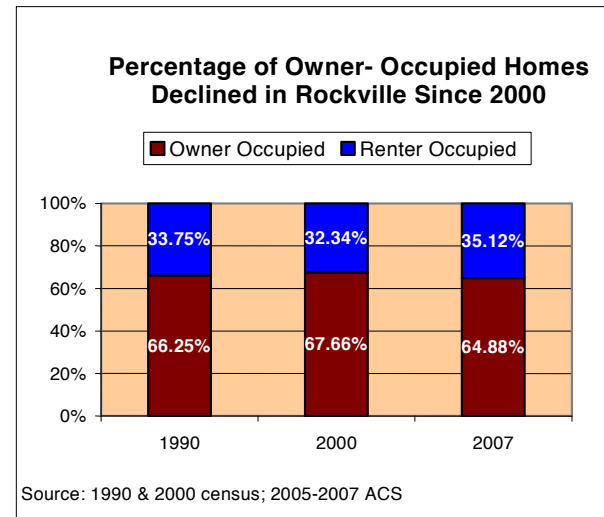
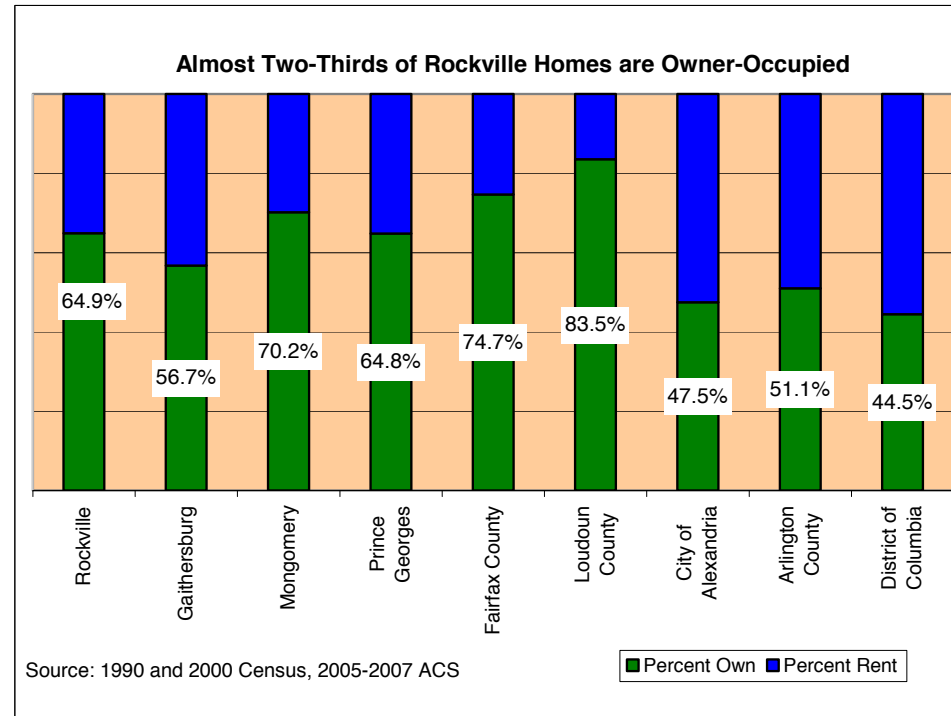


Source: Realty Trac, MNCPPC

Approximately two-thirds of Rockville households are homeowners.

Rockville has a higher percentage of homeowners than areas that are considered more urbanized, such as the District of Columbia, Alexandria and Arlington; but lower than more outlying suburban areas such as Loudoun County. Montgomery County has a higher home ownership rate than Rockville. The City of Gaithersburg has a lower rate.

Home ownership in Rockville declined slightly between 2000 and 2007, which generally correlates with the increasing share of multifamily housing and the overall pattern of increasing density. According to the 2000 census, 84% of multifamily units were rental in Rockville compared to 30% of townhouses and 11% of single-family detached units. Although these figures will likely change as of the 2010 census, the overall balance of most multifamily housing being rental and most single-family housing being owner-occupied is not expected to change.



Average Market-Rate Rents by Jurisdiction & Unit Type, 2009

	Efficiency	1BR	2BR	3BR	4BR+	Average
Rockville	\$ 725	\$1,313	\$1,499	\$1,794	\$2,175	\$1,484
Gaithersburg	\$ 801	\$1,060	\$1,291	\$1,493	NA	\$1,210
Takoma Park	\$ 639	\$ 822	\$ 926	\$1,104	NA	\$ 898
Unincorporated Montgomery Co.	\$1,160	\$1,249	\$1,448	\$1,852	\$2,087	\$1,390
Countywide	\$1,148	\$1,225	\$1,427	\$1,792	\$2,103	\$1,369

Source: Montgomery County Annual Rental Facility Report, 2009

Apartment rents in Rockville are generally higher than in Gaithersburg, Takoma Park and other parts of Montgomery County.

Apartment rents average almost \$1,500 in the City of Rockville.

Rents continue to increase, but the rate of increase has slowed in the Rockville Market Area since 2007. The Market Area encompasses a larger area than the City of Rockville. Rents in the Rockville Market Area increased by an average of 3.4% annually between 2005 and 2008, but by only 1.4% between 2008 and 2009. Anecdotal evidence is that there has been an increase in incentives to attract renters during the recent economic recession.

Market-Rate Rents* by Market Area, 2005-2009

	2005	2006	2007	2008	2009	2005-2009 % Change
Rockville Market Area	\$1,381	\$1,416	\$1,523	\$1,523	\$1,544	11.8%
Germantown-Gaithersburg	\$1,063	\$1,099	\$1,165	\$1,194	\$1,179	10.9%
Bethesda-Chevy Chase	\$1,467	\$1,550	\$1,674	\$1,751	\$1,863	27.0%
Silver Spring-Takoma Park	\$1,087	\$1,140	\$1,202	\$1,273	\$1,311	20.6%
Colesville-White Oak	\$1,112	\$1,151	\$1,186	\$1,240	\$1,315	18.3%
Wheaton	\$1,090	\$1,139	\$1,170	\$1,239	\$1,255	15.1%
Darnestown-Potomac	\$1,369	\$1,368	\$1,369	\$1,474	\$1,531	11.8%
Olney	\$1,261	\$1,345	\$1,364	\$1,457	\$1,443	14.4%
Upper Montgomery County	\$ 977	\$ 986	\$1,039	\$1,122	\$1,135	16.1%
Countywide	\$1,167	\$1,212	\$1,281	\$1,329	\$1,369	17.3%

Source: Montgomery County Annual Rental Facility Report, 2009

The Rockville Market Area is larger than the City of Rockville as defined in this Facility Report.

* Rents include some or all utilities at 60% of the surveyed units

Montgomery County's Department of Housing and Community Affairs produces an annual rental facility report based on a survey of all multifamily rental facilities with twelve or more rental units. The 2009 survey included responses for 71,249 units in 425 facilities which represented 93.7 % of the total 76,065 units that received a survey. The City of Rockville represented 5,114 units, or 7.2% of the survey total.

Apartment vacancy is low in Rockville.

Apartment vacancy in the City of Rockville averaged 3.1% in 2009. This was the lowest vacancy reported over the last five years and lower than the cities of Gaithersburg and Takoma Park as well as the county average.

The Rockville Market Area, which includes a larger area than the City of Rockville, had the third lowest vacancy rate (3.8%) of the major market areas surveyed by Montgomery County in 2009. Only the Darnestown/Potomac and Olney rental markets had lower vacancy rates.

Vacancy rates are lowest (3.5%) for units in the \$1,200 to \$1,299 monthly rent range in Montgomery County and highest for units priced at \$2,000 or above (7.9%). Vacancy is also high at the lowest end of the rent spectrum, up to \$899 per month, with 7.0% vacancy.

Rental Vacancy Rates by Market Area and Unit Size, 2009

	# Units Surveyed	Efficiency	1 BR	2 BR	3 BR	4 BR+	All
Rockville Market Area	10,704	3.0%	3.6%	3.6%	5.1%	0.0%	3.8%
Germantown-Gaithersburg	16,053	3.3%	6.3%	5.7%	4.2%	3.7%	5.8%
Bethesda-Chevy Chase	7,049	2.6%	4.9%	7.1%	5.6%	0.0%	5.5%
Silver Spring-Takoma Park	16,519	5.1%	4.7%	3.2%	1.6%	0.0%	3.9%
Colesville-White Oak	9,268	7.0%	6.3%	5.0%	6.4%	0.0%	5.7%
Wheaton	10,389	5.5%	7.5%	4.2%	3.7%	5.9%	5.4%
Darnestown-Potomac	510	NA	0.8%	2.0%	0.0%	0.0%	1.0%
Olney	552	0.0%	0.5%	3.1%	2.6%	3.3%	2.0%
Upper Montgomery County	205	0.0%	7.1%	5.3%	4.5%	NA	5.4%
Countywide	71,249	4.3%	5.4%	4.6%	4.1%	2.1%	4.9%

Source: Montgomery County Annual Rental Facility Report, 2009. Includes market rate and subsidized units. Rockville's average vacancy rate for market rate units only was 4.4% in 2009.

Rental Vacancy Rates by Jurisdiction

	2005	2006	2007	2008	2009
City of Rockville	3.3%	3.9%	4.5%	3.1%	3.1%
City of Gaithersburg	5.9%	4.8%	5.7%	4.5%	5.7%
City of Takoma Park	2.1%	1.3%	2.1%	5.0%	3.2%
Unincorporated Montgomery County	4.7%	3.9%	4.7%	4.4%	5.0%
Countywide	4.6%	3.9%	4.7%	4.3%	4.9%

Source: Montgomery County Annual Rental Facility Report, 2009

Workforce Household Income Ranges, DC Metropolitan Area, 2009-2010

Household Size	60% of AMI	100% of AMI
1-person	\$43,140	\$ 71,900
2-person	\$49,320	\$ 82,200
3-person	\$55,440	\$ 92,400
4-person	\$61,620	\$102,700
5-person	\$66,540	\$110,900

Sources: U.S. Department of Housing and Urban Development; "Priced Out", ULI, 2009

Housing Unit Deficit/Surplus for Workforce Households in Key Metropolitan Area Employment Cores

Household Size	Rockville	Bethesda	DC	Alexandria	Tysons Cr.	Reston/Herndon
1-person	-1,898	+3,221	+ 28,035	+14,304	- 461	-4,848
2-person	-2,785	-5,753	- 4,908	- 3,883	-6,059	-4,895
3-person	-1,716	-2,224	- 8,186	- 4,715	-7,085	-3,985
4-person	-2,133	-4,774	- 15,333	- 6,128	-7,662	-3,928

Source: "Priced Out", ULI, Terwilliger Center for Workforce Housing, 2009.

There is a deficit of affordable housing in the Washington metropolitan area and in Rockville.

The U.S. Department of Housing and Urban Development (HUD) defines area median income (AMI) for metropolitan areas. This indicator is often used to determine relative housing affordability for different income ranges and household sizes. The AMI for a family of four in the Washington, DC metropolitan area is \$102,700, one of the highest in the country.

An Urban Land Institute (ULI) study defines workforce households as those with incomes between 60 and 100% of AMI adjusted for household size. Approximately 23%, or 467,000 of the DC metropolitan area's 2 million households, fell into this income range in 2007. Approximately 29% of households earn less than 60% of AMI, 10% earn 100-120% of AMI, and 38% earn more than 120% of AMI.

The ULI study indicates that there are limited housing opportunities for workforce households of all sizes within the Rockville employment core, defined as the area that is within a 20-minute, no-traffic drive time; approximately equivalent to a 30-45 minute in-traffic commuting time. This undersupply forces some households who work in Rockville to seek housing in locations that require longer commutes, which increases regional traffic and congestion.

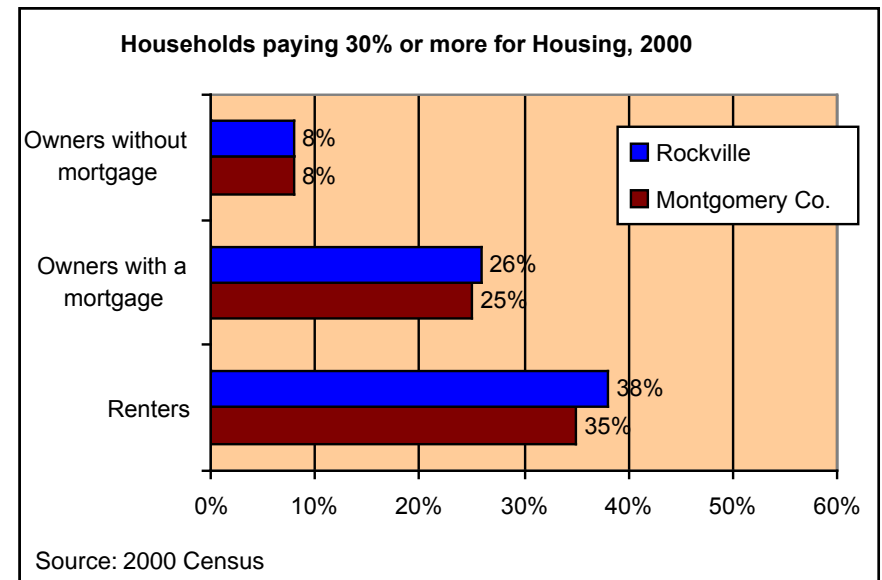
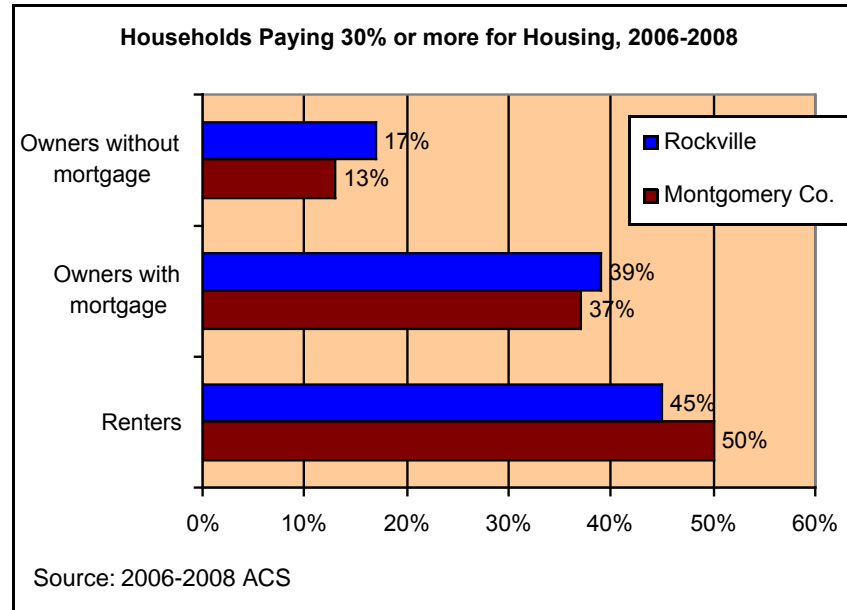
The second table shows key close-in employment cores that have experienced both employment growth and rapid housing appreciation in recent years. Rockville has a deficit of workforce housing for all household sizes, although its deficit is not as severe as in some other jurisdictions.

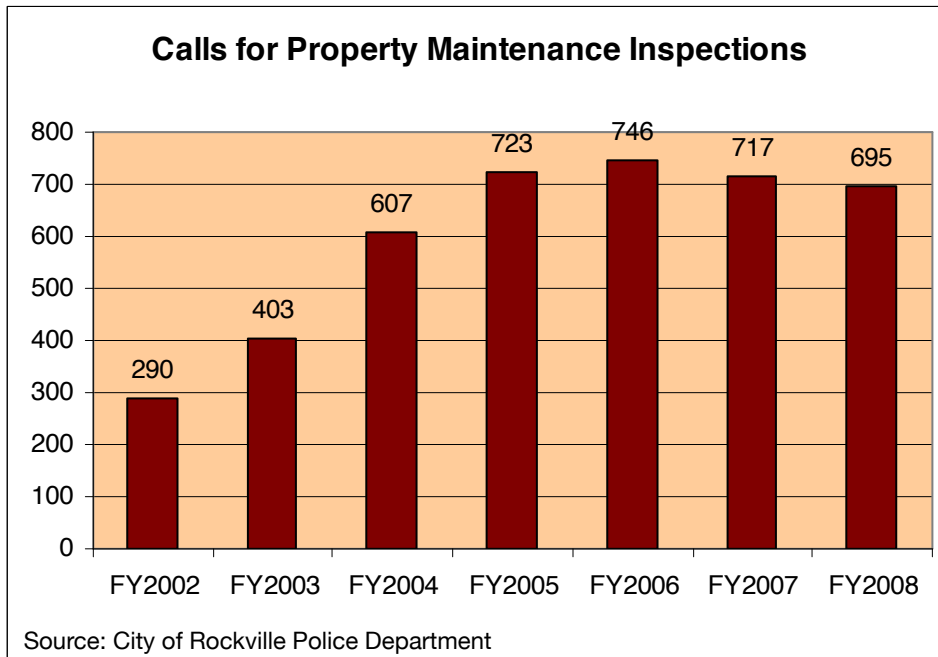
Renters in Rockville are more cost burdened than homeowners.

Households are considered cost burdened if housing costs equal or exceed 30% of income. Roughly 45% of Rockville renters spend 30% or more of their incomes on housing compared to 34% of homeowners (including those with and without mortgages). These percentages have increased significantly since the 2000 census in Rockville and Montgomery County.

There are more than 2,200 affordable housing units in Rockville and approximately 600 more in the pipeline for development.¹ About one-third of existing affordable units and almost all of those in the pipeline are in the City's moderately-priced dwelling unit (MPDU) program. The majority of MPDUs are located in large new developments such as King Farm, Falls Grove and multifamily projects along the MD 355 corridor. Residential developments that exceed fifty units must reserve up to 15% as MPDUs, affordable to households who earn less than 60% of median household income.

¹These numbers include MPDUs, public housing, tax-exempt financed, Section 8 and other housing assistance programs.





Complaints about property maintenance declined over the last two years after increasing earlier this decade.

While property maintenance complaints might be expected to increase when the housing foreclosure rate is high and housing cost burdens are increasing, complaints have declined slightly since 2006 in Rockville. Complaints were rapidly increasing during the years of escalating price increases. Rockville’s housing stock increased during the early and mid-2000 decade, especially in King Farm and Fallsgrove, which may explain the corresponding increase in complaints during that time period.



Trends

More than 20% of Rockville's housing inventory was built in the last ten years. Approximately two-thirds of Rockville residents are homeowners but this proportion has been declining slightly.

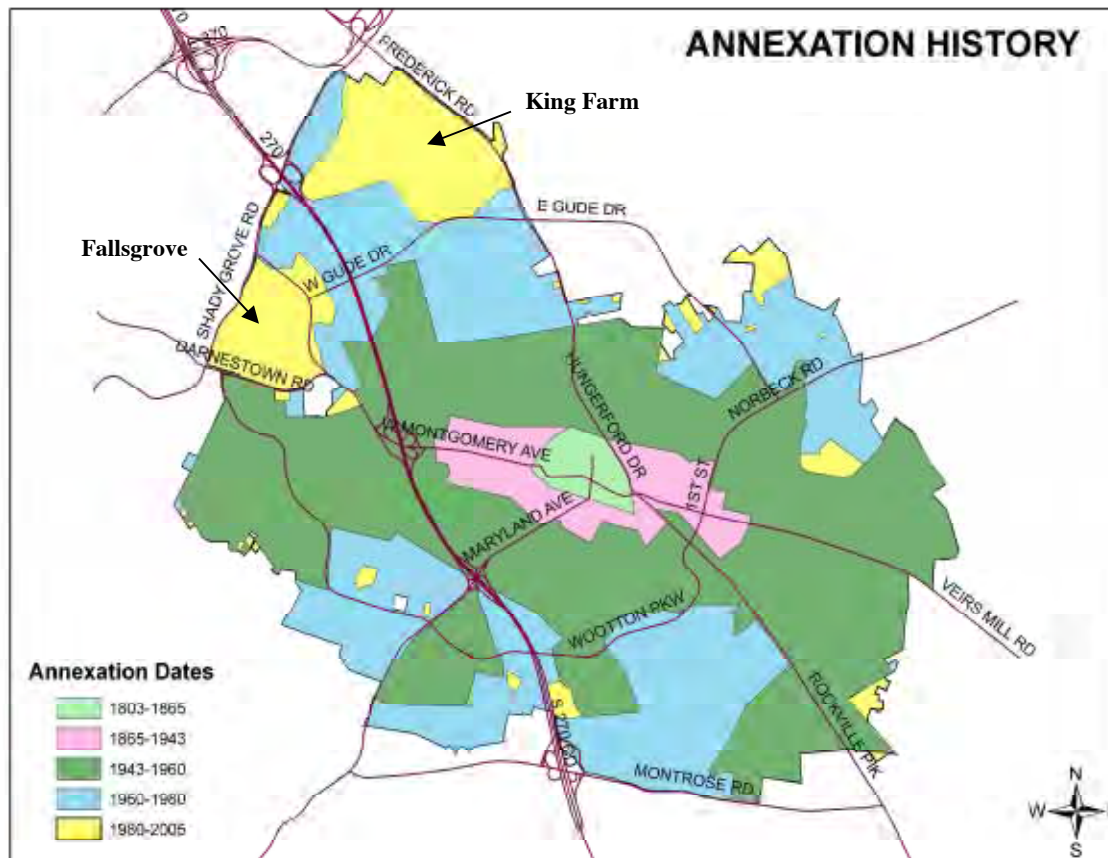
King Farm and Fallsgrove represented a large number of sales between 2003 and 2005. The volume of housing sales has since declined. Sales prices have fluctuated, generally declining in recent years, but to a lesser degree than in other jurisdictions in the region. Foreclosures continue to have an impact on the housing market, though Rockville's numbers have been lower than most of the region.

Apartment rents are higher in Rockville than in the county and other municipalities in the county, but rents have been increasing at a slower rate in the Rockville market.

Apartment vacancy rates are low in Rockville. There is demand for affordable apartments in every unit size range. Households, especially renters, are spending increasingly large proportions of their incomes on housing costs.



Chapter 4: Development Trends



Over the years Rockville has grown outward from its center through many annexation actions.

Following World War II, the presence of utilities, availability of land, and proximity to Washington, DC spurred a population and housing boom in Rockville. The largest single annexation in terms of land area occurred on June 1, 1949, when 2,210 acres were added to the City, followed by large-scale housing development on that annexed land.

A series of factors promoted growth west of Rockville Pike (MD Route 355) in the 1960s, including a new interstate highway (I-270) extending north from the Washington Beltway (I-495), the extension of the Watts Branch trunk sewer line west of the interstate, the City's 1960 Comprehensive Plan and the adoption of a new zoning ordinance. In accordance with the Plan and Zoning, pre-planned neighborhoods were built at suburban densities. Key new communities included Woodley Gardens, College Gardens, Fallsmead, and New Mark Commons.

The arrival of Metrorail stations in Rockville in the early 1980s provided additional connections for Rockville with Washington, DC and the rest of the region. Two large annexations occurred to the northwest part of the City during the 1990s. Rockville annexed Falls Grove (254 acres, formerly known as Thomas Farm) and King Farm (440 acres) in 1993 and 1995, respectively. Both King Farm and Falls Grove developed in a mixed-use manner, with a mix of single-family, townhouse and multifamily housing; as well as office, retail, schools and open space, all within walking distance of public transportation.

Population is growing faster than land area.

During the 2000-2010 period, Rockville’s population grew by 32% with little increase in land area, thereby causing density to increase. King Farm and Fallsgrove were completed during this decade, adding to population, but annexation of the land for these two developments occurred in the 1990s when there was little population growth. Recent mixed-use redevelopment projects that include multifamily housing, such as Congressional Village and Town Square, also have had a pronounced impact on the City’s density since 2000 because they have added significant population to existing land.

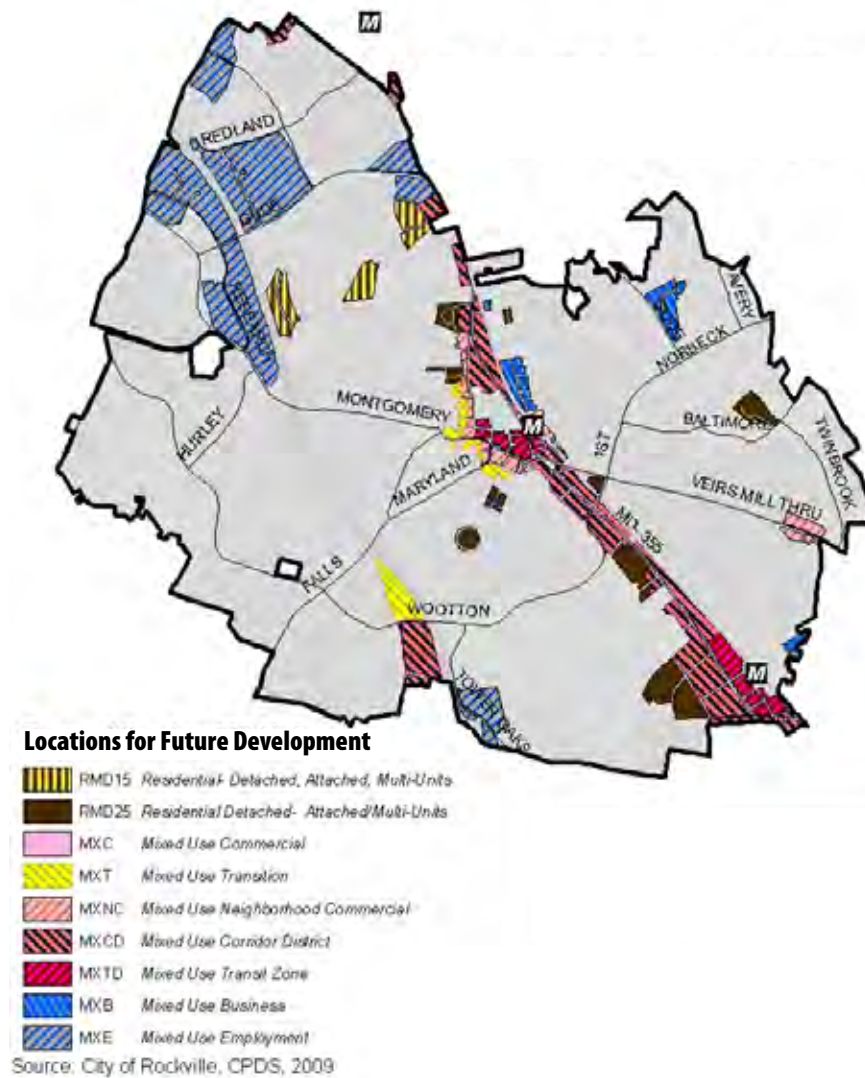
Land Area and Population Density

City of Rockville				Montgomery County			State of Maryland		
Year	Land Area in Sq. Miles	Population	Pop. Density Per Sq. Mile	Land Area in Sq. Miles	Population	Pop. Density Per Sq. Mile	Land Area In Sq. Miles	Population	Pop. Density Per Sq. Mile
1900	0.55	1,110	2,018	494.4	30,451	62	9733.8	1,188,044	122
1910	0.55	1,181	2,147	494.4	32,089	65	9733.8	1,295,346	133
1920	0.55	1,145	2,082	494.4	34,921	71	9733.8	1,449,661	149
1930	0.55	1,422	2,585	494.4	49,206	100	9733.8	1,631,526	168
1940	0.73	2,047	2,804	494.4	83,912	170	9733.8	1,821,244	187
1950	4.3	6,934	1,613	494.4	164,401	333	9733.8	2,343,001	241
1960	6.9	26,090	3,727	494.4	340,928	690	9733.8	3,100,689	319
1970	10.9	42,739	3,921	494.4	522,809	1,057	9733.8	3,922,399	403
1980	11.1	43,811	3,946	494.4	579,053	1,171	9733.8	4,216,975	433
1990	12.1	44,835	3,705	494.4	757,027	1,531	9733.8	4,781,468	491
2000	13.4	47,388	3,536	495.5	873,341	1,763	9773.8	5,296,468	542
2010*	13.5	62,476	4,628	495.5	964,100	1,919	9773.8	5,779,400	576

Source: US Census. *2010 numbers are estimates

The U.S. Census Bureau defines an urban area as: “core census block groups or blocks that have a population density of at least 1,000 people per square mile.” Rockville’s density is more than four times this number (4,628 persons per square mile), though it varies throughout the City. In comparison, the District of Columbia’s density is 8,680 persons per square mile; the City of Gaithersburg’s density is approximately 5,800 persons per square mile; and the State of Maryland has an average density of 576 persons per square mile.





Protecting the integrity of single-family residential neighborhoods is a consistent goal of City-wide and neighborhood plans.

More than half of the City’s land area is zoned for residential uses and another 18.5% is zoned as planned developments, most of which are primarily single-family residential. The areas shown in gray on the adjacent map are dominated by existing single-family developments. All single-family residential zones were retained in Rockville’s 2008 zoning ordinance with only minor modifications. Most future development will occur as infill or redevelopment in those areas that are not single-family neighborhoods.

There is no developable vacant land in Rockville.

The existing land use chart shows that 22.1% of Rockville’s land area is undeveloped and is forested, wetlands, open space, etc. Environmentally sensitive areas represent a large portion of this total and they will remain undeveloped. Land improved with residential uses is the largest land use category.

Rockville’s new zoning ordinance is indicative of the expectation that future development will be in a mixed-use context and residential development will be primarily multifamily housing. There are no large tracts of vacant, developable land remaining within the existing City boundaries, unless RedGate Golf Course (in the Park Zone) and the two private country clubs (zoned R-400, Residential Estate Zone) become available for development.

The zoning ordinance introduced seven new mixed-use zones, representing 14.4% of Rockville’s land area, including some areas that had previously been zoned exclusively for commercial or industrial uses. These new zones allow a mix of residential and commercial uses and a range of densities, according to location. The highest levels of density are proposed for areas adjacent to Metrorail stations and other public transit. Compact development near transit and services results in fewer and shorter vehicle trips per household.

2007 Land Uses		
Land Use	Acres	% of Total
Residential (all types)	4,275	49.3%
Undeveloped	1,913	22.1%
Institutional	811	9.4%
Industrial	694	8.0%
Commercial	628	7.2%
Transportation/Water	232	2.7%
Mixed-Use	114	1.3%
TOTAL	8,667	100.0%

Source: City of Rockville, CPDS

Current Zoning		
Zone	Acres	% of Total
Residential (all types)	3,653	51.4%
Planned Development (residential & commercial)	1,315	18.5%
Mixed-Use	1,022	14.4%
Park	856	12.0%
Light Industrial	184	2.6%
No Zone	80	1.1%
TOTAL	7,110	100.0%

Source: City of Rockville, CPDS, 2008 Zoning Map

Notes: Roads are not included in zoning figures and this accounts for the difference between land use and zoning totals. Land use refers to how the land is currently used or developed. Zoning is the City’s device for land use regulation to determine how land should be used or developed over the long-term.

Residential Building Permits Issued in Rockville (in units)

Year	SFD*	SFA	MF	Total
2000	177	121	435	733
2001	178	262	833	1,273
2002	118	336	654	1,108
2003	107	305	757	1,169
2004	114	99	50	263
2005	16	0	276	292
2006	17	25	0	42
2007	17	28	449	494
2008	12	0	279	291
2009	2	0	0	2
Total	758	1,176	3,733	5,667

* Includes houses built as replacements for demolished homes which do not contribute to a net increase.
 MF = multifamily units; SFA = single-family attached (townhouses); SFD = single-family detached.

Source: City of Rockville, CPDS

Building permits issued for multifamily units represent two-thirds of all residential units approved for construction between 2000 and 2009.

Since 2000, the number of multifamily housing units authorized by building permit exceeded those of single-family units in every year except 2004 and 2006. The largest number of multifamily homes authorized occurred during the 2001-2003 period when development at King Farm and Fallsgrove was at its peak. The number of single-family houses and townhouses authorized by building permit has declined dramatically since 2004.



99% of all housing under construction or approved for construction in Rockville is multifamily.

The chart below illustrates the trend toward multifamily development. There are almost 4,000 multifamily housing units under construction or approved for construction in Rockville compared to only 34 single-family units, all at Chestnut Lodge.

If all of the housing units in the chart were built, there would be enough supply to provide housing for the 340 new households projected each year for Rockville for almost twelve years. An additional 6,200 units are needed in order to meet population and household projections for years 2022 to 2040.



Residential Development Under Construction or Approved

Project	Address	MF	SFA	SFD
Twinbrook Station	Chapman Ave./TB Pkwy/Halpine	1,595	0	0
King Farm – Ingleside	West of Gaither	650	0	0
Upper Rock District	1,2,3 Choke Cherry Drive	748	0	0
Chestnut Lodge	500 W. Montgomery Avenue	7	0	34
Duball	196 E. Montgomery Avenue	486	0	0
KSI	255 N. Washington Street	293	0	0
Beall’s Grant II	254 N. Washington Street	109	0	0
Tower Oaks	2250 Tower Oaks Boulevard	100	0	0
Total		3,988	0	34

MF =multifamily units; SFA = single-family attached (townhouses); SFD = single-family detached.

Source: City of Rockville, CPDS, November 2009

Square Footage of New Non-Residential Space

Phase	Office	Retail	Industrial	Other	Tax exempt
Under Construction	0	0	0	138,085	70,752
Approved*	3,640,268	301,138	0	464,961	249,600
Application Submitted	615,554	59,220	0	14,000	0

* by CPDS staff, Planning Commission or Mayor and Council

Source: City of Rockville, CPDS 2010

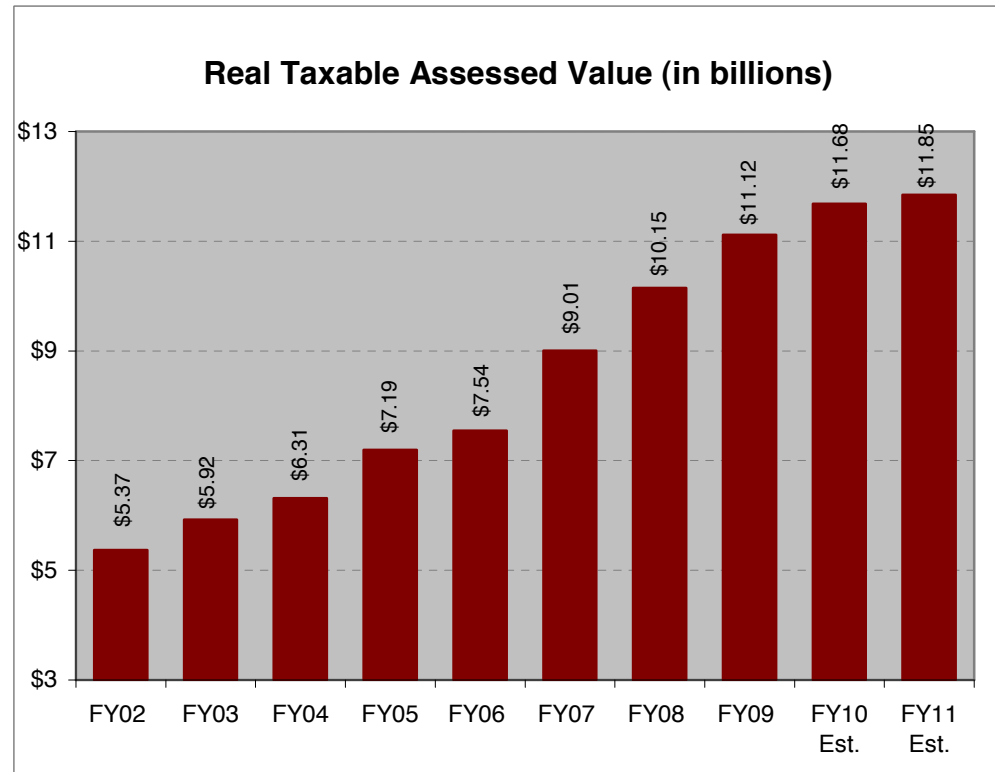
Office space represents the largest category of new and planned non-residential development.

There are approximately 25 million square feet of non-residential space in Rockville; more than half (about 16 million square feet) is office space. Approximately 208,800 square feet of non-residential space is under construction in Rockville. Another 4.66 million square feet has received City approval and 688,800 square feet is pending approval.



The rate of increase of taxable assessed values of real property has slowed significantly.

For several years both new development and existing property values increased significantly, providing the needed revenue to meet the demand for basic municipal services and maintenance of public facilities. The rate of new private development has slowed considerably over the last three years, and most property assessments are decreasing due to current economic conditions. Rockville's total assessed value is estimated to increase by only 1.4% from FY 2010 to FY 2011. This increase is very small compared to the previous eight years when taxable assessed values of real property increased by an average of more than 10% annually. All properties in the City were reassessed in January 2009 and January 2010 and many experienced large decreases in assessed values since the last assessments in 2006 and 2007. The amount of development and revenues achieved based on assessed property values have strong implications for the City's ability to provide high quality municipal services and program enhancements in the future.



Source: FY 2010 Operating Budget, General Fund Revenue Assumptions, p. 4-3 and as updated November 2010.



Residential properties make up approximately 60% of real property revenue and commercial properties account for approximately 40%.

Rockville will be Affected by Higher Density Development in Areas to its Northwest and South

	Rockville (2005) ¹	LSC area of Great Seneca Science Corridor Draft Plan *	White Flint Sector Plan*
Acreage (Sq. miles)	8,666 (13.54)	883 (1.38)	430 (0.67)
Dwelling Units	22,485	9,000	14,341
Density (D.U./Acre)	2.5	10.2	33.4
Commercial (sq. ft.)	24,884,016	17,500,000	12,980,000
Jobs	76,597	50,000-60,000	48,600
Jobs/Housing Ratio	3.4	5.5 - 6.7	3.4

¹ City of Rockville, CPDS
 * Estimated at Master Plan Build-out: 2035-2045 for GSSC and 2030 or later for White Flint. LSC is the Life Sciences Center. This Plan was previously called the Gaithersburg West Plan.



Areas around Rockville are expected to become more dense.

Even if Rockville were to stop growing, areas bordering the City, particularly to the south and northwest, are likely to become much more densely developed over the next few decades. Densities proposed for the areas covered by the Gaithersburg West Plan (now known as the Great Seneca Science Corridor Plan) and the White Flint Sector Plan are shown in the table at the left. Growth outside Rockville’s boundaries will have impacts on Rockville whether or not Rockville continues to grow.

Communities often strive for a fairly even jobs to housing ratio because such a balance theoretically offers the possibility for people to live close to work. Proximity to work means shorter commutes, less traffic and improved quality of life. A balanced ratio creates the opportunity for these outcomes but does not guarantee them because people choose where they live based on a variety of factors; proximity to place of employment being only one.

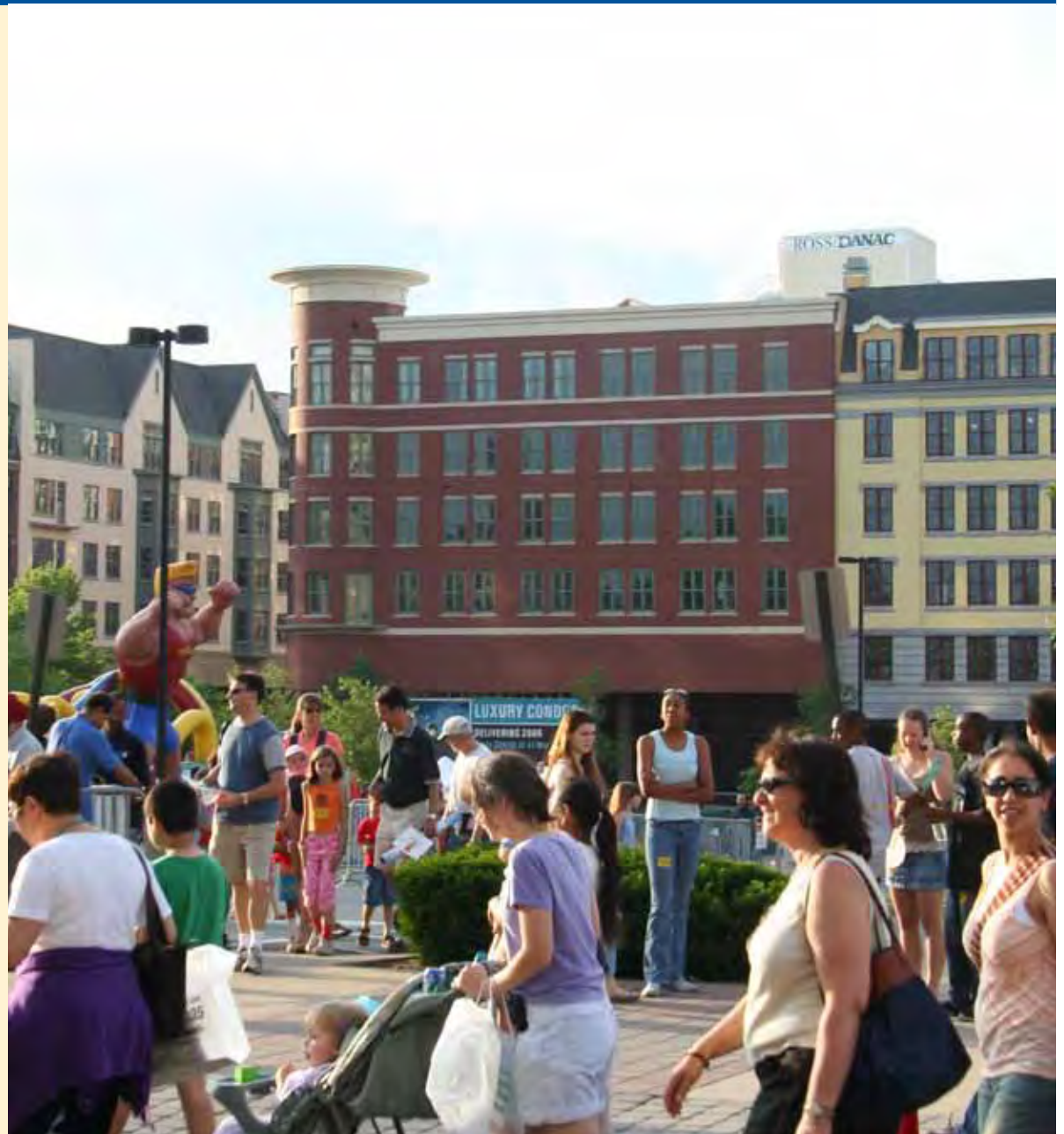
Rockville’s ratio of jobs to housing was approximately 3.4 to 1 in 2005. As a comparison, Gaithersburg has a 2.4 to 1 jobs to housing ratio but it is expected to increase to 3.0 to 1 over the next two decades. The ratio is expected to be up to 6.7 to 1 in the Life Sciences Center (LSC), the densest part of the Great Seneca Science Corridor Plan and adjacent to Rockville’s border. Rockville’s jobs to housing ratio is projected to decline to approximately 3.1 to 1 by 2040.

Trends

Rockville has experienced population growth in every decade since 1920. Until recently, there has always been land available to build single-family homes within the City limits or on abutting undeveloped land outside the City that could be annexed. King Farm and Fallsgrove may have been the last of these annexation opportunities. Other than the golf courses which are not expected to change use, there is no land left inside the City that could accommodate large-scale development. Neither is there sufficient undeveloped land outside the City's boundaries that could be annexed for such development. For the first time in its history, Rockville will need to build vertically if it chooses to accommodate the number of new jobs and households that are projected for the City.

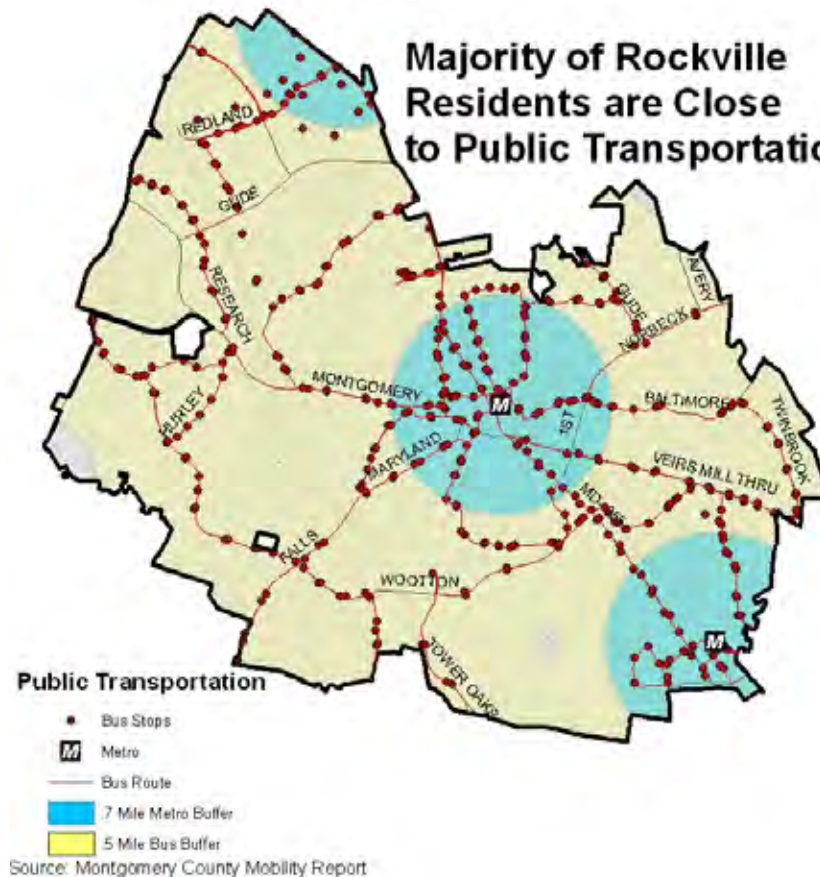
Long-range population, household and employment projections are calculated without consideration of the City's Adequate Public Facilities Ordinance (APFO) which is a short term tool. It may not be possible to accommodate the new jobs and housing units that are projected with the APFO in place because the travel volumes and numbers of school-age children could exceed current APFO limits. However, mixed-use and multifamily development close to public transportation is the prevailing development trend in the City.

The pace of development has slowed in recent years in Rockville resulting in a flattening of assessed values and revenue from property taxes. The relationship between development and the fiscal health of the City is an important area for future study as is the impact of the 2008-2009 recession.



Chapter 5: Transportation

Majority of Rockville Residents are Close to Public Transportation



Commuter times are long in DC region but not as bad for Rockville residents.

According to the Texas Transportation Institute's 2009 Mobility Report, Washington, DC-VA-MD is the second-most-congested metropolitan area in the country with an average annual delay of 62 hours per traveler, trailing only the Los Angeles-Long Beach-Santa Ana metropolitan area¹. This annual delay figure is almost four times the number reported 25 years ago. In fact, the DC-VA-MD metropolitan area had the largest increase in annual hours of delay of all metropolitan areas in the country over the last quarter century.

Commuting times in the region are more than eight minutes

Rockville Residents' Commute is Quicker Than County and Regional Averages

Jurisdiction	Minutes
City of Rockville	28.8
Montgomery County	33.0
Maryland	31.1
Virginia	26.8
District of Columbia	30.1
Washington DC Region	33.3
Nation	25.1

longer than the national average. Rockville's relatively shorter average commute is due in part to its proximity to Washington, D.C. and its positions as the County Seat and a major Employment center.

Source: TTI 2009 Mobility Report

¹ The Texas Transportation Institute defines annual delay as the extra time spent traveling at congested speeds rather than at free-flow speeds.

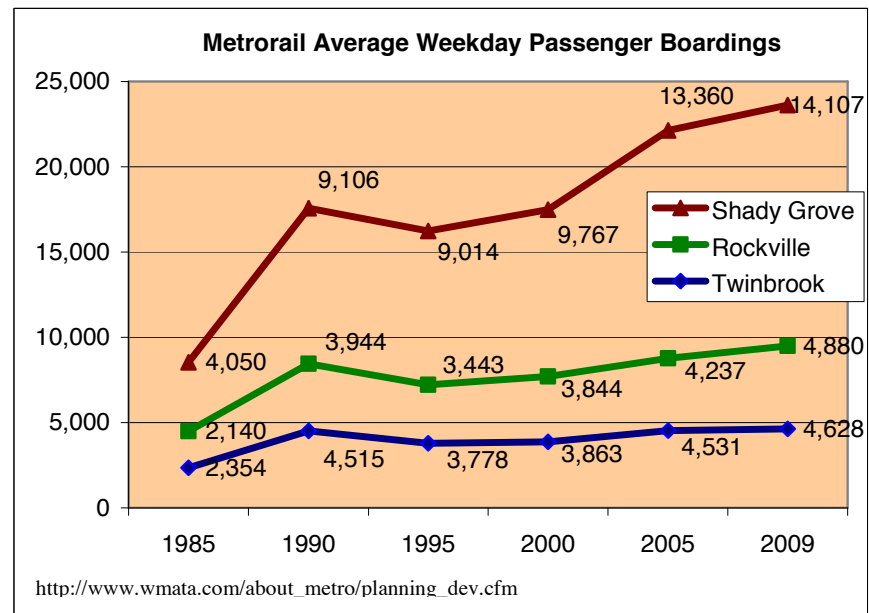
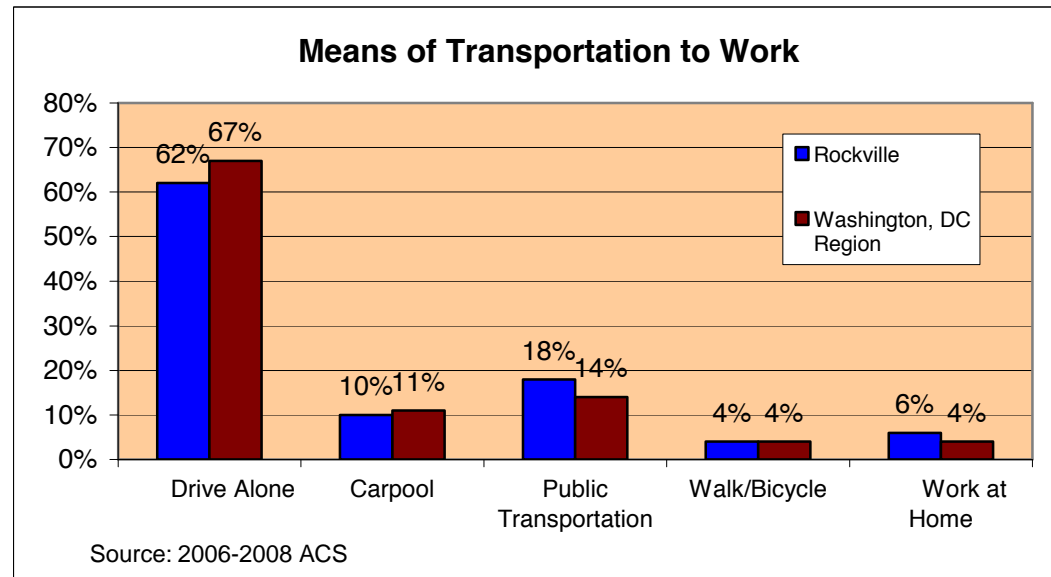
See full report at <http://mobility.tamu.edu/>

Rockville residents have more sustainable transportation habits compared to the region and the nation.

Proportionately fewer Rockville residents drive alone to work than the regional average. Nationwide, 76% of commuters drive alone to work, compared to 67% in Montgomery County and 62% in Rockville.

Rockville residents travel to work via public transportation more than their regional counterparts. Virtually all Rockville households are located within one-half mile of a Metrorail station and/or bus stop. The arrival of the Twinbrook and Rockville Metrorail stations in Rockville and the Shady Grove station just outside the City in 1984 provided additional connections for Rockville with Washington, DC and the rest of the region. Passenger boardings at Rockville area Metrorail stations have been increasing.

Rockville's future growth of commercial development and multifamily housing in a mixed-use redevelopment context is likely to offer opportunities to increase transit use and enhance transportation modes other than the automobile.



Maryland 355 Levels of Congestion, 2002-2009

Intersection	Volume/ Capacity (A.M.)	Level of Service (A.M.)	Volume/ Capacity (P.M.)	Level of Service (P.M.)
MD 355 & Mannakee				
2002	0.90	E	0.72	C
October 2006	0.84	D	0.67	B
September 2009	0.92	E	0.67	B
MD 355 & Wootton				
2002	0.96	E	0.90	E
2007	0.92	E	0.87	D
2008	0.89	D	N/A	N/A
MD 355/ N. Washington				
2002	0.77	C	0.85	D
April 2005	0.82	D	0.77	C
November 2006	0.73	C	0.72	C
September 2009	0.68	B	0.72	C
MD 355/Middle				
2002	0.94	E	0.88	D
2004	0.81	D	0.91	E
2009	0.85	D	0.81	D

These results include both data collected by the City of Rockville, Traffic and Transportation Division, and data collected by consultants and developers that was submitted to the City. Higher Volume/Capacity ratios are translated into lower levels of service (LOS) ratings from A through F. For instance, a number above 0.9 equates to an "E" LOS, a 0.8 equates to a "D" LOS, etc. Generally an E or F LOS rating is interpreted as a traffic congestion problem and, according to the City's Adequate Facilities Ordinance (APFO), would prohibit development that would further reduce a LOS rating.

Traffic congestion is a mixed story in Rockville.

While some intersections are clearly problematic, others have not shown an increase in congestion over time.

Intersections with very high levels of congestion at some time of day include the following (this list is not comprehensive):

- MD 355 and Edmonston Road (2009 Montgomery County Mobility Report)
- MD 355 and Congressional Lane and Halpine Lane (2008 Rockville's Pike Draft)
- MD 355 at Gude Drive (City data)
- The system of intersections for MD 355, First Street and Veirs Mill Road
- Park Road at South Stonestreet (City data)
- Wootton Parkway at Seven Locks Road (City data)
- Tower Oaks Boulevard at the I-270 ramps (City data)
- West Montgomery Avenue at the I-270 ramps (2009 Montgomery County traffic study)

On the other hand, there are intersections along MD 355 that have shown stability or even improvement during the past eight years. The table provides multi-year data for four intersections from 2002 through 2009. Multi-year data for all intersections in the City have not been collected.

Maryland-National Capital Park and Planning's travel demand models and Rockville's consultant for the Rockville Pike Plan estimate that traffic volumes will likely increase. Whether traffic congestion increases in the future, and by how much, will depend on several factors including infrastructure investments, development patterns, jobs/housing balance, and modal split (shares of travelers using cars, transit, bikes, etc.) Alternative transportation modes – walking, bicycling and mass transit – have the potential to become more attractive commuting choices by Rockville's continuing to build sidewalk and bicycle connections.

There have been slight declines in vehicular traffic accidents but increases in pedestrian and bicycle collisions with vehicles.

The number of vehicle accidents in Rockville steadily declined between 2005 and 2008. The majority of traffic accidents occur at or near intersections along Norbeck Road, Veirs Mill Road, MD 355, Falls Road, and Wootton Parkway. In 2008, the largest number of accidents occurred at East Gude Drive and Norbeck Road.

Vehicle collisions with pedestrians or bicycles also declined from 2005 to 2006 but increased in 2007 and 2008, according to data from the Rockville Police Department. On average, there is approximately one fatal pedestrian collision with a vehicle per year in Rockville. Pedestrian and bicycle fatalities account for one-fifth of the total traffic fatalities in the Washington, DC metropolitan region, according to the COG Transportation Planning Board's Street Smart campaign.

Pedestrian and Bicycle Collisions with Vehicles

	2005	2006	2007	2008
Pedestrian	51	33	58	65
Bicycle	11	14	17	19
Total	62	47	75	84

Source: City of Rockville Police Department

Number of Vehicle Accidents in Rockville

2005	2006	2007	2008
1,161	1,126	1,116	1,076

Source: City of Rockville Police Department

Vehicle Accidents by Location in Rockville, 2008

Location	# Accidents
E. Gude Dr & Norbeck Road	29
1st Street & Veirs Mill Road	24
Twinbrook Pkwy & Veirs Mill Road	22
Avery Road & Norbeck Road	18
Mannakee St. & Hungerford Drive	16
Veirs Mill Road & Rockville Pike	16
Edmonston Dr. & Rockville Pike	15
Atlantic Avenue & Veirs Mill Road	12
Falls Road & I-270	12
Falls Road & Wootton Parkway	12
Wootton Parkway & Rockville Pike	12

Source: City of Rockville, Traffic and Transportation Division, FY-2008

Pedestrian & Bicycle Accidents by Location, 2004-2008

Location	# Accidents
Veirs Mill Rd. & Atlantic Avenue	8
Rockville Pike & Edmonston Drive	8
Rockville Pike & Halpine Road	7
Frederick Rd. & Redland Road	7
Hungerford Dr. & Beall Avenue	5
Halpine Rd. & E. Jefferson Street	5
Rockville Pike & Templeton Place	5
E. Jefferson St. & Monroe Street	4
Thompson Ave. & Rockville Pike	4
Veirs Mill Rd. & Meadow Hall Road	4

Source: City of Rockville, Department of Public Works, Traffic and Transportation Division



Rockville is responding to the challenges of pedestrian and bicycle safety.

Among its initiatives, the City:

- Established a policy to prioritize missing sidewalks and built more than 12,000 linear feet of sidewalk;
- Conducted an on-site pedestrian/bicycle safety assessment of existing conditions at 110 signalized intersections within the City limits;
- Applied for and received nearly \$1 million in Safe Routes to School grant money to install pedestrian safety improvements;
- Completed the pedestrian/bicycle bridge over I-270 which won a pedestrian safety award;
- Created an eleven-mile pedestrian and bicycle Millennium Trail that circles the City;
- Became one of the first cities of its size to adopt a Complete Streets Policy.



More information is available from the City of Rockville Public Works Department, Traffic and Transportation Division.

Trends

Traffic congestion in Rockville remains bad in some locations, but appears to have stabilized in others. Traffic volume and congestion are expected to increase over time due to development inside Rockville and just outside of its borders.

At this point, however, the average commute time for Rockville residents is shorter than the county, regional and state averages.

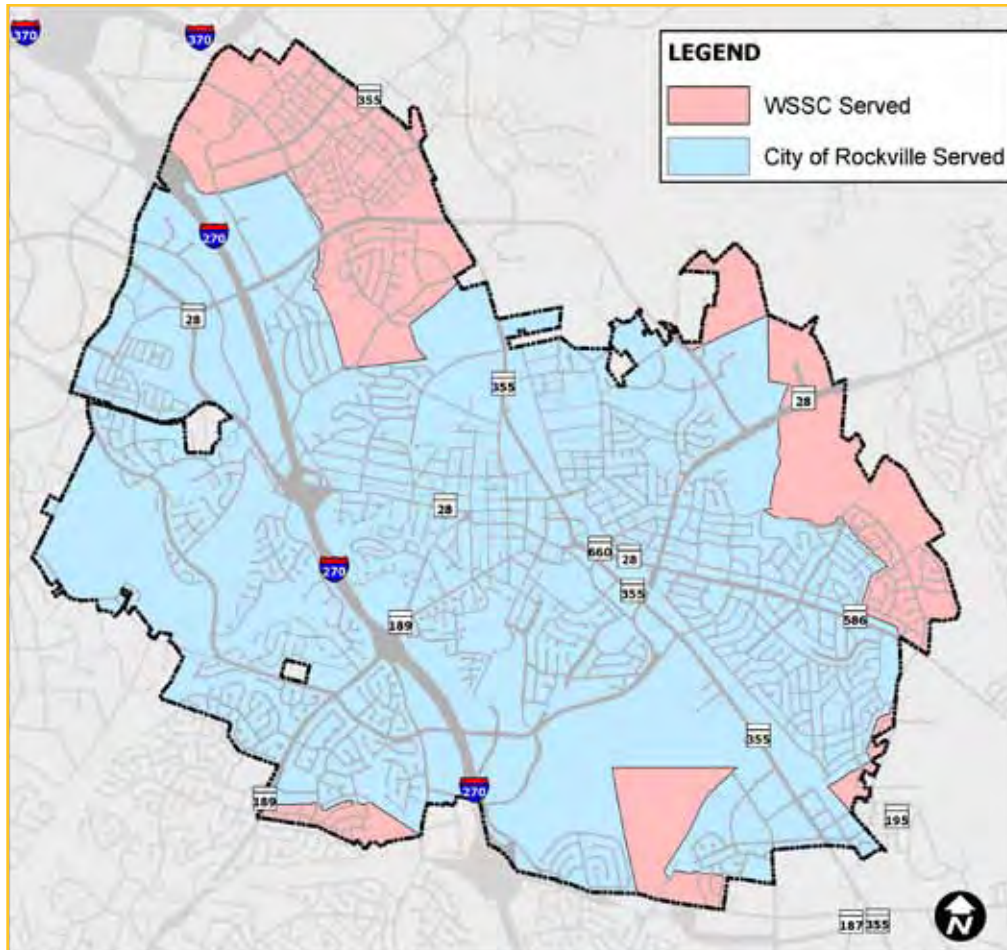
Rockville residents use transit more frequently, and drive alone less frequently, than regional averages. Transit use has increased in recent years.

It will be important to track modal split trends to determine if higher density development within walking distance of transit will eventually alter the balance from automobile use toward transit and other alternatives.

Automobile accidents have been declining for the past four years, but collisions with pedestrians and bicycles increased in 2007 and 2008. Rockville's recent emphasis on building sidewalk and bicycle connections may help to reverse this trend.



Chapter 6: Water Resources



The majority of Rockville properties are served by the City's water and sewer system.

Some properties, mostly located near the edges of the City, are served by the Washington Suburban Sanitary Commission (WSSC). There are a few isolated properties within the City limits that are served by septic and well systems. Properties located outside of the City limits but within its expansion limits, and outside of the WSSC District, can be annexed into the City. It is likely that water and sewer service would be extended to these areas were they to be annexed.

Maintaining the highest water quality is challenging.

Achieving optimal water quality is a complex issue that requires balancing several factors. Many water quality issues are related to how the water is treated for disinfection and the formation of Disinfection By-Products (DBPs). DBPs are compounds formed when disinfectants (typically chlorine) used to treat drinking water react with naturally occurring organic matter (mostly decomposing plant material) in the water. High levels of chlorine can result in high levels of DBPs and high levels of DBPs can pose health risks.

Levels of DBPs increase as water “ages.” This can occur as water in storage tanks goes unused or as it travels through the distribution system to the end user. The more time that water spends in the distribution system, the greater the potential for water quality to decrease. Tuberculation, caused by internal corrosion of unlined cast iron pipes, also contributes to an increase in DBP levels and the degradation of water quality.





Water pressure and fire fighting capability are impacted by deteriorating pipes.

Tuberculation in water pipes also causes a drop in residual pressure that can lead to reduced fire flows. The American Water Works Association (AWWA) recommends a minimum fire flow provided at fire hydrants of not less than 500 gpm (gallons per minute). Flows less than 1,000 gpm are considered less than optimal. Additionally, Rockville utilizes the Insurance Service Office (ISO) recommendation on fire flows based on the property use. The recommended flows range from 1,000 gpm (residential uses) to 3,500 gpm (industrial uses). Currently, there are approximately 259 (19% of total) fire hydrants in the City with less than optimal flows.

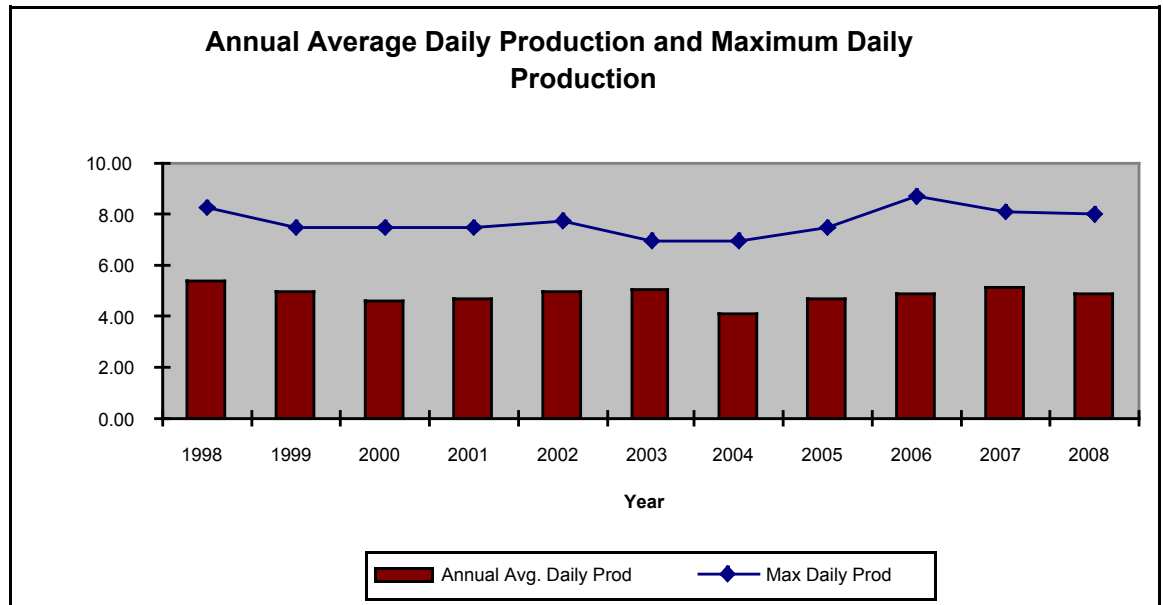
The City has undertaken a CIP project to replace deteriorating water mains and hydrants over the next 20 years which will reduce tuberculation and improve fire flow.

The water distribution system capacity is adequate to accommodate growth.

The major components of the City's water distribution system are the Water Treatment Plant (WTP), pipes, and three above-ground storage tanks. Rockville's intake and WTP were brought online in 1958 with four million gallons per day (MGD) capacity. During its 50-year history, the WTP has been updated and expanded to its present treatment capacity of eight MGD. The City's plant is being upgraded to meet new EPA regulations and produce approximately 12 MGD.

The water system was modeled in 2006, based on a development pipeline of 4,500 housing units and approximately 5.6 million square feet of commercial (office, retail and industrial) space. The system was projected to be able to manage that new demand. The water system is planned to be modeled approximately every ten years to examine capacity based on the latest projections available.

In 2002, Maryland Department of the Environment (MDE) issued a Water Appropriation and Use Permit to Rockville to appropriate and use an annual average of 7.1 MGD of water from the Potomac River with an allowable maximum daily withdrawal of 12.1 MGD.

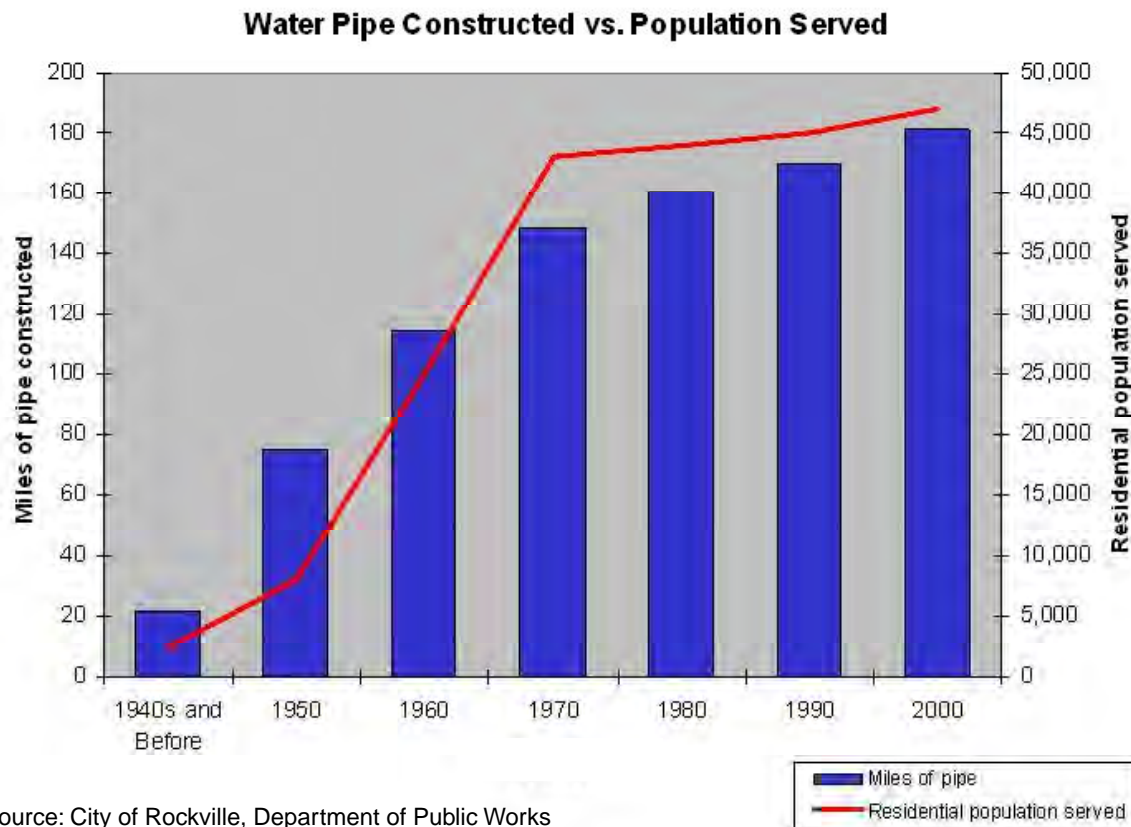


Source: City of Rockville, Department of Public Works

The graph shows that between 1998 and 2008, average annual production was approximately five MGD and the maximum daily production was approximately eight MGD. Both the average annual production and the maximum daily production have been well below the amount allocated by the 2002 State Water Appropriation and Use Permit.

Most of Rockville’s 180 miles of water pipes were installed prior to the 1970s.

The City has undertaken a long-term CIP project to replace 33 miles of water mains (and hydrants) over the next 20 years. Replacements will continue to be necessary as pipes age and as larger diameter pipe is needed to serve a denser population. Most future development is anticipated to be infill and redevelopment in areas where infrastructure already exists. There will be limited need for installation of new water pipe where they have not existed before except in a few areas that are currently on well water that could be annexed by the City.



Source: City of Rockville, Department of Public Works

Only 10% of Rockville's water is stored at optimum elevations.

The City stores 12 million gallons (MG) of potable water in three ground level storage tanks: Hunting Hill – eight MG; Carr Avenue – three MG; Talbott – one MG. Under normal operating conditions the City's water mains are supplied by water piped from the water treatment plant and by water stored in the highest portions of the tanks, producing the greatest water pressure and having the best quality. At present, however, water stored below the optimum elevation accounts for approximately 90% of the total stored volume.

A study is underway to investigate methods of lowering DBPs (thereby improving quality) by optimizing treatment processes at the water treatment plant. If cost-effective improvements cannot be made at the plant, replacing one or more of the ground level tanks with elevated tanks may be necessary. Elevated tanks would produce greater water pressures and help to increase the amount of useable high-quality stored water, but it would be expensive.

Rockville's water storage for emergency use is adequate. Furthermore, numerous interconnections between the City's system and the neighboring Washington Suburban Sanitary Commission (WSSC) system can be utilized as a backup for the City if emergency demand conditions warrant.

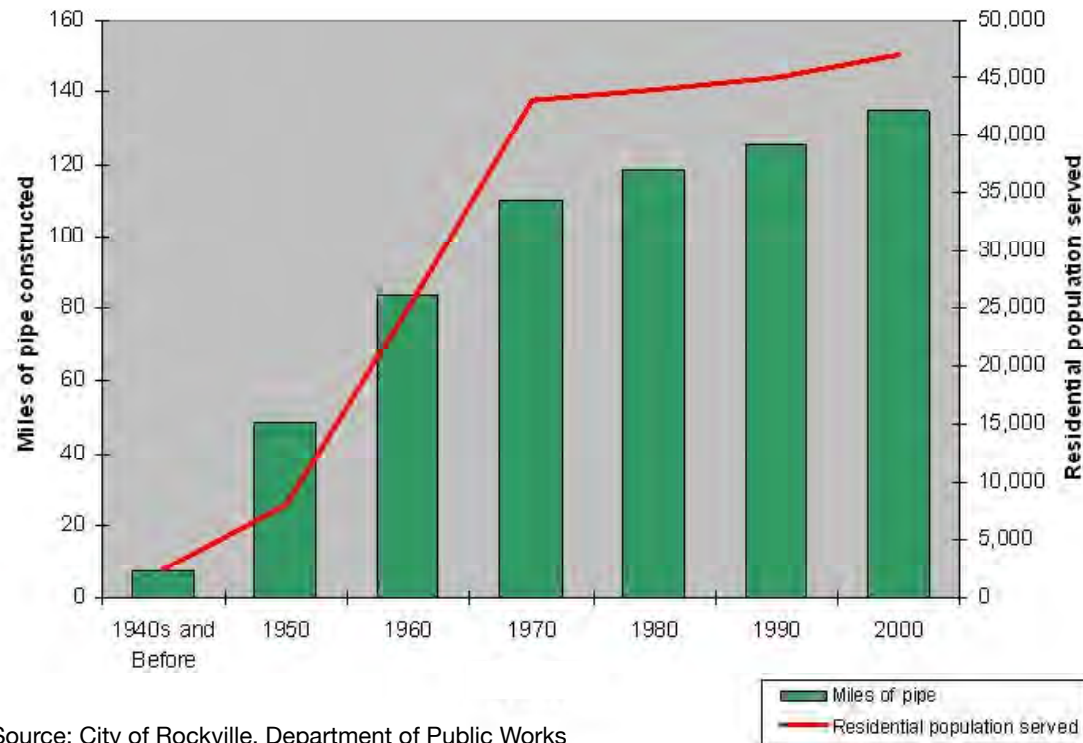


Sanitary sewer has sufficient capacity but some components need replacement.

Rockville’s sanitary sewer network contains approximately 150 miles of pipeline connecting approximately 4,300 manholes, with pipe sizes ranging from 6 to 27 inches in diameter. The system is predominantly a “gravity system”. The chart illustrates that the system has expanded to keep pace with growth in the City’s population.

The chart provides evidence that some of the City’s system is likely nearing the end of its useful life, as most pipe was installed prior to the 1970s. Aging and deteriorating pipes may result in excess flow entering the pipe from groundwater and streams, and wastewater discharging from the pipes into the surrounding streams. The City has embarked on a comprehensive preventative maintenance program to assess and identify the condition of the sewer system, prioritize the rehabilitation work, and make improvements by lining or replacing portions of the aging sewer system. The condition of the system is being assessed using camera systems that can access the manholes and pipes. System rehabilitation is funded through the City’s Sewer Fund.

Sewer Pipe Constructed vs. Population Served

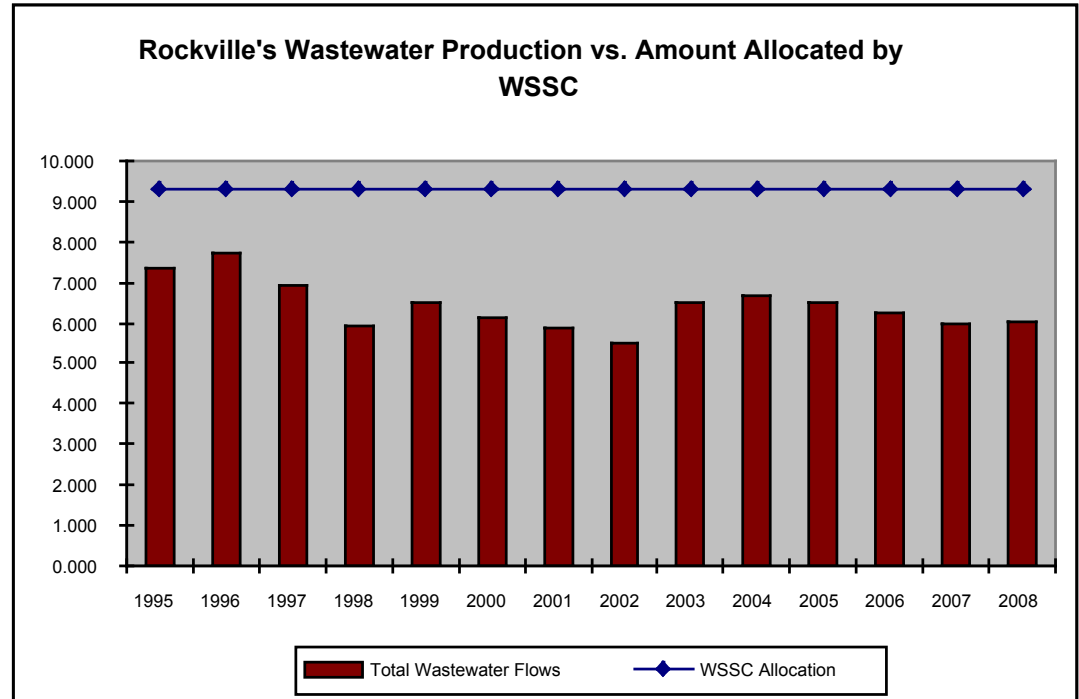


Source: City of Rockville, Department of Public Works

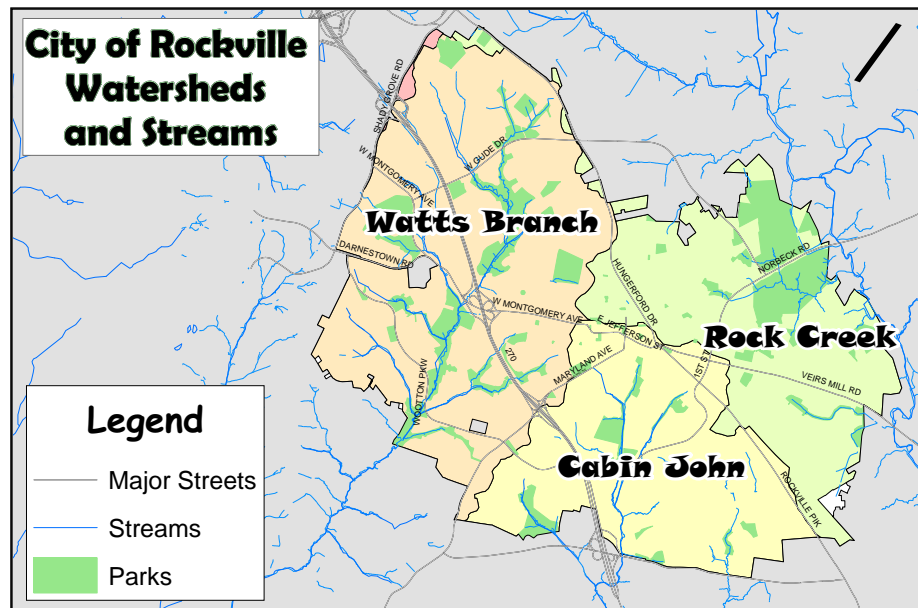
Rehabilitation of public wastewater facilities is necessary to protect public health and safety and to ensure compliance with state and federal regulations.

Rockville’s wastewater is conveyed through WSSC and D.C. Water and Sewer Authority (DSWASA) piping systems and treated at the Blue Plains Regional Wastewater Treatment Facility in Washington, D.C. Rockville pays for the conveyance and treatment of its wastewater, which amounted to 40% of the City’s total wastewater operating expenses and 68% of its total wastewater capital expenses over the past three years. The amount of CIP spending has increased in recent years to support the rehabilitation of Rockville sewers.

For the 10-year period FY 1999 through FY 2008, Rockville’s wastewater flow averaged 6.42 MGD of the 9.31 MGD allocated. The City is currently operating at approximately 66% of the total allocated amount. Non-used capacity provides for future population and employment growth in the City. Without available treatment capacity, development could not continue due to the inability to construct new treatment facilities to serve Rockville.



Source: City of Rockville, Department of Public Works



Stormwater management will be affected by new regulations in 2010.

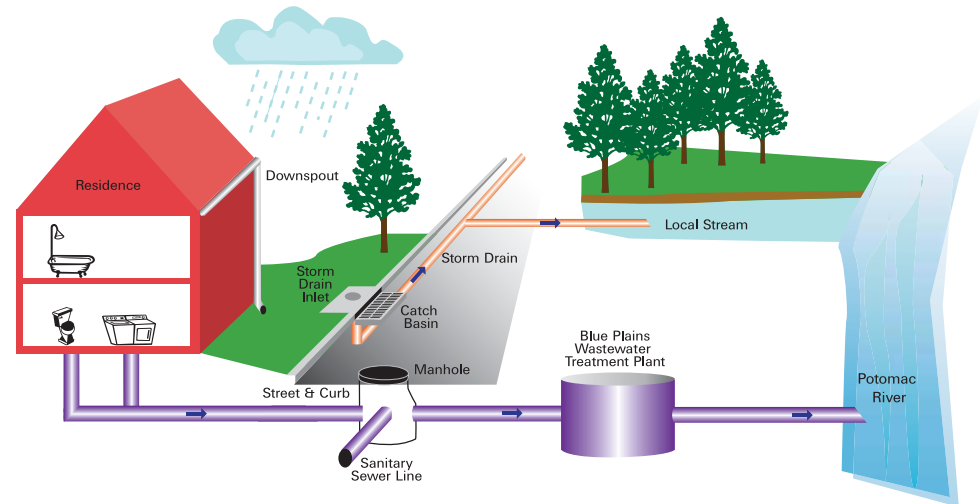
The future of stormwater management in Rockville will be defined by new codes, ordinances, policies and design guidelines that the City will be developing and adopting in 2010 in response to new Maryland Department of the Environment (MDE) regulations. In 2009, MDE adopted new criteria for sediment control and stormwater management for new development and redevelopment. The new regulations require a more cohesive approach to site planning that serves to balance development with protection of natural resources and stormwater management goals.

It is the legislative goal and policy of the City that, eventually, stormwater management shall be provided for all new and existing developed land. The City has a total of 5,345 acres served by stormwater management facilities, representing 65% of the total watershed area within Rockville. The City also owns most of these facilities, which were designed and built at different times but always to the standards that were enforced at the time of construction. Some of these facilities need to be brought up to current standards and the City has several CIP projects in place to affect this change. The projects range from retrofitting existing facilities to stream improvement and enhancement projects.

The ability of the City to fund stormwater maintenance and CIP projects has historically come from developer contributions.

As the amount of development within the City decreases, so does the funding to support this program. Recognizing a pending shortfall, Rockville’s Mayor and Council adopted regulations in 2008 to create a reliable funding source. In FY 2010, the Mayor and Council instituted the Stormwater Management Utility Fee, which is assessed on all properties that have impervious surfaces. The SWM Utility Fee rate will be set each year by the Mayor and Council to meet the cost of the growing program, which is also supported by developer permit fees and to some degree by monetary contributions in lieu of providing on-site stormwater management.

Approximately 95 miles of the City’s stormwater management system is composed of reinforced concrete pipe (RCP). With few exceptions, all new or replacement storm drain pipe that is built in the City is now required to be constructed of RCP, which has a usable life range of 35 – 50 years. The remaining 5 miles of pipe in the system is composed of corrugated metal pipe (CMP.) These pipes, which are not as durable as RCP, are reaching the end of their usable life. Department of Public Works Staff is developing a comprehensive maintenance program for the storm sewer system, which will be similar to the wastewater program. The condition of the storm sewers will be assessed and rehabilitation or replacement projects will be developed and prioritized. The system improvements will then be implemented through the CIP.



**Sanitary Sewer vs. Storm Drain
Do you Know the Difference?**

Sanitary Sewer

The sanitary sewer collects wastewater generated from the indoor plumbing (i.e., toilets, sinks, showers, washing machines, etc.) of residential, commercial and industrial properties and conveys it to a wastewater treatment plant. The City’s sanitary sewers flow to Blue Plains Wastewater Treatment Plant, where nutrients, sediment and pollution is removed from the water before being discharged into the Potomac River.

Storm Drain

The storm drain is a system of inlets, pipes and swales that drain excess rain and ground water from impervious surfaces (paved streets, parking lots, sidewalks, roofs) to prevent or minimize flooding. The stormwater runoff collected by the storm drain is discharged to local streams **untreated**. The water then flows to the Potomac River and eventually to the Chesapeake Bay.

Information on the City’s water resources is available at www.rockvillemd.gov/residents/publicworks.html and information about stormwater management in particular can be found at: www.rockvillemd.gov/residents/swm/index.html.



Trends

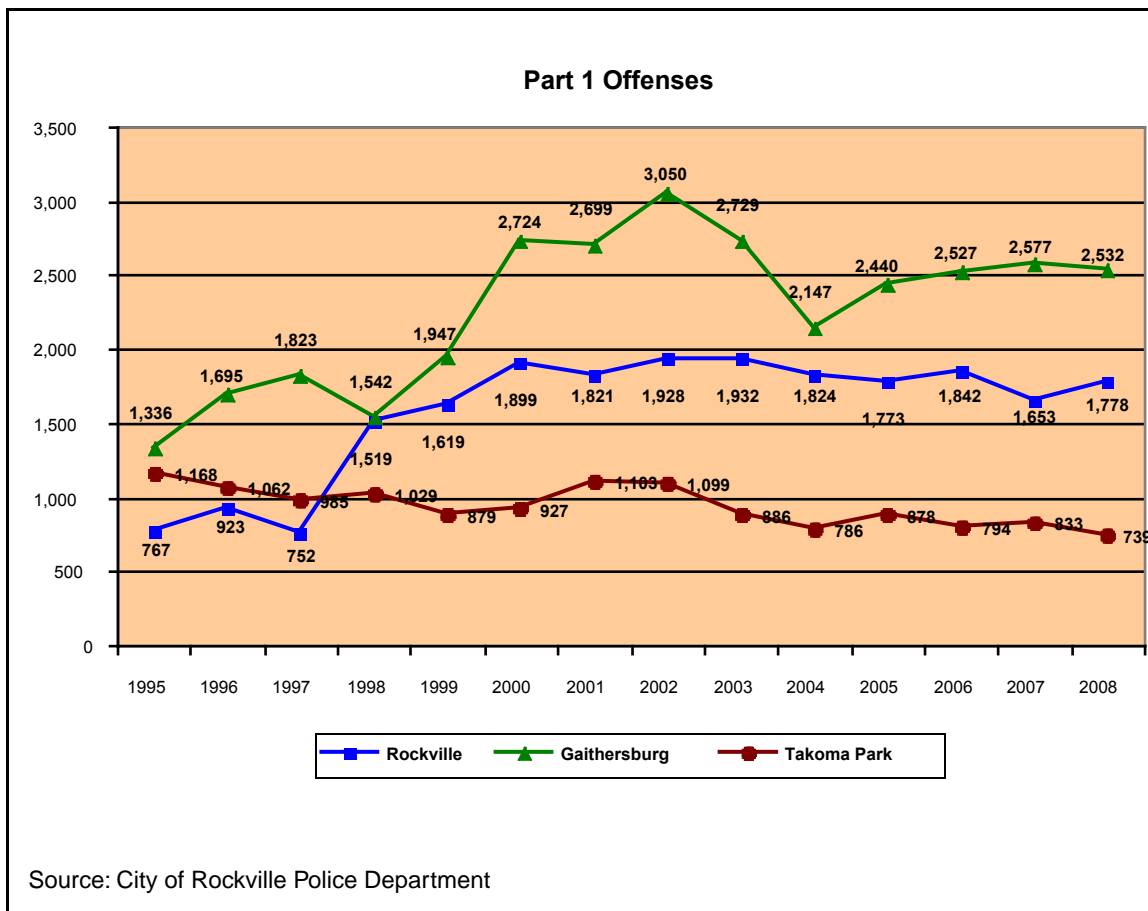
Rockville's aging water distribution system and ground-level storage tanks affect water quality and treatment processes. Corrosion of pipes also reduces fire flow at fire hydrants. Components of the water distribution system, sanitary sewer system, and stormwater management facilities require repair or replacement. Long-term plans have been, or are being, developed for each of the systems, resulting in increased spending for rehabilitation.

The City will need to meet new stormwater management regulations in 2010. Decreasing development activity has affected funding to support the City's stormwater management program and led to implementation of the stormwater utility fee in FY2010.

The City's Department of Public Works estimates that there is sufficient water capacity for development that was projected through 2030 based on a model that was run in 2006. Sanitary sewer also has sufficient capacity for the foreseeable future.

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Chapter 7: Public Safety



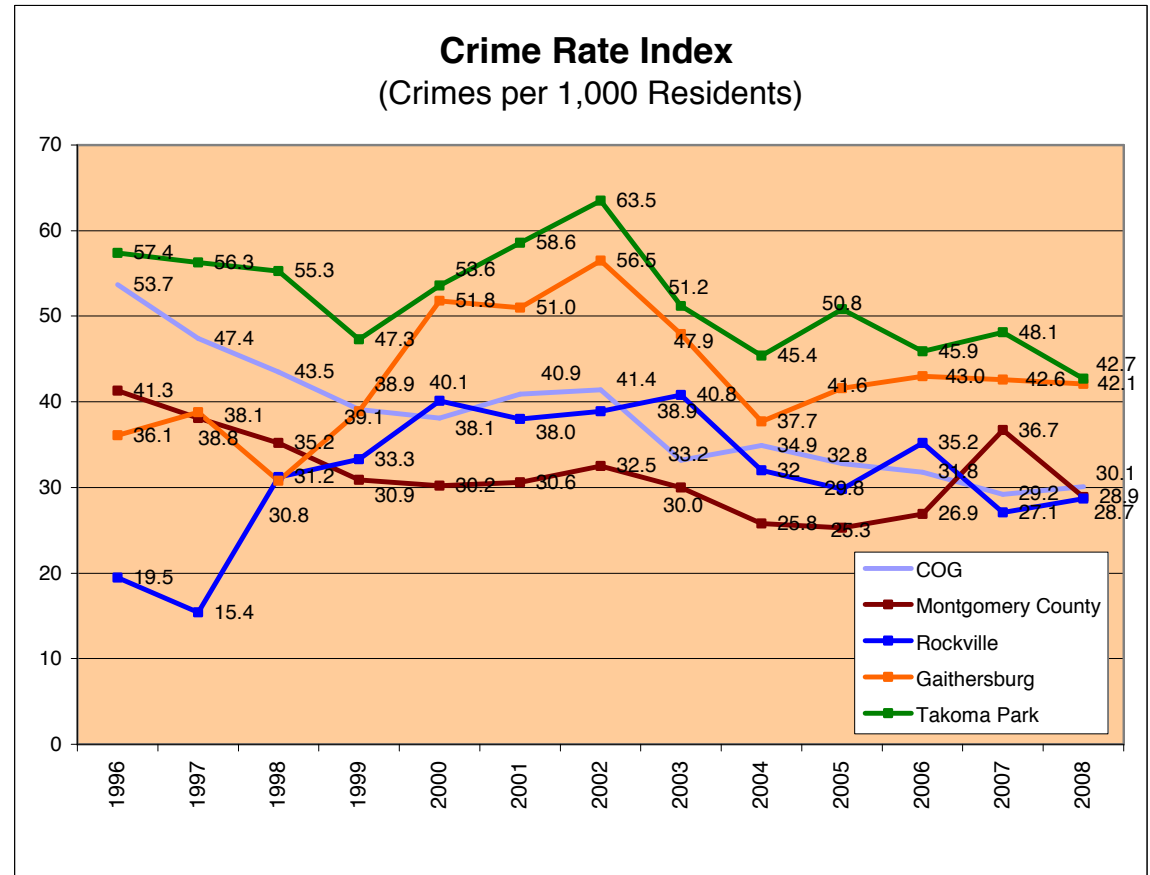
Serious crimes have not been increasing despite growing population and greater density.

Part 1 offenses include serious crimes against persons (homicide, rape, robbery and assault) and serious crimes against property (burglary, larceny, auto theft and arson). Between 1995 and 2008, Rockville’s Part 1 offenses more than doubled in number, from 767 to 1,778, but consistently remained below the number of serious crimes in the City of Gaithersburg, which is comparable in population size.

The number of crimes in Rockville increased most at the beginning of this time period and has remained fairly constant since 2000 even though population and density have continued to increase. Takoma Park’s numbers are lowest because it has the smallest population of the jurisdictions that are compared in the graph. Takoma Park consistently has had the highest crime rate index (crimes per 1,000 residents) of the three cities.

Rockville's crime rate index is below Gaithersburg and Takoma Park indices.

Rockville's crime rate index was well below other jurisdictions in 1996 and 1997; then increased significantly between 1997 and 2000. It has declined since, with some fluctuations, including a recent peak in 2006. Crime rate indices in all jurisdictions shown generally have declined since the early part of the decade.



Source: City of Rockville Police Department

Part 1 Offenses, 2008

	Homocide	Rape	Robbery	Aggravated Assault	Burglary	Larceny	Auto Thefts	Total
Rockville	1	8	62	38	285	1,288	96	1,778
Gaithersburg	2	11	86	107	235	1,940	151	2,532
Takoma Park	0	4	80	38	135	383	99	739
Montgomery Co.	21	131	1,100	835	3,603	19,027	2,258	26,975
COG Region	367	843	9,852	9,059	18,998	96,424	20,482	156,025

Source: MWCOG, Annual Report on Crime and Crime Control, 2008

Most Part 1 Offices Declined Between 2008 and 2009 in Rockville and County

Part 1 Offense	Rockville			Montgomery Co.		
	2008	2009	% Change	2008	2009	% Change
Homicide	1	1	0	21	13	-38%
Rape	8	8	0	131	124	- 5%
Robbery	62	61	- 2%	1,100	992	-10%
Agg. Assault	38	76	+100%	835	904	+ 8%
Burglary	285	183	- 36%	3,603	3,011	-16%
Theft/Larceny	1,288	1,094	- 15%	19,027	18,356	- 4%
Auto Theft	96	89	- 7%	2,258	1,732	-23%
Total	1,778	1,512	- 15%	26,975	25,132	- 7%

Source: Rockville City Police Department; Montgomery County Police

Property crimes far out-number violent crimes against persons.

According to MWCOG's Annual Report on Crime and Crime Control, larceny (theft) represented 72% of Rockville's Part 1 offenses in 2008. Burglary represented 16% of the total 1,778 offenses and automobile theft represented 5%. Less serious crimes, known as Part 2 offenses, are increasing in Rockville due to increased population, according to the Rockville Police Department, although final updated compilations of Part 2 data are not available at this time.

Recently released data for Rockville indicates a 15% decline in Part 1 offenses between 2008 and 2009 (from 1,778 to 1,512), although aggravated assaults increased by 100%. The Police Department attributes much of this criminal activity. All other Part 1 offenses decreased or were unchanged in 2009. Total Part 1 crimes fell by 7% in Montgomery County in 2009, although aggravated assaults also increased in the county. 2009 data was not obtained from other jurisdictions.

Although calls for police service have more than doubled since 2000, Part 1 crimes as a percentage of calls for service have declined.

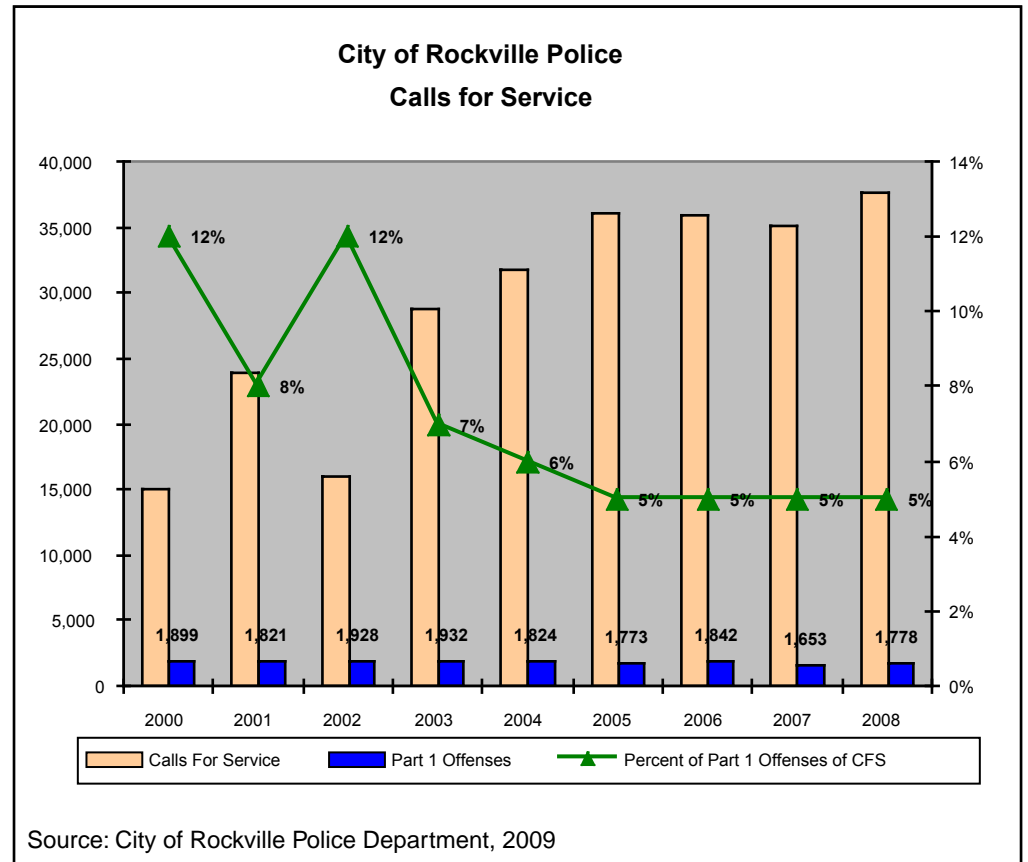
The chart shows that there is little relationship between the number of Part 1 offenses and the number of calls for service. Part 1 offenses accounted for 5% of the calls for service between 2005 and 2008.

Rockville's ratio of police officers per 1,000 residents is comparable to Gaithersburg and lower than Takoma Park, Montgomery County and the COG region.

Police Officer Ratio per 1,000 Estimated Population

	2003	2004	2005	2006	2007	2008
Rockville	1.06	0.877	0.864	0.864	0.885	0.921
Gaithersburg	0.701	0.719	0.758	0.797	0.866	0.9
Takoma Park	2.41	2.41	2.41	2.41	2.41	2.42
Montgomery Co.	1.17	1.17	1.17	1.19	1.25	1.29
COG Region	1.46	2.15	2.16	2.16	2.50	2.8

Source: City of Rockville Police Department, 2009





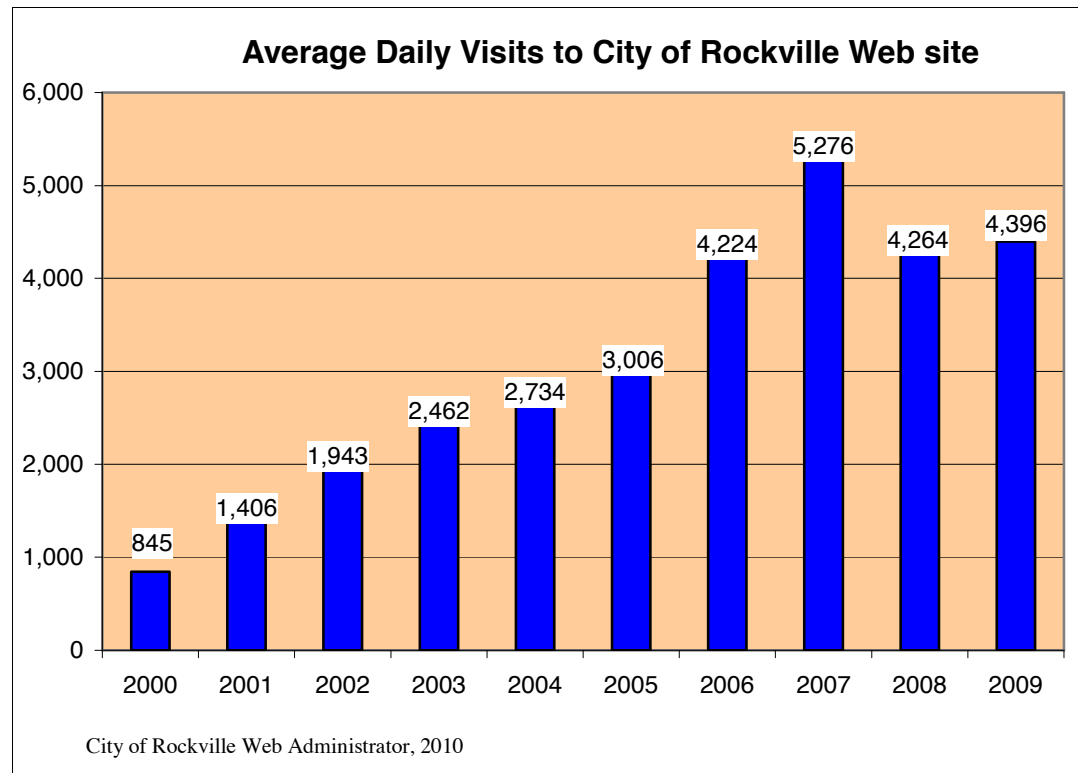
Trends

The incidence of serious crime in Rockville is holding fairly steady and does not appear to be directly correlated with population and density increases. According to interviews with Rockville Police staff, however, less serious Part 2 offenses (which include offenses such as simple assault and property theft) have been increasing in recent years, although data on these crimes is not currently available. The 2008 COG Annual Report on Crime and Crime Control concurs with this finding within the region as well. Aggravated assaults was the only Part 1 crime to increase in Rockville in 2009.

Calls for police service have steadily increased as Rockville's population has grown, density has increased, and Part 2 crimes have increased. According to Rockville Police staff, higher density and mixed-use development has an impact on the way policing occurs and presents different challenges than less dense development with homogenous uses.

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Chapter 8: Civic Engagement



Rockville attempts to connect with its community in many ways.

The 2008 Citizen Survey indicated that internet email service and the City's Web site are among the most highly utilized methods of communication between citizens and the City government. A majority of residents reported receiving information through Rockville Reports and the Rockville edition of The Gazette. Other forms of outreach include (but are not limited to) the Rockville cable t.v channel, neighborhood liaison programs, Rockville University, and participation at public meetings.

Rockville's Web site was launched in 1994. It was redesigned in 2003 and again in 2008 and it grows every year as new pages and content are added. The homepage is now updated daily to encourage repeat visitors and allow the City to highlight its wide variety of programs and services.

The chart shows the average number of visits per day to the Web site: www.rockvillemd.gov. This number reached a high of 5,276 in 2007 due to a large number of visits to obtain information on Town Center just prior to the opening of the Town Square development.

Visits to the City's community centers and attendance at City-sponsored events are generally increasing.

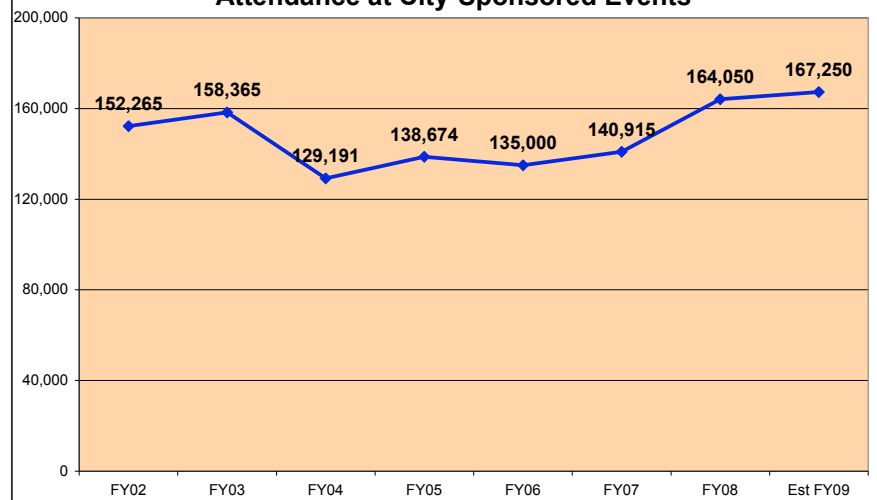
Participation in Rockville's wide variety of civic and recreational opportunities is another gauge of the City's connectivity with citizens and other members of the community. Visits to the Lincoln Park Community Center have increased every year since 2002; by 300% between 2002 and 2008. Visits to the Croydon Creek Nature Center have fluctuated, but increased overall since 2002. The Twinbrook Community Center historically has had the largest number of visitors annually but this number has also fluctuated since 2002. The number of visits to the Twinbrook facility in 2008 was at its lowest point since 2002.

Attendance at City-sponsored events increased by 10% between FY 2002 and FY 2009, also with some year-to-year fluctuations.

Number of Visits Annually to Community Centers

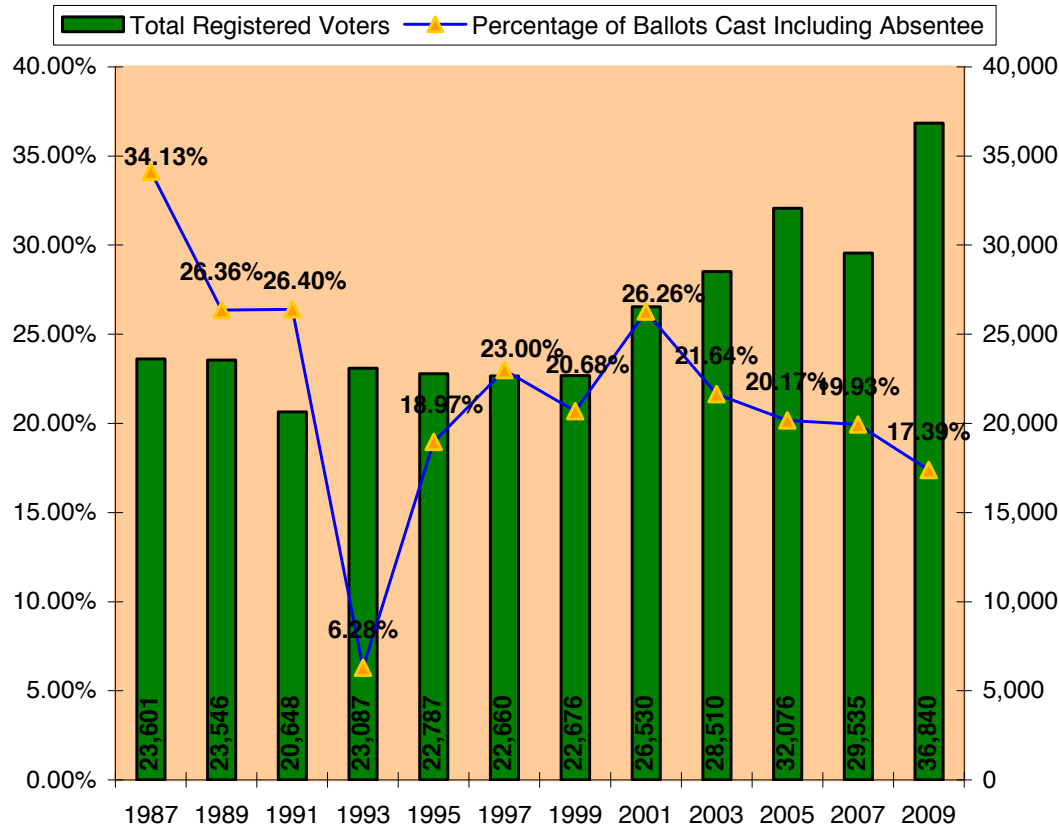
Year	Twinbrook	Croydon Creek	Lincoln Park
2002	46,696	9,130	17,071
2003	69,323	19,694	22,352
2004	79,871	21,813	26,748
2005	76,623	20,369	34,284
2006	68,638	15,791	37,493
2007	71,921	15,712	49,960
2008	65,708	20,695	51,693

Attendance at City-Sponsored Events



Source: City of Rockville, Department of Recreation and Parks

Turnout of Registered Rockville Voters in Rockville-only Elections



Source: Montgomery County Board of Supervisors of Elections.

Voter participation in Rockville municipal elections averages about 22% and is similar to other cities.

The level of citizen comment on local leadership may be best represented by voter participation rates in City elections which occur in odd-numbered years and do not coincide with other local, state or national elections. The percentage of registered voters who voted in a City election averaged 22% over the past two decades, but the percentage has been declining since 2001. The 2009 election was the second-lowest participation rate of eligible voters of the past twelve local elections

Although systematically developed comparison statistics were not found, research indicates that voter turnout for municipal elections that are not held concurrently with state/national elections tend to be much lower than those that coincide with other elections, and Rockville's average turnout may be typical. It should be noted that approximately 20% of Rockville residents are not U.S. citizens, which reduces the number of eligible voters relative to total adult population.

Trends

The City of Rockville attempts to connect with its community in many ways, with the City's Web site and e-mail increasing as communication methods.

Visits to the Lincoln Park Community Center have increased by more than 300% since 2002. Visits to the Croyden Creek Nature Center and to the Twinbrook Community Center have fluctuated, but increased overall since 2002. Attendance at City-sponsored events has also been increasing.

Rockville's voter turn-out, as a percentage of eligible voters, has been declining for the last five municipal elections. In 2009, it was at its second lowest level of the past twelve municipal elections. Voter turn-out for Rockville City elections has averaged 22% over the last two decades. This appears to be the same or better turn-out than for municipal-only elections in other jurisdictions.



Sources

Metropolitan Washington Council of Governments Forecasts www.mwco.org

The forecasts presented in this report were produced in cooperation with other local governments as a part of a regional effort coordinated by the Metropolitan Washington Council of Governments (COG). This regionally coordinated forecasting effort is called the “Cooperative Forecasting” process. The cooperative forecasts serve as a key data source for the COG transportation model, which is developed to determine the region’s conformity with EPA air quality regulations. The forecasts also are used by COG to conduct regional land use analyses. Representatives from each jurisdiction prepare forecasts independently, but a COG forecasting committee convenes to discuss methodologies and assumptions.

Forecasts of population, households and employment for the City of Rockville are based on existing development, projects approved for development by the Mayor and City Council and the Planning Commission (pipeline projections), and estimates of future development based on existing zoning or master plans. Baseline information on household, population and employment data is from 2005, and developed in-house. The forecasts are developed so that they are consistent with market conditions, a regional econometric model approved by COG, and adopted land use plans and zoning requirements. Assumptions about commercial vacancy rates, average household sizes, and square feet of office/commercial space per employee were made in coordination with COG to generate forecasts of people and jobs from the development forecasts. The data is combined with the regional projections to forecast employment and household numbers at the Traffic Analysis Zone (TAZ) level. COG Round 8.0 Forecasts (2010) were used for the purpose of this Strategic Scan.

U.S. Census Bureau www.census.gov

The Census Bureau serves as the leading source of data about the nation’s people and economy. The decennial census is a count of everyone living in the United States every ten years. Until the 2010 census, it consisted of both a long form and a short form. In 2000, the long form was sent to a sample of approximately 18 million households and the short form was sent to all other households. The long form has been replaced with the American Community Survey (ACS, described below) so only the short form of the census will be distributed in the future beginning with the 2010 census. The results of the 2010 census will become available in 2011.

The Economic Census profiles American business every five years, from the national to the local level. The 2007 Economic Census results are the most current.

The American Community Survey (ACS) www.census.gov/acs

The American Community Survey (ACS) is a nationwide, continuous survey designed to provide communities with reliable and timely demographic, housing, social and economic data every year. ACS was fully implemented in January 2005 following several years of refining sample design, survey methods, and data products. It will replace the decennial census long form in 2010 and thereafter by collecting more detailed, long form-type information throughout the decade rather than only once every ten years. ACS data will provide a continuous stream of updated information for states and local areas. It covers a broad range of topics about social, economic, demographic and housing characteristics of the U.S. population. The ACS samples nearly three million addresses each year, resulting in nearly two million responses.

The annual ACS sample is smaller than that of the previous Census long form sample. As a result, ACS combines population/household data from multiple years to produce reliable numbers for smaller local areas. The ACS provides one-, three-, and five-year estimates and data are released in the year immediately following the year in which they were collected. Starting with the data collected in 2005, ACS information has been published for areas with populations of 65,000 or more. In Fall 2008, the first three-year estimates were released for communities with populations greater than 20,000 based on 2005, 2006 and 2007 surveys. These estimates represent data collected over 36 months rather than at a point-in-time, such as the decennial census that approximates the characteristics of an area on a specific date. The ACS will provide the first five-year estimates in 2010, which will be updated annually by

Sources cont.

removing the earliest year and replacing it with the latest one. This will provide, for the first time, the ability to monitor social and economic trends for areas as small as census tracts and block groups.

Because ACS data are based on a sample, they are subject to sampling variability. There is a margin of error degree of uncertainty for all estimates arising from this variability.

Local Employment Dynamics (LED) www.census.gov

Local Employment Dynamics (LED) integrates existing data from state-supplied administrative records on workers and employers with existing censuses, surveys and other administrative records. The LED flagship product, Quarterly Workforce Indicators (QWI), provides information about trends in employment, hiring, job creation and destruction, and earnings. Data goes back to 1990 and LED is part of the Census Bureau as is ACS.

Other sources cited in this report:

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"Annual Report on Crime and Control", Metropolitan Washington Council of Governments, 2008

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Texas Transportation Institute <http://mobility.tamu.edu/>

U.S. Bureau of Labor Statistics (BLS) www.bls.gov

Washington Metropolitan Area Transit Authority www.wmata.com/about_metro/planning_dev.cfm

City of Rockville: City Manager's Office; City Clerk's Office; Department of Community Planning and Development Services; Department of Finance; Department of Public Works, Traffic and Transportation and Environmental Management Divisions; Department of Recreation and Parks; Rockville City Police Department