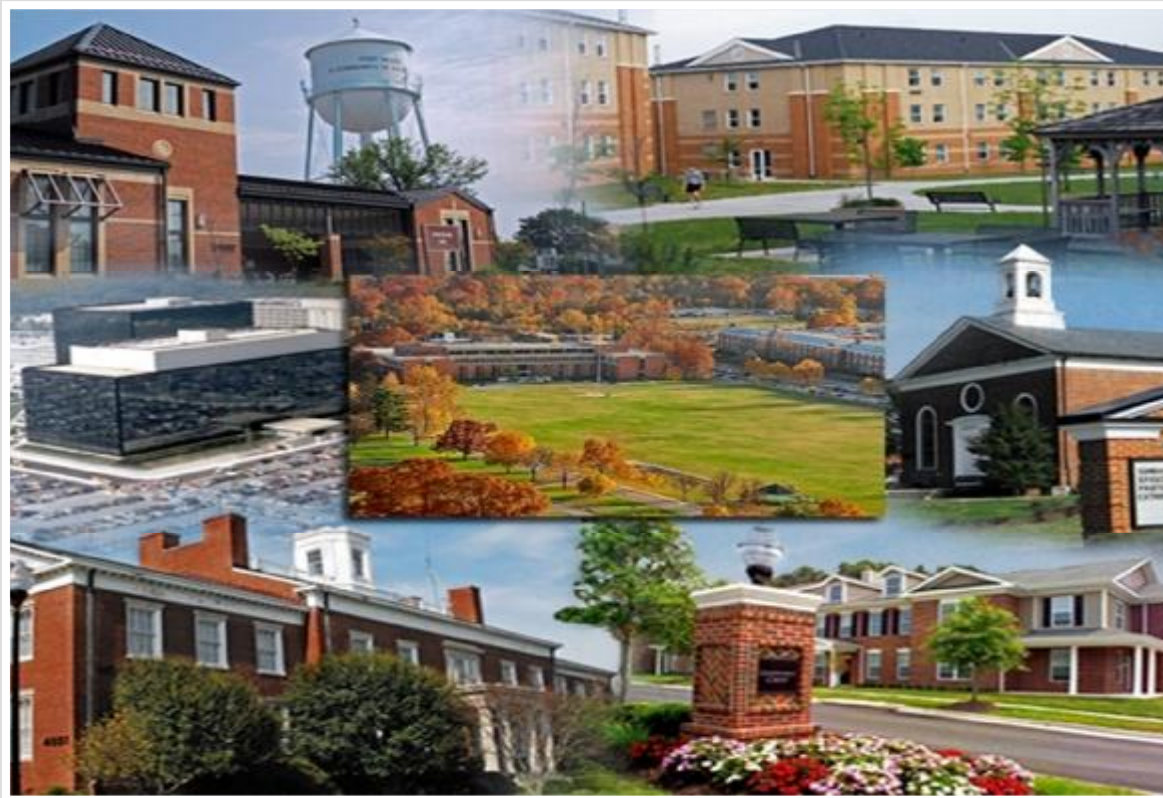


Fort Meade Regional Growth Management Committee

Regional Transportation Briefing

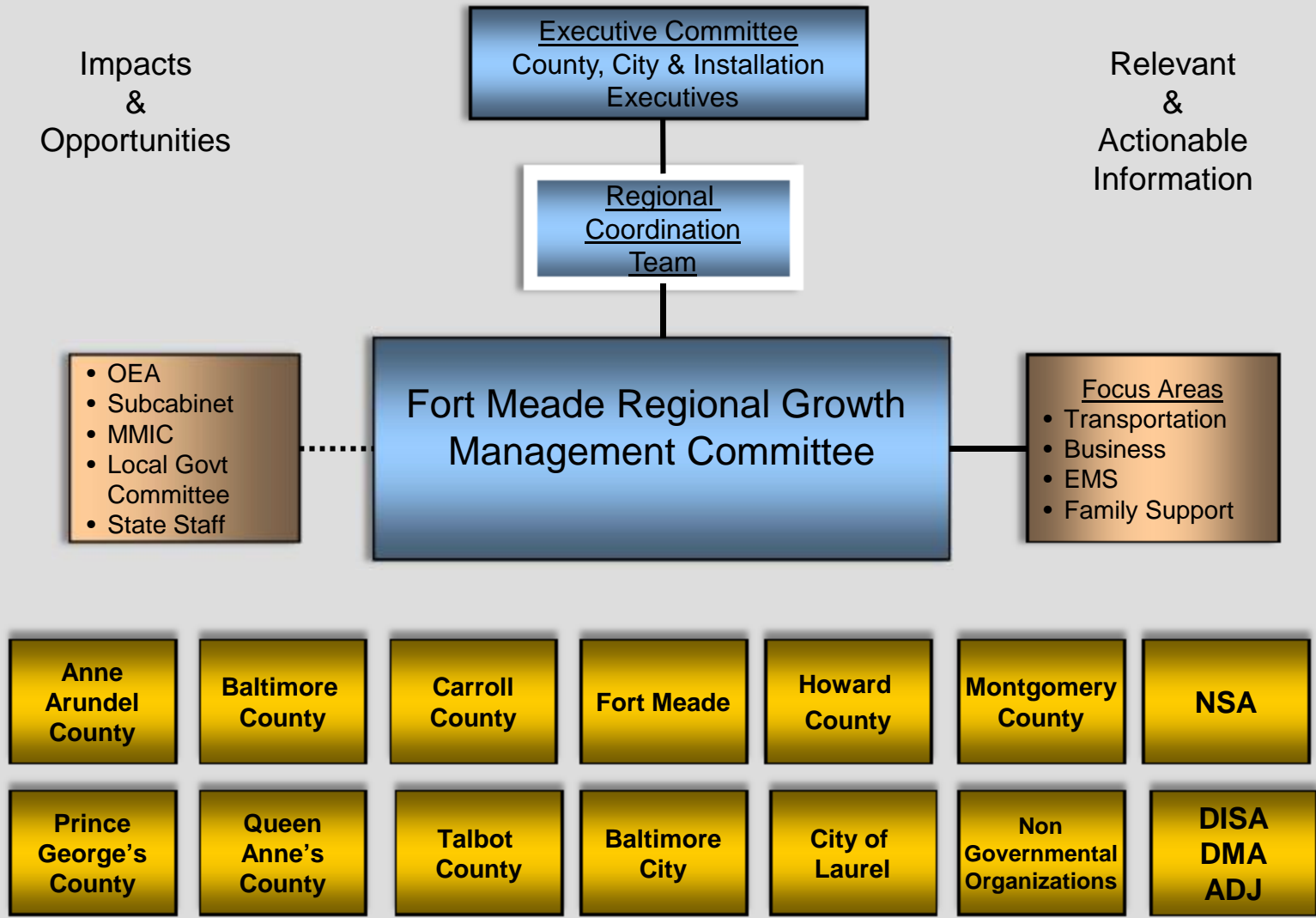
May 17, 2011

The Fort Meade Regional Growth Management Committee (RGMC)



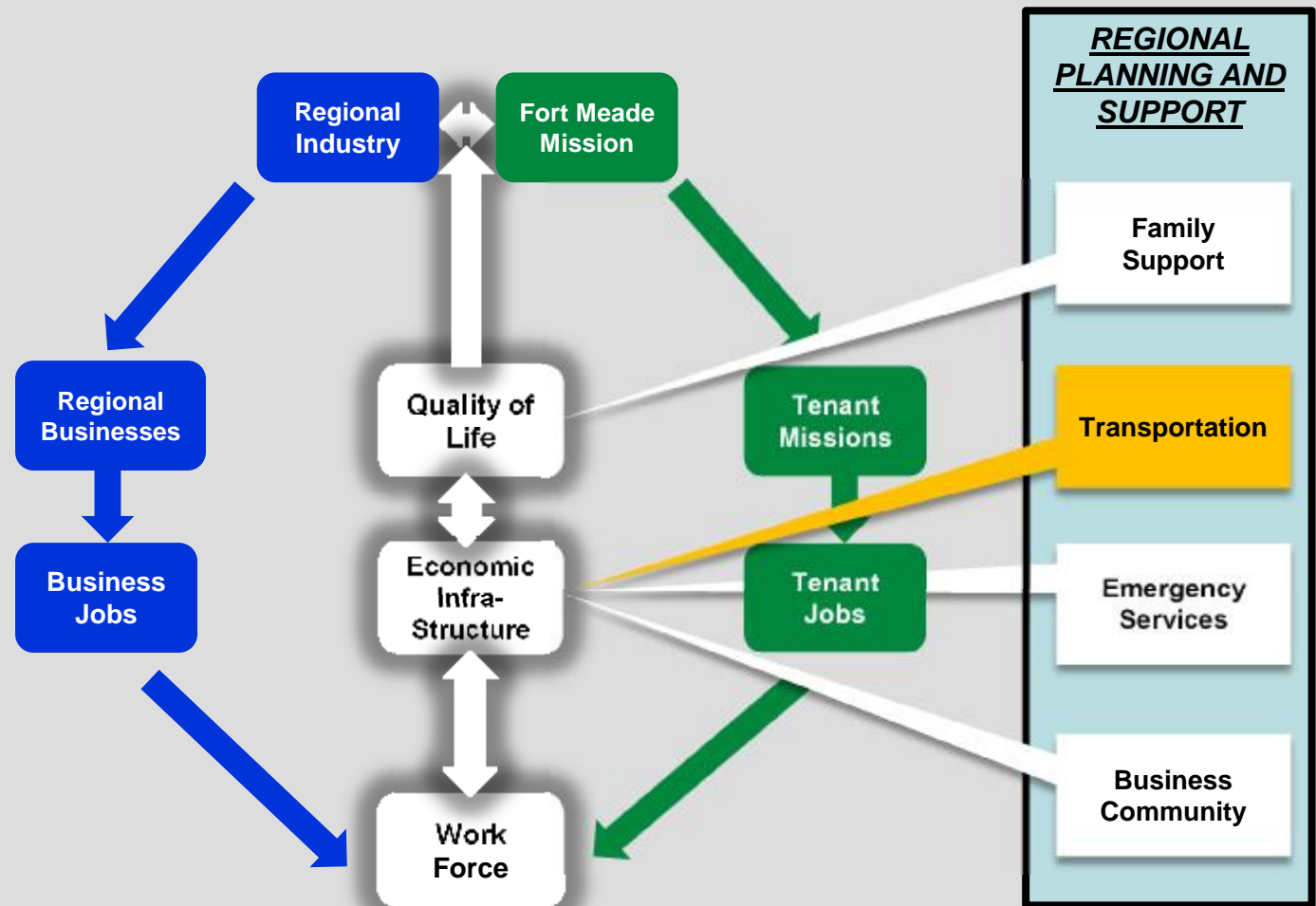
Working Within the Region To Transform Fort Meade Growth Impacts Into Opportunities

Fort Meade Regional Growth Management Committee (RGMC)



RGMC Support of Missions

The Fort Meade mission is intertwined with – and dependent on – support from the public and private sectors



Key Points

- **Fort Meade Region becoming the Cyberspace epicenter**
- **Fort Meade / NSA / Cyber a major force in the regional economy**
 - **Fort Meade agencies employ 48,000 – 85% permanent civilian employees**
 - **Each Fort Meade job supported by two private sector jobs**
 - **Current growth phase adding 40,000+ jobs by 2015-2020**
 - **One of 20 regional growth center generating 300K to 400K new jobs on base of 2.4M**
- **Mission success factors**
 - **Vibrant business community**
 - **Joint planning with local jurisdictions**
 - **Strong quality of life factors (transportation included)**
- **Transportation situation / outlook:**
 - **Growing congestion and physical deterioration**
 - **Era of economic growth and fiscal scarcity**
- **Transportation choices / outcomes:**
 - **Do nothing – unacceptable congestion**
 - **Roads only – un-fundable costs**
 - **TDM only – cultural barriers and limits**
 - **Combination – target peak period throughput**

Importance of Transportation

Plays a critical role in every facet of our lives and economy; essential to mission success

- **Economy:** Commerce, job creation and growth
- **Business Mission:** Access to workforce, customers and jobs
- **Family Support:** Quality of life; recruiting and retention
- **Competitive Positioning:** Regional success factors
- **Emergency Management:** Critical resource

Fort Meade and Related Job Growth

Requires a significant transportation investment

	JOB GROWTH		
	Jobs on Fort Meade	Jobs off Fort Meade	Total Jobs
Starting Jobs (2007)	40,000	116,000	156,000
BRAC	5,695	13,205	18,900
FGGM Organic Growth	2,000	4,600	6,600
NSA	6,680	1,620	8,300
Defense Contractors / EUL	10,000	(10,000)	-
Cyber Command (HQ)	2,320	5,400	7,720
Total New Jobs	26,695	14,825	41,520
Projected Jobs -- 2015 to 2020	66,695	130,825	197,520

Source: RGMC Staff Analysis

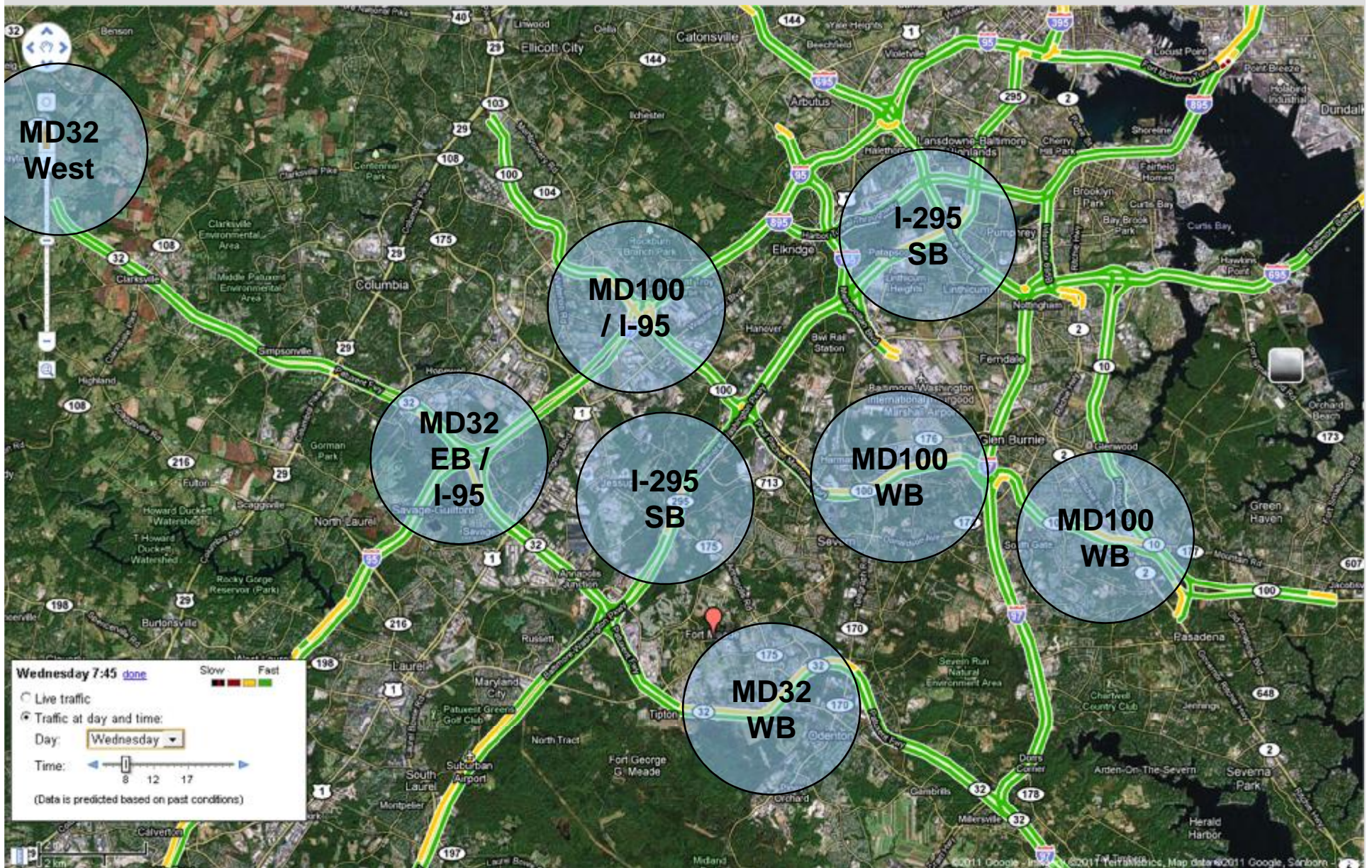
Sources of Fort Meade Area Growth

Opportunity must be sustained by infrastructure investment from multiple sources: public and private



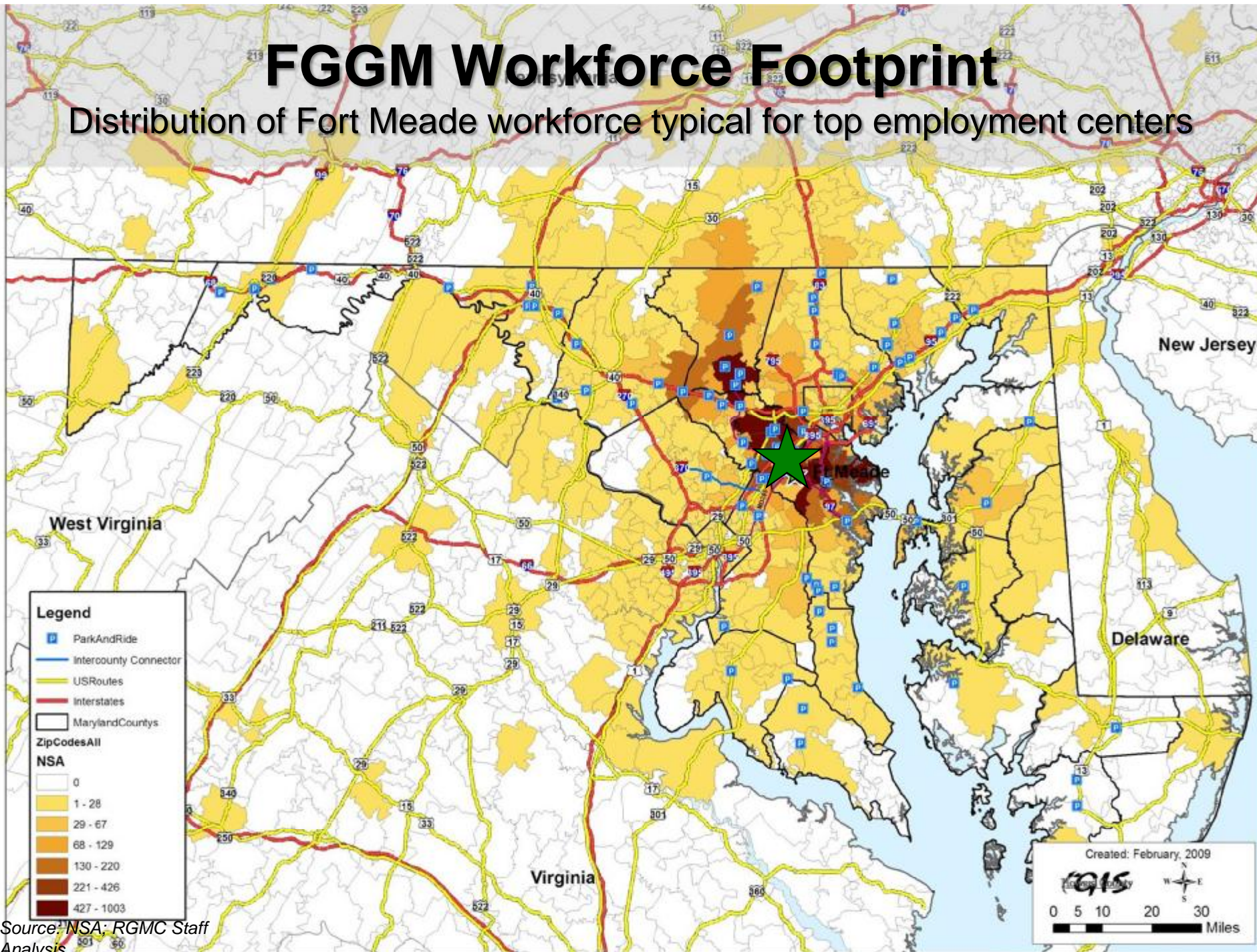
Current Peak Hour Delays and Backups

Fort Meade area under stress during peak periods



FGGM Workforce Footprint

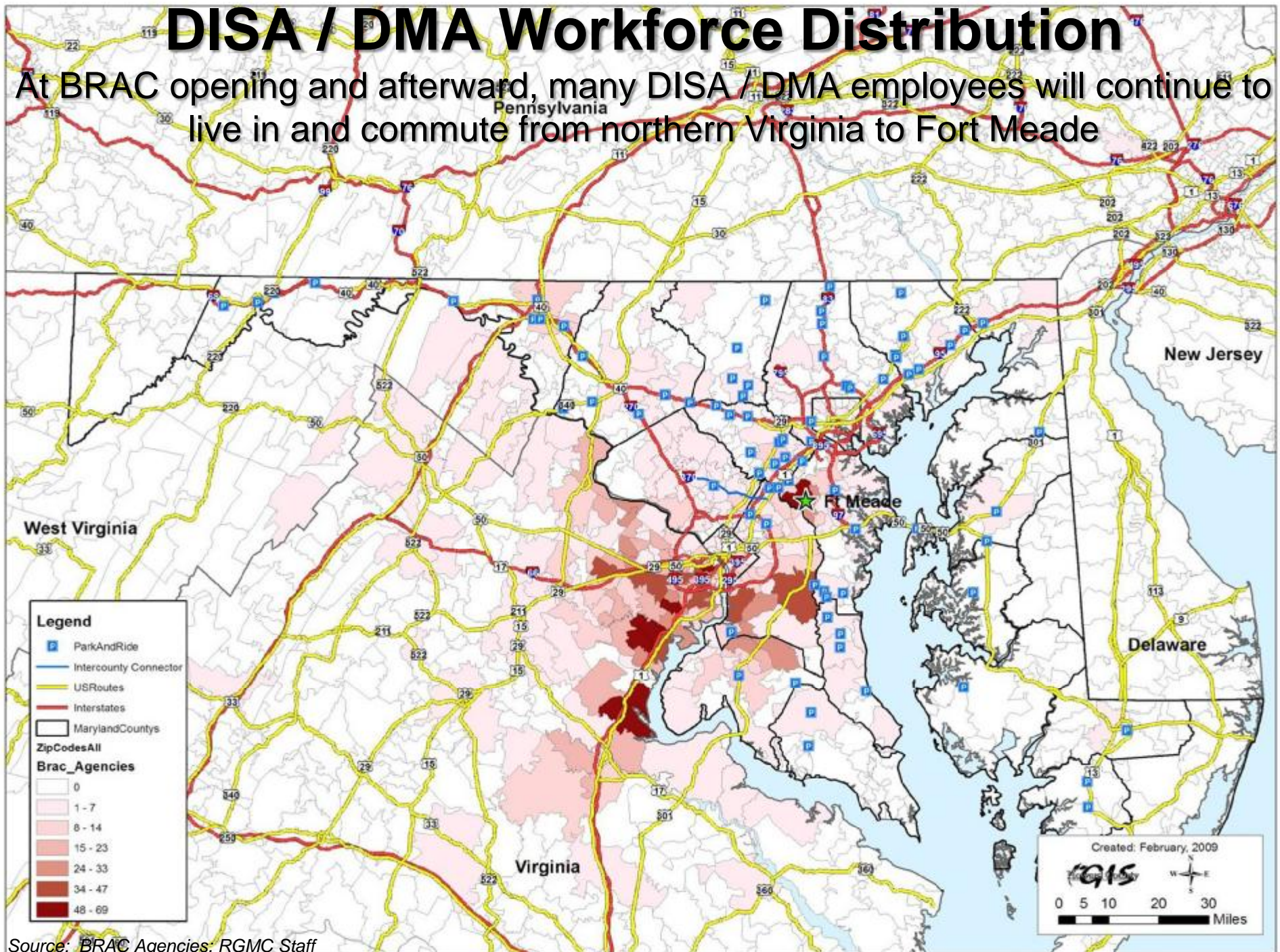
Distribution of Fort Meade workforce typical for top employment centers



Source: NSA; RGMC Staff Analysis

DISA / DMA Workforce Distribution

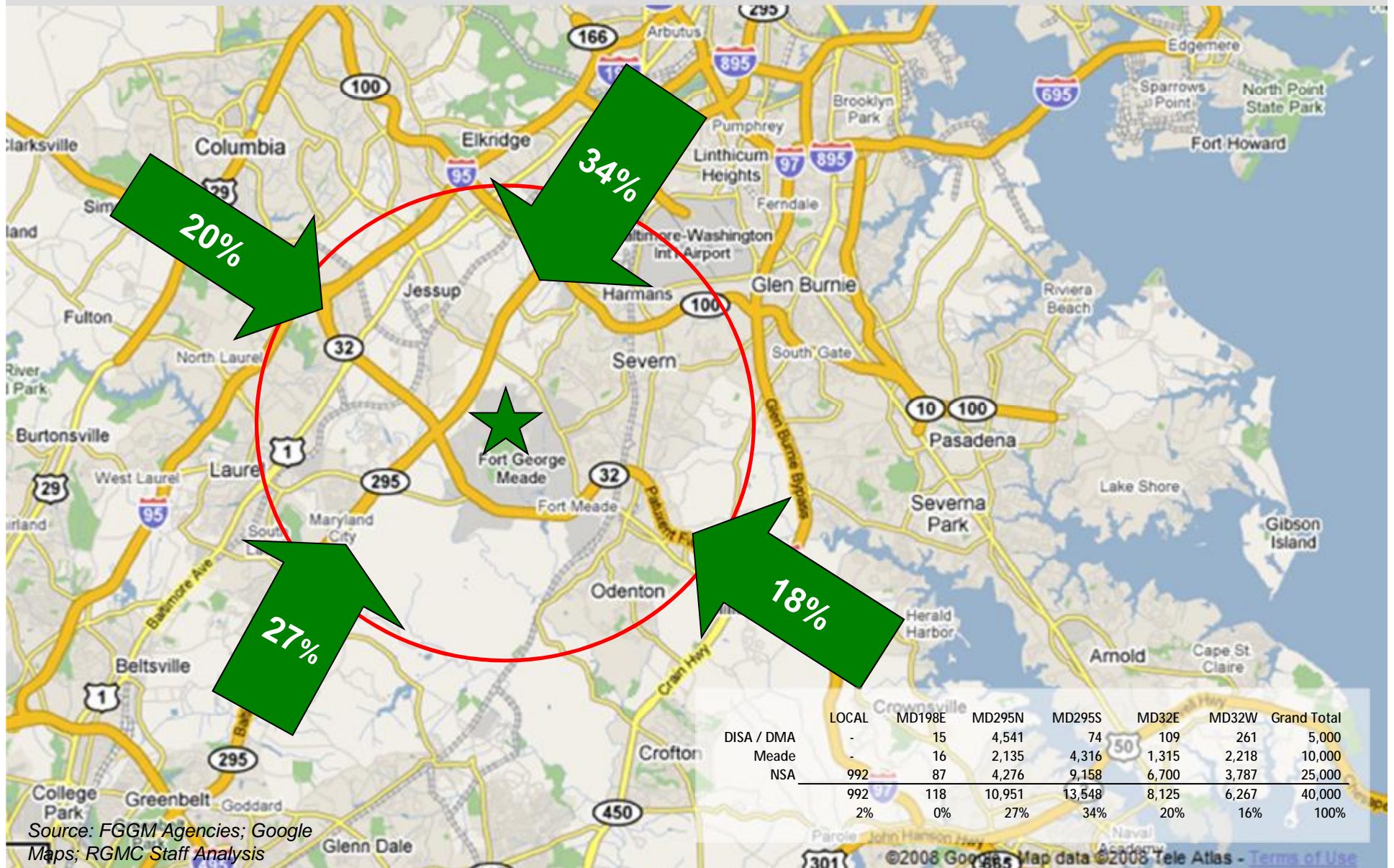
At BRAC opening and afterward, many DISA / DMA employees will continue to live in and commute from northern Virginia to Fort Meade



Source: BRAC Agencies, RGMC Staff Analysis

Meade Coordination Zone

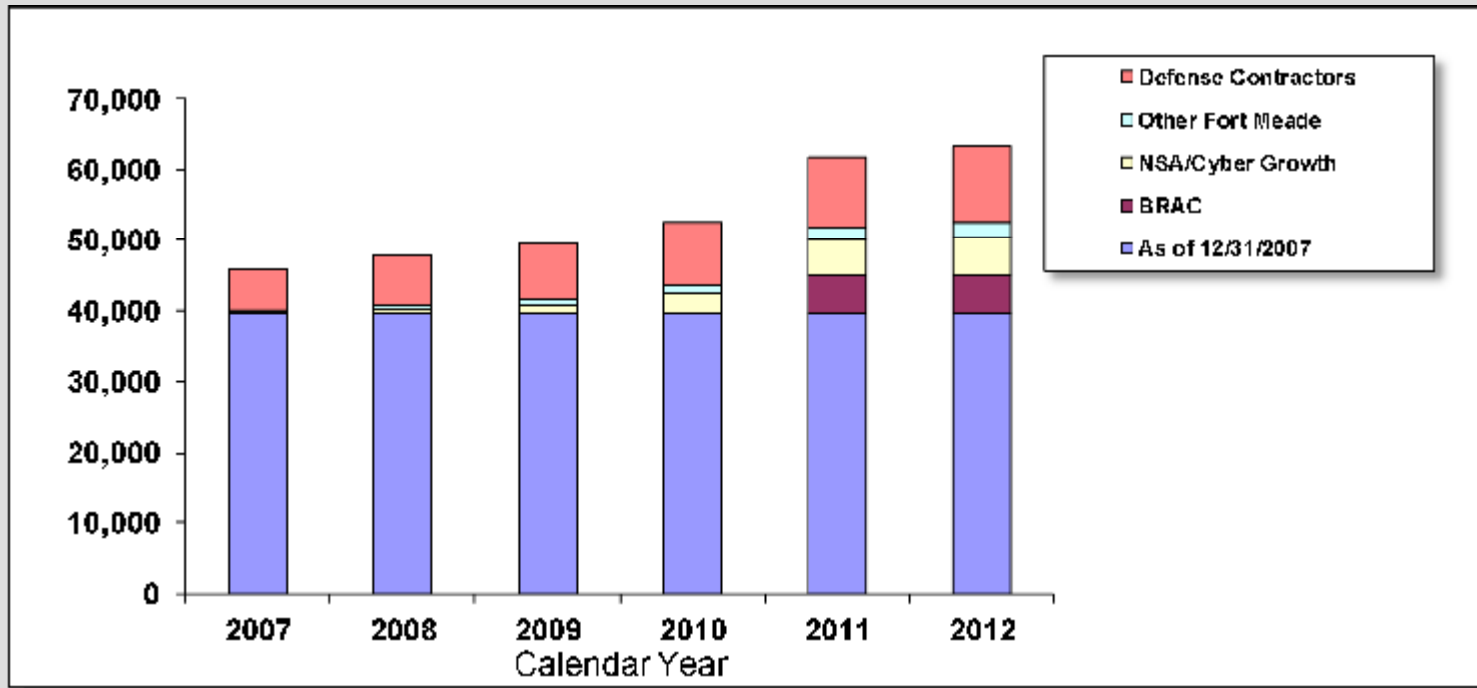
All inbound traffic affects last 5 miles



Source: FGM Agencies; Google Maps; RGMC Staff Analysis

Growth in Fort Meade and Area Workforce

Increase by at least 10,000 between 2009 and 2012

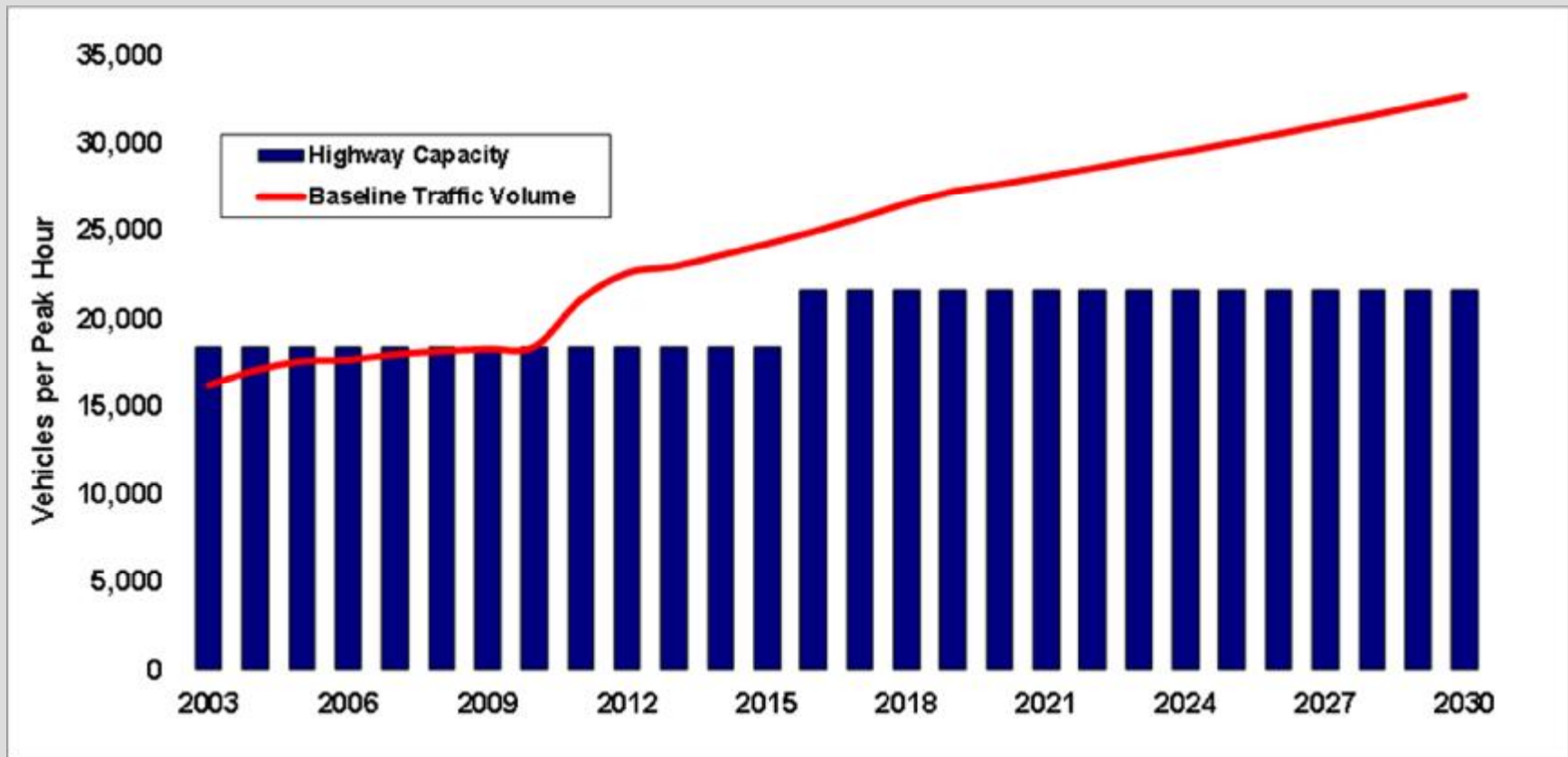


	Calendar Year					
	2007	2008	2009	2010	2011	2012
As of 12/31/2007	39,520	39,520	39,520	39,520	39,520	39,520
BRAC	-	-	-	-	5,695	5,695
NSA/Cyber Growth	480	880	1,280	2,830	4,900	5,300
Other Fort Meade	-	400	800	1,200	1,600	2,000
Defense Contractors	6,000	7,000	8,000	9,000	10,000	11,000
Total	46,000	47,800	49,600	52,550	61,715	63,515

Source: RGMC Staff Analysis

Shortfall in Road Capacity

Meade Coordination Zone highways approaching capacity in peak periods; planned increases in highway capacity will not close gap

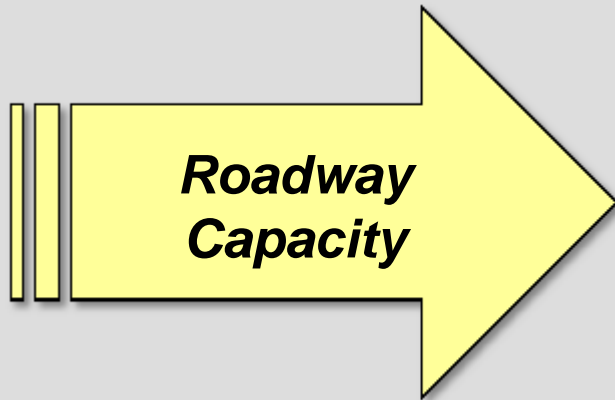


	2009	2010	2011	2012	2013	2014	2015
Highway Capacity	18,400	18,400	18,400	18,400	18,400	18,400	18,400
Baseline Traffic Volume	18,288	18,412	21,111	22,610	22,975	23,610	24,248
Excess (Shortfall)	112	(12)	(2,711)	(4,210)	(4,575)	(5,210)	(5,848)
Delay - Minutes			9	14	15	17	19

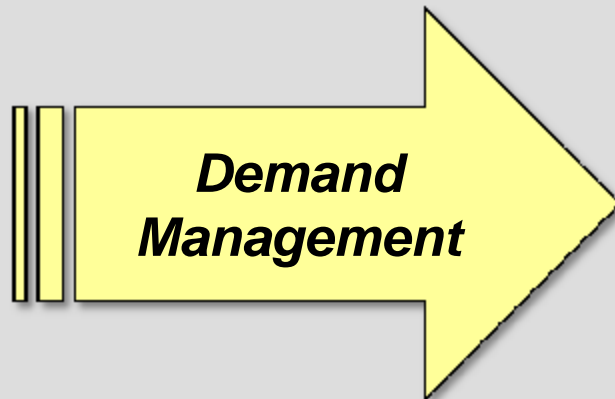
Source: RGMC Staff Analysis

Near-Term Transportation Strategy

Limit growth in traffic volume while expanding capacity at a few key highway segments and intersections; received regional endorsement



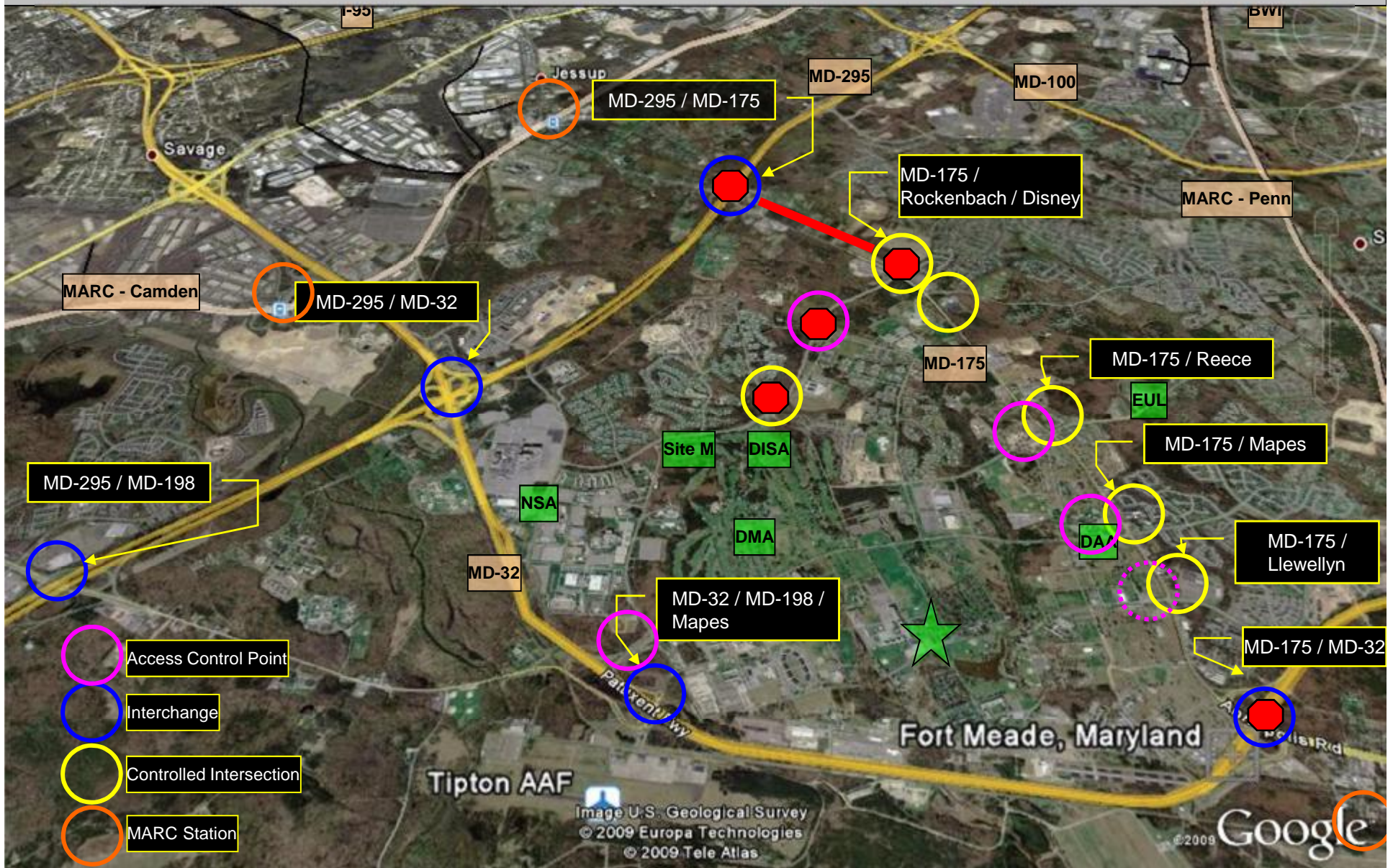
Focus limited funding – \$50M of \$1.1B – on a few key projects



Reduce peak load by 27%; to date 25% at DISA have signed up; jury is still out

Key Fort Meade Transportation Resources

Priority projects target MD-175 / Rockenbach facilities



TDM Components

Primary Modes

- **Carpool**
- **Vanpool**
- **Subscription Bus**
- **Local Transit**
- **Commuter Bus / Rail**
- **Bike / Walk**
- **Telework**

Ancillary Services and Facilities

- **Shuttles / Circulators**
- **Park and Ride Facilities**
- **Smart Car / Bike Rentals**
- **Sidewalks and Bike Trails**
- **Rideshare Coordinating Services**

Subscription Bus Concept

Make equipment, service, features and incentives competitive with SOV



- Requires no taxpayer subsidy
- Point to point service; demand driven schedule and features
- Build working relationships with colleagues
- Make travel time productive time
- Arrive at destination fresh and alert
- Experience improvement in quality of life
- Reduce commuting costs / fuel consumption / carbon footprint
- Avoid investment in peak roadway capacity

Proposed Initial TDM Goals

Near term goal of 27% varies by Agency based on variations in geographic distribution of workforce

Proposed TDM Goals by Mode and Agency Group

MODE	Workforce - %			
	Overall	NSA	DISA / DMA	Meade
SOV	73%	75%	61%	74%
Carpool	7%	7%	9%	7%
Vanpool	2%	1%	3%	1%
Subscrip Bus	6%	5%	13%	6%
Local Transit	2%	2%	1%	2%
Rail Shuttle	1%	1%	2%	1%
Telework	9%	9%	10%	9%
	100%	100%	100%	100%

MODE	Workforce - #			
	Overall	NSA	DISA / DMA	Meade
SOV	29,200	18,800	3,000	7,400
Carpool	2,900	1,700	500	700
Vanpool	600	300	200	100
Subscrip Bus	2,600	1,300	700	600
Local Transit	800	600	0	200
Rail Shuttle	300	100	100	100
Telework	3,600	2,200	500	900
	40,000	25,000	5,000	10,000

Source: RGMC Staff Analysis

Transportation Demand Management (TDM)

Proposed Objective and Principles for Fort Meade program

OBJECTIVE	Using a combination of structures and methods, restrain future FGGM SOV volume to sustainable level
PRINCIPLES	<ul style="list-style-type: none">• Employer-Sponsored. Fort Meade agencies develop, implement and monitor own TDM programs – individually or collaboratively – consistent with overall FGGM goal.• Demand Driven. Design program to provide end user value equivalent to SOV, including guaranteed ride home.• Communications Program. Use leadership, internal marketing programs, and end user input to generate participation.• Public-Private Partnership. Maximize use of TIP to fund program. Leverage private sector resources to reduce risk and access additional capital.• Savings. Structure program to pay for itself through reductions in new highway construction; use a portion of savings to ensure program success.• Environmental Component. Appeal to public's desire to reduce environmental impact as a program benefit.• Regional Template. Document approach and lessons learned; develop and apply template to support economic development across the region.

Meade Attractive Zips by Quintile

Limited number of zips key to TDM success in existing footprint

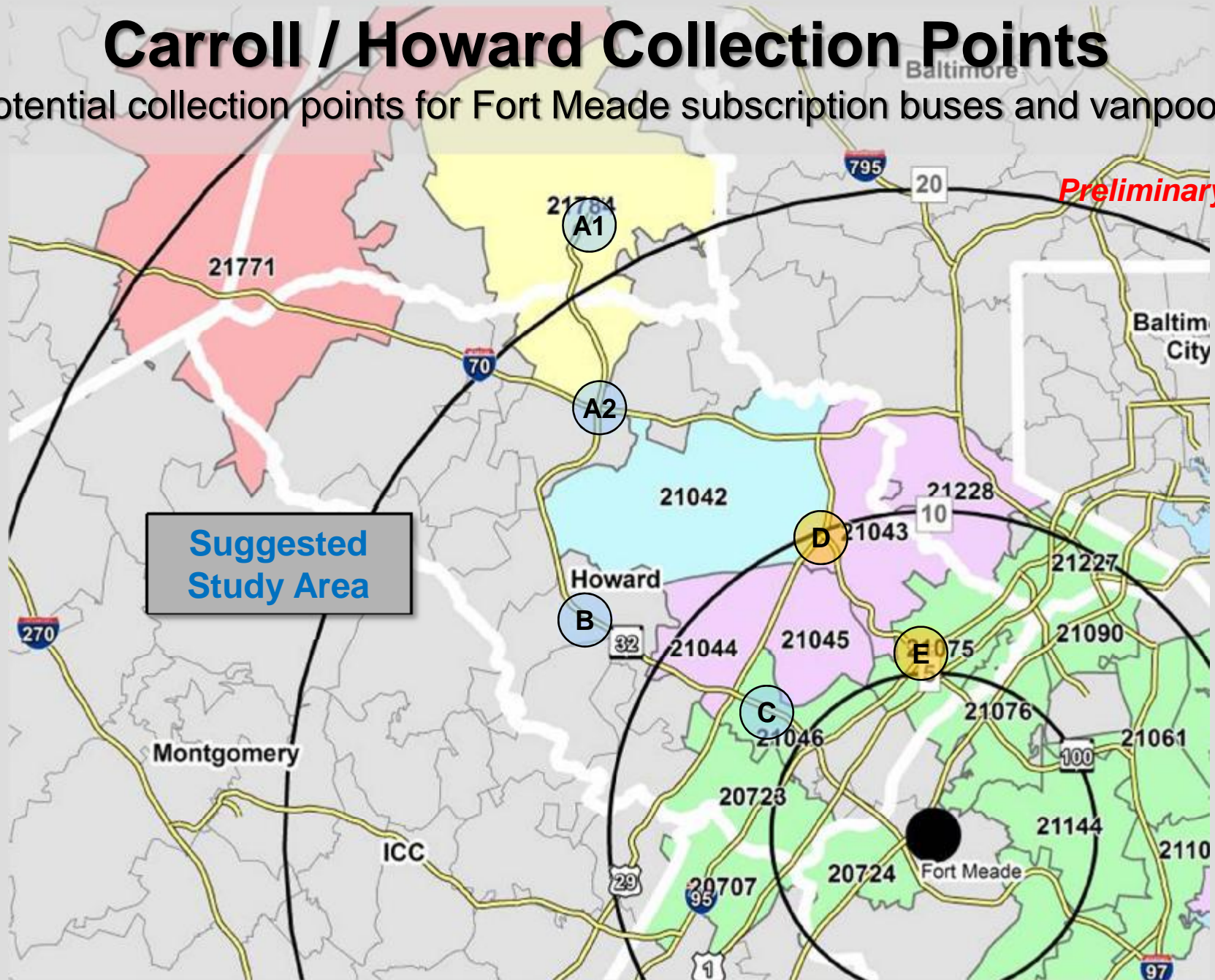
Zip	City	County	State	Miles to FGGM	Estimated Workforce	Workforce X Miles	Enrollment Rate	End Users	Bus Loads	Quintile
21784	Sykesville	Carroll	MD	32.0	919	29,416	11%	104	2	A
21122	Pasadena	Anne Arundel	MD	16.2	1,668	27,015	4%	72	2	A
21042	Ellicott City	Howard	MD	24.0	842	20,200	7%	59	2	B
22027	Dunn Loring	Fairfax	VA	39.6	466	18,446	11%	52	2	B
21157	Westminster	Carroll	MD	46.5	360	16,744	18%	65	2	B
21144	Severn	Anne Arundel	MD	6.3	2,486	15,659	3%	67	2	C
21113	Odenton	Anne Arundel	MD	7.5	2,046	15,348	3%	55	2	C
21044	Columbia	Howard	MD	14.0	1,089	15,243	4%	47	1	C
21060	Glen Burnie	Anne Arundel	MD	13.7	1,084	14,849	4%	47	1	C
21043	Ellicott City	Howard	MD	12.1	998	12,075	4%	43	1	D
21771	Mount Airy	Frederick	MD	38.8	256	9,942	11%	29	1	D
21045	Columbia	Howard	MD	13.0	734	9,544	4%	32	1	D
21061	Glen Burnie	Anne Arundel	MD	8.8	1,077	9,473	3%	29	1	D
21146	Severna Park	Anne Arundel	MD	15.1	590	8,906	4%	25	1	D
21228	Catonsville	Baltimore	MD	15.3	544	8,327	4%	23	1	D
21075	Elkridge	Howard	MD	13.3	589	7,834	4%	25	1	E
21401	Annapolis	Anne Arundel	MD	18.6	406	7,550	4%	17	1	E
21012	Arnold	Anne Arundel	MD	24.7	301	7,425	7%	21	1	E
21114	Crofton	Anne Arundel	MD	14.0	522	7,311	4%	22	1	E
21046	Columbia	Howard	MD	10.6	529	5,610	4%	23	1	E
21108	Millersville	Anne Arundel	MD	11.0	501	5,506	4%	21	1	E
21227	Baltimore	Baltimore	MD	15.7	336	5,268	4%	14	-	E
20723	Laurel	Howard	MD	9.4	518	4,868	3%	14	-	E
21054	Gambrills	Anne Arundel	MD	11.4	392	4,467	4%	17	1	E
21090	Linthicum Heights	Anne Arundel	MD	13.4	289	3,873	4%	12	-	E
21076	Hanover	Anne Arundel	MD	5.5	514	2,825	3%	13	-	E
20707	Laurel	Prince George's	MD	8.7	311	2,703	3%	8	-	E
20724	Laurel	Anne Arundel	MD	4.6	340	1,563	3%	9	-	E

14.4	20,704	297,992	5%	965	29
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Source: Fort Meade Agency; RGMC
Staff Analysis

Carroll / Howard Collection Points

Potential collection points for Fort Meade subscription buses and vanpools



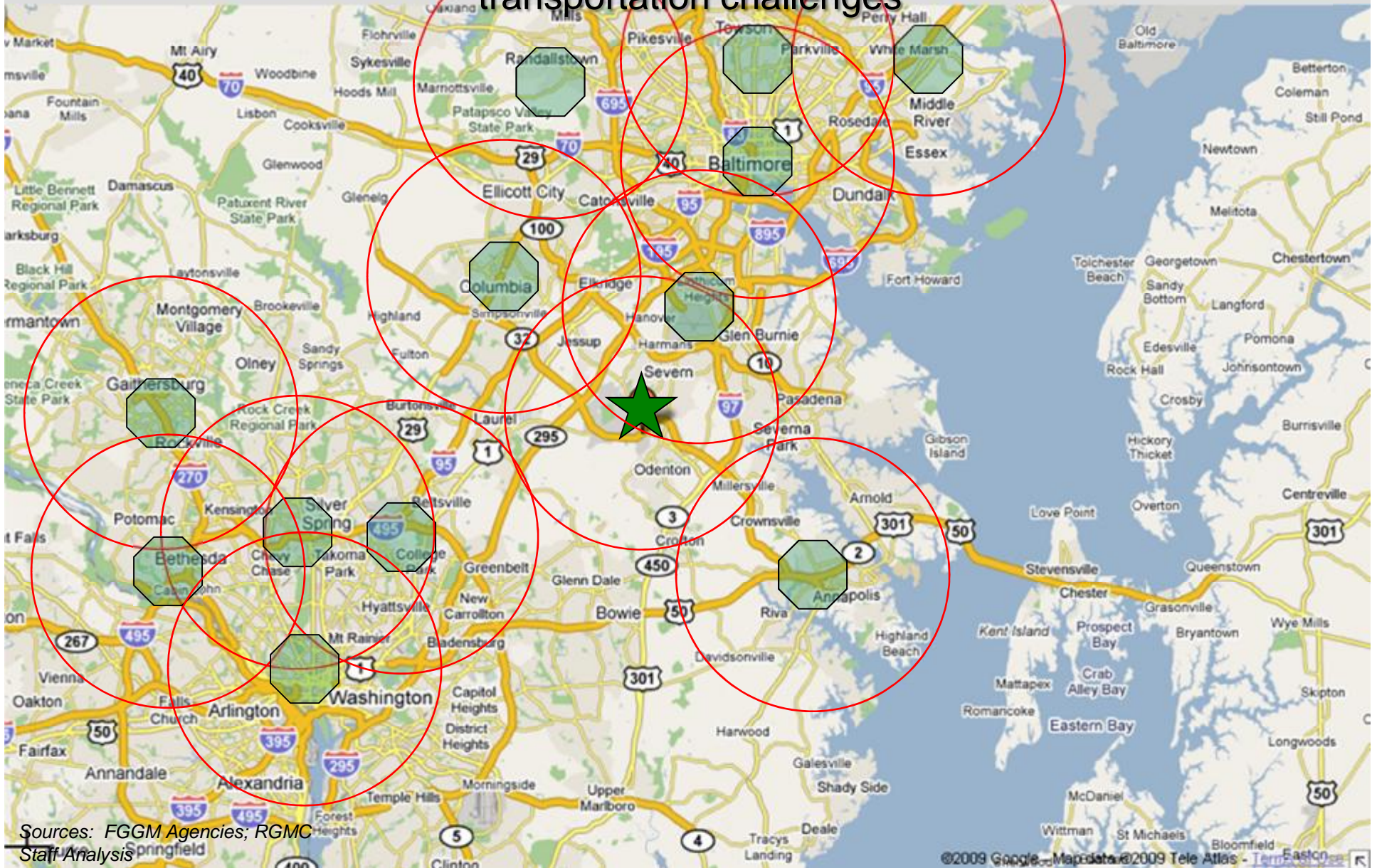
TDM Advisory Board

Collaborative effort formed in 2010 under MDOT leadership to guide implementation of the TDM program

- **Maryland Department of Transportation (MDOT)**
- **National Security Agency (NSA)**
- **Fort George G. Meade**
- **Defense Information Systems Agency (DISA)**
- **Defense Media Activity (DMA)**
- **Adjudication Co-Location**
- **Anne Arundel County**
- **Howard County**
- **BWI Business Partnership**
- **Central Maryland Regional Transit**

Regional Growth Centers

We need a unifying set of themes and templates to address our regional transportation challenges



Sources: FGGM Agencies; RGMC Staff Analysis

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Top Regional Employment Centers

About 40% of 2.5 million job base concentrated in 18 employment centers

TOP REGIONAL EMPLOYMENT CENTERS - 2020

CBRE Commercial Submarket	Jobs
Bethesda/Chevy Chase	96,100
Baltimore CBD	87,600
Baltimore North	77,500
Columbia	71,900
Fort Meade	70,000+
North Bethesda/Potomac	61,200
Towson/ Timonium	54,100
Baltimore County East	53,300
Reisterstown Road Corridor	52,800
Route 2/3	48,000
Branch Avenue Corridor	43,600
BWI Corridor	43,300
West Side	42,200
Baltimore East	41,800
Hunt Valley	28,600
Beltsville/Calverton	23,700
Rockville	23,100
Ellicott City	21,300
	1,025,100

Sources: BMC Round 7; CBRE Sub-Markets; RGMC Staff Analysis

Regional Transportation Strategy Options

Combination of road investments and TDM probably offers best mix of outcomes and feasibility

OPTION		NEAR-TERM IMPACT	LONG-TERM IMPACT
Do Nothing	Pro	No tax increase	No tax increase
	Con	More congestion	Severe congestion
Sustain	Pro	None	Limited tax increase
	Con	Tax increase	Ongoing congestion
Improve / Roads Only	Pro	None	Reduced congestion
	Con	Big tax increase	Much higher taxes / tolls
Improve / TDM Only	Pro	Less congestion; low cost	Reduced congestion
	Con	Ancillaries and cultural risks	Not viable
Combination Roads / TDM	Pro	Less congestion; low cost	Reduced congestion
	Con	Tax increase; cultural risk	Limited tax increase

Recap

- **Big job growth at regional employment centers**
- **Success requires investments in infrastructure / quality of life**
- **Transportation system is a key success factor**
- **Analysis points toward bigger role for TDM; but road investments also required**
- **Next steps:**
 - **Strengthen regional collaboration**
 - **Adopt a common set of principles, goals and decision criteria**
 - **Generate a vision based on sustainability and quality**
 - **Work together to fulfill the vision**

END