

Plan Evaluation Program (PEP) Final Report

M-NCPPC | JANUARY 2026 | VERSION 1



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Executive Summary

The Maryland-National Capital Park and Planning Commission's Plan Evaluation Program (PEP) is a foundational component of the Prince George's County Planning Department's long-range planning and statutory responsibilities. PEP supports the County's requirement to evaluate adopted comprehensive area plans on a six-year cycle and provides a structured, data-driven basis for determining whether plans should be retained, amended, consolidated, or replaced. This report documents the modernization of PEP and summarizes how updated tools, protocols, and reporting products position the Commission to meet these responsibilities consistently and defensibly.

Prior to this effort, plan implementation tracking existed largely in spreadsheet form and reflected years of incremental work by staff across multiple plans. While this work represented a significant investment and a strong foundation, it varied in structure, completeness, and status. As the number of adopted plans increased and statutory evaluation requirements became more prominent, the limitations of this approach became more apparent. Inconsistent tracking practices, manual quality control, and limited ability to synthesize information across plans constrained the Department's ability to efficiently evaluate implementation progress and communicate findings to decision-makers.

Through this project, the Commission has transformed PEP from a largely ad hoc tracking effort into an institutionalized program. Key outcomes include the delivery of a centralized tool; standardized data entry, review, and documentation protocols; a complete and validated dataset covering 36 active plans and approximately 18,000 records; and a full set of standardized progress reports. Together, these elements establish a repeatable framework for plan evaluation that supports transparency, accountability, and strategic prioritization.

Most importantly, this effort equips the M-NCPPC Planning Department and leadership with clear, comparable information about how plans are being implemented across the County. It strengthens the link between plan adoption, implementation, and future planning priorities, ensuring that decisions reflected in the Master Plans Work Program are grounded in documented progress, identified challenges, and realistic assessments of plan relevance.

Final Report

Background and Statutory Context

PEP originated in 2015 under the Prince George's County Planning Department's Planning to Plan initiative, which was launched to better understand planning capacity and establish a structured approach to managing the County's growing portfolio of master plans, sector plans, and transit district development plans. This initiative produced the Resource Allocation Model, which informed the development of the Master Plans Work Program and aligned future planning efforts with available staffing and budget resources.

Between 2017 and 2018, Planning to Plan evolved into the Plan Evaluation Program, expanding its focus from planning capacity to plan implementation, monitoring, and evaluation. A central purpose of PEP is to support compliance with [Section 27-3502\(h\) \(4\)](#) of the Prince George's County Zoning Ordinance, which requires the County Council to evaluate each approved comprehensive area plan every six years and determine, in writing, whether the plan should be amended.

PEP therefore occupies a critical role at the intersection of planning practice, statutory compliance, and policy decision-making. It is intended to document what has been implemented, and to inform forward-looking decisions about how the County allocates its planning resources.

Prior Approach & Tracking to Date

Since 2017, the Department has tracked plan implementation using spreadsheet-based workflows designed to catalog and evaluate recommendations from active plans. These workflows distinguished between policy-level statements and actionable recommendations, with the latter tracked by implementation status to support evaluation and reporting. Draft protocols were developed and refined over time to guide this effort, outlining procedures for documenting recommendations, assigning statuses, and applying basic quality checks.

While effective for initial data collection, this approach proved increasingly difficult to scale. The County's plans span more than three decades and vary widely in format, structure, and level of specificity. As a result, tracking practices evolved differently across plans and over time, leading to inconsistent review status, varying interpretations of implementation progress, and significant manual effort to validate information. The absence of a centralized tool limited the Commission's ability to efficiently synthesize data across plans or to produce consistent, defensible reports for leadership and the public.

These challenges underscored the need to formalize PEP as a long-term program supported by standardized workflows and a dedicated tool, rather than relying on spreadsheets and informal processes that are difficult to sustain over successive evaluation cycles. The formalization of this program can enable staff to maintain current information as implementation activities occur. This approach will improve transparency, reduce manual effort, and support timely reporting to the Planning Board, County Council, and other stakeholders.

Existing Plan Inventory and Tracking Status

Prince George's County currently has 38 active plans adopted between 1989 and 2022. Of these, 36 plans were included in the core PEP effort. While plan boundaries may overlap geographically, each property in the County is governed by a single adopted plan. The plans vary significantly in age, scope, and organization, reflecting decades of evolving planning priorities and methodologies.

Inventory of Active Plans

Table 1 summarizes the 36 active plans included in the PEP effort and documents the status of plan tracking materials at the outset of this project. At that time, a limited number of plans had been fully reviewed and confirmed implementation tracking, while most plans had draft information that had not yet undergone formal validation. Several plans lacked a complete tracking database altogether.

This variation reflects differences in plan age, complexity, and prior review activity rather than the relative importance or effectiveness of individual plans. It also illustrates the challenge of evaluating a large, diverse plan portfolio without standardized tools and protocols.

In addition, one plan contain no actionable recommendations and consist solely of policy guidance or defunct overlay zones. The other plan was set to be replaced in January 2025 at the time of the RFP. These plans are documented separately and do not require full implementation tracking.

Together, the plan inventory underscores the complexity of evaluating a multi-decade planning portfolio using a single set of expectations. It highlights the importance of an evaluation framework that can accommodate differences in plan age, structure, and intent while still supporting consistent reporting. See **Figure 2** for the map of the 36 active plan locations throughout Prince George's County.

Status of Existing Tracking Records

Across the 36 plans, approximately 17,979 actionable recommendation records had been identified prior to this project. However, as shown in **Table 2**, the level of completeness and review varied widely. Roughly half of all records had not yet been reviewed for implementation status, and a subset of plans lacked a fully developed database.

These conditions highlighted the need for a coordinated effort to standardize, validate, and organize existing information into a repeatable framework capable of supporting ongoing six-year evaluations and informing long-range planning decisions.

Project Approach

The project followed a collaborative, interactive approach designed to transition PEP from spreadsheet-based tracking into a fully operational, repeatable evaluation program supported by a centralized tool, standardized protocols, and consistent reporting outputs (**Figure 1**).

The project team worked with the Commission staff to obtain institutional knowledge throughout this effort. Staff provided plan interpretation, refining and understanding implementation context, and confirmation of status where professional judgment was required.

Three interrelated elements guided the work: development of a centralized Plan Evaluation Tool; refinement and operationalization of data entry and review protocols; and preparation of standardized Progress Reports that translate technical tracking data into decision-ready summaries.

This iterative approach allowed the PEP tool and progress reports to evolve together, resulting in a cohesive system that supports both operational tracking and strategic decision-making.

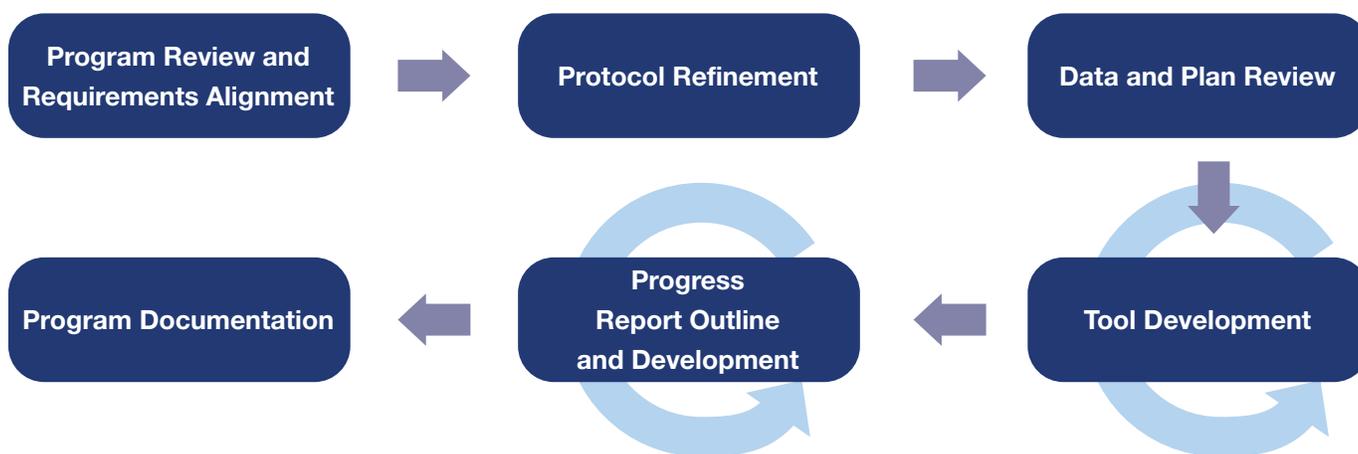


Figure 1. Project Approach – Tool Development and Progress Reports were iterative cycles that solicited feedback from M-NCPPC to help support enhancements to finalize materials.

Table 1. Active Plans and their Corresponding Phase/Deliverable

Number	Date	Plan Name	Phase/Deliverable
1	8/1/1989	Langley Park-College Park-Greenbelt & Vicinity MP & SMA	Initial Draft Completed and Status Confirmed
2	6/24/1990	Largo-Lottsford MP & SMA	Draft Completed, Status Not Yet Reviewed
3	5/17/1994	Bladensburg, New Carrollton, & Vicinity MP & SMA	Draft Completed, Status Not Yet Reviewed
4	5/19/1994	Planning Area 68 MP & SMA	Initial Draft Completed and Status Confirmed
5	11/21/2000	The Heights & Vicinity MP & SMA	Draft Completed, Status Not Yet Reviewed
6	10/16/2001	Greenbelt Metro Area SP & SMA	Draft Completed, Status Not Yet Reviewed
7	11/30/2004	Gateway Arts District SP & SMA	No Database Drafted Yet
8	3/28/2006	East Glenn Dale Area SP & SMA	Draft Completed, Status Not Yet Reviewed
9	4/25/2006	Henson Creek-South Potomac MP & SMA	Database In Progress/Incomplete
10	2/6/2007	Westphalia SP & SMA	Initial Draft Completed and Status Confirmed
11	7/1/2008	Capitol Heights TDDP & TDOZMA	Draft Completed, Status Not Yet Reviewed
12	9/23/2008	Branch Avenue Corridor SP & SMA	Initial Draft Completed and Status Confirmed
13	5/19/2009	Landover Gateway SP & SMA	Initial Draft Completed and Status Confirmed
14	10/6/2009	Port Towns SP & SMA	Draft Completed, Status Not Yet Reviewed
15	10/10/2009	Takoma-Langley Crossroads SP	Draft Completed, Status Not Yet Reviewed
16	11/17/2009	Marlboro Pike SP & SMA	Initial Draft Completed and Status Confirmed
17	3/16/2010	Central US 1 Corridor SP & SMA	Draft Completed, Status Not Yet Reviewed
18	3/16/2010	Glenn Dale Seabrook Lanham & Vicinity SP & SMA	Initial Draft Completed and Status Confirmed
19	5/4/2010	New Carrollton TDDP & TDOZ	Status Review Incomplete/Underway
20	6/1/2010	Subregion 4 MP & SMA	Initial Draft Completed and Status Confirmed
21	6/23/2010	Subregion 1 MP & SMA	Status Review Incomplete/Underway
22	10/5/2010	Central Annapolis Road SP & SMA	Draft Completed, Status Not Yet Reviewed
23	3/5/2013	Greenbelt Metro Area & MD 193 Corridor SP & SMA	Draft Completed, Status Not Yet Reviewed
24	4/2/2013	Central Branch Avenue Corridor Revitalization SP	Initial Draft Completed and Status Confirmed
25	7/24/2013	Subregion 5 MP & SMA	Draft Completed, Status Not Yet Reviewed
26	7/24/2013	Subregion 6 MP & SMA	Draft Completed, Status Not Yet Reviewed
27	11/12/2013	Largo Town Center SP & SMA	Database In Progress/Incomplete
28	2/18/2014	Eastover-Forest Heights-Glassmanor SP & SMA	Draft Completed, Status Not Yet Reviewed
29	4/25/2014	Southern Green Line Station Area SP & SMA	No Database Drafted Yet
30	5/13/2014	Landover Metro Area & MD 202 Corridor SP & SMA	Database In Progress/Incomplete
31	3/17/2015	College Park-Riverdale Park TDDP	Database In Progress/Incomplete
32	6/19/2016	Prince George's Plaza TDDP & TDOZ	Draft Completed, Status Not Yet Reviewed
33	4/27/2017	East Riverdale-Beacon Heights SP & SMA	Draft Completed, Status Not Yet Reviewed
34	1/23/2018	Greater Cheverly SP	Draft Completed, Status Not Yet Reviewed
35	3/8/2022	Bowie-Mitchellview and Vicinity MP	Draft Completed, Status Not Yet Reviewed
36	6/6/2022	Adelphi Road-UMGC-UMD Purple Line Station Area SP & SMA	Draft Completed, Status Not Yet Reviewed

Table 2. Active Plans and their Corresponding Phase/Deliverable

Phase/Deliverable	# of Plans	Number of Records	Percentage
Initial Draft Completed and Status Confirmed	9	5,958	34%
Status Review Incomplete/Underway	2	1,094	6%
Draft Completed, Status Not Yet Reviewed	19	9,075	50%
Database In Progress/Incomplete	4	1,409	8%
No Database Drafted Yet	2	443	2%
Total	36	17,979	100%

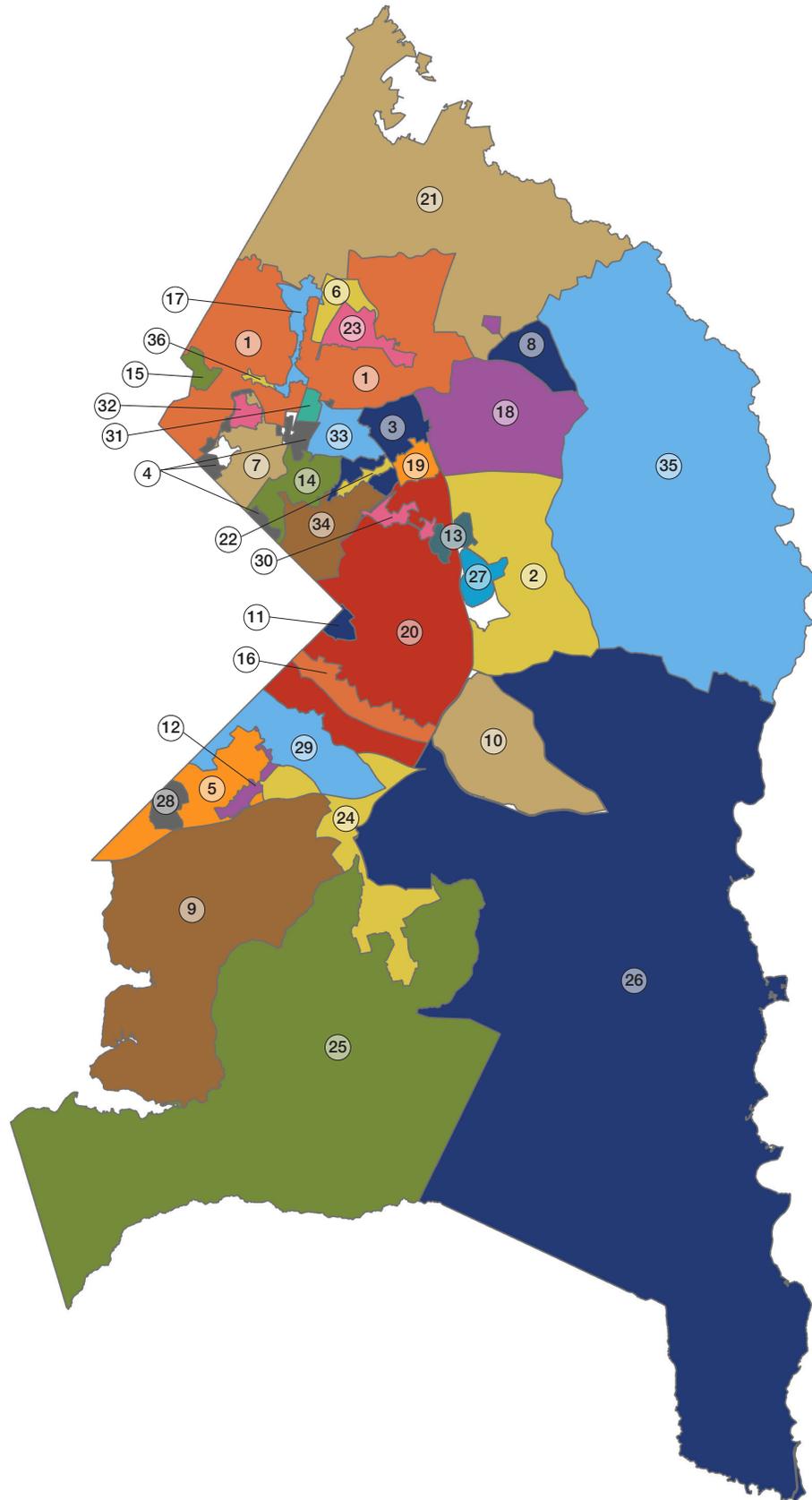


Figure 2. Active Plan Area map showing the 36 plans included in the PEP effort (refer to Table 1 for the Plan Name corresponding to each number).

Data Review and Completion Strategy

The effort began with a detailed review of existing plan tracking materials and data fields to determine which information best supports monitoring, evaluation, and reporting objectives. The project team worked closely with Commission staff to assess field relevance, consistency, and usability, documenting recommendations for inclusion, exclusion, or modification. These decisions established a standardized foundation for subsequent tool and report development.

Given the volume of records across the 36 plans, responsibilities for data review and status confirmation were shared between the project team and Commission staff. Plans with clean, confirmed records were migrated directly into the tool, while plans with incomplete or undocumented tracking were brought to full tracking status through additional review and documentation. This collaborative approach ensured that institutional knowledge informed implementation status determinations while allowing the project team to efficiently complete the dataset.

Figure 3 illustrates this data review approach. At the conclusion of this effort, all 36 plans were represented within a single standardized dataset, providing a consistent foundation for evaluation and reporting.

Overview of the PEP Tool

Purpose and Function

The PEP tool serves as the authoritative system of record for plan implementation across Prince George's County. It enables staff to enter, maintain, and review actionable plan recommendations; document implementation status over time; and generate standardized datasets that support evaluation, reporting, and decision-making.

The tool is designed to support both day-to-day updates and formal six-year plan evaluations. By structuring information so it is entered once, reviewed through defined workflows, and reused across reporting cycles, the tool reduces duplication of effort and minimizes inconsistencies that can arise

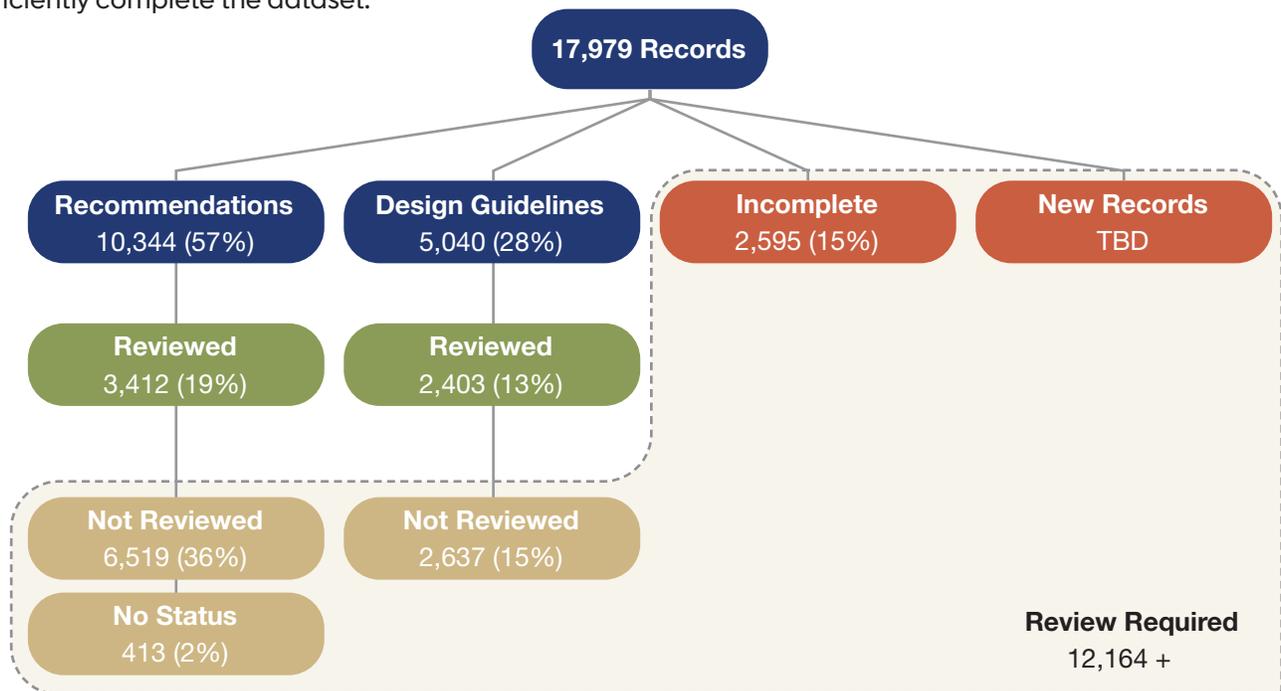


Figure 3. Data Review Approach.

from plan-by-plan or ad hoc tracking. This approach improves the reliability and defensibility of evaluation outcomes while allowing staff to focus on analysis rather than data reconciliation.

Importantly, the tool supports transparency and accountability by preserving implementation histories and enabling clear documentation of how conclusions are reached. This functionality is essential for supporting written findings, leadership briefings, and public-facing Progress Reports.

Tool Organization

The tool organizes information into five core related data groups—Plans, Records, Recommendation Status, Progress Reports, and Scorecard (Demographic Information)—linked through standardized unique identifiers to ensure traceability and consistency (**Figure 4**). Users access plans through a central interface and follow role-based workflows aligned with their responsibilities. This organization supports controlled editing, structured review, and efficient retrieval of information for analysis and reporting.

The organizational structure also supports scalability. While the current implementation meets operational needs, the data model is designed to accommodate future enhancements or platform transitions without loss of information or disruption to established workflows.

Recommendations and Design Guidelines

The tool distinguishes clearly between Recommendations and Design Guidelines. Recommendations are action-based, verifiable statements that advance the goals and policies of an adopted plan and are eligible for implementation tracking and reporting. Design Guidelines provide qualitative guidance related to physical form, character, or design intent and are documented for reference but are not assigned implementation statuses.

Original plan language is preserved across both categories, while classification and organization are standardized to support consistent analysis across plans of different vintages. Detailed criteria and workflows are documented in Attachment A: PEP Tool User Manual.

Progress Tracking and Evaluation

The Progress Tracker component operationalizes plan evaluation by linking recommendation records to implementation status updates and reporting cycles. Status definitions are applied consistently, with review and validation built into the workflow to support transparency and defensibility.

By maintaining structured status histories, the tool supports both detailed auditing of individual recommendations and summary-level analysis of overall plan progress. Aggregated outputs provide the analytical foundation for six-year plan evaluations and for decisions related to the Master Plans Work Program, including prioritization of plan updates and allocation of planning resources.

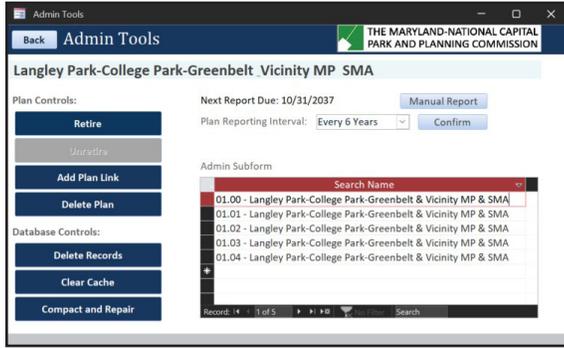
Progress Report Development

Progress Reports were developed as the primary communication product of PEP, translating detailed tracking data into clear, comparable summaries suitable for leadership, decision-makers, and the public.

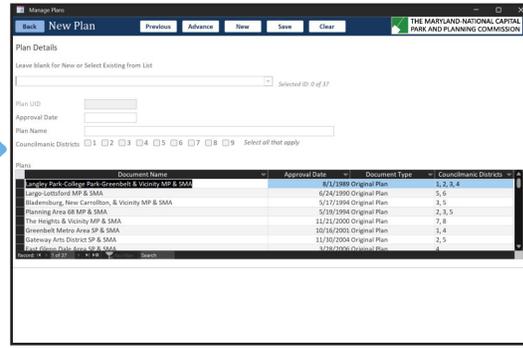
Standardized Framework

A standardized Progress Report outline and InDesign template were developed and applied consistently across all plans. **Figure 5** illustrates the 508 compliant report template. While each report reflects the unique context of its plan area, the shared structure allows readers to quickly understand plan status, compare findings across plans, and identify key issues.

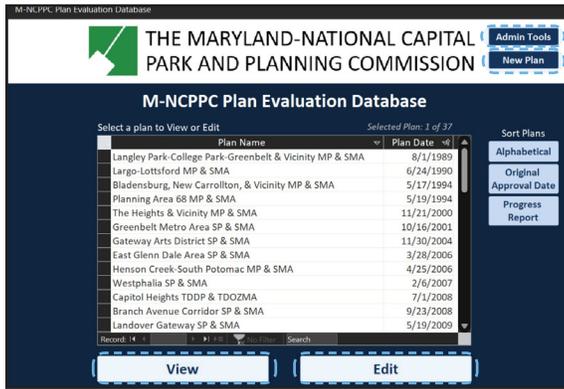
Admin Tools



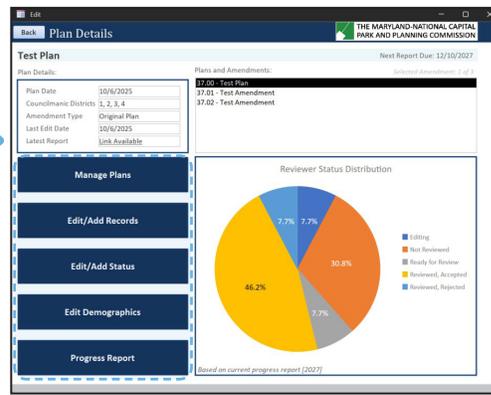
New Plan



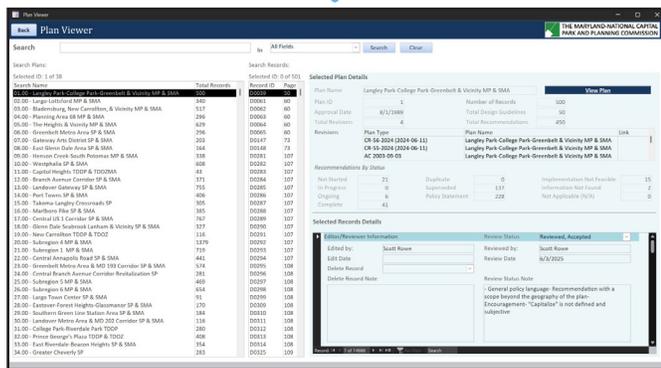
Home Page



Plan Details



Plan Viewer



- Manage Plans
- Edit/Add Records
- Edit/Add Status
- Edit Demographics
- Progress Report

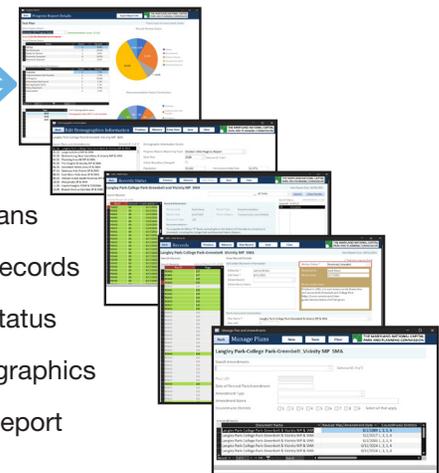


Figure 4. PEP Tool Overview & Navigation Paths from the Home Page.

Report Content and Use

Each progress report summarizes plan context, highlights implementation progress, identifies key challenges and near-term opportunities, and provides a clear recommendation regarding whether the plan should be retained, amended, consolidated, or replaced. Reports are designed to function as both decision-support documents and public-facing summaries, reinforcing transparency and accountability in the plan evaluation process.

These recommendations are not generated automatically; they are informed by a holistic review of implementation status, plan age, alignment with current Countywide policies, overlap with newer plans, and observed constraints or opportunities. By documenting both the recommended action and the supporting rationale, the reports provide decision-makers with a transparent basis for prioritizing planning efforts and allocating resources through the Master Plans Work Program. Content for each progress report comes from a variety of sources, including data from the PEP Tool regarding implementation status of recommendations; data provided by Department staff on pipeline development projects, key infrastructure investments, and demographics; and the plans themselves.

In addition to providing a summary of plan implementation to date, each progress report features recommended next steps for updating, consolidating, or replacing the plan. These recommendations are informed by multiple factors, including plan age, progress toward implementation, and fragmentation of plan areas due to superseding plans. They also consider major land use, economic, administrative, or other relevant changes that substantially affect the continued relevance and applicability of existing plan frameworks or geographies. The recommendations on plan updates, consolidation, and replacement are intended to help the Commission make informed decisions to calibrate PEP resource allocation and plan development, meet statutory reporting

Each progress report should use its subregion color as the main color for the report (in this case, red). A complementary color has been identified for each subregion, for use throughout the report. Complementary colors can be found to the left of this page.

[Template]

Plan Progress Report



[Plan Name]

Date Plan Approved: [Month, Day Year]

Date of Progress Report: [Month, Day Year]

Councilmanic Districts: [List]

Progress Summary

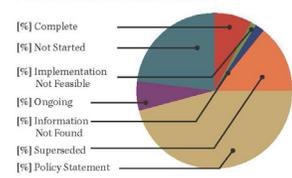
[Plan name] contains [number] recommendations, primarily focused on [list of top categories represented, as pulled from the database].

Since its adoption in [year], approximately [%] percent ([#]) of the recommendations have been completed and [%] percent ([#]) are ongoing. Approximately [%] percent ([#]) have not yet had action taken. [Note: Can add additional information if other facts stand out - for example, if a large proportion have been superseded.]

Some highlights of completed recommendations include:

- [Highlight]
- [Highlight]
- [Highlight]

Plan Recommendation Status

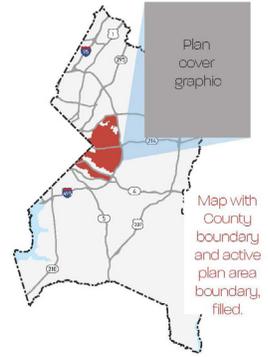


- [#] Complete
- [#] Not Started
- [#] Implementation Not Feasible
- [#] Ongoing
- [#] Information Not Found
- [#] Superseded
- [#] Policy Statement

Suggested Next Step

- Update progress report in [year]
- Minor plan amendment
- Major plan amendment
- Replace

More information about this recommendation can be found at the end of the report.



Page 1 • [Plan Title] Progress Report

Prince George's County Planning Department

Figure 5. Progress Report Template with Placeholder Text.

requirements, and support the County's vision and goals for livability, economic vitality, and sustainability. See **Table 3** at the end of the document for a detailed summary of recommendations for each plan.

Progress Reports are designed to function as both decision-support tools and public-facing documents. For leadership and elected officials, they offer defensible evaluations grounded in documented data and professional judgment. For the public, they provide accessible insight into how adopted plans are being implemented and how future planning decisions are informed.

Training Sessions

Three targeted training and engagement sessions were conducted with M-NCPPC staff and leadership to support successful adoption of the Plan Evaluation Program (PEP) tool and associated protocols. These

sessions, delivered through a combination of virtual and in-person formats, were intentionally sequenced to gather leadership input early, incorporate feedback into tool refinement, and prepare staff for consistent day-to-day use.

Training 1: September 25, 2025

The first training session was held virtually with senior Commission planners and focused on orienting participants to the PEP program background, tool structure, and data entry protocols. A live demonstration allowed staff to review workflows and provide targeted user interface (UI)/user experience (UX) and functionality feedback. Input from this session informed refinements to navigation, landing-page clarity, and early development of the progress report module.

Director Meeting: October 15, 2025

A focused meeting with the Director and senior leadership reviewed the tool's capabilities and discussed governance and future enhancements. This session underscored the need for Standard Operating Procedures (SOPs) to guide consistent status research, data entry, review, and quality control across jurisdictions. Leadership also raised the need for clearer amendment identification, defined administrative authority, and audit logging to support sound governance.

Training 2: November 11, 2025

The final training session was conducted in person with all planning staff after the database had been substantially completed and updated (**Figure 6**). The session emphasized day-to-day use of the tool, review of real plan data examples, reinforcement of updated protocols, and discussion of refinements identified during database completion. Feedback from this session informed final adjustments to the tool and documentation.

Collectively, these training and engagement efforts validated usability, reinforced standardized practices, and integrated staff and leadership feedback into final refinements. As a result, the PEP tool and workflows are staff-ready, and the Commission is positioned to sustain the program internally over time.

Challenges and Key Decisions

The project encountered interrelated challenges pertaining to technology constraints, data quality, consistency, and complexity, and plan interpretation, all of which informed key project decisions. Addressing these challenges required balancing timely delivery with long-term flexibility.

A primary challenge involved aligning the PEP tool with the Commission's enterprise IT environment. Early exploration of Oracle APEX demonstrated functional potential but proved infeasible due to platform support limitations, internal hosting requirements, and training constraints. Data Systems/Information Technology staff indicated a preference for custom .NET applications connected directly to Oracle databases; however, developing such a solution would have required additional scope, funding, and coordination beyond this project. To deliver a functional tool within the approved scope and fee, the project team implemented an enhanced Microsoft Access-based solution and designed the underlying data model and workflows to support future migration.

This approach ensured near-term operability while preserving long-term flexibility. Microsoft Access met current operational needs and enabled timely delivery, while the data architecture remains adaptable for a future transition to a .NET- and Oracle-based platform should priorities and resources allow.

The project also addressed significant data challenges resulting from the diversity of the County's



Figure 6. In-Person Training Session 2 at M-NCPPC Office in Prince George’s County.

plan portfolio. Plans vary widely in age, structure, terminology, and level of prior tracking, and many predate Plan 2035. Although formats and naming conventions differ, underlying planning themes remain consistent, requiring careful standardization without altering adopted intent.

To manage this complexity, the project team established clear criteria for identifying quantifiable, actionable recommendations and standardized entries where feasible while preserving original plan language. Legacy content was aligned to current policy categories when appropriate, and gaps were documented as expected conditions rather than deficiencies. Supplemental plan tables and multi-property recommendations were addressed through consistent rules for defining trackable units and use of Review Status Notes to document judgment calls and cross-references, ensuring transparency and defensibility.

Next Steps

Near-term priorities include formal adoption of the PEP tool and the updated manual, establishment of a regular update cadence aligned with six-year evaluation cycles, and implementation of Standard Operating Procedures (SOPs) to guide consistent use and governance. These SOPs should include procedures for adding plan amendments and updates and associated recommendations to the

PEP tool and training new Department staff on data standards and use of the tool.

Ongoing maintenance is essential to ensure system performance, data integrity, and long-term usability. The PEP tool currently operates well within acceptable capacity thresholds; however, regular monitoring is recommended to maintain performance and plan proactively for future growth.

The PEP tool includes administrative functionality that enables Data Systems/Information Technology staff to perform routine system management activities related to data maintenance, optimization, and backups. These activities support database stability and longevity. Detailed maintenance procedures and technical guidance are documented in Appendix A of Attachment A and should be followed as part of ongoing system management.

Over the longer term, the Commission may evaluate future platform enhancements as funding and IT priorities allow. The PEP data model, workflows, and documentation were designed to support such transitions with minimal rework, ensuring that the investment made through this project continues to deliver value.

Table 3. Progress Report Recommendations Summary

Plan Name	Recommendation Text
Adelphi Road UMGC-UMD Purple Line SP & SMA	As this plan is only three years old, we recommend reassessing at the six year mark in order to gauge whether the short-term (<5 year) implementation actions have been addressed. If not, a minor plan amendment may be warranted at that time, to ensure that the plan takes into account any new or emerging constraints.
Bladensburg, New Carrollton and Vicinity MP & SMA	Because the plan was approved in 1994 and has not had any amendments, it can benefit from a review to ensure that it aligns with Plan 2035 and considers ways to connect the plan area community with the Purple Line and other investments near the New Carrollton Metro Area. Given the fragmentation of this area caused by superseding plans, we recommend consolidating this plan with the Central Annapolis Road Sector Plan and the portion of the East Riverdale-Beacon Heights Sector Plan that is located east of MD 295 (Baltimore-Washington Parkway).
Bowie-Mitchellville and Vicinity MP	While this plan is relatively new (2022) the closure of Six Flags presents an opportunity to coordinate with the property owner to reenvision the area. A minor plan amendment may be warranted to ensure the plan area can benefit from this opportunity.
Branch Avenue Corridor SP & SMA	The plan was approved in 2008, and there have been no amendments to date. Many portions of the plan area have been superseded, leaving it fragmented. We recommend a master plan for Planning Area 76A (The Heights), combining the Branch Avenue Corridor Sector Plan, The Heights and Vicinity Master Plan, the Eastover/Forest Heights/Glassmanor Sector Plan, and the portions of the Southern Green Line Sector Plan and the Central Branch Avenue Sector Plan that fall within Planning Area 76A (The Heights).
Capitol Heights TDDP & TDOZMA	The Central Avenue-Blue/Silver Line Sector Plan is underway, and will fully supersede the Capitol Heights Transit District Development Plan.
Central Annapolis Road SP & SMA	Plan implementation is underway. However, many recommendations have not seen progress. We recommend reviewing this plan for potential amendments to ensure it considers current conditions and opportunities. We also recommend consolidating this plan with the Bladensburg, New Carrollton and Vicinity Master Plan and the portion of the East Riverdale-Beacon Heights Sector Plan that is located east of MD 295 (Baltimore-Washington Parkway).
Central Branch Avenue Corridor Revitalization SP	From plan: While we are not recommending short-term replacement of this plan, to reduce fragmentation of planning areas, we recommend a future consolidation of the plans in the southwestern portion of the County. The Central Branch Avenue Sector Plan would be dissolved into separate plans: A master plan for Planning Area 76A (The Heights), combining the Branch Avenue Corridor Sector Plan, The Heights and Vicinity Master Plan, the Eastover/Forest Heights/Glassmanor Sector Plan, and the portions of the Southern Green Line Sector Plan and the Central Branch Avenue Sector Plan that fall within Planning Area 76A (The Heights). A sector plan for the Henson Creek-South Potomac Plan area and the portion of the Central Branch Avenue Sector Plan that sits between I-495 (Capital Beltway) and Tinkers Creek. A future progress report should consider whether the portion of the Central Branch Avenue Sector Plan south of Tinkers Creek should be incorporated into the Subregion 5 Master Plan.
Central US 1 Corridor SP & SMA	From plan: Plan implementation is underway. A future progress report update may consider whether an amendment could help identify new opportunities for development or infrastructure improvements not currently identified in the plan. To reduce plan area fragmentation, we recommend consolidating the following plans into a single sector plan: Langley Park-College Park-Greenbelt Sector Plan, Central US 1 Corridor Sector Plan, Greenbelt Metro Area Sector Plan, and the Greenbelt Metro Area and MD 193 Corridor Sector Plan.
College Park- Riverdale Park TDDP	Plan implementation is underway. While this plan is not in need of immediate updates, we recommend consolidating several plans in this area to reduce fragmentation, including: Gateway Arts District Sector Plan, Planning Area 68 Master Plan, Prince George's Plaza TDDP & TDOZMA, College Park-Riverdale Park TDDP, and the portion of East Riverdale-Beacon Heights Sector Plan located west of MD 295 (Baltimore-Washington Parkway).
East Glenn Dale Area SP & SMA	While no immediate amendment needs are identified, we recommend a future replacement consolidating the Glenn Dale - Seabrook - Lanham Sector Plan and the East Glenn Dale Area Sector Plan areas into a Planning Area 70 (Glenn Dale-Seabrook-Lanham and Vicinity) Master Plan, as part of an overall plan consolidation effort in the County.
East Riverdale- Beacon Heights SP	From plan: While this plan is not in need of immediate updates, we recommend consolidating several plans in this area to reduce fragmentation. As recommended, the East Riverdale-Beacon Heights Sector Plan will be split into two plans: A Sector Plan combining the Gateway Arts District Sector Plan, Planning Area 68 Master Plan, Prince George's Plaza TDDP & TDOZMA, College Park-Riverdale Park TDDP, and the portion of East Riverdale-Beacon Heights Sector Plan located west of MD 295 (Baltimore-Washington Parkway). A Sector Plan combining the Bladensburg, New Carrollton and Vicinity Master Plan, Central Annapolis Road Sector Plan, and the portion of the East Riverdale-Beacon Heights Sector Plan that is located east of MD 295 (Baltimore-Washington Parkway).
Eastover/Forest Heights/Glassmanor SP & SMA	While this plan does not appear to be in need of updates in the short term, we recommend consolidating it into a master plan for Planning Area 76A (The Heights), combining the Branch Avenue Corridor Sector Plan, The Heights and Vicinity Master Plan, the Eastover/Forest Heights/Glassmanor Sector Plan, and the portions of the Southern Green Line Sector Plan and the Central Branch Avenue Sector Plan that fall within Planning Area 76A (The Heights).
Gateway Arts District SP & SMA	We recommend consolidating several plans in this area to reduce fragmentation, including: Gateway Arts District Sector Plan, Planning Area 68 Master Plan, Prince George's Plaza TDDP & TDOZMA, College Park-Riverdale Park TDDP, and the portion of East Riverdale-Beacon Heights Sector Plan located west of MD 295 (Baltimore-Washington Parkway).

Plan Name	Recommendation Text
Glenn Dale - Seabrook - Lanham SP & SMA	While no immediate amendment needs are identified, we recommend a future replacement consolidating the Glenn Dale - Seabrook - Lanham Sector Plan and the East Glenn Dale Area Sector Plan areas into a Planning Area 70 (Glenn Dale-Seabrook-Lanham and Vicinity) Master Plan, as part of an overall plan consolidation effort in the County.
Greater Cheverly SP	Plan implementation is underway. As the plan has not been amended since approval in 2018, a future progress report update may consider whether it is warranted to identify new opportunities for development or infrastructure improvements not currently identified in the plan. It is recommended that a future update incorporate the thin strips of land located along MD 50 (John Hanson Highway), currently within the boundary of the Bladensburg, New Carrollton and Vicinity Master Plan.
Greenbelt Metro Area SP & SMA	Given the plan's age, a replacement may be warranted in the future to identify new opportunities for transit-oriented development or infrastructure improvements not currently identified in the plan. This new plan should consolidate with neighboring plan areas, to reduce fragmentation. We recommend consolidating the following plans into a single sector plan: Langley Park-College Park-Greenbelt Sector Plan, Central US 1 Corridor Sector Plan, Greenbelt Metro Area Sector Plan, and the Greenbelt Metro Area and MD 193 Corridor Sector Plan.
Greenbelt Metro Area and MD 193 Corridor SP & SMA	Changes may be warranted to identify new opportunities for transit-oriented development or infrastructure improvements not currently identified in the plan. This new plan should consolidate with neighboring plan areas, to reduce fragmentation. We recommend consolidating the following plans into a single sector plan: Langley Park-College Park-Greenbelt Sector Plan, Central US 1 Corridor Sector Plan, Greenbelt Metro Area Sector Plan, and the Greenbelt Metro Area and MD 193 Corridor Sector Plan.
Henson Creek-South Potomac MP & SMA	From plan: While the National Harbor area has seen significant growth, many other envisioned centers have not. A plan amendment can support a renewed look at centers for adjustments based on Plan 2035 priorities, market changes, potential upcoming infrastructure investments, available properties, or other factors. At the same time, we are recommending consolidation of plans in the southwestern portion of the County. We recommend consolidating the Henson Creek-South Potomac Plan with the portion of the Central Branch Avenue Sector Plan that sits between I-495 (Capital Beltway) and Tinkers Creek.
Landover Gateway SP & SMA	From plan: Updates are needed in order to respond to changing opportunity areas and market conditions. We recommend updating this plan while consolidating it into two separate plans: A Planning Area 73 Master Plan, combining the Largo-Lottsford Master Plan, Largo Town Center Sector Plan, Morgan Boulevard and Largo Town Center Metro Sector Plan, and the portion of the Landover Gateway Sector Plan east of I-495 (Capital Beltway). A sector plan combining the northern portion of the Subregion 4 Master Plan (north of the in-development Central Avenue-Blue/Silver Line Sector Plan and SMA), Landover Metro Area and MD 202 Corridor Sector Plan, and the portion of Landover Gateway Sector Plan west of I-495 (Capital Beltway).
Landover Metro Area and MD 202 Corridor SP & SMA	From plan: Implementation of the plan is underway, and with a forthcoming joint development project occurring, progress is being made. We recommend a future consolidation with other neighboring plans, creating a sector plan combining the northern portion of the Subregion 4 Master Plan (north of the in-development Central Avenue-Blue/Silver Line Sector Plan and SMA), Landover Metro Area and MD 202 Corridor Sector Plan, and the portion of Landover Gateway Sector Plan west of I-495 (Capital Beltway).
Langley Park-College Park-Greenbelt SP & SMA	Given the plan's age, changes may be warranted to identify new opportunities for transit-oriented development or infrastructure improvements not currently identified in the plan. This new plan should reincorporate neighboring plan areas, to reduce fragmentation. We recommend consolidating the following plans into a single sector plan: Langley Park-College Park-Greenbelt Sector Plan, Central US 1 Corridor Sector Plan, Greenbelt Metro Area Sector Plan, and the Greenbelt Metro Area and MD 193 Corridor Sector Plan.
Largo Town Center SP & SMA	Since approval in 2013, this plan has had several amendments. We recommend creating a Planning Area 73 Master Plan, consolidating the following plans: Largo-Lottsford Master Plan, Largo Town Center Sector Plan, Morgan Boulevard and Largo Town Center Metro Sector Plan, and the portion of the Landover Gateway Sector Plan east of I-495 (Capital Beltway).
Largo-Lottsford MP & SMA	From plan: This plan was completed in 1990 and has not had any amendments. With proximity to Metro stations and Northwest Stadium (which is expected to be undergoing changes with the Commanders' move to Washington, D.C.), as well as a fairly large open space network, this area may be well positioned for the future. A replacement is suggested to establish a new vision based on current and projected market conditions as well as new opportunity areas. We also recommend creation of a Planning Area 73 Master Plan, consolidating the following plans: Largo-Lottsford Master Plan, Largo Town Center Sector Plan, Morgan Boulevard and Largo Town Center Metro Sector Plan, and the portion of the Landover Gateway Sector Plan east of I-495 (Capital Beltway).
Marlboro Pike SP & SMA	While we do not suggest an amendment for this plan at this time, we recommend replacing this plan during a consolidation with other neighboring plans, creating a sector plan combining the southern portion of the Subregion 4 Master Plan (south of the in-development Central Avenue-Blue/Silver Line Sector Plan and SMA), Marlboro Pike Sector Plan, and the portion of the Southern Green Line Sector Plan north of Suitland Parkway.
New Carrollton TDDP & TDOZMA	Plan implementation is underway, with several projects completed, in progress, or scheduled. A future progress report update may consider if an amendment is needed to identify new opportunities for development or infrastructure improvements not currently identified in the plan. This could potentially include reissuing the plan as a sector plan, incorporating new elements as needed.
Planning Area 68 MP & SMA	This plan is 31 years old, and has been significantly fragmented by superseding plans. We recommend replacing the plan while consolidating several plans in this area to reduce fragmentation, including: Gateway Arts District Sector Plan, Planning Area 68 Master Plan, Prince George's Plaza TDDP and TDOZMA, College Park-Riverdale Park TDDP, and the portion of East Riverdale-Beacon Heights Sector Plan located west of MD 295 (Baltimore-Washington Parkway).

Plan Name	Recommendation Text
Port Towns SP & SMA	An updated Port Towns Sector Plan is underway. We recommend that update be finalized, with an updated progress report scheduled upon completion.
Prince George's Plaza TDDP & TDOZMA	Plan implementation is underway. While no immediate needed updates are identified, we recommend consolidating several plans in this area to reduce fragmentation, including: Gateway Arts District Sector Plan, Planning Area 68 Master Plan, Prince George's Plaza TDDP and TDOZMA, College Park-Riverdale Park TDDP, and the portion of East Riverdale-Beacon Heights Sector Plan located west of MD 295 (Baltimore-Washington Parkway).
Southern Green Line Station Area SP & SMA	From plan: While we do not identify specific update opportunities at this time, we recommend consolidating plans to reduce fragmentation. The Southern Green Line Sector Plan would be consolidated into two separate plans: A master plan for Planning Area 76A (The Heights), combining the Branch Avenue Corridor Sector Plan, The Heights and Vicinity Master Plan, the Eastover/Forest Heights/Glassmanor Sector Plan, and the portions of the Southern Green Line Sector Plan and the Central Branch Avenue Sector Plan that fall within Planning Area 76A (The Heights). A sector plan combining the southern portion of the Subregion 4 Master Plan (south of the in-development Central Avenue-Blue/Silver Line Sector Plan and SMA), Marlboro Pike Sector Plan, and the portion of the Southern Green Line Sector Plan north of Suitland Parkway.
Subregion 1 MP & SMA	A minor plan amendment is scheduled, to assess whether new opportunities warrant changes. This is intended to include a review of the market for potential future investment in Subregion 1.
Subregion 4 MP & SMA	From plan: Though the master plan is 15 years old, there are many ongoing activities that build on its recommendations. While many recommendations can remain, a new plan for this region will allow the County to identify additional opportunities that have emerged. Recognizing that the ongoing Central Avenue-Blue/Silver Line Sector Plan and Sectional Map Amendment will supersede a portion of the Subregion 4 Master Plan area, we recommend replacing this plan in two parts. * One sector plan combining the northern portion of the Subregion 4 Master Plan (north of the in-development Central Avenue-Blue/Silver Line Sector Plan and SMA), Landover Metro Area and MD 202 Corridor Sector Plan, and the portion of Landover Gateway Sector Plan west of I-495 (Capital Beltway). * One sector plan combining the southern portion of the Subregion 4 Master Plan (south of the in-development Central Avenue-Blue/Silver Line Sector Plan and SMA), Marlboro Pike Sector Plan, and the portion of the Southern Green Line Sector Plan north of Suitland Parkway.
Subregion 5 MP & SMA	From plan: The Planning Department is preparing an amendment to the Subregion 5 Master Plan and Sectional Map Amendment. This minor plan amendment will create a forward-looking, market-viable framework to guide investment and economic development while enhancing the quality of life for residents and workers in the area. A future progress report may consider incorporating the portion of the Central Branch Avenue Sector Plan south of Tinkers Creek into the Subregion 5 Master Plan. This is not recommended in this progress report, as the current Minor Plan Amendment is underway.
Subregion 6 MP & SMA	The Planning Department is preparing an amendment to the approved Subregion 6 Master Plan and Sectional Map Amendment. This minor plan amendment is intended to establish a forward-looking, market-viable framework that enables investment and economic development while enhancing quality of life for residents and workers in the area.
Takoma/ Langley Crossroads SP	Plan implementation is underway, and with the Purple Line under construction, larger elements of the plan vision may be realized. As the plan has not been amended since approval in 2009, a future progress report may consider whether an amendment is warranted to identify new opportunities for transit-oriented development or related infrastructure improvements not currently identified in the plan.
The Heights and Vicinity MP & SMA	This plan was completed in 2000 and has not had any amendments. A replacement is suggested to establish a new vision based on current and projected market conditions as well as new opportunity areas. We recommend a master plan for Planning Area 76A (The Heights), combining the Branch Avenue Corridor Sector Plan, The Heights and Vicinity Master Plan, the Eastover/Forest Heights/Glassmanor Sector Plan, and the portions of the Southern Green Line Sector Plan and the Central Branch Avenue Sector Plan that fall within Planning Area 76A (The Heights).
Westphalia SP & SMA	A major plan amendment is currently scheduled to be undertaken to ensure the plan adjusts to new conditions and opportunities. The process will evaluate the market potential for future residential and non-residential investment, measure traffic impact of planned future developments, and provide traffic mitigation strategies.

Plan Evaluation Program (PEP) Tool User Manual

M-NCPPC | JANUARY 2026 | VERSION 1



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CHAPTER 1

Overview

The Plan Evaluation Program (PEP) Data Entry Protocols & User Manual supports the effective management and tracking of Prince George’s County’s planning documents. It establishes a standardized framework for entering, organizing, and maintaining plan recommendations and design guidelines within a centralized data system. The manual defines the processes and protocols needed to ensure accuracy, consistency, and reliability of plan-related information, enabling staff to monitor progress, generate reports, and make informed decisions. By providing a clear structure and defined field standards, it ensures that planning information can be analyzed, compared, and updated over time as new plans and amendments are adopted.

The PEP – referred to throughout this manual as the PEP tool – enhances transparency and accountability across the Commission by standardizing how plan recommendations are documented, tracked, and reported. The protocols establish a consistent structure for recording quantifiable recommendation statements, logging design guidelines, and updating recommendations as plans and amendments evolve. The tool also supports

progress monitoring and the generation of concise charts, tables and summaries for the recurring Six-Year Plan evaluations. This manual is a living reference that will be revised as the PEP and its supporting system mature. Requests for updates or refinements should be submitted through Planning Department leadership for future incorporation.

While the tool captures actionable recommendations and design guidance, it is not a substitute for reviewing and understanding the full intent of each adopted plan and their amendments.

Background and Objectives

The Commission's Community Planning Division developed the PEP tool to store plan recommendations and design guidelines from across Prince George's County. Its primary goal is to streamline data storage, facilitate progress tracking, and provide staff with a reliable system for plan evaluation.

The PEP tool's structure allows M-NCPPC to:

- Provide a structured organizational framework for plan data
- Systematically track and assess plan progress over time
- Ensure data accuracy and consistency
- Enhance transparency and accountability through standardized reporting
- Build internal capacity for managing and utilizing plan data.

Organization of this Report

This manual guides staff through the full life cycle of data management within the PEP tool, from entering new plans and updating recommendations to reviewing, approving, and maintaining the tool.

It can be used both as a training resource for new users and a reference guide for experienced staff.

How to Use this Manual

New staff should read the manual sequentially to understand how each component of the PEP connects—from data structure to process workflows. Experienced users can refer directly to specific sections for targeted guidance (e.g., entering new recommendations, updating statuses, or exporting report data).

Cross references are provided where procedures overlap (for example, data-entry hierarchy and review protocols).

Manual Structure

The manual is organized into four chapters that follow the logical order of PEP use and reflect the complete lifecycle of plan management:

- **Overview** – Defines the purpose, structure, and roles that guide its use.
- **Data Entry Protocols** – Establishes standards for entering, reviewing, and maintaining plan information.
- **The PEP Tool** – Describes the Microsoft Access interface and its core functions.
- **Process Workflows** – Provides step-by-step guidance on data entry, review, and reporting functions.

User Roles and Responsibilities

The PEP tool defines five user personas, each with specific permissions and responsibilities that align with their function in the planning process. Together, these roles ensure accountability, data integrity, and clear review workflows.



Editor

Responsible for creating and updating records in the database, ensuring that plan, amendment, and recommendation information is entered accurately and consistently.

Typical Users: Planning Staff or Project Managers

Key Responsibilities:

- Enter new plans and plan metadata.
- Add and edit recommendations and design guidelines.
- Update implementation statuses during six-year progress cycles.
- Prepare records for Reviewer approval.



Viewer

Has read-only access to plans, recommendations, and statuses.

Typical Users: Planning Staff, Supervisors, Project Managers, or other M-NCPPC staff seeking reference data.

Key Responsibilities:

- Search and view existing plans and amendments.
- Review recommendations and statuses for analysis or reporting.
- Reference up-to-date plan data without modifying records.



Reviewer

Conducts quality control reviews and validates entries for completeness and accuracy before they are finalized in the database.

Typical Users: Planner IVs, Project Managers, or Supervisors

Key Responsibilities:

- Review, provide feedback, and approve edits or updates entered by Editors.
- Approve final plan entries, recommendation statuses, and amendments.
- Oversee data consistency.



Information Management Division (IMD)

Maintains demographic and socioeconomic data linked to active plan boundaries.

Typical Users: IMD Research or GIS Analysts

Key Responsibilities:

- Enter and update demographic data for active plan boundaries.
- Validate and maintain baseline statistics for reporting.
- Ensure consistent data alignment between plans and geographic datasets.



Data Systems / Information Technology

Manages system performance, data integrity, and network access to ensure stable operation of the PEP tool.

Typical Users: IT or Data Systems Support Staff

Key Responsibilities: Maintain the Access tool and shared network connections.

- Manage data backups, version control, and technical troubleshooting.
- Support system optimization through periodic “Compact and Repair” operations.
- Configure plan links and ensure secure data access.

CHAPTER 2

Data Entry

The PEP is built on a structured data-entry framework that standardizes how plan information is recorded, tracked, and maintained. This section defines the key field groups and entry standards, unique identifiers (UIDs) that connect information across plans, recommendations, and status updates. These standards ensure consistency, accuracy, and traceability, allowing staff to search, report, and analyze plan data efficiently.

Data Groups

Plan information is organized into five main groups. Each group captures a distinct part of the planning record.

- Plan Details capture general plan information such as plan name, approval date, and applicable Councilmanic District(s).
- Records (Recommendation and Design Guidelines) record the plan’s policy and design content, including recommendations and policy categories.
- Status Updates track progress over time by documenting implementation activity, completion, or amendments.
- Demographic Information store key population and housing data for each plan’s active boundary (managed by IMD).
- Progress Report data group outputs an excel file used to create progress reports within the six year cycle.

organizational backbone of the dataset, ensuring that every record can be uniquely identified, referenced and maintained over time. By standardizing how records are cataloged, the UID system supports data integrity, facilitates efficient searches, and enables accurate reporting across multiple plans and update years.



Unique Identifiers (UIDs)

Each record within the database is assigned a Unique Identifier (UID), an automatically generated number that provides a consistent and traceable structure for all plan entries, recommendations, and status updates (**Table 1**). This number system functions as the

Table 1. Example UID Components

Number Name	Description	Number Location
Plan	Identifies an individual plan.	01.01.R0001.01
Amendment	Links an amendment to its parent plan.	01.01.R0001.01
Record Type and Number	Links a recommendation (R) or design guideline (D) to its associated plan and amendment.	01.01.R0001.01 or 01.01.D0001.01
Recommendation Status	Links a recommendation status update to its parent recommendation. Only used for recommendations, not design guidelines.	01.01.R0001.01
Record Status	Identifies if a record has been marked for superseded (S) or deletion (D). Only appears once marked.	01.01.R0001.01S or 01.01.R0001.01D

Protocols

This section provides step-by-step guidance for entering plan and amendment information into the tool in a clear, consistent, and reliable manner. It outlines the standards for data entry, classification of records, and inclusion of supplemental plan content to ensure all information is accurate, searchable, and logically organized for effective reporting and analysis, while maintaining the proper nesting of recommendation text fields.

General Rules of Data Entry

These rules establish the baseline expectations for entering, reviewing, and maintaining information in the tool. Following them ensures that all plan records are entered accurately, consistently, and in a format suitable for review and reporting.

1. Field Type and Entry Standards

- i. **Dropdown Menus** contain fixed options defined within this manual. Users must select from the available lists and may not substitute custom text.
- ii. **Free Text Fields** allow entry of original content directly from the plan document as well as other sources.

2. Language and Formatting

- i. Free Text Fields must contain complete sentences and enter the language verbatim from the adopted plan or amendment. Do not paraphrase or alter text.

3. Handling Uncertainty or Errors

- i. When unsure about how to classify or phrase an entry, flag the record for review and provide a note detailing the concern.

Note:

- Certain fields may prepopulate with grey text. This information is generated automatically.
- Never delete data to resolve an issue. Instead, document the concern and flag for review.

Recommendation vs Design Guidelines

The PEP tool distinguishes between Recommendations and Design Guidelines to ensure that all plan content is classified and tracked appropriately. While both are recorded in the tool, only Recommendations receive a Recommendation Status for progress tracking and reporting.

To ensure full coverage of a plan, if there is any doubt about whether a statement is a Recommendation or Design Guideline, enter it into the database and flag it for review; it may later be determined to function as a policy statement and excluded from status-based tracking without being removed from the record.

Recommendations

A Recommendation is a clearly defined, actionable statement that advances the goals and policies of an adopted plan.

To qualify as a recommendation within the PEP, a statement must meet all of the following criteria.

- **Action-Based and Verifiable**
 - The statement describes a specific action or measurable outcome that can be confirmed (yes, it has occurred) or denied (no, it has not occurred).
 - The operative verb must denote an action (construct, widen, build) rather than an intent (encourage, support, explore)
- **Quantifiable or Comparable**
 - Implementation progress can be expressed numerically or contextually (e.g., 20% of dwelling units constructed)
 - The statement allows for progress to be measured or compared over time.
- **Geographically Specific**
 - The statement identifies a discrete location – point, line or area – within or coinciding with the adopted plan boundary

- **Defined Actions and Outcomes**
 - Each action is specific in both intent and location (e.g., Add on-street bike lanes to Street A [recommendation] versus add on-street bike lanes to all streets [not a recommendation])
- **Produces a Tangible Result**
 - Implementation of the recommendation leads to one or more of the following outcomes:
- **Physical development or material changes to land or structures.**
- **Creation or modification of a program, policy or regulation.**
- **Measurable change in environmental or community conditions.**
- **Observable change in behavior or operational practice.**

All stored recommendations must have a Recommendation I and Recommendation II filled out to support a consistent data structure. Recommendation III is optional (**Table 2**). All Recommendations must have a Recommendation Status applied to support plan monitoring, reporting, and evaluation.

Design Guidelines

A Design Guideline provides qualitative direction for the physical form, materials, or appearance of development, streetscape, or public spaces. Design Guidelines are recorded in the tool for reference and

searchability but are not assigned a Recommendation Status for tracking and reporting.

Design guidelines describe desirable characteristics or best practices rather than specific measurable actions.

Design Guidelines typically:

- Do not include discrete action or result that can be confirmed
- Do not reference a specific geography or parcel; they apply to generalized locations such as “plan wide,” “all streets,” or “throughout this character area.”
- May reference aesthetic or design qualities, such as building height, setbacks, landscaping or materials.

Table 2. Recommendation structure

Field	Purpose	Example
Recommendation I	Highest-level organizing element – typically the goal or policy statement.	Improve multimodal transportation options within the plan area.
Recommendation II	Action-level statement that implements the goal or policy.	Add on-street bicycle lanes along A Street.
Recommendation III	Optional field used when a recommendation includes multiple sub actions or refinements	Prioritize installation near schools and transit stops.

Process for Data Entry and Hierarchy

The data-entry process provides a standardized method for extracting key information from adopted plans and amendments and recording it in the PEP. This ensures that all Recommendations and Design Guidelines are captured consistently, linked to the correct policy categories, and remain traceable across plans.

1. Identify Relevant Plan Sections

Review the plan's table of contents to locate chapters associated with the PEP Policy Categories (see Appendix A). Focus on chapters containing policy and recommendation content. Background sections (plan purpose, context, public engagement, etc.) do not require data entry.

2. Identify Goal or Policy Statements

Most chapters begin with a goal statement or policy statement before listing recommendations. These goal or policy statements provide context serve as the organizational parent for one or more recommendations.

3. Enter Records Using the Hierarchal Text Fields

Each record must include the Recommendation I field. This may be the recommendation or, more often, the goal or policy statement under which recommendations are nested. Use the following structure:

Rules for nesting:

- All recommendations sharing the same parent goal/policy must use identical text in Recommendation I.
- Each recommendation must contain complete sentences, not fragments or section headers.
- All records should fit within the three-field hierarchy (I, II, III)

4. Apply the Correct Record Type and Category

- i. Each record must be assigned:
- ii. Record Type
- iii. Policy Category

5. Verify Before Submission

- i. Confirm that the correct Record Type and Policy Category are applied.
- ii. Ensure identical Recommendation I text across all nested records.
- iii. Review entries for accuracy, completeness, and grammar.
- iv. Flag any ambiguous content or irregular plan structures for Reviewers.

Example of Record Entry

The following example demonstrates how a policy and its associated recommendation would be entered into the tool based on the Adelphi Road – UMGC-UMD Purple Line Station Area Sector Plan (**Figure 1**).

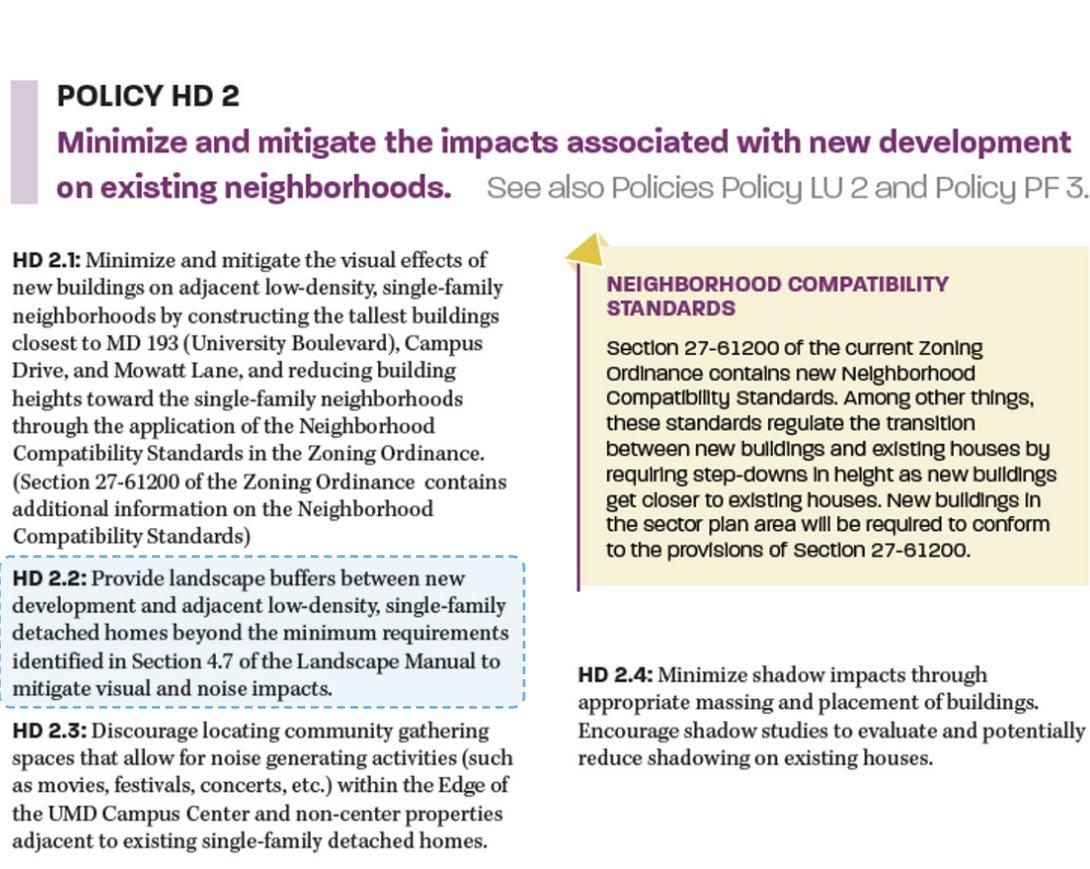


Figure 1. Example of hierarchical record entry.

Plan Name: Adelphi Road – UMGC-UMD Purple Line Station Area Sector Plan

Record Type: Recommendation

Policy Category: Community, Heritage, Culture, and Design

Recommendation I: Minimize and mitigate the impacts associated with new development on existing neighborhoods.

Recommendation II: Provide landscape buffers between new development and adjacent low-density, single-family detached homes beyond the minimum requirements identified in Section 4.7 of the Landscape Manual to mitigate visual and noise impacts.

In this example, Recommendation I represents the higher-level policy statement that establishes the intent of the Community, Heritage, Culture, and Design policy.

Recommendation II contains the actionable recommendation that implements that policy.

Because this entry includes a discrete, verifiable action located within a defined area, it qualifies as a Recommendation rather than a Design Guideline.

Entering Plan Tables

Some plans include supplemental tables – most often for Transportation or Parks and Open Space Policy Categories that provide greater detail than the narrative recommendations in the plan text. See Appendix A for detailed field definitions and examples.

These tables often specify locations, design standards, function, or amenities that support the overarching goals and policies.

1. Create One Record per Row. Each row in a plan table represents a unique recommendation and must be entered as a single record in the tool. Do not merge or duplicate entries across multiple rows.
2. Maintain Nesting Consistency. Each record derived from a table must be nested under its associated Goal or Policy Statement using the Recommendation I field. The corresponding table content is entered into the relevant subsection of the tool, such as Transportation Information or Parks Information.
3. Ensure Completeness. Verify that each table-derived record includes all applicable details.

Some Transportation or Parks/Open Space tables are referenced under multiple goals or policies rather than a single unifying statement. In such cases, flag for the Reviewer to determine the most appropriate Goal or Policy Statement under which to nest the record. When a table entry supports multiple policies, select the most relevant one based on context and note the cross-reference in the Review Status Note field.

Translating Older Plans

Many plans incorporated into the tool predate Plan 2035 and therefore do not fully align with its current policy framework. While the organizational structures and terminology of earlier plans vary, their general planning themes remain consistent.

Users may encounter variations in policy organization, naming conventions, or record completeness when reviewing or updating these legacy entries. In such cases:

- The original plan text was retained and standardized as closely as possible to align with Plan 2035 categories.
- Some plans may not include all current Policy Categories (for example, Healthy Communities or Economic Prosperity), which is expected.
- When clarification is needed, users should document observations in the Review Status Note.
- Legacy entries should not be rewritten to fit the new framework. Instead, maintain their original language and structure to preserve consistency and historical accuracy.

Entering Recommendations with Tabular or Multi-Property Data

Some recommendations include lists or tables identifying multiple properties, TaxIDs, or other location-specific details. These should be entered in a way that maintains clarity and avoids creating duplicate records for the same recommendation. Each row or list item from the tables does not require a separate record if all entries share the same intent or action. The nesting principles described earlier apply equally to table-derived or multi-property recommendations (**Figure 2**).

When entering recommendations derived from tables or lists:

1. Create a single record representing the overall recommendation.
2. Enter all associated details (addresses, Tax IDs, or parcel numbers) directly within the appropriate Recommendation text field. Use semicolons to differentiate list items.
3. Retain context. If the plan includes a map or reference, include that phrase in the appropriate Recommendation text field.
4. Maintain linkage by ensuring the record is nested under the appropriate goal or policy statement.

Example of Entering Recommendations with Tabular or Multi-Property Data

Policies and Strategies

POLICY LU 1

Create a high-intensity, mixed-use, pedestrian-oriented, and university- and transit-supportive neighborhood at the Adelphi Road-UMGC-UMD Purple Line Station Area (UMD West Local Transit Center). Discourage non-transit-supportive or automobile-oriented uses.

LU 1.7: Construct buildings on the following properties within the Edge of the UMD West Local Transit Center that support a vertical mix of uses with multifamily residential units (apartments) on upper floors and flexible ground-floor spaces that allow for commercial, personal services, office, institutional, cultural, and recreational uses:

PROPERTY	TAX ID
4141 Guilford Drive	2379410
4201 Guilford Drive	2347151

See Map 10 for more information.

LU 1.8: Construct buildings on the following properties within the Edge of the UMD West Local Transit Center that support a vertical mix of uses with multifamily (student units, and/or apartments) on upper floors and flexible ground-floor spaces that allow for institutional, cultural, and recreational uses. Alternatively, townhomes may be constructed on these properties; townhouses should be located south of multifamily buildings, creating a step-down in building heights to adjacent neighborhoods, where feasible. See Map 10 for more information.

PROPERTY	TAX ID
4141 Guilford Drive	2379410
4201 Guilford Drive	2347151

Figure 2. Example of tabular or multi-property data

Plan Name: Adelphi Road – UMG-UMD Purple Line Station Area Sector Plan

Record Type: Recommendation

Policy Category: Land Use

Recommendation I: Create a high-intensity, mixed-use, pedestrian-oriented, and university- and transit-supportive neighborhood at the Adelphi Road-UMGC-UMD Purple Line Station Area (UMD West Local Transit Center). Discourage non-transit-supportive or automobile-oriented uses.

Recommendation II: Construct buildings on the following properties within the Edge of the UMD West Local Transit Center that support a vertical mix of uses

with multifamily residential units (apartments) on upper floors and flexible ground-floor spaces that allow for commercial, personal services, office, institutional, cultural, and recreational uses: PROPERTY TAX ID: 4141 Guilford Drive 2379410, 4201 Guilford Drive, 2347151. See Map 10 for more information.

CHAPTER 3

The PEP Tool

This section introduces the primary pages that form the foundation for navigation and data entry within the PEP tool. It provides an overview of how users access, view, and maintain plan records through the tool's form-based interface, which was developed in Microsoft Access.

The PEP tool is organized around two main functional areas:

- **Navigation Pages**, which allow users to open, view, or manage plans, and
- **Data Entry Pages**, where users can add, edit, or review information associated with specific plans.

Figures throughout this section reflect the live application interface. Personas and buttons are color-coded, and a graphic key is provided to link the figures with the text references.

The workflows described in Section 4: Data Entry Protocols are executed through the forms presented in this chapter. Understanding the layout and navigation of these forms is essential for accurate and consistent data management.

First Time Users:

Before proceeding, review Appendix B, which outlines the steps required to enable the tool to run on your computer and connect to shared data sources.

Home Page

The Home Page is the first form presented after the tool is opened. From this page, users can create new plans, view or edit existing plans, and access administrative functions.

The center list of plans displays all active plans currently stored in the tool. Users can sort this list either alphabetically, by the plan's original approval date, or by the next Progress Report Due Date.

Inactive or retired plans remain in the system for reference but are greyed-out from the active list until re-activated in Admin Tools.

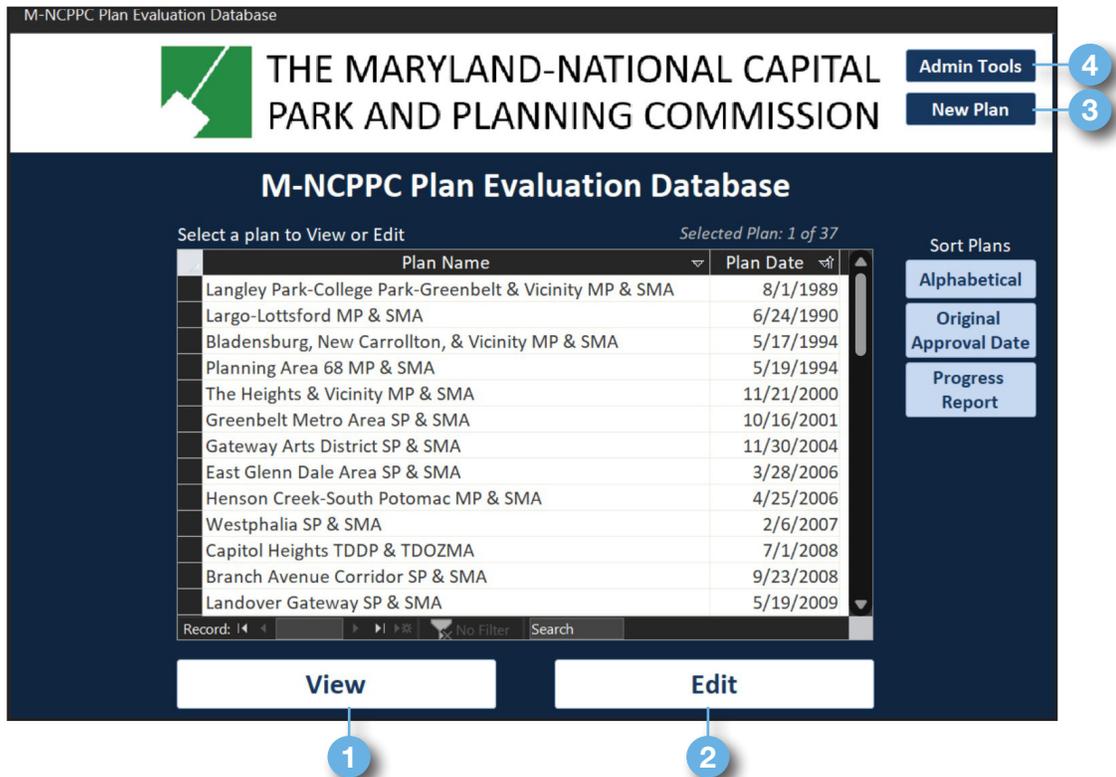


Figure 3. Home Page Interface

1. **View** – Opens a read-only page that allows users to see and search all plan records.
2. **Edit** – Opens the Master Plan Details Page for data entry and editing.
3. **New Plan** – Opens a data-entry form to add a new plan.
4. **Admin Tools** – Opens a window that handles plan and tool maintenance options.

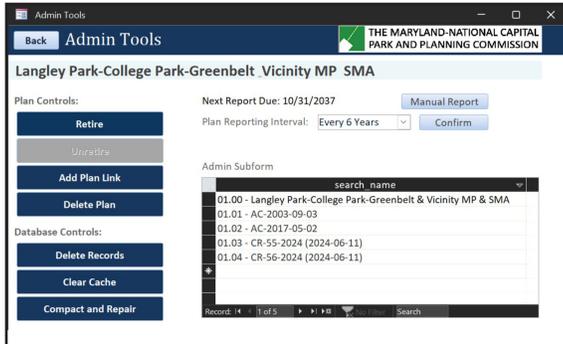
Notes:

- A plan must be selected from the list before using the Edit or Admin Tools buttons. Actions will apply only to the selected plan.
- When a form is open, use its Back button to return to the Home Page.

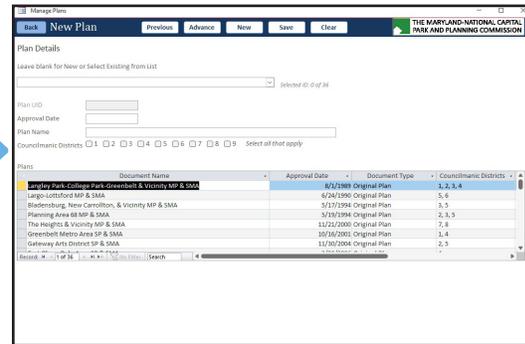
Home Page Navigation

The PEP tool is organized around ten primary pages that guide users through all major functions—from viewing and editing plans to managing data and maintaining records. Users begin on the Home Page, which provides access to four primary windows. Selecting Edit opens the Plan Details Page, the central hub for managing plan data. From there, users can navigate to additional pages for editing recommendations, updating statuses, managing demographics, or performing administrative tasks.

Admin Tools



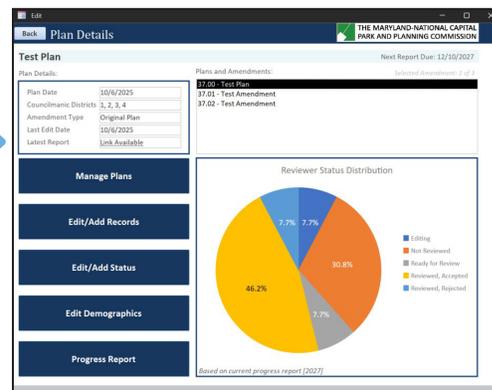
New Plan



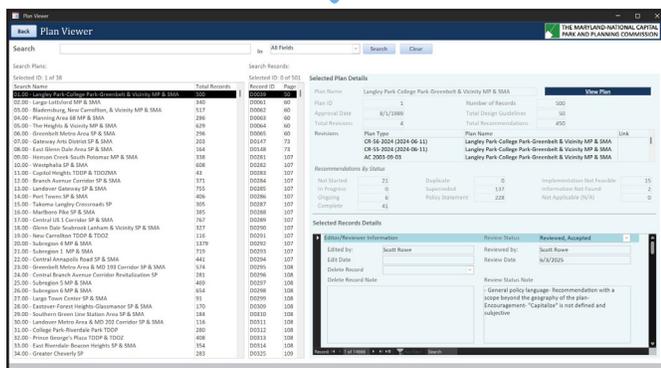
Home Page



Plan Details



Plan Viewer



- Manage Plans
- Edit/Add Records
- Edit/Add Status
- Edit Demographics
- Progress Report

Figure 4. Home Page Navigation Paths.

Viewing and Searching Plans

The View Page provides read-only access to all plan records. Use this page to explore existing data, verify entries, or review progress without risk of editing the underlying records. Reach this page by selecting View from the Home Page.

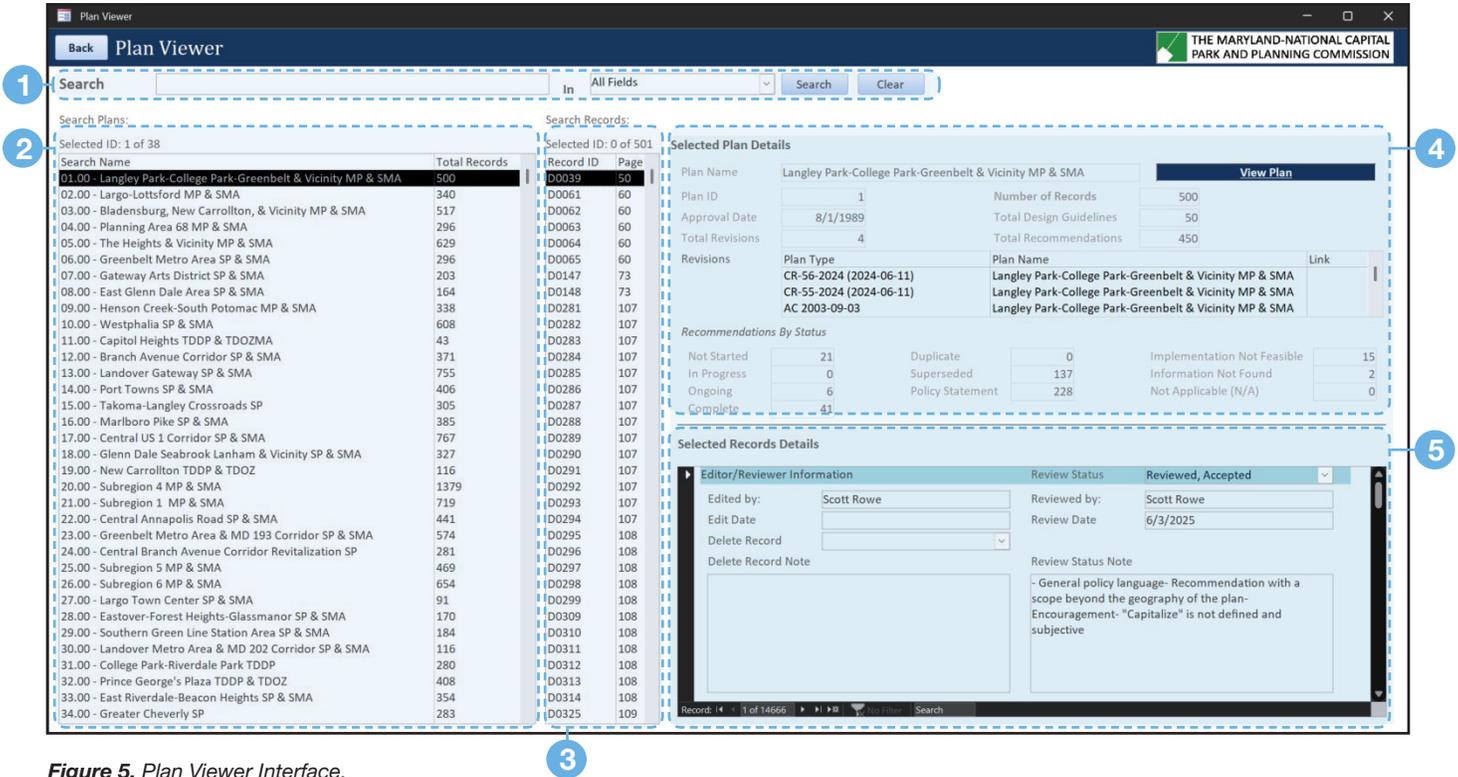


Figure 5. Plan Viewer Interface.

1. Search Bar

A search bar at the top of the screen panel allows users to quickly locate text or references by keyword. Entering any portion of a plan name, policy category, or text field will dynamically filter the results below. The search is not case sensitive and can be used to locate both full and partial matches.

Additional filter options allow users to narrow results by Policy Category, Record Type, Review Status, or Recommendation Status. Filters can be used along or in combination with keyword searches to refine the list of displayed records.

2. Search Plans

The left panel lists all plans. Select a plan to display its associated records. Once a plan is selected, the Search Records Panel will populate with the total number of records linked to that plan, and the Plan Details panel will populate.

3. Search Records

The center panel displays all records associated with the selected plan. Selecting a record from this list will populate the Selected Record Details panel with the complete record.

4. Plan Details

The upper portion of the right panel displays key plan information, including any related amendments or revisions. This panel also provides a summary of the total number of records and an overview of plan status.

5. Selected Record Details

The lower portion of the right panel presents the full record, including status. Additional optional fields – such as Location, Agency, Park, Public Facility, or Transportation – appear when applicable. This section is scrollable and displays all relevant record information.

Plan Details Page

The Plan Details Page opens when the Edit button is selected from the Home Page.

This page serves as the central hub for launching all major data-entry and update functions. From here, users can manage the plan metadata, create or edit records, update recommendation status, and maintain demographic information.

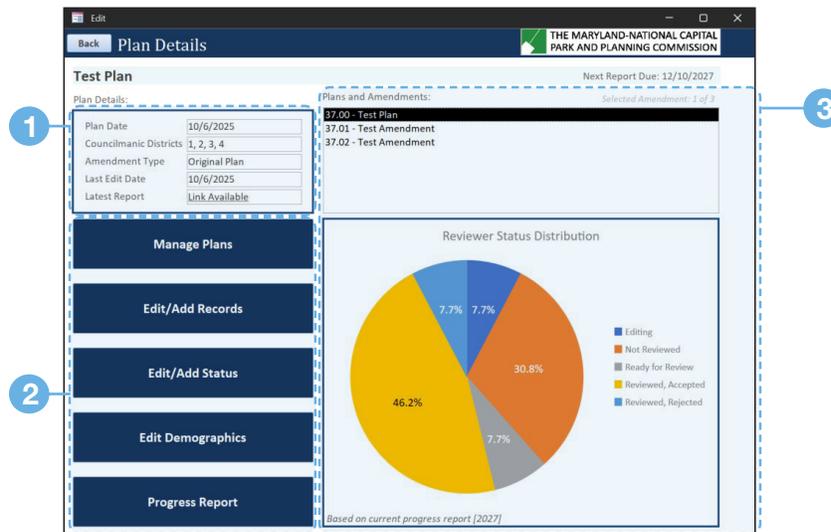


Figure 6. Plan Details Page Interface.

Page Overview

The layout of the Plan Details Page is organized into several panels and action buttons designed for efficient navigation and data review.

- 1. Plan Details** - Displays key plan information automatically populated, including official approval date, Councilmanic District, and a link to the latest progress report.
- 2. Plans and Amendments List** - Lists the active plan and any related amendments. Selecting an item updates the Plan Details panel and the record status chart to the right.
- 3. Record Status Chart** - Displays a pie chart summarizing the implementation status of all recommendations for the selected plan. This provides an at-a-glance view of overall progress.

Primary Functions

- **Manage Plan/Amendments** - Opens a subpage for creating new amendments or editing plan metadata.

- **Edit/Add Records** - Launches the main data-entry subpage used to create or update plan records.
- **Edit/Add Status** - Opens the subpage for updating implementation progress for existing recommendations.
- **Edit Demographics** - Opens the demographics data-entry page. This dataset supports plan progress metrics and is managed by the Information Management Division (IMD).
- **Progress Report** - Generate a summary view of all recommendations and statuses for the selected plan, supporting reporting for the Six-Year Plan submissions.

Notes:

- Only one plan or amendment can be active at a time.
- Selecting an item in the Plans and Amendments List updates all panels automatically.
- All actions are automatically saved when moving between subpages or records

New Plans

The New Plan button opens a form used to create a new plan entry. This form establishes the foundational information required for the tool to recognize, track, and display plan records throughout the system.

When a new plan is created, users must complete all required fields, including the Plan Name, Approval Date, and Councilmanic Districts. Once saved, the plan automatically appears in the Home Page list and becomes available for data entry through the Plan Details Page. A unique Plan UID is generated upon saving, ensuring consistent identification and traceability.

The screenshot shows the 'Manage Plan and Amendments' interface for 'Langley Park-College Park-Greenbelt Vicinity MP SMA'. The interface includes a search bar, input fields for Plan UID, Date of Revised Plan/Amendment, Amendment Type, and Amendment Name, and a list of amendments with columns for Document Name, Revised Plan/Amendment Date, Amendment Type, and Councilmanic Districts.

Document Name	Revised Plan/Amendment Date	Amendment Type	Councilmanic Districts
01.00 - Langley Park-College Park-Greenbelt & Vicinity MP & SMA	8/1/1989	Original Plan	1, 2, 3, 4
01.01 - AC-2003-09-03	9/3/2003	Administrative Correction (AC)	1, 2, 3, 4
01.02 - AC-2017-05-02	5/2/2017	Administrative Correction (AC)	1, 2, 3, 4
01.03 - CR-55-2024 (2024-06-11)	6/11/2024	Minor Amendment (MA)	1, 2, 3, 4
01.04 - CR-56-2024 (2024-06-11)	6/11/2024	Minor Amendment (MA)	1, 2, 3, 4

Figure 7. New Plan Interface.

When to use:

The New Plan function should only be used when a plan is formally adopted or approved by the County Council. This action is infrequent and should be performed carefully to maintain tool integrity.

Notes:

- Always confirm that a plan does not already exist in the tool before creating a new record.
- Duplicate plans may result in data conflicts and inconsistencies during reporting.
- The tool does not support merging duplicate plans once created.

Admin Tools

The Admin Tools page provides databases management functions used to maintain plan records and overall system performance. These functions should only be used by administrators or data managers to ensure the tool runs efficiently and to prevent data loss. A plan must be selected before selecting Admin Tools, as some actions only apply to the active plan displayed in the list.

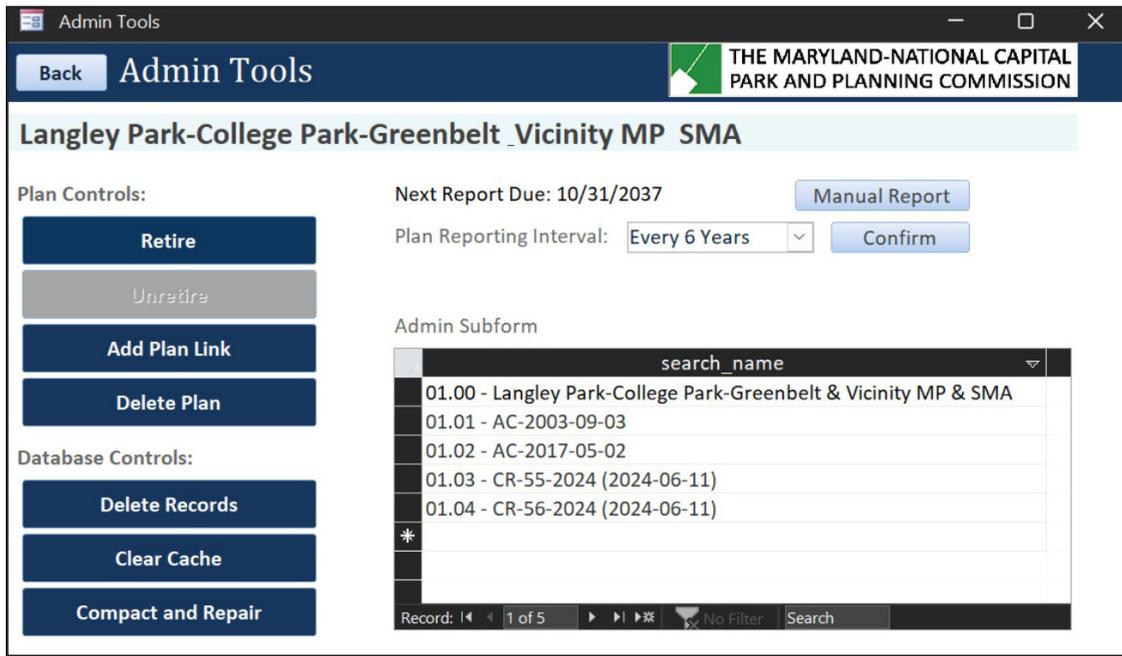


Figure 8. Admin Tools Interface.

Plan Controls

These controls manage how plans are displayed and linked within the tool.

- **Retire / Unretire Plan** - Temporarily hides or restores a plan's visibility on the Home Page. Retired plans appear in gray text, while active plans display in black text. Retiring a plan does not delete or affect the plans data; it simply changes visibility or organizational clarity.
- **Add Plan Link** - Allows administrators to connect a digital plan file (hyperlink or web address) to the database entry. Paste the web link into the text field and confirm to finalize the link.
- **Delete Plan** - Permanently removes a plan and its associated data from the PEP tool. Deleted plans are moved to a temporary deletion table before being fully purged. Use this function cautiously to prevent data loss.

- This action cannot be undone after purge.

Database Controls

These controls help maintain tool performance and manage stored data. For more information and details on Database maintenance see Appendix C.

- **Delete Records** - Removes all records marked for deletion within the tool, regardless of selected plan. Records are moved first to a deletion table for administrative review before permanent deletion.
- **Clear Cache** - Clears temporary files and refreshes internal database processes. Use this function if the tool begins to load slowly or performance slows.
- **Compact and Repair** - Optimizes and rebuilds the database to improve performance and data integrity. This process may take several minutes and should only be performed after using Clear Cache.

CHAPTER 4

Process Workflows

This chapter provides detailed guidance for performing the core tasks within the PEP tool. The workflows are ordered from most frequent (status updates and reporting support) to least frequent (plan creation and administrative maintenance).

Each section describes where to begin with the tool, key actions, and important notes to ensure data accuracy and consistency.

1. Adding a New Plan
2. Managing Plans
3. Editing or Adding Records
4. Editing or Adding Recommendation Status
5. Editing Demographic Information
6. Exporting Progress Report Data

Adding a New Plan

The new plan creation process ensures that plan-level data is entered correctly and linked to subsequent recommendations and demographic records.

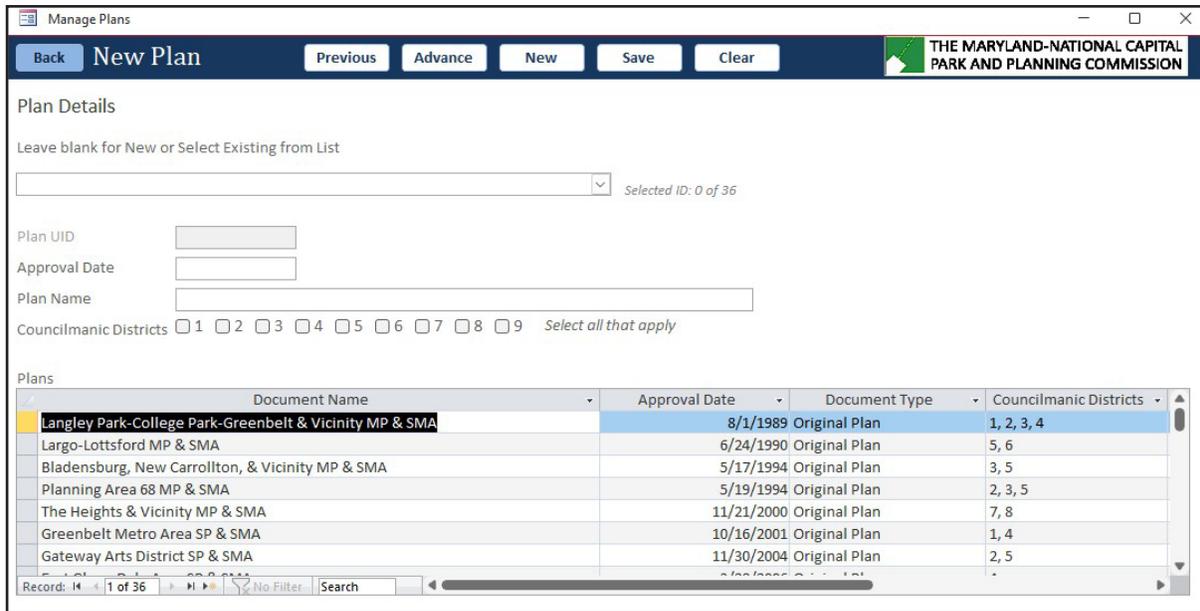


Figure 9. Add New Plan Interface.

Accessing the Add Plan Page

1. From the Home Page, select New Plan from the top right of the window.

Page Navigation and Organization

The New Plan form consists of three panels and a search bar.

- **Search Existing Plans**– A dropdown menu for locating existing plans.
- **Plan Information Panel** – Displays editable fields used to create or update plan metadata:
 - **Plan UID** – Automatically assigned by the database in sequential order.
 - **Approval Date** – The formal plan approval date.
 - **Plan Name** – Free-text field for entering the plan title.

- **Councilmanic Districts** – Checkboxes to select all applicable districts (1–9). A Select All That Apply option is provided for multi-district plans.
 - *Note: Councilmanic district boundaries change approximately every 10 years. Active plans will require adjustment to reflect these changes.*

- **Plans Table** – Displays all existing plans with sortable columns for Document Name, Approval Date, Document Type, and Councilmanic Districts.

Navigation Controls

- **Previous / Advance** – Scroll between records.
- **New** – Clears existing fields and prepares the form for a new plan entry.
- **Save** – Saves the new or updated plan record to the database.
- **Clear** – Clears all fields without saving.
- **Back** – Returns to the Home Page.

Creating a New Plan

Editor Steps

1. Click New to begin entering a new record. All fields will clear for data entry.
2. Enter the Approval Date (i.e., the formal plan adoption date).
3. Select the relevant Councilmanic District(s).
4. Enter the full Plan Name in the Plan Name field.
5. Confirm that the Plan UID is automatically assigned and sequentially higher than the most recent plan entry. Next to the dropdown a total number of plans is shown and plans are organized from least to greatest in the dropdown.
6. Click Save to finalize the new plan record.
7. Upon saving, a confirmation message will appear indicating that the plan has been successfully added to the database. The new record will now display on the Home Page list for editing or viewing.

Reviewer Steps

Once a plan has been created, the Reviewer or Approver should verify that:

- The Plan Name and Approval Date match the official plan document.
 - The Councilmanic District(s) selected are correct.
 - The record appears correctly in the Home Page listing.
- If corrections are needed, the Reviewer can open the record, make necessary updates, and re-save.

Editing a New Plan

Editor or Reviewer Steps

1. Select the appropriate plan from the dropdown field.
2. Information will populate all fields and reflect the data stored within the Amendments table at the bottom of the form.

3. Select any field, outside of Plan UID, to update the information of your choice - Approval Date, Plan Name, and/or Councilmanic Districts.
4. Once the changes to this information have been completed, click Save to finalize the edited plan record.

Notes and Best Practices

- Always verify that a plan does not already exist in the Amendments Table before creating a new one to prevent duplication.
- Duplicate records may cause inconsistencies in reporting and must be deleted manually by IT support.
- New plan entries should only be created after formal plan adoption or Planning Board approval.
- Use the Admin Tools page to link the plan to its corresponding PDF file once the plan has been added.

Managing Plans

The manage plan process ensures that plan-level data and its sequent updates are entered correctly and linked to the original plan and the corresponding recommendations and demographic records.

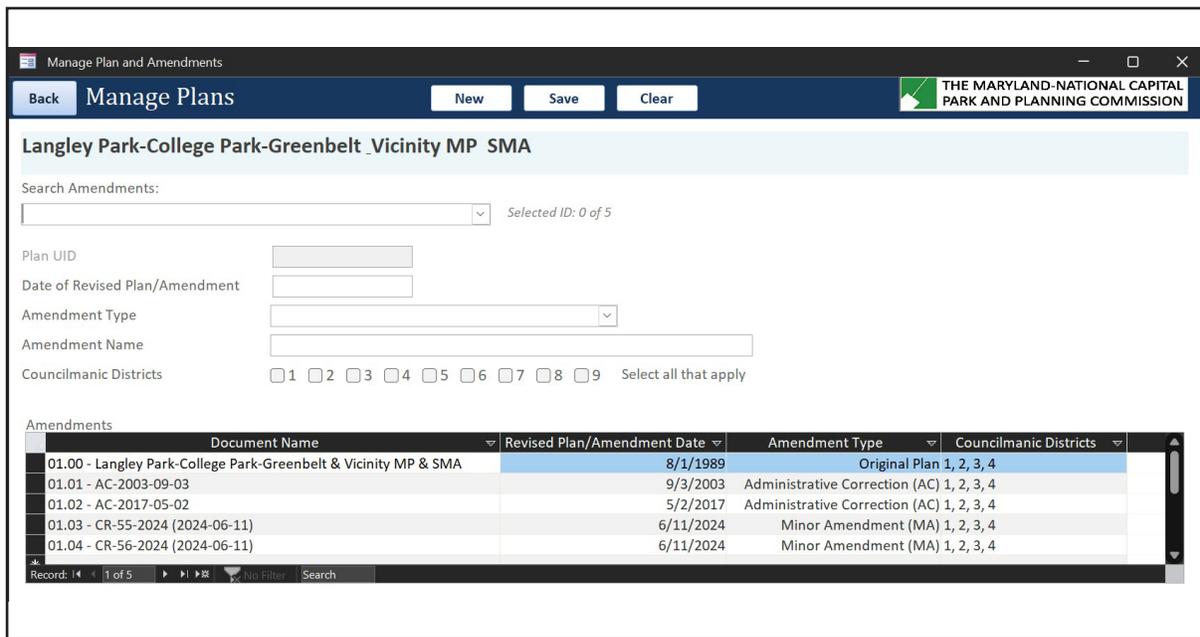


Figure 10. Manage Plans Interface.

Accessing the Add Plan Page

1. From the Home Page, select a plan and click Edit.
2. Within the Plan Details Page, select Manage Plans to open the Manage Plans form.

Page Navigation and Organization

The Manage Plans form consists of three panels and a search bar.

- **Search Amendments** – A dropdown menu for locating existing plans or amendments.
- **Plan Information Panel** – Displays editable fields used to create or update plan metadata:
 - **Plan UID** – Automatically assigned by the database in sequential order.
 - **Date of Revised Plan/Amendment** – The formal plan or amendment approval date.
 - **Amendment Type** – Dropdown field for selecting the amendment category (Administrative Correction, Minor Amendment, Major Amendment, or Erratta).
 - **Amendment Name** – Free-text field for entering the plan or amendment title. The proposed format is shown in grey text to support naming consistency.
 - **Councilmanic Districts** – Checkboxes to select all applicable districts (1–9). A Select All That Apply option is provided for multi-district plans.
 - *Note: Councilmanic district boundaries change approximately every 10 years. Active plans will require adjustment to reflect these changes.*
- **Amendments Table** – Displays all existing plans and amendments with sortable columns for Document Name, Amendment Type, Revised Plan/Amendment Date, and Councilmanic Districts.

Navigation Controls

- **New** – Clears existing fields and prepares the form for a new plan entry.
- **Save** – Saves the new or updated plan record to the database.
- **Clear** – Clears all fields without saving.
- **Back** – Returns to the Plan Detail Page.

Creating a New Amendment or Plan Update

Editor Steps

1. Click New to begin entering a new record. All fields will clear for data entry.
2. Enter the Approval Date (i.e., the formal plan adoption date).
3. Select the Amendment Type for the appropriate option within the dropdown field.
4. Enter the full Plan Name in the Amendment Name field. Note an abbreviation will populate outside of the Amendment Name to help organize updates by type.
5. Select the relevant Councilmanic District(s).
6. Confirm that the Plan UID is automatically assigned and sequentially higher than the most recent plan entry. Next to the dropdown a total number of updates/amendments are shown and updates are organized from least to greatest in the dropdown.
7. Click Save to finalize the new plan record.
8. Upon saving, a confirmation message will appear indicating that the plan has been successfully added to the database. The new record will now display on the Plan Details list underneath the Plans and Amendments for editing or viewing.

Reviewer Steps

Once a plan update has been created, the Reviewer or Approver should verify that:

- The Amendment Name, Amendment Type, and Approval Date match the official plan document.
- The Councilmanic District(s) selected are correct.
- The record appears correctly in the Plan Details listing.
If corrections are needed, the Reviewer can open the record, make necessary updates, and re-save.

Editing an Amendment or Plan Update

Editor or Reviewer Steps

1. Select the appropriate plan from the dropdown field underneath Search Amendments.
2. Information will populate all fields and reflect the data stored within the Amendments table at the bottom of the form.
3. Select any field, outside of Plan UID, to update the information of your choice - Date of Revised Plan/ Amendment, Amendment Type, Amendment Name, and/or Councilmanic Districts.
4. Once the changes to this information have been completed, click Save to finalize the edited plan record.

Notes and Best Practices

- Always verify that a plan does not already exist in the Amendments Table before creating a new one to prevent duplication.
- Duplicate records may cause inconsistencies in reporting and must be deleted manually by IT support.
- New plan updates and amendment entries should only be created after formal plan adoption or Planning Board approval.
- Use the Admin Tools page to link the plan to its corresponding PDF file once the plan has been added.

Editing or Adding Records

The Record Editing workflow supports the creation, revision, and review of all Recommendation and Design Guideline entries within a plan.

While this process is less frequent than status updates, it is critical for maintaining the accuracy and completeness of the database, particularly during plan amendments, corrections, and quality-control reviews.

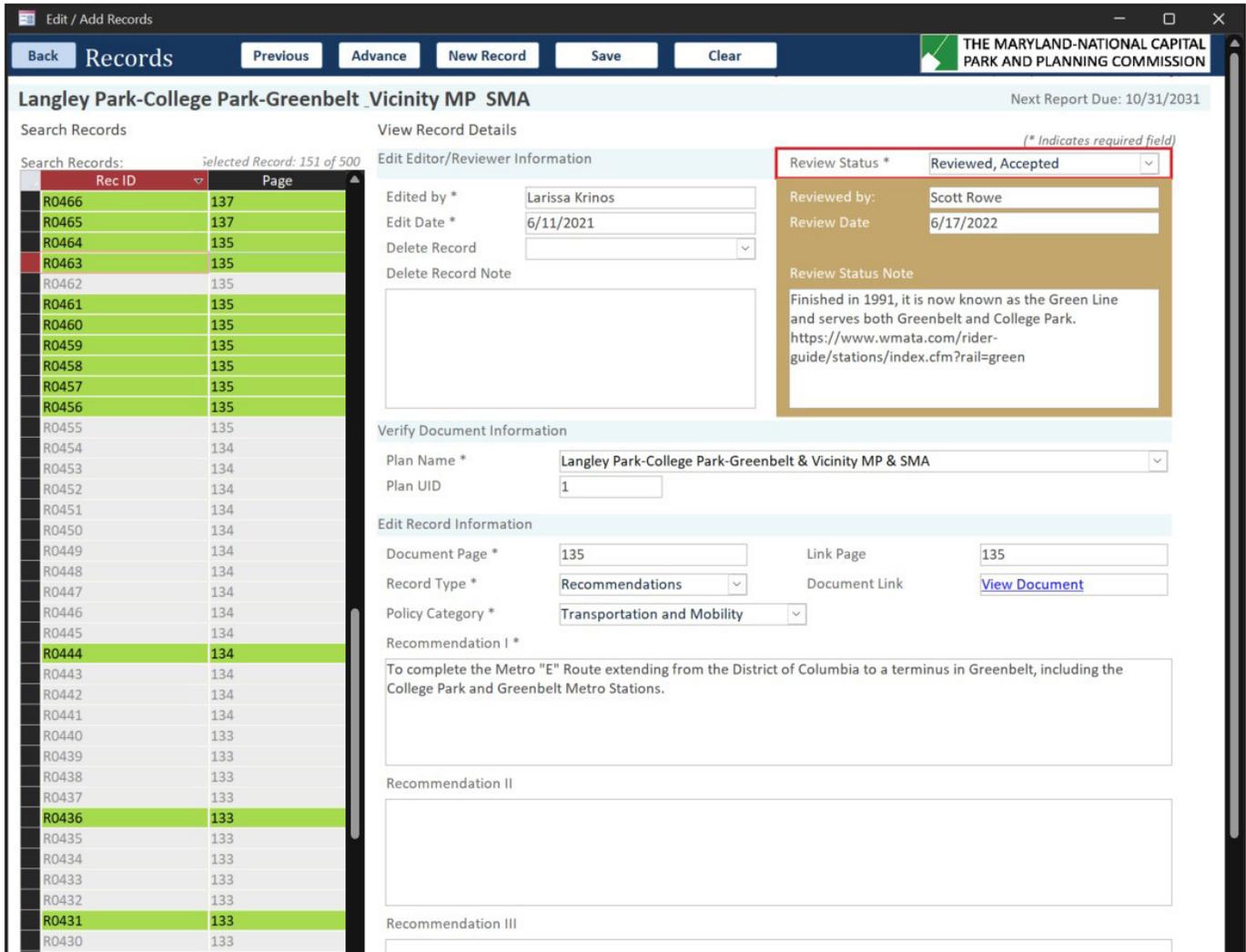


Figure 11. Edit/Add Records Interface.

Accessing the Edit/Add Records Page

1. From the Home Page, select a plan and click Edit.
2. Within the Plan Details Page, select Edit/Add Records to open the Record Editing Form.

Page Navigation and Organization

The Record Editing Form consists of two main panels

- **Search Records** – The left panel, displaying all recommendations and design guidelines under the selected plan.

- **View Record Details** – The Records Detail panel contains six sub panels required to complete a record.
 - **Editor/Reviewer Information** – This is where the Editor identifies who made the edit and when.
 - **Verify Document Information** - This section ties the record back to the Plan.
 - **Edit Record Information** – This most critical element on the page, this is where planning content is documented.
 - **Status Information** – Displays the latest status information for the recommendation, if any.
 - **Optional Tables** – Depending on the recommendation, there may be additional information to document including Location, Agency, Park, Public Facility, and Transportation Information.
 - ii. Edit Date – Pre-populated with the current date
 - iii. Delete Record – Only utilized when a record was entered in error or is otherwise needed to be deleted. This field will be predominantly blank and only be switched to “No” if the record was marked for deletion in error.
 - iv. Delete Record Note – (if required) Briefly describe why the record should be deleted.
3. Complete the fields in the Document Information panel, as required.
 - i. Plan Name – Prepopulated with the current selected plan name.
 - ii. Plan UID – Prepopulated from the Plan UID
 - iii. Document Page – Enter the page number from the plan, not PDF, where the recommendation starts. If the recommendation runs over to another page, only enter the first page that the recommendation appears.
 - iv. Link Page – Enter the PDF page number from the online plan that corresponds to the page number where the information is found. These numbers maybe similar, but can be different based on how the PDF is published.
 - v. Document Link – Prepopulated link to the exact plan or amendment document page based on the entered Link Page information.

Navigation Controls

- **Previous / Advance** – Scroll between records.
- **New Record** – Start a new record.
- **Save** – Confirm and commit changes.
- **Clear** – Reset all editable fields.
- **Back** – Return to the Plan Details page.

Creating a New Record

The status update process involves coordinated steps between the Editor and Reviewer. Editors initiate the record; Reviewers validate and finalize it. Each step must be completed before moving the record to the next stage of review. Reviewers are responsible for ensuring consistency, completeness, and proper linkage to progress reporting windows.

1. Click New Record at the top of the form.
 - i. The tool will auto-fill Plan Name, Plan UID, and Edit Date.
2. Complete the Editor Information
 - i. Edited by - Enter first and last name (e.g., Kayla Williams)
4. Enter Record Information based on the guidance provided in Section 4.
 - i. Record Type – Select Recommendation or Design Guideline.
 - ii. Policy Category – Select the most relevant Policy Category:
 - » Community Heritage, Culture, and Design
 - » Culture and Design
 - » Economic Prosperity
 - » Healthy Communities
 - » Housing and Neighborhoods
 - » Land Use
 - » Natural Environment
 - » Public Facilities
 - » Transportation and Mobility

- iii. Complete Recommendation I – III
- 5. Enter Optional information, If applicable. See Optional Table Information and Appendix A for additional information.
- 6. In the Review Panel, change the Review Status to Ready-for-Review.
- 7. Click Save to record the new status entry and flag it for review.

Reviewer Steps

Once Editors complete and flag records as Ready for Review, the Reviewer performs the quality control and approval process.

Note: Editors and Reviewers must always be different individuals. While they may rotate roles across projects, each record must undergo independent review.

1. Select a record flagged for review.
2. Scan the Search Records pane for yellow-highlighted entries marked Ready for Review.
3. Complete the fields in the Review Panel:
 - i. Reviewed by – Enter first and last name (e.g., Kayla Williams)
 - ii. Review Date – Prepopulated to the date of the original status update; adjust to your actual review date.
 - iii. Review Status – Select one of the following outcomes:
 - » Reviewed, Rejected – Indicates the record requires additional revisions before approval.
 - » Reviewed, Accepted – Confirms the record is accurate and complete.
 - iv. Reviewer Note – (if rejected) Briefly describe what revisions or clarifications are needed.
4. Click Save to finalize the review decision.

Rejected Status Updates

If a record is marked Reviewed, Rejected, the record automatically returns to the Editor for revision.

- The record will appear red in the Search Records list, and Reviewers should also notify the Editor directly to ensure awareness.
- Once revisions are complete, the Editor should update the record as needed a re-flag it as Ready for Review
- The Reviewer will then repeat the review process to close out the record.

Optional Table Information

The optional tables, outlined in the workflow above are used only in unique situations where specific information is detailed in the plan document. The optional tables below outline the required information for each table. Since the tables are optional, they are not required fields, however when filling out, ensure all fields are complete.

- Location Information
 - Location – Provide name of the location/physical address.
 - Location Note – Detailed description of location
 - Feature Class – Select dropdown to define the area type of Point, Polyline, or Polygon.
- Agency Information
 - Agency Role
 - Agency Level
 - Agency
- Park Information
 - Park Name
 - Park Acres Range
 - Park Type
 - Park Ownership
 - Park Acres
 - Park Notes

- Public Facility Information
 - Public Facility Name
 - Public Facility Time Year
 - Public Facility Location
 - Timespan of Facility
 - Public Facility Type
 - State-Rated Capacity (SRC)
 - Public Facility Notes

- Transportation Information
 - Route Identifier
 - Facility Name
 - Minimum ROW
 - Number of Lanes
 - Facility From
 - Facility To
 - ROW Type
 - ROW Elements
 - Master Plan of Transportation (MPOT) Notes

Editing or Adding Recommendation Status

The Status Update workflow is the most frequently used data-entry process within the PEP tool. It is used to document implementation progress for each recommendation within a plan and forms the basis for reporting during the six-year plan update cycle.

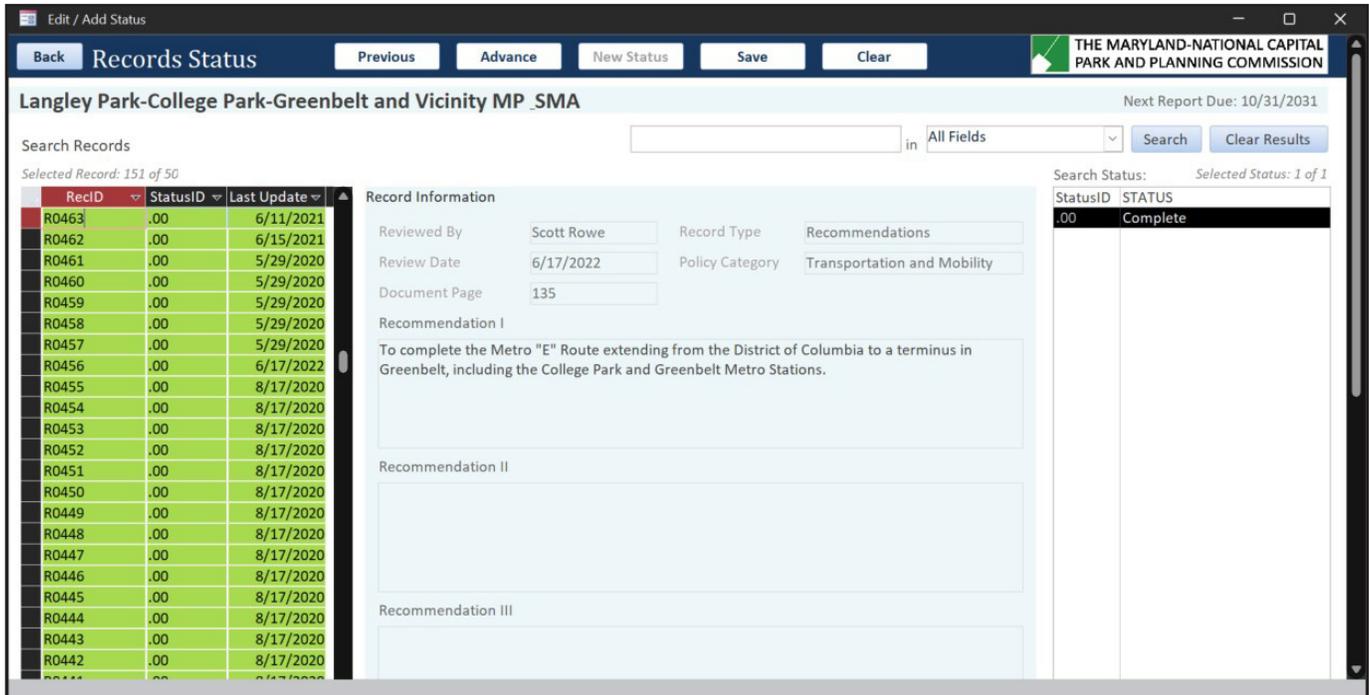


Figure 12. Edit/Add Recommendation Status Interface.

Accessing the Edit/Add Status Page

1. From the Home Page, select a plan and click Edit.
2. Within the Plan Details Page, select Edit/Add Status to open the Status Update Form.

Page Navigation and Organization

The Record Status Update form consists of five panels and a search bar.

- **Search Bar** – Operates similarly to the search function on the View Plans page but is limited to records within the selected plan.
- **Search Records** – The leftmost panel, displays a list of all recommendations and their most recent status update number and date.
 - Records are color-coded by Review Status for quick visual reference:
 - Not Reviewed (White)
 - Editing (White)

- Ready for Review (Yellow)
- Reviewed, Rejected (Red)
- Reviewed, Approved (Green)

- **Record Information** – The upper center panel displays read-only recommendation information.
- **Search Status** – The upper right panel displays a list of all status updates for the recommendation.
- **Status Information** – The lower left panel used by the Editor for entering or updating status information.
- **Review Panel** – The lower right panel used by the Reviewer to evaluate and approve or reject updates.

Navigation Controls

- **Previous / Advance** – Scroll between records.
- **New Status** – Start a new status.
- **Save** – Confirm and commit changes.
- **Clear** – Reset all editable fields.
- **Back** – Return to the Plan Details page.

Creating a New Status

The status update process involves coordinated steps between the Editor and Reviewer. Editors initiate the record; Reviewers validate and finalize it. Each step must be completed before moving the record to the next stage of review. Reviewers are responsible for ensuring consistency, completeness, and proper linkage to progress reporting windows

Editor Steps

1. In Search Records, select the recommendation to update. The search bar may be used to locate records by keyword or status.
2. Click New Status at the top of the form to generate a new entry.
3. Complete the required fields in the bottom Status Information panel:
 - i. Status ID – Auto-generated sequentially.
 - ii. Author – Enter first and last name (e.g., Kayla Williams)
 - iii. Status Update Date – Prepopulated with the current date; adjust if the actual date occurred earlier.
 - iv. Status – Select the most applicable option from the dropdown list (see Record Status Updates Table in Appendix A).
 - » If superseding a plan, a dropdown will appear to provide the superseding plan name.
 - v. Progress Report – Select the relevant six-year progress reporting window. This is essential for linking status updates to reporting automation.
 - vi. Status Update Note – Provide a concise summary of progress or change.
4. In the Review Panel, change the Review Status from Not Reviewed to Ready for Review.
5. Click Save to record the new status entry and flag it for review.

Reviewer Steps

Once Editors complete and flag updates as Ready for Review, the Reviewer performs the quality control and approval process.

Note: Editors and Reviewers must always be different individuals. While they may rotate roles across projects, each record must undergo independent review.

1. Select a Review Status marked as Ready for Review.
2. Filter via the Search Bar or scan the Search Records pane for yellow-highlighted entries marked Ready for Review.
3. Complete the fields in the Review Panel:
 - i. Reviewer Name – Enter first and last name (e.g., Kayla Williams)
 - ii. Review Date – Prepopulated to the date of the original status update; adjust to your actual review date.
 - iii. Review Status – Select one of the following outcomes:
 - » Reviewed, Rejected – Indicates the record requires additional revisions before approval.
 - » Reviewed, Accepted – Confirms the record is accurate and complete.
 - » Reviewer Note – (if rejected) Briefly describe what revisions or clarifications are needed.
4. Click Save to finalize the review decision.

Rejected Status Updates

If a status update is marked Reviewed, Rejected, it returns to the Editor for revision and appears red in the Search Records list. After making updates and re-flagging it as Ready for Review, the Reviewer repeats the review process to finalize the record.

Editing Demographic Data

The Edit Demographics workflow allows users to manage demographic data associated with each plan. This function is maintained exclusively by the Information Management Division (IMD) persona and supports the Six-Year progress report by ensuring demographic data trends reflect the most current data and adheres to the active plan boundary six-year plan update cycle.

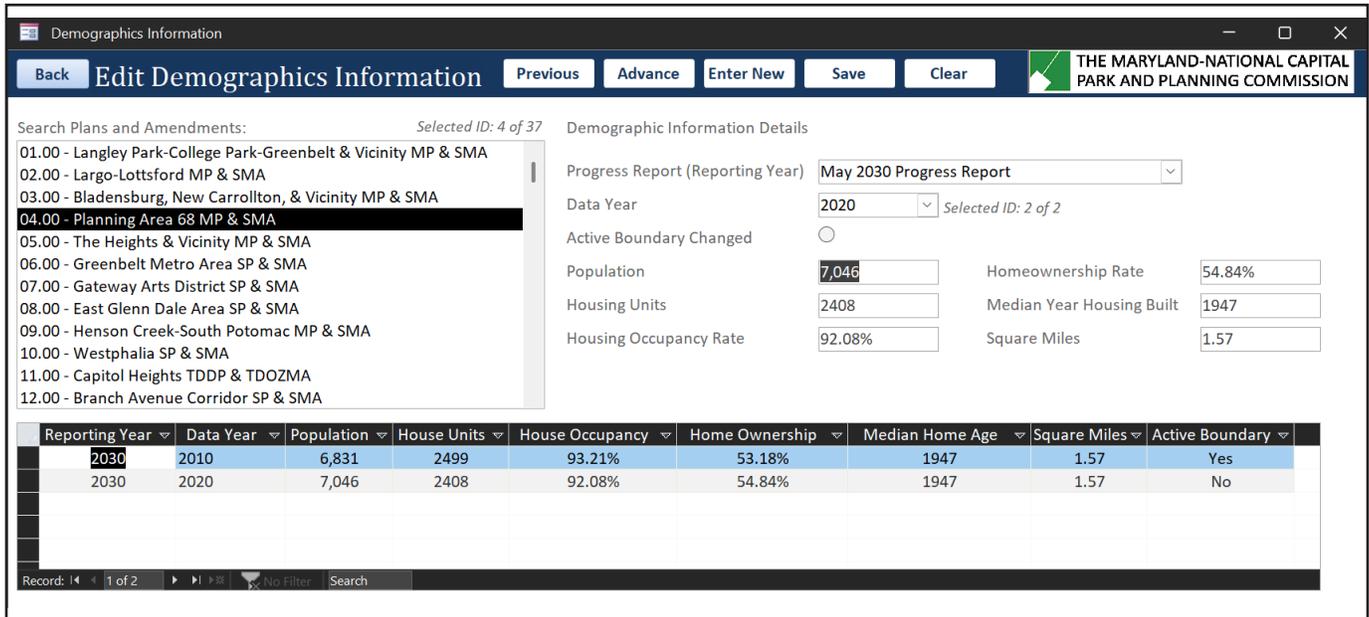


Figure 13. Edit Demographic Data Interface.

Accessing the Edit Demographics Page

1. From the Home Page click Edit. Unlike, other workflows, no plan selection is required.
2. Within the Plan Details Page, select Edit Demographics to open the Demographics Management form.

Page Navigation and Organization

The Demographics form consists of five panels and a search bar.

- **Search Plans and Amendments** – Lists all plans with existing demographic records. Selecting a plan populates its demographic history and boundary status.

- **Demographic Information Details** – Displays or allows entry of demographic data tied to a specific year.
- **Demographics** – Shows all historical entries for the selected plan in tabular form, allowing quick comparison and editing.

Navigation Controls

- **Previous / Advance** – Scroll between records.
- **Enter New** – Start a new demographic record.
- **Save** – Confirm and commit changes.
- **Clear** – Reset all editable fields.
- **Back** – Return to the Plan Details page.

Entering New Demographic Information

1. In the Search Plans and Amendments panel, select the relevant plan.
2. Click Enter New at the top of the form.
3. A prompt will appear asking “Has the Active Boundary been Changed?”
 - i. Select Yes if the plan's active boundary area has changed since the last Progress Report. Active boundary must be selected for one of the entries so that this year and following years are added to the progress report.
 - ii. Select No if the plan boundary is the same as the previous Progress Report.
4. Complete the Demographic Information Details fields for the new entry year. All data should be within the active plan boundary.
 - i. **Reporting Year** – Automatically fills with the current year. Adjust as needed to the actual year of the data.
 - ii. **Data Year** - Manual entry of the year that the demographic data was calculated. If same as reporting year, still record separately.
 - iii. **Population** – Enter total population.
 - iv. **Housing Units** – Enter total housing units.
 - v. **Housing Occupancy Rate** – Enter as a percentage or decimal value.
 - vi. **Homeownership Rate** – Enter the share of owner-occupied units.
 - vii. **Median Year Housing Built** – Enter the median year for all housing units.
 - viii. **Progress Report** – Select the Progress Report the data is relevant to.
 - ix. **Square Miles** – Enter a two decimal place number for the square miles of the active plan boundary
5. Click Save to confirm the revisions

Note: Data in demographics cannot be deleted, information should be updated, as needed.

Editing Existing Demographic Records

1. In the Search Plans and Amendments list, select a plan with existing demographic entries.
2. In the Demographics Information Details Reporting Year dropdown, select the year to be edited.
3. Update any field values as needed within the Demographic Information Details panel.
4. Click Save to overwrite the previous entry with the corrected data.

Best Practices and Notes

- IMD is solely responsible for demographic entries and updates.
- Each reporting year's record represents one complete data snapshot and must be unique for that progress report cycle. Duplicate data years are permitted only when a plan boundary has changed and a new baseline is required for comparison with prior datasets.
- If the plan boundary changes, a new baseline year must be established.
- Verify that ACS block-group boundaries align with the plan's official boundary before extracting data.
- Avoid rounding intermediate values; store precise figures.

Export Progress Report Data

The Export Progress Report Data workflow allows users to generate standardized datasets for analysis, reporting, and publication of the Six-year plan progress reports. This process extracts records, recommendation status, and demographic data into an external file format for further use in Power BI dashboards, Excel summaries, Progress Reports, and other analytical tools.

This workflow can be performed by any of the personas, as needed, however closely follow data validation steps to ensure accurate data exports.

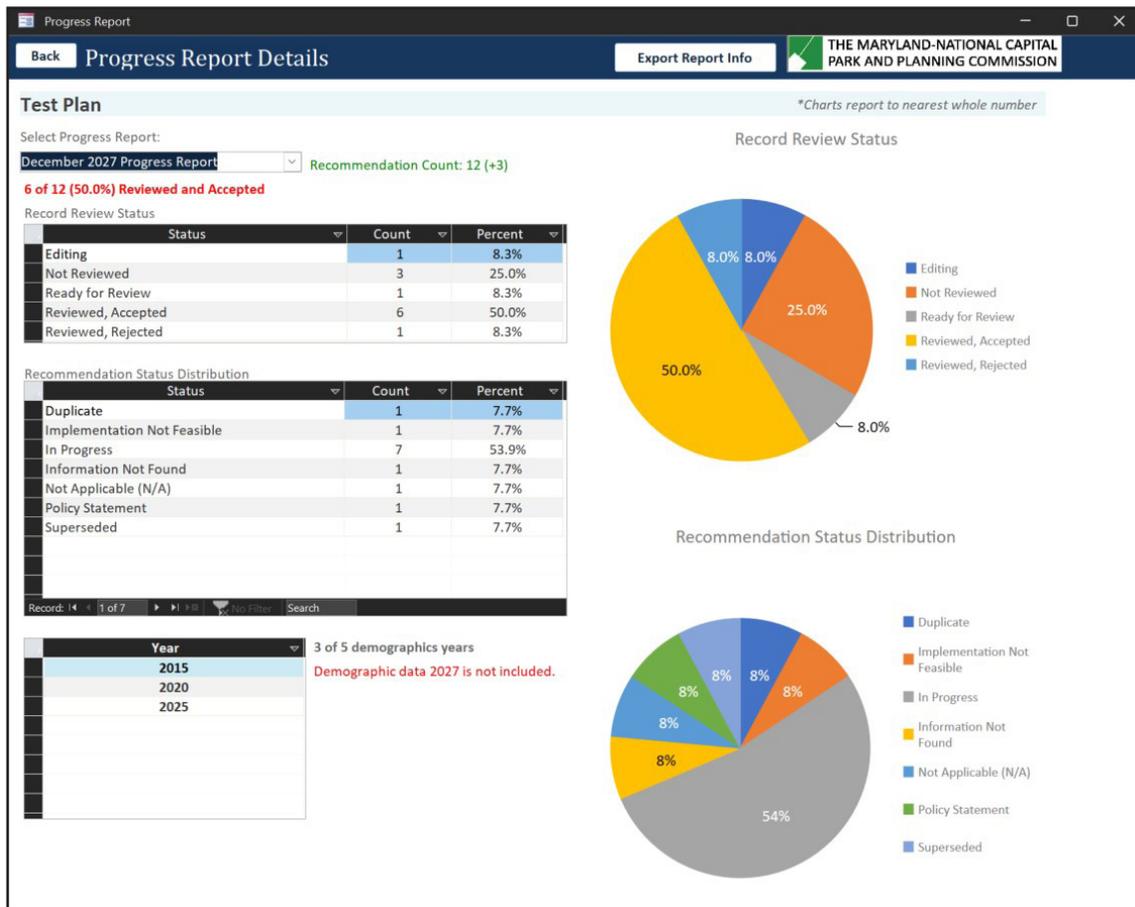


Figure 14. Export Progress Report Data interface.

Accessing the Progress Report Page

1. From the Home Page, select a plan and click Edit.
2. Within the Plan Details Page, select Progress Report to open the Progress Report Details Form.

Page Navigation and Organization

The Status Update form consists of five panels and a search bar.

- **Select Progress Report** – Allows for the selection of the Progress Report intended for export and record review.
- **Record Review Status** – Illustrates the status of record entries. Used primarily when new plans are being entered.
- **Recommendation Status Distribution** – Tabular form of the progress of all statuses.

- **Demographic Data Years** - Displays the demographic data available for the selected progress report year. Active boundary should be used for the first demographic year that will be used for this comparison. All subsequent years will populate based on this designation.
- **Record Review Status Distribution (graphic)** – Visually illustrates the status of record entries for the selected progress report year.
- **Recommendation Status Distribution (graphic)** – Visually illustrates the breakdown of recommendation statuses for the selected progress report.

This exported data provides the basis for creating Adobe Illustrator graphics and tables used in the InDesign template of the Progress Report.

Verify and Export Data

1. Verify data accuracy by confirming all record updates, statuses, and demographic information have been finalized and reviewed.
2. Launch the export tool by clicking Export Report Info, located in the top-right of the screen. This will open a dialog box titled Select Folder to Save Export File.
3. Choose the folder where the exported file should be saved for future reference and accessibility.
 - i. **Note:** Do not enter a file name. One will be auto generated upon export. File names follow the format: [Plan Name]_[YYYYMMDD].xlsx (e.g., CentralAvenueCorridor_20251003.xlsx)
4. Initiate the export, when complete a confirmation message will appear:
 - i. “Data exported successfully to: [Selected destination folder]”
5. Click OK to finalize the process.

Reviewing the Exported Data

The export creates a Microsoft Excel workbook containing two tabs:

- **Status Distribution** – Summarizes the total count and percentage of recommendations by implementation status for the selected plan.
- **Demographics** – Lists current population, housing, and related metrics for the plan boundary.

Plan Evaluation Program (PEP) Tool User Manual - Appendix

M-NCPPC | JANUARY 2026 | VERSION 1



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APPENDIX A

All Fields

The following tables provide a comprehensive data dictionary of all available fields in the Prince George's County Plan Evaluation Program (PEP) tool.

The Field Name represents the label shown to day-to-day users within the Microsoft Access tool interface. The Database Name corresponds to the field name used within the structured backend database that powers the tool's functionality.

Each entry also identifies whether the field is required, its expected data type, and provides a representative example of the input. Fields shown in bold indicate required entries within the Access tool.

Progress Reports
progress_report_ID
plan_UID
report_date
created_date

Scorecard
ID
plan_UID
year
pop
house_units
median_age_house
house_occ
home_own_rate
active_boundary
progress_report_ID
sq_mi

Plans
ID
plan_UID
plan_date
plan_name
search_name
plan_type
revision_date
is_retired
plan_link
delete_plan
next_report_due
last_report_due
cd_#
report_interval_months

Records
ID
plan_UID
reviewer
review_date
reviewer_notes
plan_name
rec_UID
page_from
policy_cat
rec_type
rec_l
rec_cont_II
rec_cont_III
status
status_note
delete_rec
delete_rec_note
edit_date
editor_name
fac_from
fac_to
fac_name
feature_class
lane
loc
loc_note
min_row
mpot_notes
park_acres
park_acres_rg
park_name
park_notes
park_own
park_ty
pf_loc
pf_name
pf_notes
pf_ty
rte_ID
row_elmts
row_ty
src
source_name
time_year
timespan
rec_num_count
agency_role
agency_lvl
agency
link_page
full_link

Rec Status
ID
plan_UID
plan_name
rec_UID
reviewer
status_review_note
status_review_date
status_note
status_updated
status
author
status_UID
superseded
review_status
progress_report_ID

Plan Details

Field Name	Database Name	Field Description & Notes	Data Type	Example
Plan Name	plan_name	Title of the adopted plan or amendment.	Free Text	Prince George's Plaza...
Councilmanic District(s)	cd_#	List of councilmanic districts for the plan.	Checkbox (multi)	District 1; District 2, etc.
Plan Type	plan_type	Plan family/type (Sector Plan, TDDP, etc.).	Dropdown	Sector Plan
Approval Date	plan_date	Official plan approval date.	Date	06/15/2024
Document Link	plan_link	Hyperlink to the official plan document.	Link	https://...
Plan UID	plan_UID	System-generated plan identifier.	Auto	01.01
Search Name	search_name	System-generated identifier paired with the adopted plan or revision title.	Auto	32 - Prince George's Plaza...
Revision Date	revision_date	Official revision date for plan change.	Date	02/07/2014
Is Retired	is_retired	Marking the plan as active or superseded.	Dropdown	True/False
Delete Plan	delete_plan	Marking the plan to be deleted.	Dropdown	True/False
Next Report Due	next_report_due	Next due date for progress reporting.	Date	10/31/2037
Last Report Due	last_report_due	Last due date for progress reporting.	Date	10/31/2031
Report Interval Month	report_interval_months	Calculated months between next progress report.	Calculation	72

Records (Recommendation and Design Guidelines)

Field Name	Database Name	Field Description & Notes	Data Type	Example
Recommendation I	rec_I	Highest-level policy/goal statement under which actions are nested.	Long Text	Create a mixed-use, transit-supportive neighborhood...
Recommendation II	rec_cont_II	Action-level statement that implements the goal/policy.	Long Text	Construct buildings with vertical mixed use along A Street...
Recommendation III	rec_cont_III	Optional sub-action/refinement.	Long Text	Prioritize near transit stops.
Author (Edited by)	editor_name	Editor full name - first and last name.	Free Text	Kyle Williams
Edit Date	edit_date	Date when the record was fully created.	Date	01/05/2025
Delete Record	delete_rec	Flag if entry is marked for deletion.	Dropdown	Yes/No
Delete Record Note	delete_rec_note	Reason for deletion, required.	Long Text	Duplicated
Reviewer (Reviewed by)	reviewer	Reviewer full name - first and last name.	Free Text	Josh Smith
Review Date	review_date	Date when the record was fully reviewed.	Date	01/06/2025
Review Note	status_note	Comments related to the review of the record.	Long Text	Confirmed with Joe Meinert.
Review Status	status	Review Status of record (Reviewed, Accepted / Reviewed, Rejected + guidance).	Dropdown	Reviewed, Accepted
Record UID	rec_UID	System-generated record identifier.	Auto	01.01.R0001
Record Type	rec_type	Recommendation or Design Guideline.	Dropdown	Design Guideline
Policy Category	policy_cat	Plan 2035 categories, defined below.	Dropdown	Land Use
Page Number	page_from	PDF page number where the record begins in the plan.	Number	4
Link Page	link_page	Default is the PDF page number; however, if the online version of the plan is different a new number can be added to support the connection to the exact page.	Number	5

Policy Category Dropdown Options and Definitions

Plan Element	Examples
Land Use	Land use, zoning, development type and location, County growth policies, General Plan policies, etc.
Economic Prosperity	Jobs, business services, industry types, work force, regional competitiveness, vocational/job training
Transportation and Mobility	Roads, transit, connectivity, level of service, transportation demand management (TDM), maintenance, parking, sidewalks/bicycles, trails
Natural Environment	Water quality, green construction [including Leadership in Energy and Environmental Design (LEED)], climate change, tree canopy, noise/light pollution, environmental outreach and education, stormwater management, floodplain issues, soils, green infrastructure, mining/extraction
Housing and Neighborhoods	Housing types/price range, ownership, programs, senior housing, foreclosures, neighborhood conservation
Community Heritage, Culture, and Design	Adaptive reuse, historic preservation, heritage tourism, the arts, archaeology, Crime Prevention Through Environmental Design (CPTED), scenic byways, urban design, buffering, landscaping, architecture.
Healthy Communities	Food access, health services programs, awareness, access to health care, access to recreation.
Public Facilities	Schools, libraries, fire/EMS, police, parks and recreation facilities, water and sewer expansion, etc.

Record Status Updates (RecStatus)

Field Name	Database Name	Field Description & Notes	Data Type	Example
Status	status	Current implementation state, defined on next page.	Dropdown	In Progress
Status Update Date	status_updated	Date the status record was created/ updated.	Date	10/13/2025
Author	author	Editor full name - first and last name.	Free Text	Kyle Williams
Review Status	review_status	Outcome/notes (Reviewed, Accepted / Reviewed, Rejected + guidance).	Dropdown	Reviewed, Accepted
Status Update Note	status_note	Summary of progress/changes since last update.	Long Text	ROW acquisition at 60%; construction drawings 30%.
Superseded Plan	superseded	Selection of the plan that supersedes the recommendation	Dropdown	32 - Prince George's Plaza...
Reviewer	reviewer	Reviewer full name - first and last name.	Free Text	Josh Smith
Review Date	status_review_date	Date reviewer completed QC.	Date	10/18/2025
Reviewer Note	status_review_note	Comments related to the review of the record.	Free Text	Confirmed record
Status UID	status_UID	System-generated status identifier.	Auto	01.01.R0001.01.02
Progress Report	progress_report_ID	Reporting cycle linkage as part of the six-year reporting cycle.	Dropdown	October 2031 Progress Report

Status Options Dropdown Options and Definitions

Status Name	Definition
Not Started	A recommendation has Not Started when it does not meet the criteria for Complete, Ongoing, or Not Feasible, or when evidence is found that implementation has definitively or demonstrably not begun.
In Progress	A recommendation is In Progress when it is definitively and demonstrably underway and has a clear end (e.g., a capital improvement under construction, legislation initiated but not approved). Construction must have started.
Ongoing	A recommendation is Ongoing when it is definitively underway but has no clear end or completion point. If completion timing is unclear, categorize as Ongoing; upgrade to In Progress when a definitive end date is identified.
Complete	A recommendation is Complete when it has been definitively implemented. All Complete recommendations must include a Status Note describing how completion was verified, with a source.
Information Not Found	Used when research time or unavailable data prevent confirming implementation status. Describe why information could not be located in the Status Note.
Implementation Not Feasible	Implementation is not feasible due to physical, environmental, regulatory, or other prohibitive conditions—e.g., a different project constructed on the site, cost infeasibility, or project cancellation. Document infeasibility in the Status Note.
Superseded	A recommendation is Superseded when a subsequent plan replaces or invalidates it. Applies when a new master/sector or functional plan overlaps or conflicts with the earlier recommendation unless it can be proven Complete prior to the new plan or is explicitly carried forward in adoption resolutions.
Duplication	A repeated action applicable across sub-geographies or an implementation item that duplicates another record's content.
Not Applicable (N/A)	Applies to Record Types = VISION or GOAL, except where they duplicate actionable strategies or policy statements not otherwise categorized above.
Policy Statement	A statement of intent upon which decisions are evaluated. Often, a policy is actually an implementation action in disguise. A policy with no subordinate strategies or recommendations often is its own implementation action.

Demographic Information (Scorecard)

Field Name	Database Name	Field Description & Notes	Data Type	Example
Data Year	year	Year when data was populated for comparison purposes.	Number	2020
Population	pop	Total population within active boundary.	Number	41,230
Housing Units	house_units	Total dwelling units.	Number	17,905
Housing Occupancy Rate	house_occ	Share of occupied units (%).	Percent	94.2%
Homeownership Rate	house_own_rate	Share of owner-occupied units (%).	Percent	52.8%
Median Year Built	median_age_house	Median year housing built.	Number	1978
Square Miles	Sq_Mi	Active boundary area (2 decimals).	Number	5.43
Progress Report (Reporting Year)/Reporting Year	progress_report_ID	Reporting cycle linkage as part of the six-year reporting cycle and the calendar year in which the data was populated.	Dropdown	October 2031 Progress Report or 2031
Active Boundary	active_boundary	Node for showing which year is the most active boundary for plan reporting purposes. Helps to ensure the same boundaries are being compared with demographics information.	Node	Yes or No
Square Miles	sq_mi	Square miles of the active plan boundary area (2 decimals)	Number	21.95

Optional Tables within Records

Location

Field Name	Database Name	Field Description & Notes	Data Type	Example
Location	loc	Named place/address/parcel ID(s) for the action.	Free Text	Dean Drive; Tax IDs 2379410;2347151
Location Note	loc_note	Descriptive location context or instructions.	Long Text	Area northeast of MD 500 (Queens Chapel Rd) and Jamestown Rd.
Feature Class	feature_class	Geometry type for mapping.	Dropdown	Point / Polyline / Polygon

Feature Class Dropdown Options and Definitions

Feature Class	Definition	Feature Class Examples	Location Example	Location Type
Point	Points are considered to have no dimension and no direction defined by a coordinate pair.	A specific building or intersection.	Intersection of MD 214 and MD 193	Intersection
Polyline	A line is defined when two or more points are connected. Lines have length but no area.	Stream, Trail, Road, Corridor, Transit Line, etc.	Oxon Run Trail	Trail
Polygon	A polygon is a closed shape of connected lines. Considerations: (1) A lot or parcel of land is a polygon.	A municipality, a neighborhood, watershed, zoning district, etc.	Rural Tier	General Plan Policy Area

Transportation

Field Name	Database Name	Field Description & Notes	Data Type	Example
Route Identifier	rte_ID	Official route/segment identifier.	Free Text	A-10
Facility Name	fac_name	Segment name/terminus label.	Free Text	Aberdeen St
Facility From	fac_from	Origin/start descriptor.	Free Text	Ager Road
Facility To	fac_to	Terminus/end descriptor or class.	Free Text	Arterial
Minimum Right of Way	min_row	Recommended ROW width.	Free Text	100', 120' w/ parking
ROW Type	row_ty	Functional/design classification.	Free Text	Urban Avenue
ROW Elements	row_elmts	Amenities/features in the ROW.	Free Text	Parking on each side; cycle track
MPOT Notes	mpot_notes	Any notes.	Long Text	Construct continuous sidewalks
Number of Lanes	lane	How many recommended lanes.	Number	6

Public Facility

Field Name	Database Name	Field Description & Notes	Data Type	Example
Public Facility Name	pf_name	Name of the facility.	Free Text	Central Library
Public Facility Time of Year	time_year	Describes when during the year a public facility is used, active, or relevant.	Free Text	Year-round
Public Facility Type	pf_ty	Facility type/classification.	Free Text	Library
Public Facility Location	pf_loc	Address or siting details.	Free Text	Along Brightseat Rd north of Landover Rd...
Public Facility Notes	pf_notes	Details not covered in other PF fields.	Long Text	100,000 sq ft with adjacent public parking and transit
Timespan of Facility	timespan	Implementation timeframe if defined.	Dropdown	Short-term
State-Rated Capacity (if school)	src	SRC value when applicable to school facilities.	Dropdown	Primary or Supporting

Park

Field Name	Database Name	Field Description & Notes	Data Type	Example
Park Name	park_name	Proposed/existing park name.	Free Text	Woodstream Community Park
Park Acres	park_acres	Number of acres (if specified).	Number	4.2
Park Acres Range	park_acres_rg	Range of acres when exact value unknown.	Free Text	<0.5
Park Type	park_ty	Park classification/type.	Free Text	Common/Green
Park Owner	park_own	Recommended owner/maintainer.	Free Text	M-NCPPC
Park Notes	park_notes	Additional park-related notes.	Long Text	

Agency

Field Name	Database Name	Field Description & Notes	Data Type	Example
Agency Role	agency_role	Primary or Supporting implementer for this action.	Dropdown	Primary
Agency Level	agency_lv	Government/organizational level.	Dropdown	Federal
Implementing Agency	agency	Name of the implementing agency/entity.	Free Text	M-NCPPC

Agency Name Abbreviations

Agency Abbreviation	Agency Full Name	Agency Level
NPS	United States Department of the Interior, National Park Service	Federal
USAF	United States Air Force	Federal
USDA	United States Department of Agriculture	Federal
Census	United States Department of Commerce, United States Census Bureau	Federal
GSA	United States General Services Administration	Federal
NASA	National Aeronautics and Space Administration	Federal
ONI	United States Navy, Office of Naval Intelligence	Federal
FBI	United States Department of Justice, Federal Bureau of Investigation	Federal
BEP	United States Department of the Treasury, Bureau of Engraving and Printing	Federal
SHA	Maryland Department of Transportation, State Highway Administration	State
MTA	Maryland Department of Transportation, Maryland Transit Administration	State
MDHCD	Maryland Department of Housing and Community Development	State
MDE	Maryland Department of the Environment	State

MDP	Maryland Department of Planning	State
DNR	Maryland Department of Natural Resources	State
MPS	Maryland Department of Natural Resources, Maryland Park Service	State
M-NCPPC	The Maryland-National Capital Park and Planning Commission	Regional
WSSC	Washington Suburban Sanitary Commission	Regional
WMATA	Washington Metropolitan Area Transit Authority	Regional
DoE	Department of the Environment	Regional
DPW&T	Department of Public Works and Transportation	Regional
DHCD	Department of Housing and Community Development	Regional
DPIE	Department of Permitting, Inspections and Enforcement	Regional
DCS	Department of Central Services	Regional
OCE	Office of the County Executive	Regional
SCD	Soil Conservation District	Regional
PGCPS	Prince George's County Public Schools	Regional
DOH	Department of Health	Regional
DER	Department of Environmental Resources (prior to 2012)	Regional

APPENDIX B

New User Protocols

This appendix provides instructions for properly opening the PEP Microsoft Access database, ensuring that all security settings are configured to allow the tool to run successfully.

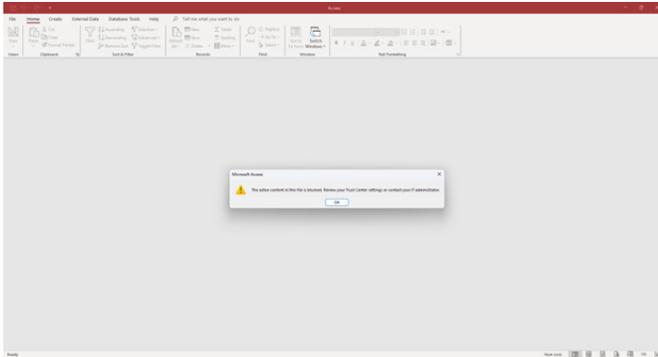
This process is primarily needed for new users accessing the tool for the first time from a server location on the M-NCPPC network.

Step 1. Locate the Access File

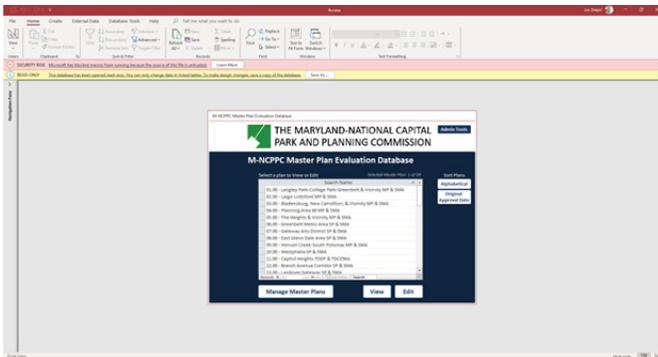
1. Locate the .accdb file titled “PEP_Tool” (or current version name).

Step 2. Address the Security Block

2. When you first open the file, a red banner may appear stating that a potentially dangerous macro has been blocked.

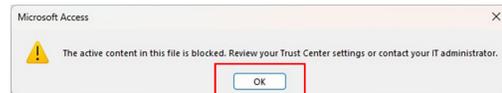
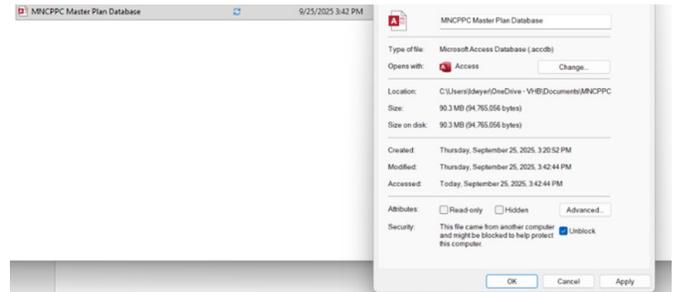


3. If this appears, a link will direct you to Microsoft's official support article on macro blocking, if this appears, move to step 4.



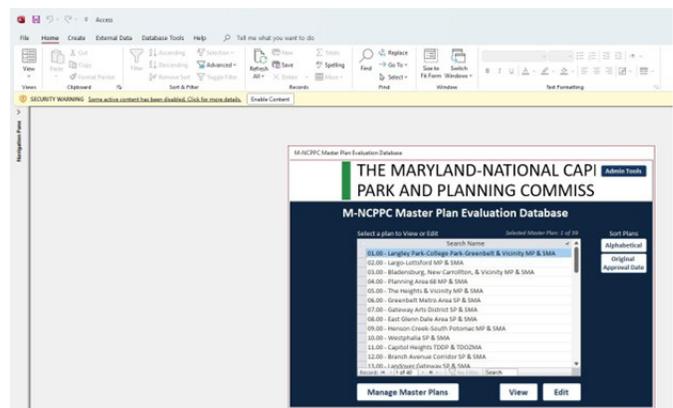
4. To Unblock the Access file:

- i. Right-click the Access file in File Explorer and select Properties.
- ii. On the General tab, check the box labeled Unblock at the bottom.
- iii. Click Apply and then OK.



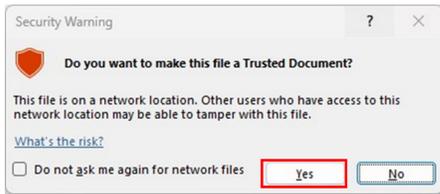
Step 3. Enable Macros and Trusted Content

5. Double-click the Access file from the original saved location to open it.
6. If prompted with a message stating “This file may be blocked,” click Yes to continue as the file opens.
7. Once opened, a yellow banner titled Security Warning will appear at the top of the screen.
8. Click Enable Content to allow the PEP tool to function.



Step 7 and 8. Yellow Banner at the Top of the Access Tool. Click Enable Content to allow the PEP Tool to Function.

9. If asked whether this is a trusted document, select Yes.



Step 4. Verify Proper Launch

After enabling content, the PEP tool will load the Home Page interface.

If the tool does not open correctly, close Access, repeat the unblock steps, and confirm that the file location is within a trusted network path.

Note

- If issues persist, contact the Data Systems / Information Technology persona for additional support and verification of security permissions.

APPENDIX C

Database Maintenance

This appendix documents the technical operations, maintenance considerations, and system stewardship responsibilities associated with the (PEP) Microsoft Access tool. It is intended for use by the Data Systems / Information Technology persona and complements the PEP Tool User Manual by focusing on system performance, data integrity, storage, and recovery rather than user workflows or data entry procedures.

Role of Data Systems / Information Technology

Through proactive capacity monitoring, routine maintenance, secure storage, and technical troubleshooting, Data Systems / IT staff play a critical role in ensuring the PEP tool remains:

- Stable and performant
- Secure within the Commission's network environment
- Reliable as the system of record for plan evaluation and reporting

These responsibilities support Planning staff's ability to use the PEP tool confidently.

Database Information and Capacity Management

As of January 2026, the PEP Microsoft Access database is approximately 40 MB in size, representing roughly 2 percent of the platform's 2 GB file size limit. This confirms that the system is operating well within acceptable capacity thresholds and does not currently present performance or storage concerns.

To ensure long-term stability and scalability, the following capacity management principles should guide system oversight:

- Initiate planning discussions at approximately 50 percent capacity to evaluate archiving strategies or future platform transitions.
- Maintain the database below approximately 75 percent capacity to support performance and responsiveness.
- If database growth accelerates, consider archiving inactive or historical data or evaluating migration to an alternative environment.

IT staff are responsible for monitoring database size trends and coordinating with Planning leadership as thresholds approach.

Regular System Maintenance

The PEP tool includes an Admin Tools interface that enables IT staff to perform routine system maintenance functions necessary to preserve performance and data integrity. These functions support the health of the database over time and should be incorporated into standard operational practices. Core maintenance activities include:

- Deleting Plans, Records, and Statuses
- Clearing Cache
- Compact and Repair

Each activity serves a distinct purpose in managing database size, performance, and stability and should be applied based on system behavior and usage patterns.

Deleting Plans, Records, and Statuses

Planning staff may flag plans, records, or recommendation statuses for deletion through standard review workflows. IT staff use the Admin Tools interface to process these items in a controlled manner. Key characteristics of this process include:

- Items marked for deletion are migrated to designated trashed tables within the MS Access Tool, rather than immediately removed.
- IT staff may:
 - Export trashed data for archival purposes, or
 - Permanently delete trashed content to reduce database size
- Trashed tables may be deleted entirely if needed

This approach balances data governance, auditability, and system performance, allowing cleanup without compromising traceability.

Cache Management

Cache clearing is a situational housekeeping function used to address performance issues such as slow form loading or delayed queries.

General guidance includes:

- Clear cache when performance degradation is observed.
- In environments with frequent user access, a regular clearing cadence (e.g., weekly) may be appropriate.
- Create a backup prior to clearing cache to safeguard against unexpected issues.

Cache management is typically the first troubleshooting step before more intensive maintenance actions are taken.

Compact and Repair Operations

Over time, database files grow as data are added, modified, or removed. The Compact and Repair operation reclaims unused space, improves performance, and can resolve minor corruption. Best-practice considerations include:

- Running Compact and Repair on a regular schedule (monthly as a baseline).
- Allowing sufficient uninterrupted time for completion, approximately 30 minute process.
- Ensuring exclusive access during the operation.
- Creating a backup prior to execution.

This operation is especially important following large data updates or removal of archived content.

Corruption Detection and Response

Although uncommon, database corruption can occur due to interrupted operations, network instability, or improper file handling. Indicators may include:

- Errors when opening forms
- Tables returning unexpected results
- Sudden, unexplained increases in file size
- System prompts indicating the database requires repair

If corruption is suspected:

- Immediately create a copy of the database file
- Run Compact and Repair on the copied file
- If successful, replace the original file with the repaired version
- If unsuccessful, restore the original database from a backup

Prompt action and adherence to backup protocols are essential to minimizing disruption and data loss.

Storage and Backup Practices

Secure storage and reliable backups are critical to maintaining system integrity. Key storage considerations include:

- Do not store the database in synchronized environments (e.g., SharePoint, OneDrive, Teams, Dropbox), as background syncing can corrupt Access files.
- Preferred storage locations include:
 - Local disk, or
 - Network file servers without automated synchronization.
- Avoid interrupting the database during save or close operations.

IT staff are responsible for managing backups, version control, and recovery procedures in alignment with Commission policies.

APPENDIX D

Progress Report Engine Technical Summary

The Progress Report Engine is the technical backbone that enables time-based evaluation and longitudinal tracking of plan implementation within the PEP. It automates the creation of scheduled Progress Reports for each adopted plan and its amendments, carries forward demographic (Scorecard) data and recommendation status histories, and supports consistent comparison of historical and current implementation progress across reporting cycles. By managing these functions centrally, the engine ensures that each reporting interval begins with a complete, traceable snapshot of prior conditions while allowing staff to update information for the current evaluation period.

1. Purpose of the Progress Report Engine

The Progress Report Engine is the core mechanism that enables time-based evaluation of plan implementation within the PEP. It automates the creation, maintenance, and comparison of Progress Reports across reporting cycles, ensuring that implementation status and demographic conditions are captured consistently and preserved historically. Specifically, the engine:

- Creates scheduled Progress Report records for each adopted plan and its amendments;
- Carries forward demographic (Scorecard) data and recommendation status records (RecStatus) from prior reporting cycles;
- Enables users to view, compare, and export historical and current plan progress at defined reporting intervals.

All Progress Report logic is implemented in VBA and operates directly against the system's core data tables, including Plans, ProgressReports, Scorecard, Records, and RecStatus. This design ensures that reporting outputs are generated from a single authoritative data source and remain aligned with the underlying implementation tracking database.

2. Key Data Structures

The Progress Report Engine relies on a set of interrelated tables that together support scheduling, historical versioning, and reporting.

- Plans
 - Fields used: plan_UID, report_interval_months, last_report_date, next_report_due.
 - Plan_UID includes base plans and amendments (e.g., 3.00, 3.01, 3.02).

- ProgressReports
 - One row per plan per report date.
 - Key fields: rprogressreport_ID, plan_UID, report_date, created_date.
- Scorecard
 - Demographic data.
 - Linked to Progress Reports via progressreport_ID.
- Records / RecStatus
 - Records: Individual recommendations / design guidelines.
 - RecStatus: Status history for each recommendation, tied to plans and progress reports via rec_UID, plan_UID, status_UID, and progressreport_ID.

3. Progress Report Creation & Cadence

Progress Report creation is controlled by the routine modProgressReports. CheckAndCreateProgressReports, which executes when the Home form loads (e.g., Home V3). This routine:

- Identifies plan where next_report_due <= Today or next_report_due Is Null.
- Normalizes plan IDs to a base plan UID: basePlanUID = Int(Val(plan_UID)), ensuring that base plans and amendments (e.g., 3.00, 3.01, 3.02) are treated as a single plan family for evaluation purposes.

For each base plan:

1. Determines the report interval in months: Report_Interval_Months (defaults to 72 months = 6 years).
2. Calculates the new report date:
 - If Last_Report_Date is Null: newReportDate = Date + interval
 - Else: newReportDate = last_report_date + interval

3. Calls:

- CreateProgressReport (basePlanUID, newReportDate)
- UpdatePlanReportDates (basePlanUID, newReportDate, interval)

Recalibration routine: modProgressReports.
UpdateLastReportDates

- Walks all plans and back-fills last_report_date and next_report_due using qryMaxReportDates.
- Useful for a manual sync if anything gets out of alignment.

Shared dates for base plan + amendments:
modProgressReports.UpdatePlanReportDates

- Updates all Plans rows where Int(Val(Plan_UID)) = basePlanUID so that:
 - last_report_date = new report date.
 - next_report_due = new report date + interval.

4. Creating a Progress Report & Copying Demographics

The routine modProgressReports.
CreateProgressReport(PlanUID As String,
reportDate As Date) controls initialization of each new Progress Report. This process:

1. Inserts a new row into ProgressReports (for the given plan_UID and reportDate).
2. Identifies the most recent previous report for this plan (ProgressReport_ID with latest Report_Date).
3. If a previous report exists:
 - Selects all Scorecard records where ProgressReport_ID = previousReportID.
 - Inserts copies into Scorecard with the new ProgressReport_ID (demographic data carry-forward).
4. Calls:
 - CopyStatusesToNewReport (PlanUID, newReportID) (section 5).

This carry-forward approach ensures that each Progress Report begins with a complete snapshot of prior conditions, which staff can then update for the current evaluation cycle.

5. Copying Recommendation Statuses to the New Report

Recommendation status bulk copy is handled by modProgressReports.

CopyStatusesToNewReport(PlanUID As String, newReportID As Long).

- Finds all distinct Rec_UID in Records for the plan and its amendments: plan_UID >= planUID AND plan_UID < planUID + 1
- For each recommendation: Calls CreateNewStatusRecord (Rec_UID, True, newReportID)

Per-status creation logic: modProgressReports.
CreateNewStatusRecord(RecID As String,
copyFromPrevious As Boolean, newReportID As Variant)

1. Locates the most recent existing status in RecStatus for that rec_UID.
2. Generates a new status_UID sequence.
3. Determines if the previous status is terminal, based on STATUS and/or suffix:
 - Examples: Complete, Superseded, Duplicate, Implementation Not Feasible, Information Not Found, Not Applicable (N/A), Policy Statement, or a D suffix.
4. Creates a new RecStatus row:
 - If terminal:
 - Copies all fields (STATUS, AUTHOR, REVIEW_STATUS, REVIEWER, etc.) so the status is frozen historically.
 - If active:
 - Copies core fields (STATUS, STATUS_NOTE).
 - Resets review-related fields:

- » REVIEW_STATUS = “Not Reviewed”
- » SUPERSEDED, REVIEWER, STATUS_REVIEW_DATE, STATUS_REVIEW_NOTE set to Null.

5. Sets ProgressReport_ID for the new status:

- Uses the supplied newReportID (new report), or
- Falls back to the most recent existing report if none is supplied.

This design allows Progress Reports to track which recommendations are complete and immutable vs. which should be re-evaluated each reporting cycle.

6. Viewing & Interacting with Progress Reports

All user interaction with Progress Reports occurs through Form_Progress Report.

Form initialization: Form_Progress Report.Form_Load

- Receives plan_UID via OpenArgs.
- Populates cmbReport with all Progress Reports for that plan, newest first.
- Selects the latest report and wires up subforms:
 - Status list
 - Policy list
 - Demographic year list
 - Recommendation status detail
- Calls summary/visual update routines:
 - UpdateProgressStats
 - UpdateRecordBreakdown
 - UpdateDemographicsYearsCount
 - UpdateStatusCountComparison
 - UpdateDemographicsStatus
 - UpdatePieChartReviewStatus
 - UpdatePieChartRecStatus

Changing the selected report: cmbReport_AfterUpdate

- Requeries subforms and charts.
- Re-runs all the same update routines to reflect the newly chosen Progress Report.

7. Summary Metrics & “Ready for Export” Logic

Key routines on Form_Progress Report:

- UpdateProgressStats
 - Calculates the number and percentage of recommendations that are Reviewed, Accepted for the current report.
 - Updates lblProgressComplete with a “X of Y (Z%)” summary and colors the label green (100%) or red (incomplete).
- UpdateStatusCountComparison
 - Compares the count of eligible recommendations between the current report and the previous report.
 - Outputs a labeled count with +/- delta (colored green/red) in lblStatusComparison.
- UpdateDemographicsYearsCount
 - Counts how many demographic years are present in this Progress Report (since the Active_Boundary year).
 - Compares to the total years available for the plan.
 - Updates lblDemographicsYearsCount.
- UpdateDemographicsStatus
 - Checks if the year of the Progress Report’s Report_Date is present in Scorecard for that ProgressReport_ID, and within the active boundary.
 - If yes:
 - Label: “Demographic data is current (YYYY included) – Report ready for export” (green).
 - If no:
 - Label indicates that the report year’s demographics are missing (red).

These routines collectively determine whether the report is complete enough to export and provide quick at-a-glance status for staff.

8. Exporting a Progress Report

The export routine `Form_Progress Report`. `btnExport_Click` packages finalized Progress Reports for external use.

- Uses the current `Plan_UID` and selected `ProgressReport_ID` to run:
 - A status distribution query (latest statuses per recommendation).
 - A demographics query (Scorecard data from active boundary years onward).
- Prompts the user to choose a folder location.
- Creates an Excel workbook:
 - Sheet 1 – “Status Distribution”: Recommendation status breakdown.
 - Sheet 2 – “Demographics”: Time-series demographic data.
- File naming convention: `SanitizedPlanName_ProgressReportName_YYYYMMDD.xlsx`.

This provides an exportable package for external reporting and archival.