



## Supporting Document: MDOT 657.2

Effective Date: May 30, 2025

Approved by:

Assistant Secretary for Assistant Secretary for Project Development and Delivery

Date: 5/28/2025

### Joint Development Roles and Responsibilities

This supporting document outlines the key responsibilities of internal and external stakeholders and highlights the partnerships necessary for effective Joint Development project execution. Joint Development projects involve complex coordination between the federal government, State agencies, local jurisdictions, private developers, and the community. This section describes the roles and responsibilities of those parties and the necessary partnerships for successful Joint Development projects, as well as State policies that relate to Joint Development.

The following matrix provides an overview of key stakeholders, both internal and external to MDOT, who participate in the Joint Development process. Additional information on how MDOT collaborates with these partners is provided below. For a detailed breakdown of the Joint Development process and key stakeholders roles and responsibilities, see Appendix A – Joint Development Roles and Responsibilities Matrix.

The core project team for each Joint Development project consists of the Joint Development Partner, MDOT's Office of Real Estate and Economic Development ("ORED"), the Maryland Transit Administration ("MTA"), and the Office of the Attorney General ("OAG"). Together, these entities collaborate to oversee the planning, evaluation, negotiation, design, and implementation of Joint Development projects, ensuring alignment with MDOT's strategic goals and objectives, policies, and regulatory requirements.

Stakeholder	Role Summary
<b>Internal to MDOT</b>	
Office of Real Estate and Economic Development ("ORED")	Located within The MDOT Secretary's Office, ORED will lead and coordinate MDOT's Joint Development efforts including executing planning efforts, solicitations, and agreements.
Maryland Transit Administration ("MTA")	As the transit operator, MTA will define transit infrastructure requirements, standards, and specifications. MTA will be a key stakeholder in the Development Plan, detailed design review and approval; and construction to ensure the proposed development is integrated with the transit infrastructure, that the future service supports new development, that there are minimal disruptions to transit operations throughout construction, and that the assets are designed and delivered in accordance with the requirements, standards, and specifications. MTA will also be responsible for inspection during construction, commissioning, and handover of the transit infrastructure assets.
Maryland State Highway Administration ("SHA")	As the owner and maintainer of state roads, SHA will be a key partner in ensuring that local road capacity supports intended development, as well as providing early input into defining



Stakeholder	Role Summary
	requirements and assisting with analysis in defining needs improvements and permitting. To manage risk associated with Joint Development projects, SHA shall evaluate planning-level concepts of potential Joint Development projects to estimate potential SHA positions on future permitting. MDOT will seek to engage local roadway owners in this process as well. This process is outlined in the document <i>TIS for Early Planning Coordination on Joint Developments (JD)</i> .
Maryland Aviation Administration ("MAA")	The MAA owns and operates the Baltimore/Washington International Thurgood Marshall (BWI) and Martin State airports. MAA will be a key partner to ensure development adjacent to either of these MARC stations conforms with all airport requirements and operations.
Office of Attorney General ("OAG")	The OAG is the legal counsel to MDOT and is involved in reviewing solicitations and the drafting and negotiations of development agreements.
Other MDOT Modal Departments	As the owner and operator of State-owned land within ½ mile of transit station, other MDOT Modal Departments may be a key stakeholder in Joint Development projects. Any impacted modes will be a key partner to ensure development does not impact modal infrastructure or operations.
<b>External to MDOT</b>	
Other State Agencies	MDOT will partner with other state agencies, as appropriate, to advance Joint Development projects.
Federal Transit Administration ("FTA")	FTA-assisted Joint Development is any Joint Development project that uses FTA funding or property acquired with FTA funding. MDOT coordinates its Joint Development as applicable with FTA to ensure that the project satisfies FTA's Joint Development requirements.
Local Jurisdictions	Local jurisdictions are the local land use authority over State land and often control adjacent road networks and public space. Local jurisdictions are a key partner in developing site requirements and early site strategies to ensure potential future development meets local zoning and other regulations, as well as conforming with land use and comprehensive planning. Local jurisdictions should closely coordinate with MDOT to ensure Master Developments that involve Joint Development uphold the State goals for TOD and Joint Development while also administering its own development approval process.
Local Communities	Residents, community-based organizations, and businesses in communities adjacent to Joint Development projects are key stakeholders throughout the process. MDOT and its Joint Development partners will engage local communities throughout the Joint Development process.
Other Rail Authorities Having Jurisdiction	MDOT will seek to coordinate with other rail authorities having jurisdiction to define requirements and processes for external



Stakeholder	Role Summary
	review should the proposed joint development project potentially have impacts to the rail corridor or its zone of influence.

### Partnerships with Local Jurisdictions

In the pursuit of Joint Development, MDOT will work with local jurisdictions to coordinate pre-solicitation planning and site infrastructure needs and funding opportunities, defining community and jurisdictional goals and guiding principles, leveraging local economic development tools and strategies as well as resolving feasibility issues prior to solicitation as much as practically possible. For example, where amending land use and zoning regulations to better align with TOD objectives is necessary, MDOT may:

- Advocate for or initiate zoning amendments,
- Participate in and/or fund any necessary studies; and
- Provide technical assistance.

Through the course of planning and executing Joint Development, MDOT will work to include local development goals as well as community needs such as community and public service facilities as feasible. Defining these goals will occur in coordination with local jurisdictions and community partners through the pre-planning process.

### Coordination with State Agencies

MDOT will coordinate with key State agency partners outside of MDOT to bring state resource support for realizing TOD through Joint Development.

### Joint Development Partners

MDOT will be seeking, through Joint Development proposals, qualified development partners who have aligned interests in developing transit-oriented, mixed-use, mixed-income development at appropriate densities. MDOT views working with qualified developer partners as a key tool to advance TOD projects with shared costs and shared benefits to both parties. While MDOT will seek various methods to fund and finance the public infrastructure necessary to enable Joint Development, in collaboration with its local jurisdictional partners, MDOT expects its Joint Development partners to deliver high-quality TOD in accordance with the MDOT 657 Joint Development Policy and applicable local laws and land use policies.

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## ADDITIONAL AUTHORIZED DOCUMENTS

MDOT 657.1 Joint Development Principles  
MDOT 657.3 Joint Development Implementation



## Appendix A - Joint Development Process - Roles & Responsibility Matrix

#	Task	Joint Development Partner	Office of Real Estate and Development ("ORED")	Maryland Transit Administration ("MTA")	Office of Attorney General ("OAG")	State Highway Administration ("SHA")	Other MDOT Modal Departments (If Applicable)	Other State Departments	Local Jurisdiction	Local Communities
TOD Site Strategy	Solicited Joint Development									
	1-A Opportunity Identified	-	R/A	C	-	-	-	-	C	-
	2-A TOD Site Strategy	-	R/A	C	I	C	C	C	C	C/I
	Unsolicited Joint Development									
Solicitation	1-B Unsolicited Joint Development Proposal	R	A	I	I	I	I	-	I	-
	2-B Unsolicited Joint Development Proposal Assessment	C	R/A	C	I	C	C	C	C	C/I
	3 Complete Modal Internal Clearance Process	-	A	R	-	C	C	-	-	-
	4 Confirm Transit Requirements, Standards, and Specifications	-	R	R/A	C	C	C	-	C	-
Exclusive Negotiating Period & Development	5 Joint Development Go/No-Go Decision	-	R/A	C	I	I	I	I	I	I
	6 Draft Solicitation Package	-	R/A	C	C	C	C	C	C	-
	7 Issue Solicitation /or Request for Alternative Proposals (Unsolicited)	-	R/A	I	I	I	I	I	I	I
	8 Solicitation Submissions	R	A	I	I	I	I	-	-	-
Detailed Design & Closing	9 Submission Evaluations	I	R/A	C	I	I	I	C	C	-
	10 Developer Selection & Award	I	R/A	I	I	I	I	I	I	I
	11 Exclusive Negotiations Privilege (ENP) Agreement	R	A	C	C	I	I	I	-	-
	12-A Right of Entry Permit	-	A	R	-	-	-	-	-	-
Construction & Operations	12-B Development Plan Design	R/A	C	C	I	C	C	C	C	C/I
	12-C Draft Master Development Agreement (MDA)	C	A	C	R	-	-	C	-	-
	13-A MDA Negotiations	R	R/A	C	C	-	-	-	-	-
	13-B Development Plan Submission Review	C	A	R	I	C	C	C	-	-
Construction & Operations	14 MDA and Development Plan Settlement	R	R/A	C	C	-	-	-	-	-
	15 Project Approvals - Board of Public Works / FTA Concurrence, if applicable	I	R/A	C	C	-	-	C	-	-
	16 MDA Execution	R	R/A	I	C	I	I	I	I	I
	17 Detailed Design Review Process (~30% - 100% Design)	R	A	R	-	C	C	C	C	-
Construction & Operations	18 Developer-Led Planning Approvals	R/A	C	C	I	I	-	-	C	C/I
	19 Phased Closing Deliverables & Phased Closing									
	19-A Phased Ground Lease / Purchase Agreement Execution	R	R/A	C	C	-	-	-	-	-
	19-B Reciprocal Easement and Operating Agreement Execution	R	R/A	C	C	-	-	-	-	-
Construction & Operations	19-C Construction Agreement, as applicable	R	R/A	C	C	C	-	-	-	-
	19-D Easements, as applicable	R	A	R	C	C	-	-	-	-
	19-E Title Recording	C	A	R	C	-	-	-	C	-
	20 Issue Notice to Proceed	I	A	R	I	-	-	-	-	-
Construction & Operations	21 Construction	R/A	C	C	-	-	-	-	-	-
	22 Transit Infrastructure Monitoring & Inspection	C	C	R/A	-	-	-	-	-	-
	23 Transit Infrastructure Commissioning, Close-Out, and Handover	C	C	R/A	-	-	-	-	-	-
	24 Transit Infrastructure Operations	C	C	R/A	I	I	I	I	I	I
Construction & Operations	25 Post-Closing	R	A	R	C	-	-	-	-	-

### Legend:

#### Project Team

R	Responsible	The individual(s) who perform the work to complete the task. They are responsible for execution and implementation
A	Accountable	The individual who is ultimately answerable for the task or decision. They ensure completion but may delegate work. (Each task should have only one "A.")
C	Consulted	The individual(s) who provide input or expertise before a decision or action is made. Their feedback is required for informed decision-making.
I	Informed	The individual(s) who receive updates after a decision or action is taken. They are kept in the loop but do not contribute directly to execution.