An Economic Development Strategy for Greenbelt, MD

Submitted by:
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Submitted to:

The City of Greenbelt

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An Economic Development Strategy for Greenbelt, MD

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- An Economic Development Strategy for a Special Community

This Sage Policy Group, Inc. (Sage) report supplies an economic development strategy for the City of Greenbelt; a community characterized by its unusual start and development. The City of Greenbelt represents the first community in America developed as a federal housing venture.

From the beginning, it has been a community rich in amenities, offering businesses, schools, a City government, roads, and recreational facilities. Greenbelt is a planned community that is noted for its underpasses, interior walkways, system of inner courtyards, and one of America's first mall-type shopping centers. Greenbelt, MD is modeled after the English garden cities of the 19th century and adopted its name from the belt of green forest surrounding it.[1]

In order to craft this strategy, the Sage study team has combed through mounds of demographic and economic data, conducted focus groups and interviews, read previously produced reports, analyzed budgets, fashioned a SWOT analysis, and looked for relevant best practices in communities similar to Greenbelt. There were a number of challenges in generating recommendations for a community as historic and complex as Greenbelt, including:

1. Widely divergent visions of Greenbelt's economic development future, including separate visions held by certain stakeholders for Historic Greenbelt, Greenbelt West, and Greenbelt East;
2. The possible location of a new and massive FBI headquarters that would alter the economic and fiscal trajectory of Greenbelt, MD; and
3. An economic environment characterized by soft private investment and stiff competition for that investment.

- Recommendations

1. Support Owner-Occupied Housing Development in Greenbelt East and Greenbelt West

While Sage does not necessarily believe an increase in zoning density is necessary, we think it makes sense to emphasize owner-occupied units, including in the form of townhomes. According to the American Community Survey, Greenbelt's homeownership rate is just 46.2 percent, compared to more than 68 percent

[1] History of Greenbelt, MD, City of Greenbelt, MD, greenbeltmd.gov/DocumentCenter

statewide. The hope is that the next set of residents in Greenbelt feels just as committed to the city's future as do long-time residents in Historic Greenbelt and elsewhere. To the study team, this implies greater policy support for owner-occupied dwellings.

This new housing, particularly if it takes the form of townhomes or condominiums, would provide a vehicle by which to attract younger families. This housing may also appeal to FBI workers who move to the area if the headquarters should relocate near the Greenbelt Metro station.

In keeping with other successful Greenbelt communities, there should be requirements for substantial amounts of planned open space and other amenities such as play areas and other recreational facilities. We think the City should also impose architectural standards, including requiring the use of high quality materials such as brick. This likely means this new product won't be quite as affordable, but part of the goal of this new housing would be to diversify and help modernize the city's housing stock.

The City has $30,000 set aside to support economic development efforts. That level of funding will not support even a part time economic development professional. However, that funding could supply the resources for the City of Greenbelt to study residentially developable sites. Our research indicates that there is little opportunity to development new residential product in Greenbelt East, but such product could be added to form mixed-use sites at current commercial-use only areas. We recommend that the City use the $30,000 to fully catalogue potential opportunities for new residential development.

2. Provide Tax Breaks for Owner Occupants of Homes Constructed before 1980 Who Invest in Significant Upgrades

Many focus group participants expressed enormous satisfaction with the prevalence of affordable housing in Greenbelt, including in the form of co-op housing. However, several also expressed the view that many properties are not as well maintained as would be optimal and that the ongoing aging of residents could set the stage for housing stock deterioration given the growing propensity toward fixed incomes.

Accordingly, the study team recommends that the City offer tax breaks to resident owners of properties constructed before 1980 who invest more than $30,000 in their respective dwellings. The improvement plan would need to be approved by City government. The choice of the year 1980 is not arbitrary. Properties constructed prior to that year are less likely to offer central air conditioning (62.5% have it according to the 2011 American Housing Survey), have two or more bathrooms, and more than 1,500 square feet of living space.

After the physical improvement is completed to the City of Greenbelt's satisfaction (we think that the City's Department of Planning & Community Development should implement this), these properties would be allowed to keep their total City tax payment fixed at the previously established level for six years (two three-year cycles), at which time the tax payment would be subject to the standing assessed value.

This tax break should be made available for four years beginning on July 1st, 2015, which is the first day of FY2016. This means that conceivably, someone applying for this residential tax break four years after initiation of policy implementation could still be receiving a reduced tax bill roughly a decade from now.

We think that it is important that if the property is sold to another owner, that the tax break remain in place. Not allowing the tax break to remain in place could act as a deterrent to the original investment. The goal is to ensure sufficient investment in the City's residential base over the next decade. Over the next decade, the study team believes that more members of Generation Y, many of whom are currently in their early- to mid-20s, will be transitioning to homeownership. It is important that the City of Greenbelt's housing stock be competitive enough at that time to attract a sufficient share of young families.

3. Provide Tax Breaks to Catalyze Rejuvenation of Older Commercial Areas

According to NAI Michael, the office vacancy rate in Prince George's County stood at 18.2 percent at the end of the fourth quarter of 2013. That compares unfavorably with the 10 percent vacancy rate that characterized the Washington metropolitan area at that time.

In Greenbelt, vacancy stood at 26.8 percent, with more than 1,000,000 square feet vacant. Given the competition for tenants and the aging of Greenbelt's office stock, this represents a significant issue. Should vacancy continue to rise, Greenbelt could become home to a number of large, abandoned office buildings, which would emerge as eyesores and would diminish the aesthetic appeal of the city, as well as the tax base.

The study team proposes a tax break for owners of properties encompassing more than 16,000 square feet of office space (roughly the size needed to house 100 employees). Under the proposed tax break, owners who invest $10 million or more in their properties would be allowed to hold their level of tax payments constant for a period of six years. In other words, they would not pay additional taxes on the value of rendered improvements. Like the residential investment tax break detailed above, this tax break should be made available for a period of four years beginning July 1st, 2015.

4. Reconsider Redevelopment Plans at Beltway Plaza

Several years ago, developers submitted a conceptual site plan for Greenbelt Place at Beltway Plaza. According to various sources, a request was made to rezone 15.4 acres at the rear of Beltway Plaza from C-S-C zone (commercial shopping center) to the M-U-I (mixed use infill) zone.[2] The proposal also included plans for 700 multifamily dwelling units wrapped in midrise form as well as 22,000 square feet of commercial/restaurant space.

We think this plan for Beltway Plaza makes sense, particularly if a significant share of the proposed 700 units were slated for owner occupancy. Our preference for townhomes or condominiums over apartments may mean that fewer than 700 units can be developed. That should not be viewed as a problem. Even a development plan offering half as many units would help provide Beltway Plaza with a much-needed catalyst.

5. Strive for Change at Roosevelt Center

The Roosevelt Center is simply too important to Historic Greenbelt and the balance of the city to permit potential deterioration. For whatever reason, there is enormous dissatisfaction with current ownership and while there is not significant vacancy, there is evidence of rapid tenant turnover.

As a Plan A, the study team proposes the forging of an agreement between the City and the Center's owner to improve current tenant experiences. The City may want to attempt to convince ownership that lower rents would be better not only for the community, but for ownership. Excess rents lead to rapid turnover, which leads to lost rent due to vacancy and inconsistent patron experience. This is good for neither landlord nor the broader community.

Should negotiations with current ownership falter, we propose Plan B, which could include the following: 1) threats of eminent domain; 2) concerted code enforcement;

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[2] Beltway Plaza was in fact rezoned to M-U-I in the Approved Greenbelt Metro Area and MD-193 Corridor Sector Plan and Proposed Sectional Map Amendment.

and/or 3) other means by which to render the ownership experience unpleasant. In exchange for improvements, we think it makes sense for the City to grant tax breaks or offer additional inducements to improve tenant experiences and to accelerate investment in maintenance and physical improvements.

In this report, we have provided some ideas regarding how other communities deal with problematic landlords. Occupancy at Roosevelt Center remains high despite strained landlord-tenant relations. We suspect that this is because the Roosevelt Center is so visible and convenient to large segments of the community. The Roosevelt Center is also highly symbolic, and represents Greenbelt's front door. For this reason, we do not believe that the City of Greenbelt has the luxury of remaining passive and hoping for the best.

Conclusion

This report has put forth a set of recommendations to accentuate Greenbelt's economic strengths (e.g. location, charm, responsive City government) and to limit the impact of its weaknesses (e.g. older housing stock, several marginal commercial areas). The report also focuses upon opportunities available to Greenbelt, including the creation of a defined brand. Above all, the study team has been focused on helping to ensure the fiscal sustainability of Greenbelt, even in the face of possible loss of financial support from State and federal sources.

The proverbial 800-pound gorilla in the room is the looming announcement of a new FBI headquarters in Greenbelt. The City has already announced support for the FBI headquarters, and we agree – it would represent a major victory. While a number of key stakeholders worry that the new headquarters would undermine Greenbelt's quality of life, characterized by close-knit communities that enjoy their tranquility, we believe the FBI represents Greenbelt's way to have its cake and eat it, too.

Many FBI workers will use the Metro to arrive on site. That will help limit traffic impacts. Moreover, the economic and fiscal impacts of the new headquarters would provide the City with resources to invest in Historic Greenbelt, including in the form of additional street trees, maintenance of open space, and provision of more opportunities for children to play safely. There would also be additional resources to create more amenity-rich environments in Greenbelt East and Greenbelt West, which did not develop with the broad array of amenities that characterized Historic Greenbelt right from its origins.

An Economic Development Strategy for Greenbelt, MD

Introduction: Preserving History while Ensuring Vibrancy

This Sage Policy Group, Inc. (Sage) report supplies an economic development strategy for Greenbelt, MD. To craft this strategy, the study team did the following: participated in a public session with the Mayor and City Council, conducted five focus group sessions, compiled a combination of historic and contemporary data, developed a SWOT analysis, and produced a set of recommendations susceptible to implementation with fidelity.

While the objective was to develop a strategy for the City of Greenbelt, focus group discussions, a review of comprehensive plans, and deep dives into Census data reveal that there are at least three Greenbelts: Historic or Old Greenbelt, Greenbelt East, and Greenbelt West. These three parts of Greenbelt are associated with different histories, separate demographics, distinct housing stocks, and therefore discrete opportunities for public improvements and private investment.

More than anything, the study team sought to develop a strategy that helps the City of Greenbelt remain financially viable. A number of surrounding communities are presently experiencing significant private investment, positioning them to attract more commercial businesses and potential residents, expanding their tax bases. One of them, College Park, is experiencing a complete transformation of its downtown area. Other communities that are evolving rapidly include National Harbor, parts of Laurel, Columbia, Shady Grove, Hyattsville, Bowie, and Frederick.

While Greenbelt, MD has been a success story to date, like all communities there is a need to attract new residents and employers to retain vitality and support tax base retention and growth. Expanding competition from other communities could serve to deflect prospective residents and businesses away from Greenbelt, which in turn would result in a stagnant tax base or worse. The specters of sequestration, further federal government downsizing, and diminished support from the fiscally constrained State of Maryland represent additional factors to consider.

At the same time, the Sage study team remained mindful of the fact that many people do not seek radical transformation and large-scale development in Greenbelt. Many with whom we spoke expressed a desire for only incremental improvement, though there were a handful of people who wanted to see more rapid economic development, particularly in the form of more extensive retail, dining, and entertainment opportunities.

Rapid change may be on the way in any case. In late-July 2014, the General Services Administration (GSA), which oversees the utilization of federal office space, named two sites in suburban Maryland and one in northern Virginia as the three finalists for the new FBI headquarters. The three sites on the shortlist are a warehouse complex in Franconia, Virginia, the site of a former mall in Landover, MD, and the Greenbelt Metro station.

Were the GSA to select Greenbelt, the development of a large-scale mixed-used complex would be triggered. Under the plan, the new mixed-use transit-oriented development would replace the parking lot at the station. The FBI would occupy five buildings, and other offices, apartments, retail, and a hotel would take up the balance of the site. A central plaza would serve as the area's main public space. The site would accommodate 3,678 parking spaces for the potential FBI facility, which amounts to roughly 1 parking spot for every 3 FBI employees. This implies that the majority of FBI workers will use mass transit. According to published sources, to discourage FBI employees from using general public Metro parking, the Greenbelt Metro would institute a $14.50 per day non-rider fee.[3]

The attraction of the FBI to Greenbelt would be, in the words of many, a "game-changer". However, it would have more impact on some parts of Greenbelt than others. Accordingly, the study team fashioned its analysis and recommendations to be relevant to both conceivable scenarios: FBI in Greenbelt and FBI elsewhere.

This report is organized as follows. The next section provides data and discussion characterizing the economics, demographics, and finances of Greenbelt. The study team then summarizes the discussions that transpired during five separate focus group discussions and the public session, which involved a mix of local opinion leaders, business owners, executives at major institutional employers located in and around Greenbelt, real estate managers, and brokers. A SWOT discussion ensues, in part based upon the statements of focus group participants. The report concludes with recommendations and associated rationales.

[3] www.thesentinel.com, 15 Oct 2014, Greenbelt city council discusses environmental impact of FBI headquarters, sourced on November 22, 2014.

Greenbelt History and Statistical Profile

- Greenbelt: A Strong Community Culture Rooted in History

Greenbelt, MD is remarkable in many ways. For one, its history is nearly unique. President Franklin Delano Roosevelt's Resettlement Administration created Greenbelt as part of its "green belt" town program. Greenbelt, MD was one of three such communities to be created; the other two are Greenhills outside of Cincinnati and Greendale outside of Milwaukee. According to the Greenbelt Museum, these three communities were developed to provide work relief for the unemployed, offer affordable housing for low-income workers, and emerge as models for future town planning in America.

The construction of Greenbelt began during the fall of 1935. The homes built for Greenbelt included apartment buildings, row homes, and a handful of free-standing prefabricated homes. By 1937, 885 units were nearing completion. The Resettlement Administration received more than 5,000 applications from interested families. Applicants were required to be married, earn between $800 and $2,200 per annum, and the husband had to be employed. The town was not racially integrated, but was integrated religiously, with 63 percent associated with Protestantism, 30 percent with Catholicism, and 7 percent with Judaism.[4]

Greenbelt is a community in which people are frequently connected through associations. The town's initial residents formed more than 30 organizations during the first year, including churches, citizen associations, a credit union, a journalism club, athletic clubs, six women's clubs, youth clubs, and a cooperative organizing committee.

All of the businesses in Greenbelt were operated cooperatively. Residents purchased shares in Greenbelt Consumer Services, which operated a grocery store, gas station, variety store, movie theater, beauty salon, barbershop, and valet.

Housing shortages emerged during World War II, and another 1,000 additional row homes were constructed for defense workers in 1941, effectively doubling the town's size. The federal government continued to operate Greenbelt as a low-income rental community until 1952 when it was sold. With limited exceptions, a

[4] Greenbeltmuseum.org/history

cooperative formed by residents purchased all of the homes. Today, that co-op is called Greenbelt Homes, Inc. The entity owns and manages 1,600 homes, common areas, and woodlands.

- The Past Half Century

Greenbelt is located just 12 miles from the nation's capital. In its early years, the city was relatively isolated since neither the Baltimore-Washington Parkway nor the Beltway (I-495) existed. The Baltimore-Washington Parkway opened in stages to traffic between 1950 and 1954. The first section of the 64-mile long Washington Beltway opened on December 21, 1961. The highway was completed on August 17, 1964.

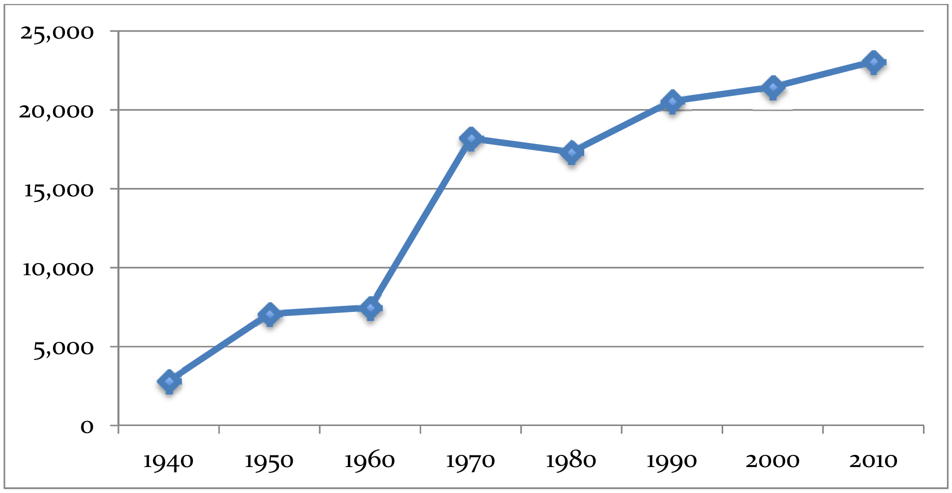
By the mid-1960s, Greenbelt was no longer isolated, but for a variety of reasons, including a desire by Greenbelt's original residents to maintain the original character of the community, Greenbelt did not develop as rapidly as many other Washington metropolitan area communities. An ongoing desire to leave Greenbelt fundamentally unchanged was expressed by many participants during numerous focus groups conducted by the study team.

- Population, Income & Poverty

By 2010, Greenbelt's population had surpassed 23,000 (23,068 according to decennial Census data). Since 1970, the city has added fewer than 5,000 people (through 2010), which translates into slightly more than 100 people added per year. Over that same period, the population of the Washington metropolitan area expanded from 3.14 million to 5.48 million, representing population growth of roughly 75 percent. Population growth in Greenbelt over the course of this four-decade period was in the range of 27 percent.

In other words, in percentage terms, Greenbelt's population growth since 1970 has been roughly one-third of the balance of the region, in part because of a desire to retain tranquility in Greenbelt. An outsider armed only with a map might have been surprised that this was possible given the central location of Greenbelt. Not only is there a Greenbelt Metro stop that forms part of the Green Line, but Greenbelt is directly served by a number of major roadways, including I-95, I-495, and the Baltimore-Washington Parkway. Exhibit 1 depicts overall population dynamics in Greenbelt, MD since 1940.

Exhibit 1. Greenbelt Maryland Total Population 1940-2010



Source: U.S. Census Bureau, Tri-County Regional Planning Commission.

Exhibits 2 and 3 provide a sense of Greenbelt's population growth relative to other geographies. The exhibit stands for the proposition that while Greenbelt's population has expanded, it has done so at a slower pace than a number of other key Prince George's County communities.

While some may view this in a negative light, including local realtors and retailers among others, there are undoubtedly some who perceive slow population growth as reflecting a successful slow growth policy implementation.

Exhibit 2. Population Change, 2000-2012

	2000	2012	Net Change	Percent Change
U.S.	281,421,906	309,138,711	27,716,805	9.85%
Maryland	5,296,486	5,785,496	489,010	9.23%
Prince George's County	801,515	865,443	63,928	7.98%
Bowie	50,269	55,059	4,790	9.53%
College Park	24,657	30,478	5,821	23.61%
Greenbelt	***21,456***	***23,113***	***1,657***	***7.72%***
Hyattsville	14,733	17,549	2,816	19.11%

Source: U.S. Census Bureau: 2000 Census, 2008-2012 ACS 5-year estimates

Exhibit 3. Total Households, 2000-2012

	2000	2012	Net Change	Percent Change
U.S.	115,904,641	131,642,457	15,737,816	13.58%
Maryland	2,145,283	2,378,932	233,649	10.89%
Prince George's County	302,378	327,803	25,425	8.41%
Bowie	18,718	20,313	1,595	8.52%
College Park	6,245	7,172	927	14.84%
Greenbelt	***10,180***	***10,465***	***285***	***2.80%***
Hyattsville	5,795	6,424	629	10.85%

Source: U.S. Census Bureau: 2000 Census, 2008-2012 ACS 5-year estimates

Slow population growth often translates into slow tax base growth, which in turn frequently translates into rising taxes and fees. Another way to view this is from the perspective of age. According to the Census Bureau's American Community Survey (ACS), between 2000 and 2012, Greenbelt experienced a loss in population in the 20-24 age group, the 25-34 age group, and in the 35-44 age group. These age groups are associated with people approaching their prime income earning years, and their disappearance does not bode well for Greenbelt's long-term future. At the same time, the local population aged 60 or older expanded by nearly 41 percent in just 12 years, and the group aged 55 to 59 expanded by more than 85 percent.

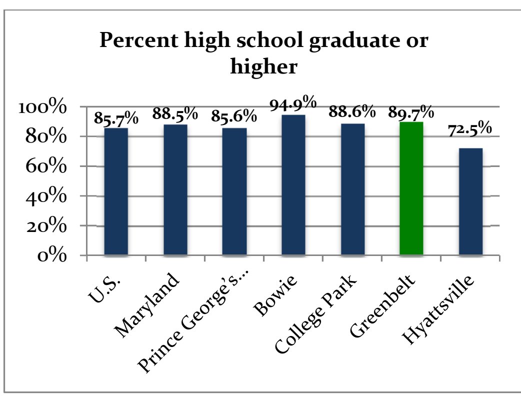
Exhibit 4. Greenbelt Population by Gender and Age, 2000 v. 2012

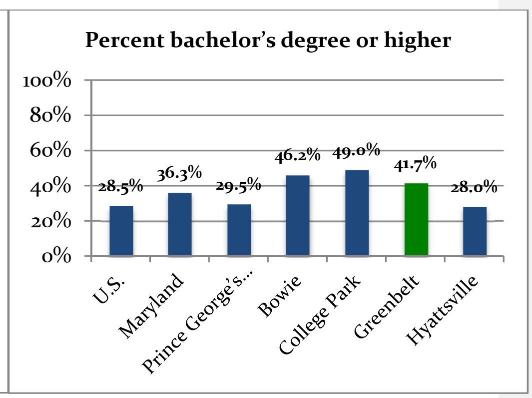
Population	2000	2012	Net Change	Percent Change
Total Population	*21,456*	*23,113*	*1,657*	*7.72%*
Gender				
Male	10,272	10,828	556	5.41%
Female	11,184	12,285	1,101	9.84%
Age				
Under 9	2,786	2,837	51	1.83%
10 to 19	2,381	2,812	431	18.10%
20 to 24	2,203	1,880	-323	-14.66%
25 to 34	4,541	4,325	-216	-4.76%
35 to 44	3,850	3,370	-480	-12.47%
45 to 54	2,811	3,448	637	22.66%
55 to 59	846	1,568	722	85.34%
60 and over	2,038	2,873	835	40.97%
Median Age	*31.9*	*34.0*	--	--

Source: U.S. Census Bureau: 2000 Census, 2008-2012 ACS 5-year estimates

Greenbelt's population is relatively well educated. Only about 10 percent of the community's adult population lacks a high school degree and the proportion of residents with a bachelor's degree is well above the countywide average (42% vs. 30%).

Exhibit 5. Percentage of Population 25 years and over by Select Levels of Educational Attainment, 2012





Source: U.S. Census Bureau: 2008-2012 ACS 5-year estimates

Community incomes, however, are not particularly high. Greenbelt's median household income stood at less than $60,000/annum during the 2000-2012 ACS survey period. This is considerably less than the countywide average of $73,600 and the statewide average as well. This may seem surprising given the strong correlation between educational attainment and income, but Greenbelt is known for one thing that many Washington area communities are not – housing affordability. Due to a combination of historic origins, public policy, and market dynamics, housing in Greenbelt is not as expensive as in many other communities. This helps to attract many families that are highly educated, but do not necessarily work in high-wage occupations.

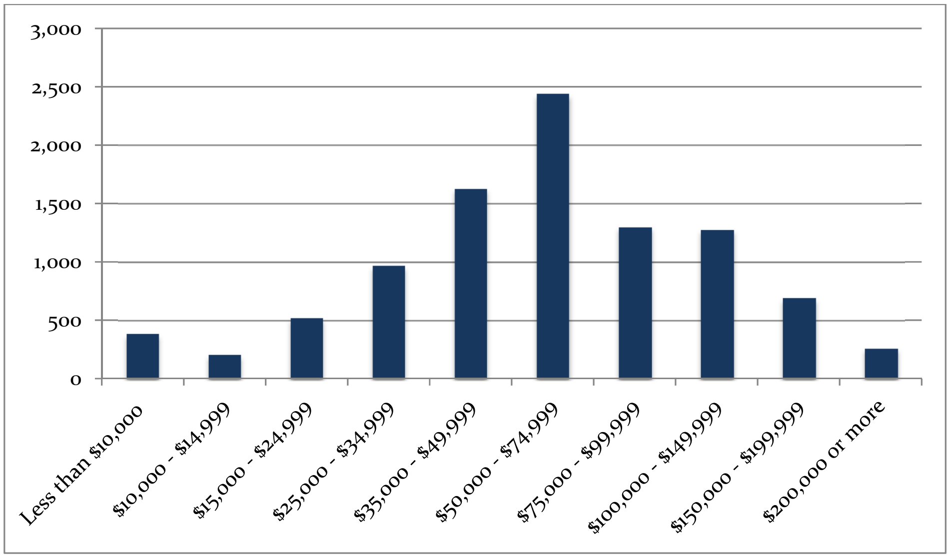
Exhibit 6. Median Household Income, 2000 v. 2012

	2000	2012	Percent Change
U.S.	$41,994	$53,046	26.3%
Maryland	$52,868	$72,999	38.1%
Prince George's County	$55,256	$73,568	33.1%
Bowie	$76,778	$105,936	38.0%
College Park	$50,168	$60,402	20.4%
Greenbelt	***$46,328***	***$59,399***	***28.2%***
Hyattsville	$45,355	$56,534	24.7%

Source: U.S. Census Bureau: 2000 Census, 2008-2012 ACS 5-year estimates.

This can be observed in Exhibit 7, which indicates that the category of income associated with the highest Greenbelt household share is the $50,000-$74,999 category. While this represents a relatively high-income threshold by national standards, the same is not true by Prince George's County or Maryland standards. Moreover, Exhibit 8 provides statistical detail indicating that Greenbelt's poverty rate (7.4%; 2008-2012) is also high by Prince George's County (5.8%) and Maryland (6.5%) standards, though not by national standards (10.9%).

Exhibit 7. Greenbelt Household Income Distribution, 2012



Source: U.S. Census Bureau, 2008-2012 ACS 5-year estimates

Exhibit 8. Poverty Rates (Families), 2000 v. 2012

	2000	**2012**
U.S.	9.2%	10.9%
Maryland	6.1%	6.5%
Prince George's County	5.3%	5.8%
Bowie	0.7%	1.2%
College Park	4.2%	4.0%
Greenbelt	***6.0%***	***7.4%***
Hyattsville	7.9%	5.7%

Source: U.S. Census Bureau: 2000 Census, 2008-2012 ACS 5-year estimates

- Housing Stock & Dynamics

Greenbelt's housing stock can be characterized as relatively old and affordable. This is consistent with the relatively slow pace of population growth over the course of decades. Of the city's roughly 10,000 units, approximately 12.6 percent were built prior to 1939 (Exhibit 9).[5] The corresponding share in Prince George's County is less than 5 percent. A large group of Greenbelt homes were built between 1960 and 1999, which means that a relatively small number of units are

[5] Per the City's approved FY2015 budget, in 2013, there were 9,940 dwelling units in Greenbelt. Census Bureau data indicate a slightly larger number of units for the Census-designated area known as Greenbelt.

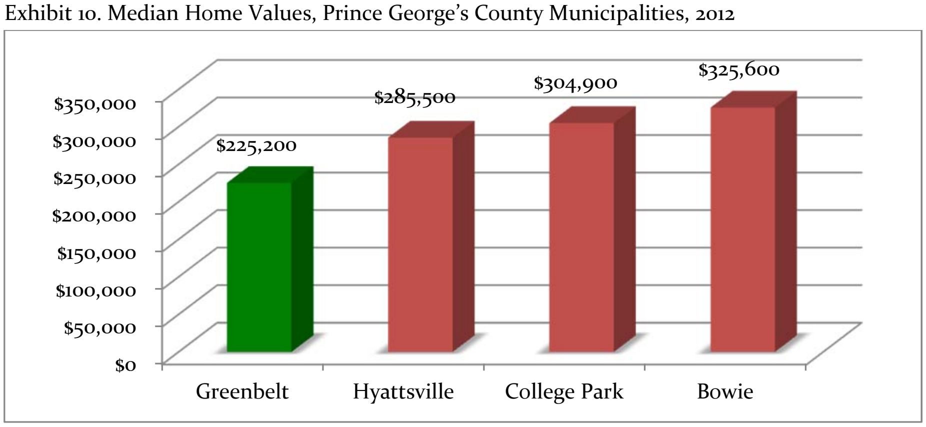
less than 15 years old. As indicated by Exhibit 10, Greenbelt also represents a relative oasis of affordability in the Washington metropolitan area and in Prince George's County.

Exhibit 9. Home Structure by Year Built, Prince George's County & Municipalities, 2012

	Prince George's County	Bowie	College Park	Greenbelt	Hyattsville
Total housing units	*327,803*	*20,313*	*7,172*	***10,465***	*6,424*
2005 or later	924	12	122	**0**	0
2000 to 2004	34,765	2,210	1,014	**187**	489
1990 to 1999	43,616	5,108	395	**1,109**	66
1980 to 1989	43,679	3,499	434	**1,340**	210
1970 to 1979	52,913	1,843	681	**2,538**	719
1960 to 1969	69,960	6,991	1,234	**2,329**	846
1950 to 1959	45,428	378	1,612	**667**	1,502
1940 to 1949	20,432	90	816	**979**	1,397
1939 or earlier	16,086	182	864	**1,316**	1,195
Median Year Structure Built	1972	1982	1962	**1970**	1954

Source: U.S. Census Bureau: 2008-2012 ACS 5-year estimates

Exhibit 10. Median Home Values, Prince George's County Municipalities, 2012



Source: U.S. Census Bureau: 2008-2012 ACS 5-year estimates

- Employment and Industry

According to U.S. Census data, Greenbelt's labor force numbers roughly 14,500 people. An estimate from 2012 indicated that the community's unemployment rate was 5.3 percent, which at that time was well below the national average.

However, not all employment dynamics have been positive. Unemployment is measured by place of residence, and Greenbelt residents have been able to participate in what has been, until recently, amongst the most resilient, dynamic, and deepest labor markets in America. More recently, however, sequestration and other factors have taken their toll on the Washington area employment market, which is now among the slower expanding labor markets in the nation.

If one analyzes employment within Greenbelt itself, the news is more alarming. Between 2005 and 2011, employment by place of work in Greenbelt declined by nearly 3,000 jobs even as it expanded in Maryland and Prince George's County (albeit slowly). This suggests the presence of under-utilized commercial property and the presence of excess vacancy in both office and retail segments. Indeed, several focus group stakeholders indicated that vacancy was an issue in Greenbelt and that certain properties, including large office buildings, were becoming less competitive over time with respect to having the capacity to attract new tenants. Exhibit 12 provides relevant statistical detail regarding employment dynamics between 2005 and 2011 for several relevant geographies.

Exhibit 11. Employment Status of Workers, 2012

	Maryland	Prince George's County	Bowie	College Park	Greenbelt	Hyattsville
Population 16 years and over	4,598,714	684,215	42,782	28,356	**18,659**	14,114
In labor force	3,199,290	506,570	32,981	15,109	**14,472**	10,784
Civilian labor force	3,171,064	503,343	32,563	15,071	**14,459**	10,731
Employed	2,924,344	456,959	30,488	13,628	**13,694**	10,029
Unemployed	246,720	46,384	2,075	1,443	**765**	702
Armed forces	28,226	3,227	418	38	**13**	53
Not in labor force	1,399,424	177,645	9,801	13,247	**4,187**	3,330

Source: U.S. Census Bureau: 2008-2012 ACS 5-year estimates

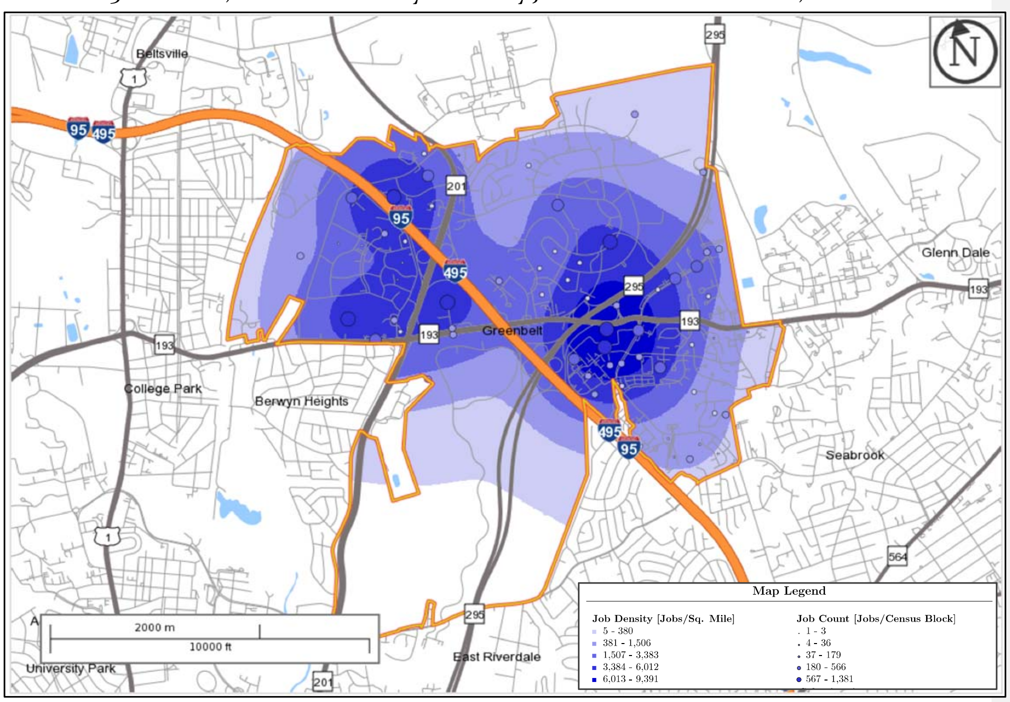
Exhibit 12. Total Employment, All Industries, 2005 & 2011

	2005	*2011*	*% Chg.*
Maryland	2,168,653	2,266,902	4.5%
Prince George's County	273,044	282,664	3.5%
Bowie	12,783	13,461	5.3%
College Park	21,133	21,838	3.3%
Greenbelt	***15,011***	***12,164***	***-19.0%***
Hyattsville	5,476	6,699	22.3%

Source: U.S. Census Bureau. 2013. OnTheMap Application. Longitudinal-Employer Household Dynamics Program. Notes: 1. Numbers represent individuals employed in, though not necessarily living in, the geographic area. 2. Numbers represent primary jobs, not total jobs. Primary Jobs: Public and private-sector jobs, one job per worker. A primary job is the highest paying job for an individual worker.

Exhibit 13 depicts Greenbelt in a different way. The map highlights the concentrated nature of employment in Greenbelt, with major job concentrations adjacent to I-95 and surrounding the intersection of the Baltimore-Washington Parkway (295) and Route 193.

Exhibit 13. Greenbelt, Counts and Density of Primary Jobs in Work Selection Area, 2011



Source: U.S. Census Bureau. 2013. OnTheMap Application. Longitudinal-Employer Household Dynamics Program. Notes: Numbers represent primary jobs, not total jobs. Primary Jobs: Public and private-sector jobs, one job per worker. A primary job represents the highest paying job for an individual worker.

Exhibit 14 provides an elaborate breakdown of the industrial categories where Greenbelt residents work (home area) and of the jobs available within the city itself. While these data are three years old, industrial/occupational shifts tend to be glacial in pace. The data indicate that more than half of Greenbelt residents work in educational services, health care/social assistance, public administration, or professional services. The concentration of professional service jobs within city limits is large, with the professional/scientific/technical services share exceeding one-third. Retail trade, accommodation and food services (e.g. hotels and restaurants), health care, and educational services represent significant employers within Greenbelt.

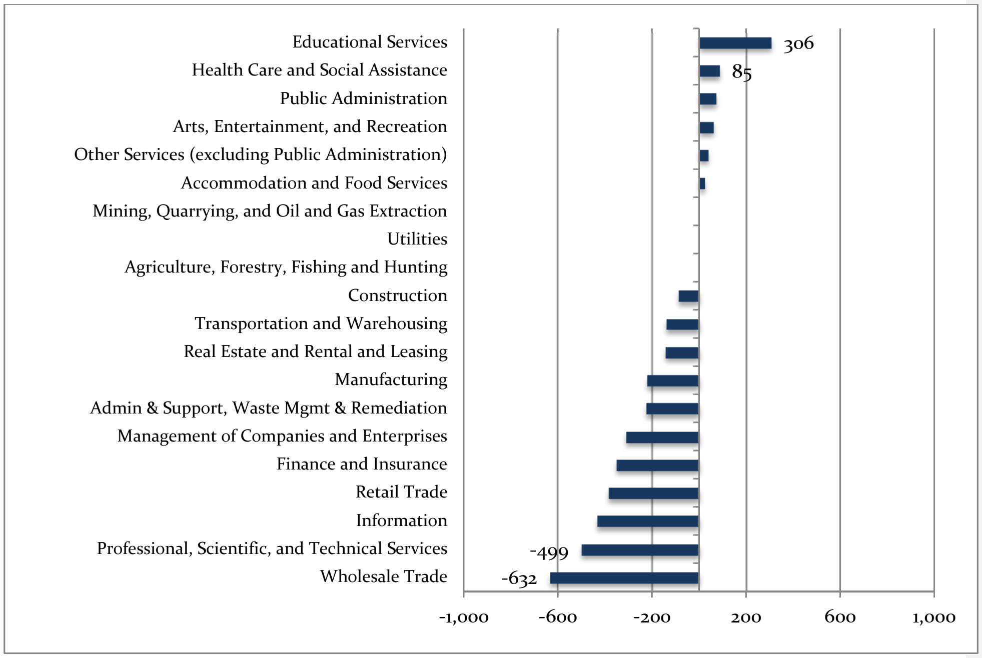
Exhibit 14. Greenbelt Employment by Industry, 2011

Industry	Work Area		Home Area	
	Count	*Share*	*Count*	*Share*
Agriculture, Forestry, Fishing and Hunting	0	0.0%	3	0.0%
Mining, Quarrying, and Oil and Gas Extraction	10	0.1%	2	0.0%
Utilities	0	0.0%	29	0.3%
Construction	35	0.3%	389	4.0%
Manufacturing	330	2.7%	201	2.1%
Wholesale Trade	113	0.9%	218	2.2%
Retail Trade	1,328	10.9%	818	8.4%
Transportation and Warehousing	35	0.3%	279	2.9%
Information	151	1.2%	247	2.5%
Finance and Insurance	521	4.3%	264	2.7%
Real Estate and Rental and Leasing	262	2.2%	181	1.9%
Professional, Scientific, and Technical Services	4,245	34.9%	1,225	12.5%
Management of Companies and Enterprises	389	3.2%	75	0.8%
Administration & Support, Waste Management and Remediation	858	7.1%	676	6.9%
Educational Services	1,022	8.4%	1,299	13.3%
Health Care and Social Assistance	1,065	8.8%	1,277	13.1%
Arts, Entertainment, and Recreation	83	0.7%	94	1.0%
Accommodation and Food Services	1,098	9.0%	724	7.4%
Other Services (excluding Public Administration)	240	2.0%	512	5.2%
Public Administration	379	3.1%	1,248	12.8%
Total	**12,164**	**100%**	**9,761**	**100%**

Source: U.S. Census Bureau. 2013. OnTheMap Application. Longitudinal-Employer Household Dynamics Program. Notes: Numbers represent primary jobs, not total jobs. Primary Jobs: Public and private-sector jobs, one job per worker. A primary job is the highest paying job for an individual worker.

Exhibit 15 disaggregates industry performance over time and reflects the large numbers of jobs lost among distributors, professional services, information providers (e.g. newspapers and magazines), retail, finance, and other sectors. To the extent that there has been job growth, it has been in institutional categories (e.g. education, health, government).

Exhibit 15. Growth in Greenbelt Employment by Industry Sector, 2005-2011



Source: U.S. Census Bureau. 2013. OnTheMap Application. Longitudinal-Employer Household Dynamics Program. Notes: 1. Numbers represent individuals employed in, though not necessarily living in, the geographic area. 2. Numbers represent primary jobs, not total jobs. Primary Jobs: Public and private-sector jobs, one job per worker. A primary job is the highest paying job for an individual worker.

Exhibit 16 indicates Greenbelt's major employers. These include the City itself, Eleanor Roosevelt High School, and a number of key private employers, such as the prominent developer Bozzuto & Associates, Orbital Sciences Corporation, and Presidio Network Solutions.

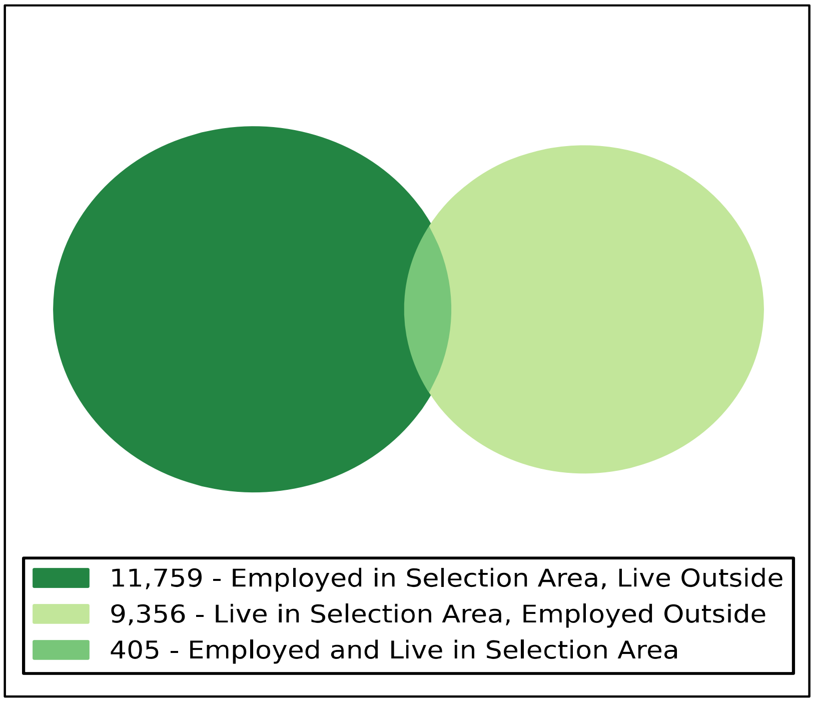
Exhibit 16. Major Employers in Greenbelt, 2013

Employer	Employees	Rank	% of Total City Employment
City of Greenbelt	446	1	7.3%
Eleanor Roosevelt High School	250	2	4.1%
Atlanta Restaurant Partners	248	3	4.0%
Bozzuto & Associates	210	4	3.4%
Orbital Sciences Corp.	208	5	3.4%
Target Corporation	165	6	2.7%
Presidio Network Solutions Inc.	150	7	2.4%
Springhill Lake Hotel Partners	150	7	2.4%
Columbus Technologies & Services Inc.	146	8	2.4%
Giant of Maryland, LLC	135	9	2.2%
ITT Corp	120	10	2.0%
Total	**2,228**		**36.3%**

Source: City of Greenbelt, 2013 Comprehensive Annual Financial Report (CAFR). Note: data from employers who made information available.

Exhibit 17 indicates something very interesting about Greenbelt and perhaps something a bit surprising – very few people who live in Greenbelt work in Greenbelt and vice versa. The dark green circle represents people employed in Greenbelt, but live outside city limits. The lighter-colored circle represents people who live in Greenbelt, but work elsewhere. Notice the tiny degree of overlap.

Exhibit 17. Greenbelt Inflow/Outflow Job Counts, 2011



Source: U.S. Census Bureau. 2013. OnTheMap Application. Longitudinal-Employer Household Dynamics Program. Notes: 1. The relative size of the Venn diagram circles represents the number of workers living and working in the City of Greenbelt. The size of the intersection area represents the count of workers that both live and work in the City of Greenbelt. 2. Numbers represent *primary* jobs, not total jobs. Primary Jobs: Public and private-sector jobs, one job per worker. A primary job is the highest paying job for an individual worker.

As indicated by Exhibit 18, the most up-to-date data indicate that only about 400 people both live and work in Greenbelt. Despite that, the commutes of Greenbelt residents isn't particularly lengthy – about 30 minutes on average.

Exhibit 18. Greenbelt Labor Market Details, 2011

Area Labor Market Size (Primary Jobs)	***Count***	***Share***
Employed in Greenbelt	12,164	-
Living in Greenbelt	9,761	-
Net job inflow	2,403	-
In-Area Labor Force Efficiency		
Living in Greenbelt	9,761	100.0%
Living and employed in Greenbelt	405	4.1%
Living in area but employed outside Greenbelt	9,356	95.9%
In-Area Employment Efficiency		
Employed in Greenbelt	12,164	100.0%
Employed and living in Greenbelt	405	3.3%
Employed in area but living outside Greenbelt	11,759	96.7%

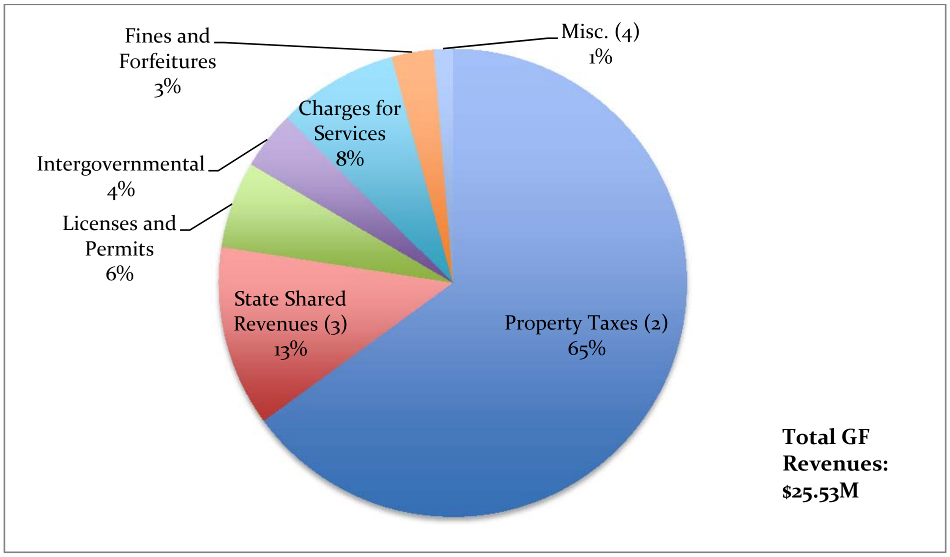
Source: U.S. Census Bureau. 2013. OnTheMap Application. Longitudinal-Employer Household Dynamics Program.
Notes: 1. Numbers represent *primary* jobs, not total jobs. Primary Jobs: Public and private-sector jobs, one job per worker. A primary job is the highest paying job for an individual worker.

- An Analysis of the City Tax Base and Budgets

Real property tax rates have generally been creeping higher at the County and City levels. Five years ago, during the 2009-2010 tax year, the County's property tax rate for the City of Greenbelt was $0.784/$100 of assessed value. That year, the City's own tax rate was $0.786/$100. Those tax rates now stand at $0.819 and $0.8125, respectively, according to information provided by the State of Maryland.

As Exhibit 19 indicates, like many local governments, the City of Greenbelt is heavily dependent upon real property tax revenues, which form roughly two-thirds of the City's General Fund. If the State were to reduce support for Maryland municipalities, which seems possible given recent disappointments regarding State tax collections, the level of dependence would climb.

Exhibit 19. City of Greenbelt General Fund Revenues -Year Ended June 30, 2013 (1)



Source: City of Greenbelt, Comprehensive Annual Financial Report (CAFR), 2013.
Notes: 1. Data presented on budgetary basis. 2. Includes additions & abatements, penalties & interest, payments in lieu of taxes, and tax credit for elderly. 3. Includes admissions & amusements, highway, hotel/motel, and income tax. 4. Revenues from the following categories are combined in "Misc.": Miscellaneous ($328,000) and Interest ($4,000).

This level of dependence becomes even more apparent when one considers how large a share real property tax revenues represent of total Greenbelt tax revenues. In FY2004, property taxes represented less than 73 percent of City of Greenbelt tax collections. By FY2013, this share had risen to nearly 84 percent.

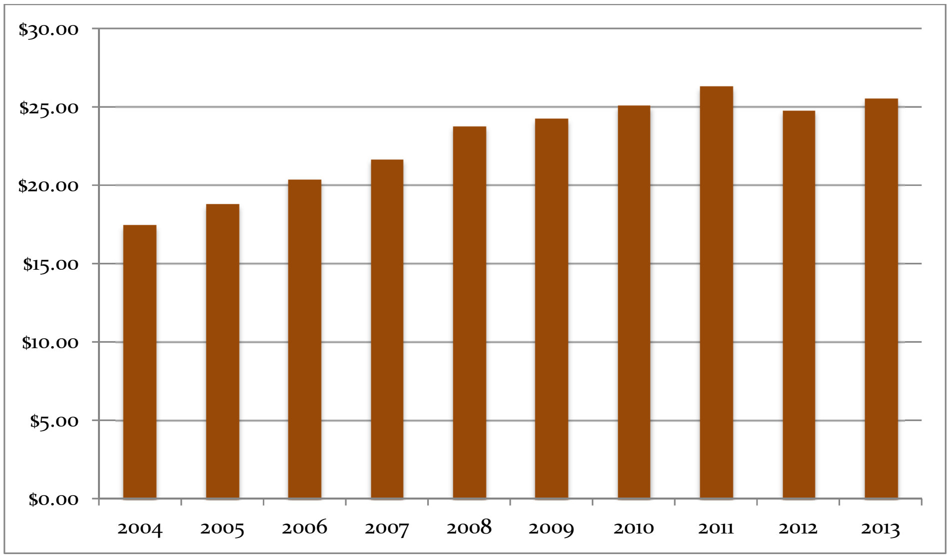
Exhibit 20. City of Greenbelt Property Tax Revenues as a Share of Total Tax Revenues (Millions $), FY2004-FY2013

Fiscal Year	Property Tax Revenues	Total Tax Revenues	Property Taxes % of Total Tax Revenues
2004	$9.68	$13.28	72.9%
2005	$10.70	$14.28	74.9%
2006	$12.30	$15.95	77.1%
2007	$13.22	$16.90	78.3%
2008	$15.12	$18.70	80.9%
2009	$15.99	$19.37	82.6%
2010	$17.16	$20.04	85.6%
2011	$17.20	$20.18	85.2%
2012	$16.23	$19.43	83.5%
2013	$16.58	$19.77	83.9%

Source: City of Greenbelt, Comprehensive Annual Financial Report (CAFR), 2013.

Not surprisingly, slow population growth coupled with a loss of jobs has caused the City's tax base to stagnate, as reflected in Exhibit 21. By FY2013, City of Greenbelt general fund revenues continued to fall short of FY2011 levels and have not risen significantly since FY2008.

Exhibit 21. City of Greenbelt General Fund Revenues, (Millions $), FY2004-FY2013

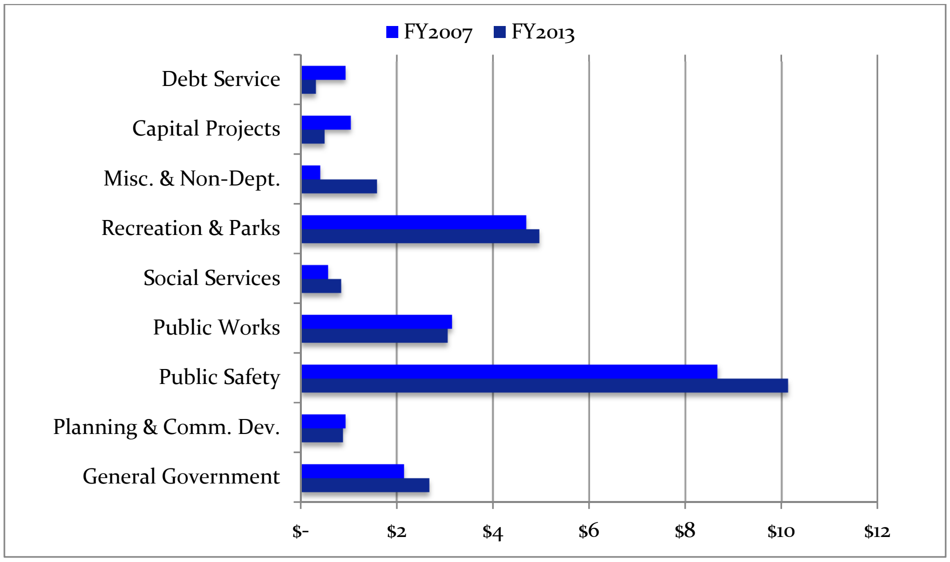


City of Greenbelt, Comprehensive Annual Financial Report (CAFR), 2013.

Exhibit 22 provides statistical detail regarding how the City spends its resources and how its allocations have shifted over time. By 2013, Greenbelt spent less on planning and community development, public works, capital projects, and debt service than it did the six years prior. Categories in which the level of expenditure rose included general government, public safety, recreation/parks, and social services.

It is possible that expanding amounts of expenditure in public safety and social services categories point to some emerging community issues. The aging of the population also likely contributes to growing outlays in these categories.

Exhibit 22. City of Greenbelt, Governmental Expenditures by Function (Millions $)



	FY2007	FY2013
General Government	$2.15	$2.67
Planning & Comm. Dev.	$0.93	$0.88
Public Safety	$8.67	$10.12
Public Works	$3.14	$3.05
Social Services	$0.58	$0.84
Recreation & Parks	$4.69	$4.96
Misc. & Non-Dept.	$0.41	$1.59
Capital Projects	$1.04	$0.49
Debt Service	$0.93	$0.32
Total Governmental Expenditures	$22.53	$24.92

Source: City of Greenbelt, Comprehensive Annual Financial Report (CAFR), 2013.

The Three Greenbelts

- A Tale of Three Sections

During the study team's multiple focus group sessions, it quickly became apparent that economically and socially, there is more than one Greenbelt. Broadly, stakeholders have a tendency to divide the community into three discrete areas: Historic or Old Greenbelt, Greenbelt East, and Greenbelt West. This section of the report provides statistical detail and discussion regarding the perceptible differences between the three Greenbelts.

- Using Census Tracts to Analyze Greenbelt Divisions

Five census tracts (as defined by the 2010 Census) cover the majority of Greenbelt's city boundary, though city limits also overlap with portions of several other census tracts.

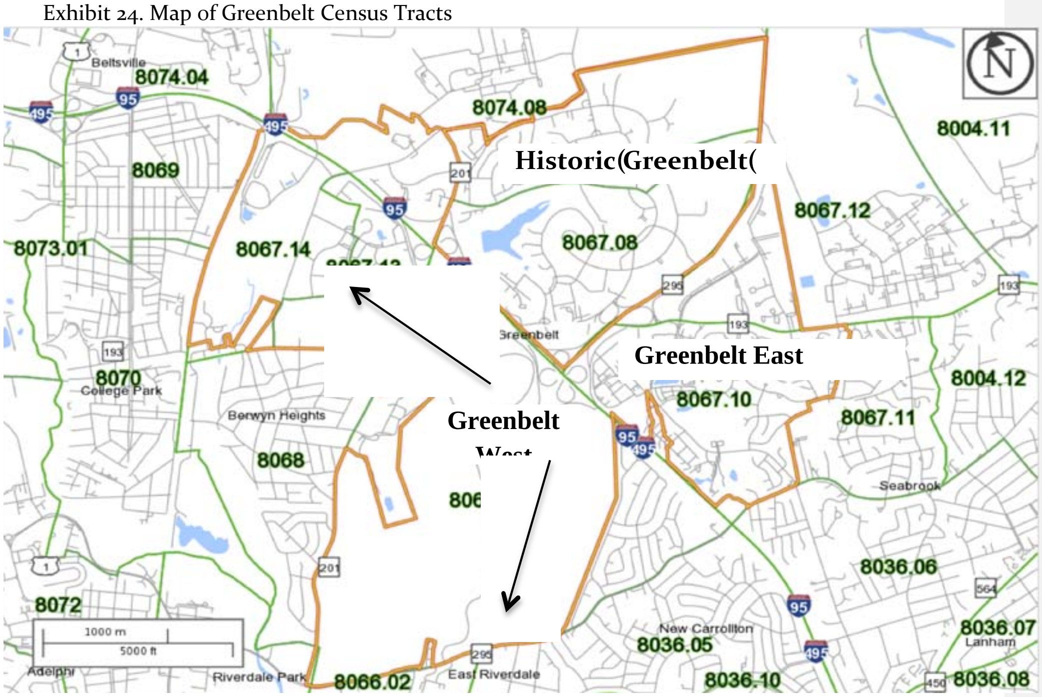
Exhibit 23. Census Tracts Pertinent to the City of Greenbelt

8067.06
8067.08
8067.10
8067.13
8067.14[6]
8074.08 (partial)
8067.12 (partial)

Historic Greenbelt encompasses all of census tract 8067.08 and part of census tract 8074.08. Greenbelt East encompasses almost all of census tract 8067.10 and a small portion of census tract 8067.12. Greenbelt West encompasses most of census tracts 8067.06, 8067.14, and 8067.13, and stretches into small portions of census tract 8074.08 to the north.

[6] The 2010 census tracts 8067.13 and 8067.14 were formerly a single census tract (8067.03) in the 2000 Census.

Exhibit 24. Map of Greenbelt Census Tracts



Source: U.S. Census Bureau. 2013. OnTheMap Application. Longitudinal-Employer Household Dynamics Program.

Exhibits 25 and 26 reflect how dissimilar some of these sub-regions of Greenbelt are from others demographically. For instance, in Census tract 8067.13, which forms part of Greenbelt West, the median age is just 28.2. Contrast that with Census tract 8067.06, which forms another part of Greenbelt West, where the median age exceeds 43 years. In the world of demographics, that gap is simply massive. Not surprisingly, these portions of Greenbelt may tend to express vastly different visions of the city's future.

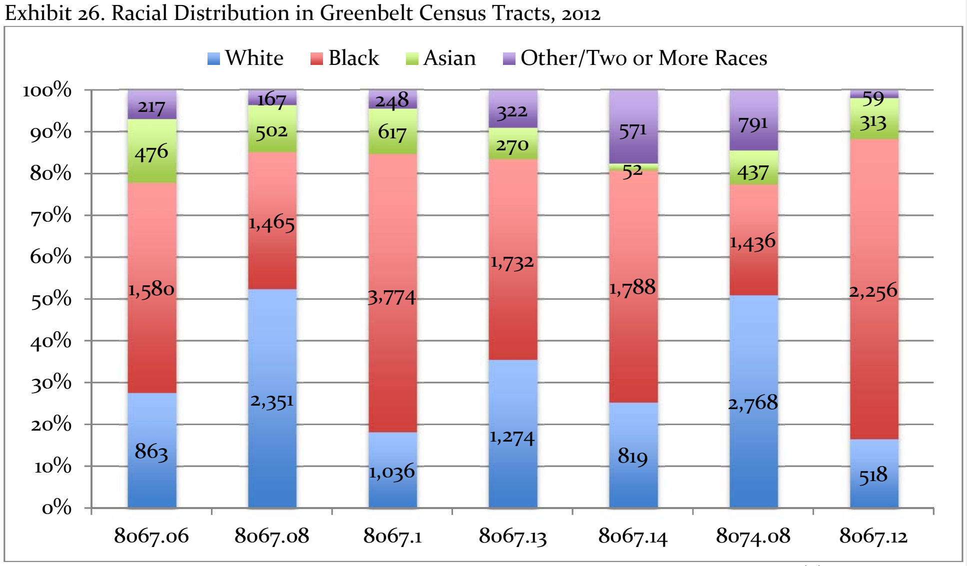
Exhibit 25. Select Demographic Characteristics, 2012

Census Tract	8067.06	8067.08	8067.10	8067.13	8067.14	8074.08	8067.12
Total Population	3,136	4,485	5,675	3,598	3,230	5,432	3,146
Total Households	1,378	2,245	2,350	1,304	1,173	2,238	1,234
Average Household Size	2.3	2.0	2.4	2.8	2.8	2.4	2.6
Total Families	704	1035	1173	811	710	1373	773
Average Family Size	3.0	2.8	3.5	3.3	3.5	3.1	3.1
Median Age	43.4	37.9	38.3	28.2	30.6	39.9	35.2

Source: U.S. Census Bureau: 2000 Census, 2008-2012 ACS 5-year estimates

While the study team did not consider race as part of its determinations, many focus group participants emphasized this aspect of Greenbelt's history and structure. Exhibit 26 reflects the fact that various sections of Greenbelt are racially different. For instance, the African-American population forms a larger share in Census tract 8067.12, part of Greenbelt East, than it does anywhere else.

Exhibit 26. Racial Distribution in Greenbelt Census Tracts, 2012



Source: U.S. Census Bureau: 2008-2012 ACS 5-year estimates. Note: Hawaiian/Pacific Islander (0) and American Indian and Alaska Native (9 in Census Tract 8067.12) are included in the "Other/Two or More Races" category.

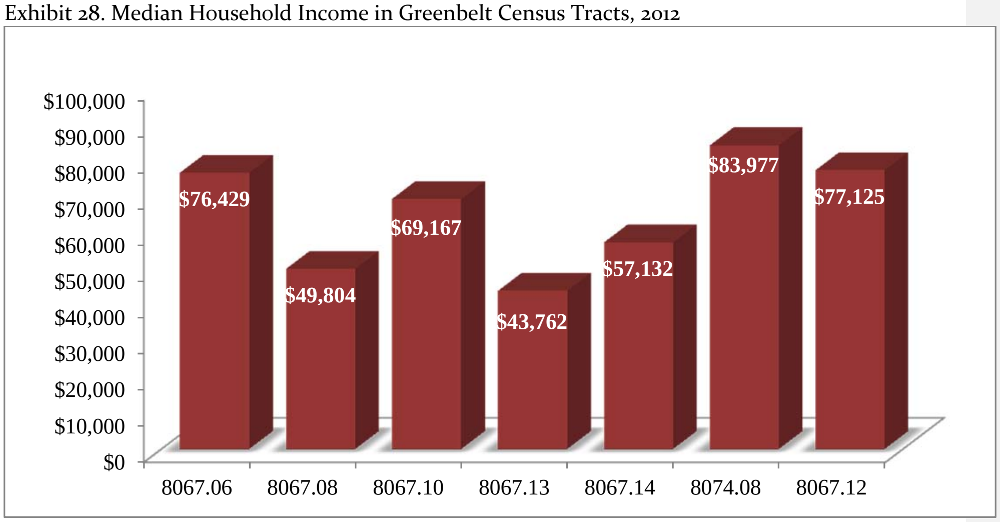
The various sections of Greenbelt also differ by educational attainment. Arguably, the most educated Census tracts are 8067.10 and 8074.08 (which also reports the highest median household income – see Exhibit 28), where more than 50 percent of the population has at least a bachelor's degree. The smallest bachelor's degree share is attached to Census tract 8067.14, part of Greenbelt West.

Exhibit 27. Highest Level of Educational Attainment of Greenbelt Residents Aged 25 and Over, by Census Tract, 2012

Census Tract	**8067.06**	**8067.08**	**8067.10**	**8067.13**	**8067.14**	**8074.08**	**8067.12**
Population 25 and over	2,462	3,269	3,821	1,992	2,052	3,937	2,093
Less than 9th grade	244	60	86	340	239	90	87
9th to 12th grade, no diploma	115	75	199	184	214	128	36
High school graduate	469	856	624	399	733	768	603
Some college, no degree	509	609	586	443	417	801	400
Associates degree	291	162	309	154	128	137	155
Bachelor's degree	402	697	1,378	310	215	962	384
Graduate or professional degree	432	810	639	162	106	1,051	428
Percent high school graduate or higher	85.4%	95.9%	92.5%	73.7%	77.9%	94.5%	94.1%
Percent bachelor's degree or higher	33.9%	46.1%	52.8%	23.7%	15.6%	51.1%	38.8%

Source: U.S. Census Bureau: 2000 Census, 2008-2012 ACS 5-year estimates

Exhibit 28. Median Household Income in Greenbelt Census Tracts, 2012



Source: U.S. Census Bureau, 2008-2012 American Community Survey 5-Year Estimates: DP03.
*In 2011 Inflation-Adjusted Dollars.

Census tract 8067.08 is most closely associated with Historic Greenbelt. Accordingly, it is home to the oldest housing stock, with the median year of structure construction being 1948. The youngest Census tract in terms of median year of structure construction is 8067.10 (1983). This means that the most educated Census tract is also associated with the youngest housing stock, which represents a key consideration behind at least one Sage recommendation.

Exhibit 29. Housing Characteristics, Greenbelt-Associated Census Tracts, 2012

Census Tract	8067.06	8067.08	8067.10	8067.13	8067.14	8074.08	8067.12
Total Housing Units	1,512	*2,361*	2,350	*1,466*	1,406	2,427	1,317
Occupied Housing Units	1,378	2,245	2,350	1,304	1,173	2,238	1,234
Owner Occupied	1,040	*1,013*	1,771	0	0	1,890	626
Renter Occupied	338	1,232	579	1,304	1,173	348	608
Median Year Structure Built	1969	1948	1983	1967	1968	1965	1976
Median Home Values	$300,800	$217,900	$238,500	-	-	$269,200	$219,400
Median Gross Rent (Monthly)	$1,373	$998	$1,506	$1,259	$1,166	$1,330	$1,635
Median Monthly Owner Costs for Housing Units with a mortgage (1)	$1,997	$1,375	$1,878	-	-	$2,031	$1,827

Source: U.S. Census Bureau: 2008-2012 ACS 5-year estimates. Notes: 1. Selected Monthly Owner Costs (SMOC) for housing units with a mortgage; 2. Census tracts may embody addresses physically located beyond City limits – for instance, Census tract 8067.06 includes Westchester Park and Kingswood, which are not within Greenbelt limits. The study team considered adjusting for this, but the attempt would have produced a new set of issues. The reader can make his/her own adjustments in part by placing relatively greater emphasis on the non-8067.06 Census tracts.

Exhibit 30 provides statistical detail regarding labor force participation, employment and unemployment in each Census tract of interest. Again, note Census tract 8067.14. This Census tract is associated with the least educational attainment and also the highest unemployment. During a recent five-year period, unemployment in this Census tract averaged roughly 22 percent. By contrast, in well-educated Census tract 8067.10, unemployment averaged around 5 percent.

Exhibit 30. Employment Status of Workers, 2012

Census Tract	8067.06	8067.08	8067.10	8067.13	8067.14	8074.08	8067.12
Population 16 years and over	2,719	3,792	4,717	2,468	2,432	4,271	2,686
In labor force	2,000	2,623	3,619	2,157	1,994	3,217	2,243
Civilian labor force	1,961	2,623	3,619	2,157	1,994	3,217	2,243
Employed	1,844	2,567	3,436	2,038	1,706	3,079	2,185
Unemployed	117	56	183	119	288	138	58
Armed forces	39	0	0	0	0	0	0
Not in labor force	719	1,169	1,098	311	438	1,054	443

Source: U.S. Census Bureau: 2008-2012 ACS 5-year estimates.

The Voice of the Community: The Harvest of Seven Public Sessions

- Historic Greenbelt Residents Most Likely to Express Satisfaction, Business Owners Least

The study team has conducted seven public sessions in Greenbelt, MD with business leaders, the Community Association, and other members of the community, one of which took the form of a general community dialogue, one of which was a work session with the Mayor and City Council, and five of which took the form of formal focus groups. The focus groups took place on August 5th and August 6th, 2014. Each session lasted roughly two hours. No statements have been attributed to any individual. Rather, expressed sentiments have been summarized more broadly.

The first focus group session involved large institutional employers while the second engaged small- and medium-sized employers. Though the attitude toward Greenbelt was mildly positive, both groups of employers felt the city wasn't doing a good job attracting young families. Participants who said that they live near a public school reported they choose not to send their children there. People even expressed concern about Eleanor Roosevelt High School, traditionally one of the best high schools in the state.

According to a handful of these early focus group participants, the housing stock in Greenbelt represents another obstacle to attracting new residents. Employers felt the prevalence of co-op townhome units, though popular with long-time local residents, is not as appealing to families looking for more contemporary forms of housing. Because of this, many people who work in Greenbelt, including the large technical and scientific communities, tend to live in other areas. For a city with several major roads passing through it, as well as access to multiple major markets, the ongoing inability to attract and retain young, talented workers represents a major obstacle to future growth and a warning signal. Both groups also describe Greenbelt as "aging in place" due to a lack of younger families.

The biggest complaint amongst Greenbelt's employers is a perceived anti-business attitude. Representatives from large institutions expressed the opinion that a relatively small group of people, referred to as the "old time" group, catered more to resident interests than to those of business owners. Local regulations and requirements render Greenbelt less attractive for new businesses, and cause existing businesses to devote more time and resources toward compliance. Representatives from large institutions expressed the following belief – the relocation of FBI headquarters to Greenbelt is critical to the city's future. Smaller employers concurred, indicating that the FBI could also attract more restaurants and other commercial businesses to enliven Greenbelt.

Participants expressed an extremely different set of opinions during the third focus group, which involved leaders from local community associations. They described the city as "utopian", saying that it is an inclusive, carefully planned city that offers much-needed affordable housing. They also cite the large number of associations and groups in the community as evidence of successful integration in the city.

This group noted, however, that the city is divided in accordance with the demographic discussion above. They also perceived that Greenbelt is getting older, though several participants believe that plenty of young families are coming to Greenbelt. That opinion was not universally shared.

Significant support was expressed for the co-op model, which pervades much of historic Greenbelt. However, these co-ops are under pressure, in part because financiers do not fully understand how they operate and how ownership is structured. Correspondingly, co-op housing tends to be associated with somewhat higher mortgage rates than other forms of housing *ceteris paribus*. This group heavily emphasized preservation, but also understood that the city needs to attract young families.

The fourth focus group also involved members of Greenbelt's business community. Many referred to Greenbelt as a "hidden gem" and found value in what they perceive to be a close-knit, friendly community. This group broadly agreed that there are three Greenbelts: East, West, and Historic.

Like the initial focus group of business participants, the fourth focus group participants also expressed the view that the City is not particularly pro-business and characterized the City as "distrustful". These participants also expressed the view that Greenbelt has a well-deserved reputation for being anti-business, and that this reputation helped explain a relative lack of private investment and interest. This group also expressed concern regarding community infrastructure, citing the age of the housing stock and the condition of schools.

This group held co-op businesses in high esteem. They noted, however, that some of the city's co-op housing is in need of upgrade and questioned whether the co-op structure could generate requisite levels of private investment. Despite this, these participants still believe that co-op housing represents an opportunity for Greenbelt to appeal to young families because of their relative affordability.

These fourth group participants went so far as to produce a three-prong strategy to improve the city. This included 1) preserving Historic Greenbelt; 2) allowing for significant improvement of Greenbelt East in order to attract younger families; and 3) revitalizing Greenbelt West's commercial sections (e.g. Franklin Park).

The fifth and final focus group invited any interested resident to come and express their opinions/views regarding economic development in Greenbelt. Not surprisingly, this focus group was associated with the least consensus. A handful of participants demanded retention of the status quo and not simply in Historic Greenbelt. Another group, however, perceived a significant need for substantial change. These participants tended to be from either Greenbelt East or West. This group favored new commercial development and substantial upgrading of existing retail centers. This group also tended to express an elevated level of concern regarding the capacity of Greenbelt to appeal to young professional families.

These fifth focus group participants disagreed massively in terms of whether or not the proposed FBI headquarters is desirable. Many worried about traffic and a lack of tranquility while others felt that Greenbelt would finally be positioned to attract more retailers and quality of life enhancing service providers.

Despite their disagreements, many participants emphasized a need for better public transportation, with some recommending the implementation of a city circulator. There was also much appreciation expressed for the New Deal Café, which has emerged as one of the Washington area's more popular music venues and an indication that Greenbelt can attract high quality amenities.

Finally, this group did not sense that the quality of area schools is particularly problematic. One school system parent expressed deep satisfaction with the public school system and anticipates that their child will eventually attend Eleanor Roosevelt High School.

A SWOT Analysis for Greenbelt

Strengths	Weaknesses
• Walkability and tranquility • Housing affordability • Highly associative, close-knit and supportive community • Quality of life (low crime, small town feel) • Outdoor recreational opportunities • Physical beauty (parks, open space, lake) • Central location in Washington-Baltimore corridor • Local schools (Greenbelt area schools) enjoy solid reputation • Intense City planning -- stressed as a benefit and detriment • Significant employment opportunities in Greater Washington area • Educated workforce • NASA Goddard • Mass transit availability, including Metro station • Relatively easy access to several major roadways (I-95, 495, 295, etc.) • Proximity to University of Maryland, College Park	• Income levels are not high by Washington area standards • Landlord/Tenant/Community relationship at Roosevelt Center • Beltway Plaza is not operating at optimal level • High office vacancy and questionable competitiveness of office product • Increasing traffic volume/congestion • Inability to attract younger families in sufficient numbers (source of contention) • Large aging population that is aging in place and will require more service provision over time • Slow population growth • Prince George's County school system reputation • Limited single family housing availability in certain parts of the city • Business taxes not perceived as competitive • Significant numbers of businesses view City as anti-business • Difficult/complicated regulatory environment for developers and businesses. • Shrinking/stagnant tax base • High property taxes and HOA fees • Significant business turnover, including in retail segments • Limited retail and fine dining options, particularly when compared to areas like Bowie, Columbia, Bethesda, Gaithersburg, Frederick & Hyattsville

Opportunities	Threats
• FBI headquarters – significant multiplier effects, including new retail opportunities, small business formation, tax base growth, and growth in demand for housing. • Residential development at Beltway Plaza to help revive retail center. • New business plan (ownership?) for Roosevelt Center • Tax breaks offered to specific types of in-demand businesses, including fine-dining establishments, original work art galleries, and clothing boutiques • Provision of more upscale housing options • Supply of additional planned open space (though there is plenty already) • Enhanced engagement with University of Maryland faculty and staff	• FBI headquarters – loss of small town feel and partial loss of housing affordability. • Ongoing loss of State of Maryland financial support, leading to further pressure on local government service provision. • Inadequate numbers of young people moving in, leading to growing share of pensioners. • Sprawl impacts quality of life, including in Greenbelt West and Greenbelt East • Loss of economic strength among key cooperatives competing with much larger business enterprises in and out of Greenbelt • Ongoing aging and deterioration of housing stock throughout the city due to stagnant/aging population • Loss of business to growing commercial communities in National Harbor, Bowie, Laurel, Columbia, College Park, Silver Spring, Odenton and other regional hotspots. • Expanding vacancy at Roosevelt Center due to in part to poor tenant/landlord relations

- SWOT Discussion

Many of the strengths, weaknesses, opportunities and threats highlighted in the matrix above represent the harvest from the multiple focus groups the study team conducted. Others emerge from the analyses of economic, demographic and budgetary data supplied above.

One of the central themes of the SWOT analysis is the divergence of opinion between residents of Greenbelt West and Greenbelt East, Historic Greenbelt, and the local business community. Based on focus groups and responses to a survey conducted by the City of Greenbelt with the assistance of the study team, residents of Historic Greenbelt are most likely to be satisfied with the status quo. This group is also quite likely to oppose the attraction of the FBI headquarters. This group treasures the tranquility of the community, housing affordability, and the presence of various cooperatives, including GHI and a cooperative grocery store. This group expresses significant dissatisfaction, however, with certain aspects of Roosevelt Center operations.

Members of the business community tend to express the most dissatisfaction with Greenbelt's status quo, citing difficulty working with the City's government and uncompetitive taxes as principal complaints. This group also suggests that there is a lack of real estate competitiveness in terms of quality of existing office and retail space. They also tend to complain about the lack of growth in local spending power in Greenbelt vis-à-vis other Washington-Baltimore corridor communities.

Residents of Greenbelt East and Greenbelt West tend to offer more mixed reviews. Like their counterparts in Historic Greenbelt, they tend to like the services offered by the City, housing affordability, and a sense of small town tranquility. However, they frequently indicated a lack of amenities in their own neighborhoods and some have indicated that "Greenbelt needs more" in terms of retail amenities, employers, and overall vibrancy. They express concern regarding aspects of both Beltway Plaza and Roosevelt Center.

The divergent views of Greenbelt are reflected in the two distinct survey responses below:

- In support of the status quo

"I do not want Greenbelt to end up looking like Tyson's Corner, Reston, or some of the other very overbuilt areas in Northern Virginia where every square inch of land has been developed and there is not a tree in sight . . . Through its preservation of green/open space and its historic center and cultivation of arts and recreation, the city of Greenbelt has grown into a diverse, thriving community . . . If I could name one thing that makes Greenbelt so special, it is the amount of parkland and open space that is available for public use – Buddy Attick Park, Greenbelt Park, the forest preserve and ball fields, and the acres of farmland nearby in the USDA's Beltsville facility . . . This is an oasis of green in a metro area . . ."

- A call for change

"The biggest frustration of living in Greenbelt is the City's perception as being hostile to business and economic development. The voices against change are strong. The City should be doing much, much more to encourage the location/relocation of businesses to create jobs and provide residents with greater shopping/restaurant options, especially high quality businesses for higher salaried professionals. . . Our close proximity to Metro, the University of Maryland, NASA, the Archives, the Ag Reserve, and DC combined with the low housing costs, good schools, safety, and recreational amenities should make Greenbelt a destination of choice for businesses and professionals. The City should get on board and this survey/project is a great start."

- Opportunities and Threats

The study team considers the potential attraction of the new FBI headquarters as both the leading opportunity and threat to the community. The headquarters would bring thousands of jobs to the area and would represent such a significant level of net new incremental economic activity that vacant office space would likely be filled, retail space would be occupied, new restaurants would emerge, and housing would be in high demand. Of course, for many Greenbelt stakeholders, this implies more traffic, at least a partial loss of small town feel, greater demand for services, and a general loss of tranquility.

From the study team's perspective, if the FBI headquarters locates elsewhere, Greenbelt would potentially be faced with complex fiscal issues. As our demographic analysis indicates, the population of older residents is expanding rapidly. At the same time, competing development in other communities including Frederick, Gaithersburg, Columbia, Laurel, Maple Lawn, Odenton, Bowie, National Harbor, and elsewhere has the potential to attract younger families and businesses away from Greenbelt. The implication is that the demand for local government services could outstrip local government revenue growth.

Some of these dynamics are already apparent. According to City budget data, property tax revenues were lower in FY2013 than they were in FY2010. Income tax collections in FY2013 were only 9.2 percent above what they were in FY2004. When one adjusts for inflation, income tax collections declined by roughly 18 percent in real terms over that period. State Shared Revenues declined from $3.6 million in FY2004 to $3.2 million in FY2013, placing further fiscal pressure on the City.

As noted earlier, the City appears to have responded to the growing pressures by edging tax rates higher over time. In FY2004, Greenbelt's direct real property tax rate was 0.696 per $100 of assessed value. By FY2011, it stood at 0.790 per $100 and did not change during the subsequent two fiscal years. The personal property tax rate has also increased, from $1.61 per $100 in FY2004 to $1.70 per $100 more recently.

Based upon this analysis the study team concludes that more vibrant real estate dynamics are required. Though many in the community treasure housing affordability, there probably needs to be counterbalancing development of more upscale housing to enhance local spending power as well as tax base. Tax breaks may be necessary to attract more desirable businesses, especially if the FBI chooses to locate its headquarters elsewhere. Special attention should be given to Beltway Plaza, Roosevelt Center, and other retail/service districts, many of which are not presently operating at optimal levels of occupancy and stakeholder satisfaction.

While the provision of open space is one of Greenbelt's greatest strengths, some attention should be given to ensuring that *all* areas of the city are proximate to planned, usable open space. Stepped up marketing/engagement with professional populations at the University of Maryland, College Park, and NASA Goddard is also warranted, particularly given that this represents a relatively inexpensive way to increase demand for housing and local business services.

- Opportunities for Branding

The study team is comprised of economic analysts, not advertising executives or associates. While a full-fledged branding campaign would likely require the participation of professionals who specialize in social media campaigns and graphic design, the study team has learned much about the distinguishing aspects of Greenbelt and the aspirations of its people. These unique or rare characteristics render branding not only possible, but desirable from an economic development perspective.

The goal of branding would be to attract people to Greenbelt, whether new residents, employers, or visitors. We think a brand such as "Greenbelt: A Newer Deal" would be workable for a number of reasons. First, the tag line relates to Greenbelt's historic origins. Second, the New Deal Café, which is approaching its 20th anniversary, has emerged as one of the most popular music venues in the Washington metropolitan area and has become one of the best reasons to repeat visit Greenbelt. Third, the word "newer" speaks to Greenbelt's embrace of the contemporary, while the world "deal" speaks to Greenbelt's accessibility, including in terms of housing price points.

We think that this form of branding would be particularly appealing to well-educated younger families, who are wrestling with student debt in many instances as well as with the costs of raising young children. Accordingly, these families are likely to be in search of communities offering an attractive value proposition. Our analysis indicates that Greenbelt is a community that offers an extremely attractive value proposition in the form of reasonably priced housing, good schools, an amenity rich environment, and a close-knit, friendly community.

Recommendations

In order to develop the recommendations presented and discussed below, the Sage study team combed through mounds of demographic and economic data, conducted focus groups and interviews, read previously produced reports, analyzed budgets, fashioned a SWOT analysis and looked for relevant best practices in similarly situated communities. For the most part, these recommendations are not expensive to implement and require little additional effort on the part of City government. However, certain tax breaks are proposed to help accelerate investment in both residential and commercial categories.

- Recommendations

1. Support Owner-Occupied Housing Development in Greenbelt East and Greenbelt West

While Sage does not necessarily believe an increase in zoning density is necessary, we think it makes sense to emphasize owner-occupied units, including in the form of townhomes. According to the American Community Survey, Greenbelt's homeownership rate is just 46.2 percent. That compares with more than 68 percent statewide. The hope is that the next set of residents in Greenbelt feels just as committed to the city's future as long-time residents. To the study team, this implies greater policy support for owner-occupied dwellings.

In keeping with other successful Greenbelt communities, there should be requirements for substantial amounts of planned open space and other amenities such as play areas and other recreational facilities. We think the City should also impose architectural standards, including requiring the use of high quality materials such as brick. This likely means this new product won't be quite as affordable, but part of the goal of this new housing would be to diversify and help modernize the city's housing stock.

The primary challenge to implementation is the general lack of developable sites. Particularly in Greenbelt East, there is a dearth of undeveloped or under-developed land. In 2006, the Director of Planning and Community Development developed a report summarizing the zoning and development potential of Greenbelt East. That report notes that the area that is now "the Maryland Trade Center was originally zoned R-10 (high rise apartments). The development potential given that zoning was 2,232 units. This area was rezoned to permit the development of the Maryland Trade Center (780,000 square feet total), Martin's Crosswinds, and the Holiday Inn."[7]

One possibility is that the Maryland Trade Center could be redeveloped for mixed-use. This could also be a strategy deployed at Greenway Center. We think that introducing mixed-use concepts at these sites would be useful in terms of enhancing homeownership opportunities in Greenbelt East while improving commercial real estate outcomes. Sage has recommended precisely such an approach at the Melford site in Bowie, where the commercial vacancy rate is presently in the range of 30 percent.

As a final point related to this recommendation, the City has $30,000 set aside to support economic development efforts. That level of funding will not support even a part time economic development professional. However, that funding could supply the resources for the City of Greenbelt to study residentially developable sites. Our research indicates that there is little opportunity to develop new residential product in Greenbelt East, but such product could be added to form mixed-use sites at current commercial-use only areas. We recommend that the City use the $30,000 to fully catalogue potential opportunities for new residential development.

Comment [KS1]: See previous note.

2. Provide Tax Breaks for Owner Occupants of Homes Constructed before 1980 Who Invest in Significant Upgrades

Many focus group participants expressed enormous satisfaction with the prevalence of affordable housing in Greenbelt, including in the form of co-op housing. However, several also expressed the view that many properties are not as well maintained as would be optimal and that the ongoing aging of residents could set the stage for housing stock deterioration given the growing propensity toward fixed incomes.

Accordingly, the study team recommends that the City offer tax breaks to resident owners of properties constructed before 1980 who invest more than $30,000 in their respective dwellings. The improvement plan would need to be approved by City government. The choice of the year 1980 is not arbitrary. Properties constructed prior to that year are less likely to offer central air conditioning (62.5%

[7] http://greenbelteast.org/media/Zoning%20History%20of%20Greenbelt%20East.pdf.

have it according to the 2011 American Housing Survey), have two or more bathrooms, and more than 1,500 square feet of living space.

By contrast, there is nothing particularly magical about the $30,000 threshold. We view that level of investment, however, as representing a transformational investment – one that perhaps includes the addition of a bathroom and/or significant upgrades to appliances, heating and air conditioning, or other critical elements of a given dwelling unit. We believe that this level of commitment should be rewarded.

After the physical improvement is completed to the City of Greenbelt's satisfaction (we think that the City's Department of Planning & Community Development should implement this policy by establishing guidelines, approving individual project plans and confirming completion), these properties would be allowed to keep their total City tax payment fixed at the previously established level for six years (two three-year cycles), at which time the tax payment would be subject to the standing assessed value.

This tax break should be made available for four years beginning on July 1st, 2015, which is the first day of FY2016. This means that conceivably, someone applying for this residential tax break four years after initiation of policy implementation could still be receiving a reduced tax bill roughly a decade from now.

We think that it is important that if the property is sold to another owner, that the tax break remain in place. Not allowing the tax break to remain in place could act as a deterrent to the original investment. The goal is to ensure sufficient investment in the City's residential base over the next decade. Over the next decade, the study team believes that more members of Generation Y, many of whom are currently in their early- to mid-20s, will be transitioning to homeownership. It is important that the City of Greenbelt's housing stock be competitive enough at that time to attract a sufficient share of young families.

The National Association of Realtors' "2014 Home Buyers & Sellers Generational Trends" report found that Gen Y (ages 33 and younger) easily represents the largest share of first-time buyers (76%) and have the following preferences:

Exhibit 31. Factors influencing neighborhood choice (Gen Y home-buyers)

Factor	% Indicating Factor Influenced Choice
Quality of the neighborhood	69%
Convenient to job	67%
Overall affordability of homes	50%
Convenient to friends/family	44%
Quality of the school district	41%
Convenient to schools	29%
Design of neighborhood	27%
Convenient to entertainment/leisure activities	24%
Convenient to parks/recreational facilities	24%
Convenient to shopping	21%
Availability of larger lots or acreage	18%
Convenient to public transportation	8%
Convenient to health facilities	6%
Home in a planned community	6%
Convenient to airport	4%
Other	3%

Source: National Association of Realtors, "2014 Home Buyers & Sellers Generational Trends".

The study team's interpretation is that an element of neighborhood quality is the condition of housing stock. Accordingly, it is important for there to be sufficient investment in the years to come to guarantee sufficiently high quality housing stock. Here are some additional considerations:

- 77 percent of home buyers aged 33 and younger purchase homes with 2 or more bathrooms (2 bathrooms: 62%; 3+ bathrooms: 15%).
- Environmentally friendly features are considered "very important" by homebuyers aged 33 and younger: heating and cooling costs (36% of respondents), commuting costs (37%), energy efficient appliances (17%), energy efficient lighting (19%).
- Only 18 percent of Gen Y homebuyers purchased homes that were less than 1,500 square feet in size.

3. Provide Tax Breaks to Catalyze Rejuvenation of Older Commercial Areas

According to NAI Michael, the office vacancy rate in Prince George's County stood at 18.2 percent at the end of the fourth quarter of 2013. That compares unfavorably with the 10 percent vacancy rate that characterized the Washington metropolitan area at that time.

In Greenbelt, vacancy stood at 26.8 percent, with more than 1,000,000 square feet vacant. Given the competition for tenants and the aging of Greenbelt's office stock, this represents a significant issue. Should vacancy continue to rise, Greenbelt could become home to a number of large, abandoned office buildings, which would emerge as eyesores and would diminish the aesthetic appeal of the city, as well as the tax base.

The study team proposes a tax break for owners of properties encompassing more than 16,000 square feet of office space (roughly the size needed to house 100 employees). Under the proposed tax break, owners who invest $10 million or more in their properties would be allowed to hold their level of tax payments constant for a period of six years. In other words, they would not pay additional taxes on the value of rendered improvements (nor would they pay taxes on general property inflation). Like the residential investment tax break detailed above, this tax break should be made available for a period of four years beginning July 1st, 2015.

4. Reconsider Redevelopment Plans at Beltway Plaza

Several years ago, developers submitted a conceptual site plan for Greenbelt Place at Beltway Plaza. The proposal included plans for 700 multifamily dwelling units wrapped in midrise form as well as 22,000 square feet of commercial/restaurant space.

We think this plan for Beltway Plaza makes sense, particularly if a significant share of the proposed 700 units were slated for owner occupancy. Our preference for townhomes or condominiums over apartments may mean that fewer than 700 units can be developed. That should not be viewed as a problem. Even a development plan offering half as many units would help provide Beltway Plaza with much-needed momentum.

5. Strive for Change at Roosevelt Center

The Roosevelt Center is simply too important to Historic Greenbelt and the balance of the city to permit potential deterioration. For whatever reason, there is enormous dissatisfaction with current ownership and while there is not significant vacancy, there is evidence of rapid tenant turnover.

As a Plan A, the study team proposes the forging of an agreement between the City and the Center's owner to improve current tenant experiences. The City may want to attempt to convince ownership that lower rents would be better not only for the community, but for ownership. Excess rents lead to rapid turnover, which leads to lost rent due to vacancy and inconsistent patron experience.

Should negotiations with current ownership falter, we propose Plan B, which could include: 1) threats of eminent domain; 2) concerted code enforcement; and/or 3) other means by which to render the ownership experience unpleasant. In exchange for improvements, we think it makes sense for the City to grant tax breaks or offer additional inducements to improve tenant experiences and to accelerate investment in maintenance and other forms of physical improvement.

Occupancy at Roosevelt Center remains high despite strained landlord-tenant relations. We suspect that this is because the Roosevelt Center is so visible and convenient to large segments of the community. The Roosevelt Center is also highly symbolic, and represents Greenbelt's front door. For this reason, we do not believe that the City of Greenbelt has the luxury of remaining passive and hoping for the best.

Our research indicates that the most effective incentive programs are multifaceted ones that are based on a broad definition of good landlord behavior. Exhibit 32 provides some ideas to improve municipal-landlord relations that are often used in the United Kingdom.[8]

[8] Center for Community Progress. "Building American Cities Toolkit."

Exhibit 32. Potential incentives cities can offer in a Landlord Incentive Program

CATEGORY	EXAMPLES
Training and technical assistance	• Free training courses sponsored by the city • One-on-one technical assistance on specific problems • Discounts to community college courses • Free preventive maintenance and security inspections
Improved access	• Single point of contact to city hall • Designated police department liaison • Participation in regular landlord forums with key government officials
Improved process	• Fast-track-approval for construction permits • Flexibility to make necessary repairs and improvements in stages • Expedited problem tenant eviction procedure • Greater access to available properties
Help obtaining tenants	• Free advertising in newspapers and web sites • City guarantees security deposit for tenants meeting set standards but lacking funds • Recommended landlord status for housing choice vouchers
Indirect financial assistance	• Free or subsidized safety inspections • Free or subsidized equipment, such as smoke detectors, carbon monoxide detectors, security locks or closed-circuit cameras • Insurance discounts • Discounts on goods and services at local merchants • Reduced fees for municipal permits or licenses
Direct financial assistance	• Rebate of licensing or other fees • Loans or grants for property improvements

Source: Center for Community Progress. "Building American Cities Toolkit." http://www.communityprogress.net/tool-6--good-landlord-incentives-page-212.php.

The City has a certain degree of control regarding Roosevelt Center dynamics beyond those associated with managing municipal-landlord relations. The Greenbelt Theatre at 129 Centerway Road represents a significant cultural asset and icon in the community.

While we are not experts in maximizing the impact of theater operations, our research into the Senator theater in Baltimore and other theaters indicates that successful theaters often host many types of events, including major social functions, meetings/conferences, birthday parties, and special movie showings (e.g., in December 2014, the Senator is scheduled to show Casablanca, Citizen

Cane, It's a Wonderful Life, and Pulp Fiction; in January 2015, The Breakfast Club, Pretty in Pink, and Sixteen Candles will be shown).

The City also currently maintains a $15,000 revolving loan fund for Roosevelt Center merchants who render improvements to their space. Individual loans are capped at $7,500. If the City were able to make progress in improving landlord-tenant relations, we would recommend increasing the loan fund to $40,000 and allowing individual loans as large as $10,000. We understand that the loan program has not been popular, with only a few businesses participating over the course of several years, but there have been many headwinds, including the state of landlord/tenant relations and the impact of the Great Recession. With the recession now increasingly behind us, there is reason to believe that the loan fund could be used more frequently, particularly if tenants can be assured of a more productive and trustful relationship with their landlord.

- Conclusion

This report has put forth a set of recommendations to accentuate Greenbelt's economic strengths (e.g. location, charm, responsive City government) and to limit the impact of its weaknesses (older housing stock, several marginal commercial areas). Above all, the study team has been focused on helping to ensure the fiscal sustainability of Greenbelt.

The proverbial 800-pound gorilla in the room is the looming announcement of a new FBI headquarters in Greenbelt. The City has already announced support for the FBI headquarters, and we agree – it would represent a major economic development victory. While a number of key stakeholders worry that the new headquarters could undermine Greenbelt's quality of life, new economic activity could be leveraged into more investment in other parts of the city and augmentation of service provision, including perhaps the city circulator that so many focus group participants want.

Implementation of offered recommendations would 1) increase spending power in Greenbelt; 2) bolster homeownership; 3) provide additional economic support for existing commercial developments, including Beltway Plaza, Greenway Center, and Roosevelt Center; 4) balance Greenbelt demographically through the attraction of younger families; 5) improve quality of life; and 6) defend Greenbelt's fiscal future.

Appendix A. Identified Funding Sources

There are sources of funding available to communities that are striving to accelerate economic development. The Sage study team has provided descriptions of a few of the most prominent sources of support below.

- Financing Transportation Alternatives

The **Federal Transportation Alternatives Program**[9] (TAP) provides funding for projects that are defined as transportation alternatives. This category of projects includes pedestrian and bicycle pathways (both on- and off-road), environmental mitigation, recreational trail programs, additional routes to schools, and the construction of roadways in the right-of-way of former interstate system routes. TAP funding can be requested for up to half of a project's total estimated cost. TAP specifically targets intermodal transportation systems that "improve residents' quality of life and enhance their travel experience…"

While additional governmental funding sources — **the Congestion Mitigation and Air Quality Improvement Program (CMAQ)** and **Maryland Bikeways Grant Funds**, for instance — exist, there are also a variety of small non-profits that offer grants for alternative transportation projects. **People for Bikes**[10] offers grants for bike paths, lanes, trails, and bridges, as well as end-of-trip facilities like bike racks, bike parking, and bike storage.

- The U.S. Economic Development Administration

The U.S. Economic Development Administration offers **Economic Development Assistance Programs**[11] that provide "investments that support construction, non-construction, technical assistance, and revolving loan fund projects . . . designed to leverage existing regional assets and support the implementation of economic development strategies." While applications for the first funding cycle of FY2015 are due by October 17, 2014, each fiscal year has four funding cycles. This is an ongoing program.

[9] http://www.fhwa.dot.gov/map21/guidance/guidetap.cfm
[10] http://www.peopleforbikes.org/pages/apply-now
[11] http://www.grants.gov/web/grants/view-opportunity.html?oppId=248297

The Economic Development Administration also offers **Planning and Local Technical Assistance Programs**[12], which offers grants to entities creating regional economic development plans. Applications for these awards, which have a $100,000 ceiling, are accepted on a continuous basis.

- In Support of Low-Income Communities

The United States Department of Labor Employment and Training administration offers competitive job training-program grants through the **Workforce Innovation Fund.**[13] These grants, which primarily focus on innovative approaches that generate long-term improvements in the performance of the public workforce system and better outcomes for jobseekers, provided approximately $53 million in funding in FY2014.

The Corporation for National & Community Service, a federal agency committed to strengthening communities, offers **Social Innovation Fund Grants (SIF)**[14] on an annual basis. The grants are awarded to entities "seeking to grow innovative, evidence-based solutions to challenges facing low-income communities nationwide." These grants prioritize applications targeting youth and vulnerable populations. In 2014, up to $65.8 million in SIF grants will be awarded. These grants are applicable to the Economic Viability goal as well as Goal V, which regards equitable access to basic livelihood, education, and health resources.

The Department of Agriculture offers **Community Food Projects Competitive Grants.**[15] The primary goal of these grants is to meet the food needs of low-income individuals and increase the self-reliance of communities in providing for their food needs. Eighteen percent of applications were funded under this program in FY 2013, and awards were as high as $250,000.

Greenbelt is not a low-income community, but there may be sections of Greenbelt that could qualify. Moreover, the need to improve nutritional outcomes appears to be a ubiquitous one across American communities of virtually every type.

[12] http://www.grants.gov/view-opportunity.html?oppId=189193
[13] http://www.doleta.gov/workforce_innovation/
[14] http://www.nationalservice.gov/build-your-capacity/grants/funding-opportunities/2014/social-innovation-fund-grants-fy-2014
[15] http://www.csrees.usda.gov/fo/communityfoodprojects.cfm

- Supporting Broadly Shared Quality of Life in Our Communities

The Department of Justice, through the Office of Community Oriented Policing Services (COPS), offers the **COPS Hiring Program,**[16] which provides funding directly to law enforcement agencies to hire additional law enforcement officers in an effort to reduce crime. While the deadline for the 2014 program has passed, this program has received $247 million in funding for FY2015. In FY2013, the COPS office awarded 266 grants in the amount of $127 million. The award ceiling in FY2014 for such grants was $3.125 million.

Maryland's Department of Natural Resources offers **Program Open Space Grants.**[17] This program has two components: a local grant called Localside POS and a separate component that funds the acquisition and development of recreational facilities by the State. The Localside component provides financial and technical aid to local governments for the planning, acquisition, and development of recreational areas or open spaces. This program provided $6.781 million in funding to Baltimore City in FY2014.

The United States Department of Agriculture's Agricultural Marketing Service has a **Farmers Markets Promotion Program,**[18] which provides grants for the creation and expansion of local farmers' markets. In 2012, only one such grant was issued in Maryland, however: $77,863 to the Suitland Family and Life Development organization in Lanham, MD.

There are several potential funding sources for expanding recreation programs. The **Lowe's Community Partners Grants**[19] provide assistance in the range of $5,000 to $100,000 for high needs projects. The National Park Service's Land & Water Conservation Fund's **Outdoor Recreational Grant Program**[20] provides local governments with funding for public outdoor recreation areas and facilities. These grants can be used to develop recreational areas such as playgrounds, pools, trails, green spaces, and even boat-launching ramps.

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[16] http://www.grants.gov/search-grants.html?fundingCategories%3DLJL%7CLaw%2C%20Justice%20and%20Legal%20Services
[17] http://www.dnr.state.md.us/land/pos/
[18] http://www.ams.usda.gov/AMSv1.0/FMPP
[19] http://responsibility.lowes.com/apply-for-a-grant/
[20] http://www.nps.gov/lwcf/

Appendix B. Fiscal Notes to Recommendations

- **Estimated Fiscal Implications**

Throughout the analytical phase of this project and in forming recommendations, the study team has been sensitive to the fiscal implications of its suggestions. The recommendations have been fashioned to minimize negative short-term fiscal impacts and to maximize positive long-term impacts. The study team's recommendations are restated below.

- Support Owner-Occupied Housing Development in Greenbelt East and Greenbelt West
- Provide Tax Breaks for Owner Occupants of Homes Constructed before 1980 who Invest in Significant Upgrades
- Provide Tax Breaks to Catalyze Rejuvenation of Older Commercial Areas
- Reconsider Redevelopment Plans at Beltway Plaza
- Strive for Change at Roosevelt Center

Support Owner-Occupied Housing Development in Greenbelt East and Greenbelt West

Several focus group participants indicated support for new owner-occupied housing development in Greenbelt East and Greenbelt West. We concur with their logic, which includes increasing the City's capacity to attract younger, upwardly mobile families and enhancing the tax base.

In attempting to understand the fiscal implications of such a policy, it is important to note that new homes are generally more expensive than existing home prices. In August 2014, the median new home price was $56,500 above the median existing home price, or by nearly 26 percent.

New and Existing Median Single Family Home Prices, U.S.

	2013	Aug-14
New Home Prices	$268,900	$275,600
Existing Home Prices	$197,400	$219,100

Source: National Association of Home Builders, http://www.nahb.org/fileUpload_details.aspx?contentID=55764.

According to RBI, median sales prices for homes in Greenbelt have been in the range of $123,000 year-to-date in 2014. The study team envisions new home development similar to what has been delivered at the Kentlands in Gaithersburg. The exhibit below reflects the massive prices fetched by homes in Kentlands, which has achieved global notoriety for its successful new urbanist designs.

The study team does not envision price points anywhere close to those in the Kentlands for Greenbelt. However, we are recommending housing that offers plentiful amenities and average prices for new townhomes could easily exceed twice the current median sales price in Greenbelt. This is likely to generate significantly positive net fiscal impacts for Greenbelt, which is currently able to balance its budget with its existing and much less expensive housing stock.

Median Sale Prices 2013 YTD v. 2014 YTD, Select Areas

Location	2013 YTD	2014 YTD	% Change
Gaithersburg, MD	$387,100	$380,000	-1.8%
Kentlands, Gaithersburg, MD	$620,500	$649,950	4.8%
Greenbelt, MD	$119,450	$123,000	3.0%

Source: RealEstate Business Intelligence (RBI)

Provide Tax Breaks for Owner Occupants of Homes Constructed before 1980 who Invest in Significant Upgrades

The study team recommends that the City offer tax breaks to resident homeowners of properties built before 1980 who invest more than $30,000 in their respective dwellings. Properties would be eligible to apply for the tax break for four years beginning July 1st, 2015.

At first blush, such a recommendation would seem to present negative financial implications. That is only true to the extent that these improvements would have taken place even without the presence of a tax break. As a practical matter, we think it unlikely that there are many households prepared to invest more than $30,000 in their properties under current circumstances. Moreover, to the extent that these improvements are rendered to interiors of homes, they would have little impact on assessments, which means that the improvement would not translate directly into enhanced tax payments in any case.

We estimate that over ten years, the City of Greenbelt will end up foregoing less than $200,000 in real property tax collections. By contrast, we estimate that the

City's tax base in a decade will produce more than $300,000 a year in additional collections if the proposed tax break is implemented with fidelity and produces the level of investment in neighborhood improvement that we anticipate. Importantly, investment in homes increases sales prices, which translates into increased assessed values not only for home owners who invested in their properties, but also for their neighbors. Note: there are approximately 2,900 units in the City of Greenbelt that were built before 1980.

Fiscal Impact of Tax Break (Per Home) – an Example

	Baseline	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7+
Home Value	$225,000	$255,000	$255,000	$255,000	$255,000	$255,000	$255,000	$255,000
Tax Liability	$225,000	$225,000	$225,000	$225,000	$225,000	$225,000	$225,000	$255,000
Tax Payment	$1,828.1	$2,071.9	$2,071.9	$2,071.9	$2,071.9	$2,071.9	$2,071.9	$2,071.9
Tax Payment with Break	-	$1,828.1	$1,828.1	$1,828.1	$1,828.1	$1,828.1	$1,828.1	$2,071.9
Tax Break	-	$243.8	$243.8	$243.8	$243.8	$243.8	$243.8	$0.0
Tax Break %	-	11.8%	11.8%	11.8%	11.8%	11.8%	11.8%	0.0%

Source: Sage

Provide Tax Breaks to Catalyze Rejuvenation of Older Commercial Areas

The study team proposes a tax break for owners of properties encompassing more than 16,000 square feet of office space (roughly the size needed to house 100 employees). Under the proposed tax break, owners who invest $10 million or more in their properties would be allowed to hold their level of tax payments constant for a period of six years. In other words, they would not pay additional taxes on the value of rendered improvements.

- Fiscal Impacts

The fiscal considerations are similar to those discussed above regarding the proposed GHI residential tax break. The question regards the extent to which investment would have transpired in commercial settings even in the absence of the tax break. To the extent that investment would have transpired in any case, the tax break will be both unnecessary and costly.

However, given the state of commercial vacancy, the study team is skeptical that significant commercial upgrades are forthcoming. This could change if the FBI headquarters are situated in Greenbelt, which would spawn significant positive economic multiplier effects. As of now, the decision regarding the location's headquarters is unknown. Moreover, there is no guarantee that highly visible commercial properties will be meaningfully upgraded even if the FBI headquarters arrives. After all, existing properties will be required to compete with the new product offered by the mixed-use development that would take place adjacent to the Greenbelt Metro.

Sage has identified at least two commercial properties that would likely move forward with significant improvements if such a tax break were offered.
Over the course of six years, Sage estimates that investment in commercial property in Greenbelt would be augmented by $7 million if one property owner pursues this tax break and by $14 million if two property owners do. However, because some capital improvement projects that would otherwise occur become eligible for the tax break, there is a loss in tax collections (opportunity cost). Sage estimates that over the course of six years the opportunity cost to the City would be $488,000, or about $81,000 per fiscal year.

However, the actual costs to the City associated with the implementation of this tax break could be less since the opportunity cost is based upon a presumption of ongoing capital improvements. To the extent that those improvements would not have occurred, there is effectively little to no opportunity cost to the City. Moreover, after year 6, the City would gain revenues through an augmented tax base. There may be other positive effects because an upgraded product may attract higher quality employers and expand visitation, which would serve to generate additional positive economic and fiscal impacts. The City would also presumably collect additional fee income associated with the construction phase.

Estimation of the fiscal impact of the tax break (2 Properties)

Year of tax break	Baseline Level of Investment in Absence of Tax Break ($000s)	Augmented investment/tax base (attributable to tax break - $000s)	Augmented Tax Collections ($000s)	Reduced Tax Collections ($000s)	Net fiscal impact ($000s)
Year 1	$1,000	$3,000	$0	$81	-$81
Year 2	$1,000	$2,200	$0	$81	-$81
Year 3	$1,000	$2,200	$0	$81	-$81
Year 4	$1,000	$2,200	$0	$81	-$81
Year 5	$1,000	$2,200	$0	$81	-$81
Year 6	$1,000	$2,200	$0	$81	-$81
Cumulative Impact					*-$488*

Assuming the City real property tax rate of $0.8125/$100 of assessed value; Source: Sage

Reconsider Redevelopment Plans at Beltway Plaza

No negative associated fiscal impacts - potentially positive to the extent of investment and increase in assessed value.

Strive for Change at Roosevelt Center

No significant associated negative fiscal impacts – potentially positive to the extent that tenant satisfaction and performance are improved. Expanding the revolving loan fund could generate negative impacts, however, to the extent that loans are not repaid.

Appendix C. An Examination of Economic Development Efforts/Strategies in Similarly Situated Communities

A Discussion of Economic Development Strategies

Over the last couple decades, new and reformulated ideas about economic development have emerged, generally shifting away from a primary focus on attracting external investment toward a focus on promoting indigenous or "home-grown" sources of development. These approaches often involve communities instituting new organizational structures, working more collaboratively with other entities, or devising creative financing mechanisms. These new approaches can be grouped into four broad categories: economic gardening, place-based development, creativity and talent cultivation, and innovative industrial development (see table below).[21]

Traditional economic development approaches tend to emphasize the recruitment of major corporate facilities via tax breaks and other financial incentives.[22] However, given the tendency for corporations to offshore production over time, this strategy has become less appealing.

Given greater competition for new facilities, some communities seem to have deemphasized economic development altogether. The Sage study team views this as unwise since there are other approaches to promote economic development beyond the recruitment of facilities.

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[21] Morgan, Jonathan Q., and William Lambe. "Find a way or make one." *Economic Development Journal* 8, no. 3 (2009): 5-13.
[22] Ibid.

Economic Gardening	Place-Based Development	Creativity & Talent Cultivation	Innovative Industrial Development
The general theme of gardening is to “grow your own” by cultivating local entrepreneurs and creating an environment that supports their growth. This can include tax breaks, rent discounts and other conceivable financial incentives.	Place-based development incorporates strategies that capitalize on the distinctive characteristics of a particular place. Such characteristics might include the natural environment, cultural heritage, specialized infrastructure, and arts/crafts traditions.	Creativity and talent cultivation utilizes tactics that focus on attracting knowledge workers, equipping people with skills, and preparing people for community leadership. Arts and culture are often used to attract and retain talent and as occupational targets for apprenticeship and training programs.	Innovative industrial development incorporates business clustering and regional collaboration; often emphasizes “green” development; and makes use of creative incentive tools.

Source: Morgan, Jonathan Q., and William Lambe. "Find a way or make one." *Economic Development Journal* 8, no. 3 (2009): 5-13.

	Economic Gardening	Place-Based Development	Creativity & Talent Cultivation	Innovative Industrial Development
Strategies and Tools	Entrepreneurship Information brokering Infrastructure Social capital Business incubators	Quality of life amenities Downtown development Infrastructure Tourism development Growth management Arts and culture	Arts and culture Workforce development Leadership development Social capital	Cluster-based development Regional collaboration Joint industrial parks Eco-industrial parks Green industry development Creative incentives
Example Communities	Douglas, GA Ord, NE Siler City, NC Fairfield, IA Star, NC Big Stone Gap, VA Elkin, NC Spruce Pine, NC	Nelsonville, OH Dora, OR Hillsborough, NC Bakersville, NC Etowah, TN Ayden, NC Colquitt, GA Big Stone Gap, VA Columbia, NC Hollandale, MS Scotland Neck, NC	New York Mills, MN Siler City, NC Morrilton, AR Rugby, ND Allendale, SC Douglas, GA Fairfield, IA Elkin, NC	Sparta, NC Washington, NC Oxford, NC Cape Charles, VA Reynolds, IN Douglas, GA Ord, NE Farmville, NC Etowah, TN

Source: Morgan, Jonathan Q., and William Lambe. "Find a way or make one." *Economic Development Journal* 8, no. 3 (2009): 5-13. Recreated: Table 2. Alternative Economic Development Approaches.

Sage’s recommendations for the City of Greenbelt overlap with virtually all of these categories. For instance, recommendations in support of newer housing stock represent an effort to build social capital by adding to the population of upwardly mobile families while recommendations focused on upgrading commercial areas relate to downtown development, tourism and the promotion of culture.

Ideas from Similarly Situated Communities

Sage has been fortunate to work with many Maryland communities. Among these communities are Frederick, Gaithersburg, and Hagerstown. Stakeholders may find that some of the ideas Sage has presented to these communities in recent years may be relevant to improving the shared quality of life in Greenbelt.

The City of Frederick, Maryland

Town/City:	**The City of Frederick, Maryland**
Population (2012):	65,171
Recommendation:	*Target development strategies based on unique aspects of the City*
Description:	Sage has recommended that Frederick undertake certain efforts that will complement/help certain areas of the City based on their unique aspects/conditions, including the historical retail district known as the Golden Mile. Golden Mile: • Market ethnic dining experience and expand dining options to include fine dining • Support and implement the Golden Mile Small Area Plan with an emphasis on mixed-use and design • Provide an incentive for projects that implement mixed-use design • Implement façade improvement program
Relevance:	Like Greenbelt, Frederick has observed some lost vitality in certain key retail districts. The ideas Sage recommended for the City of Frederick may enjoy some salience in Greenbelt, including an emphasis on attracting ethnic restaurants and encouraging mixed-use settings, including at Beltway Plaza.

The City of Gaithersburg, Maryland

Town/City:	***The City of Gaithersburg, Maryland***
Population (2012):	60,223
Recommendation:	*Adopt an Owner Occupancy Only Policy within the MD-355 Corridor*
Description:	Sage's analysis indicated that the Corridor is in danger of rental saturation, particularly in the form of smaller rental units that take studio and 1-bedroom form. Accordingly, Sage recommended that Gaithersburg pursue public policies that could make the Corridor more appealing for current and future residents (such as commercial tenants), including: • Stopping new construction of rental apartments and encouraging conversion of existing multi-family rentals to larger condominium ownership units; • Increasing the number of Single Family Detached Homes and Townhomes or Stacked Townhomes in all potential infill areas in the Corridor. Multi-Family Condominium units should represent a secondary consideration; • Investing in as many infill opportunities as possible focusing on specific identified areas where infill development opportunities either presently exist or could be created through action.
Relevance:	The study team has indicated that like Gaithersburg, homeownership in Greenbelt has declined to unusually low levels.

Hagerstown, Maryland

Town/City:	***Hagerstown, Washington County, Maryland***
Population (2012):	Hagerstown: 40,078
Recommendation:	*Art promotion should initially focus on downtown Hagerstown*
Description:	Because downtown Hagerstown possesses many of the artistic and cultural assets in the community, it is the most logical place within the county to create an industry cluster.
Recommendation:	*Deconcentrate poverty in downtown Hagerstown*
Description:	Downtown Hagerstown is home to a high concentration of Section 8 housing. According to many stakeholders, the concentration of poverty downtown acts as a barrier to the formation of an arts, entertainment, and education cluster in Hagerstown and Washington County. Sage recommended that the Hagerstown Housing Authority (HHA), a local non-profit organization, supply voucher recipients with better information regarding their housing options and actively participate in their housing searches. It was also recommended that: • HHA encourage landlords outside of the central city to participate in the program by offering new or promoting existing incentives, as well as better informing them about the program. • HHA collaborate with the Housing Authority of Washington County (HAWC) to support the de-concentration of poverty.
Recommendation:	*Create a Community Arts Commission /Downtown Partnership*
Description:	The issue of coordination, or the lack thereof, arose frequently during focus groups and during research. Sage recommended that the community create an Arts Commission (a non- governmental, non-profit organization) to develop strategies, funding, and implementation plans for community projects. The new Commission could connect arts, entertainment and educational efforts with local businesses and residents. For successful achievement, the City and County government should be supportive of the commission's actions.
Recommendation:	*Create an arts incubator in downtown Hagerstown*
Description:	In its development of case studies, Sage found that arts incubators are often very successful at attracting and assisting artists. The presence of artists not only attracts visitors, but also leads to business formation, greater demand for real estate and a general sense of community vibrancy. Accordingly, Sage recommended that Hagerstown create an arts incubator housed in a building with subsidized office supplies,

	studio space, and technical assistance, as well as low-cost apartments for artists.
Recommendation:	*Intensive Marketing of the County's Cultural Assets/Branding*
Description:	Community leaders suggested a need for Hagerstown to alter its image. Sage recommended that the City/County market itself as an arts and cultural tourist destination by promoting the community's artistic and cultural assets, Internet marketing in the form of a comprehensive website representing the simplest and most affordable way to do this. Such a website should serve as the central repository for information regarding events, dates/complete calendar, times, ticket availability, parking, directions, proximate shopping and restaurants, reviews, etc.
Relevance:	Greenbelt is home to a large number of artisans, entrepreneurs, and entertainment venues. The ideas supplied to the City of Hagerstown may have some relevance for building on the existing cluster of arts and entertainment in Greenbelt.

Appendix D. Strategies to Support Local Business/Improve Business Relations

During a recent work session, Sage was asked to provide detail regarding ways in which the City of Greenbelt could generally improve business-government relations. Some ideas are presented below.

Tools/Roles for Local Governments

To support entrepreneurs and businesses, local governments must first examine the policies and tools that lie squarely within their powers. The National League of Cities (NLC) conducted research in 2010 and 2011 to help identify key areas for local government action, including:

- Leadership;
- Communication strategies that create avenues for local businesses to engage with local government; and
- Maintenance of an efficient regulatory environment.

This section of the report summarizes several of the key findings generated by the NLC.

Leadership

Strong local elected leaders are needed to prioritize issues and outwardly demonstrate that small businesses and entrepreneurs are important to the community.

As a practical matter, strong local leadership with committed political capital is necessary to get things accomplished. This helps motivate internal and external stakeholders and provides legitimacy for issues and programs.

City Example: Mayoral leadership for Entrepreneurs
Innovation District, Boston, Massachusetts

Summary

"Mayor Thomas M. Menino of Boston models leadership for entrepreneurs. As part of his effort to transform Boston's 1000 acre waterfront into a new "Innovation District," he uses public forums to stress the importance of entrepreneurs to Boston's success. He and his staff attend events that showcase entrepreneurs, such as openings of new businesses, co-working spaces and accelerators in the area. The City utilizes the Innovation District's website, blog and active Twitter feed to celebrate successes and to connect space-seekers with the incubators. Additionally, the city and the Boston Redevelopment Authority (BRA) staff frequently meet with new companies to introduce them to the Innovation District and relay the mayor's vision for the area."

Communication

Communication between the local government and the entrepreneurial and small business community is needed to improve processes and better respond to needs.

Research conducted by the National League of Cities suggests that a local government's ability to understand and communicate with local businesses is inherently tied to its ability to contribute to an entrepreneurial ecosystem. Without effective channels of communication a local government cannot:

- Get input to examine how local regulations and policies help or hinder growth;
- Identify small businesses that are expanding;
- Promote community resources that provide support;
- Provide permitting and zoning information; or
- Celebrate success.

Research suggests that communication is a two-way street: entrepreneurs and local small businesses also value having open channels of communication with local governments. Creating channels of communication, especially avenues for local businesses to engage with policy makers, is one of the key ways local governments can encourage local and small business development. The benefits of communication extend throughout the community. Research shows that cities that have input and involvement from the business community in policy making have a business community that is more active in other aspects of the community, including arts, education, and quality of life issues.

It is quite possible that some entrepreneurs may not see local government as a natural partner. In this case, there are a number of ways for local governments to initiate communications, such as engaging with stakeholder groups that represent or support local businesses, like chambers of commerce and universities. Another mechanism to open the channels of communication is for local elected officials to publicly acknowledge and celebrate the accomplishments of local businesses and outwardly stress their importance to the community. These public celebrations can help demonstrate that local leadership is supportive of an entrepreneurial environment, signal to individual businesses that they are valued, and even establish relationships with businesses that may be expanding and looking at new areas to grow.

City Example: Providing channels of communication
Seattle Business Casual, Seattle, Washington

Summary
"The City of Seattle is committed to creating channels for local businesses to interface with city government. The city created business advocates in its Office of Economic Development (OED) to help businesses navigate government processes and connect to resources. Additionally, OED hosts a well-attended, informal monthly networking event, so the local business community can connect with key political, departmental and economic development stakeholders. For example, the February 2012 event focused on connections with major education and healthcare institutions and had representatives from the region's universities, community colleges and hospitals in attendance. Additionally, OED staff, elected officials, the director of the department of planning and representatives from the mayor's office were also in attendance to network."
More information about Seattle Business Casual can be found at: www.seattle.gov/economicdevelopment/citybusinesscasual.htmoloradowww.innovationdistrict.org.

Regulatory Environment

In addition to communication efforts, providing regulatory assistance is one of the primary ways that local governments can encourage business development, particularly growth in small businesses.

Regulations serve many functions including helping safeguard citizens, preserving a city's sense of place, and protecting built and natural assets. However, regulations can also create bureaucratic barriers that impede development and are burdensome on businesses and entrepreneurs. Because local governments are one of the primary regulators of business, it is essential for cities to evaluate the effects of their regulatory environment.

"Navigating a regulatory process can be difficult for any business, but can be especially hard on small or new businesses that do not have the time, resources, and experience needed to navigate bureaucratic steps. Difficulties with the local regulatory process could stem from:

- Inaccessible ways to interface with government and access information;
- Lack of transparent timelines;
- Slow reaction for requests for approvals;

- Multiple uncoordinated agencies; and
- Outdated laws that no longer serve a purpose."

The issue of multiple uncoordinated agencies appears to be particularly serious in Greenbelt, where there often is a need for approval and/or support from both County-level and City-level policy implementers.

City Example: Regulatory Assistance
"Open for Business" Program, Rock Hill, South Carolina

Summary

"Recognizing the difficulties that come with opening a new or expanding a business,, the City of Rock Hill created the "Open for Business" program, which includes a "special business assistance team ready to roll up their sleeves and guide you" through the regulatory process. The program encourages business owners to fill out a questionnaire and to schedule an appointment with "Open for Business" staff. This meeting helps determine whether a proposed business location is properly zoned and identifies problems. Following the meeting, staff performs a feasibility inspection of a business' proposed site. To determine what modifications may be needed to ensure that it complies with existing codes. This information helps a potential owner understand timelines and costs. Following the inspection, staff will meet with the business owner again, go over results and provide guidance of next steps. This program ensures that plans will be reviewed within 5-10 days, and provide feedbacks for any issues. The "Open for Business" program also assists business in obtaining a business license and setting up utility and sanitation service."

More information about the "Open for Business" program can be found at: http://www.cityofrockhill.com/departments/planning-and-development/open-for-business. In a City of Greenbelt context, this work would likely have to be done by the Mayor/City Council and existing City staff.

All information in this appendix is sourced from the National League of Cities (NLC) "Supporting Entrepreneurs and Small Business: a tool Kit for local leaders".