Greenbelt City Council
Work Session

Economic Development

August 6, 2018

8:00 pm

Municipal Building
25 Crescent Road
Council Chamber

CITY OF GREENBELT, MD
CLASS SPECIFICATION

CLASS TITLE:	**Economic Development Coordinator**	**SALARY GRADE: 20**
DEPARTMENT:	**Administration**	**FLSA STATUS: E**
REPORTS TO:	**City Manager**	**DATE: 03/2018**

JOB SUMMARY AND DISTINGUISHING FEATURES OF THE WORK:

Coordinates the economic development operations and activities to achieve the goals and objectives of the City of Greenbelt. The work is performed under the direction of the City Manager, but extensive leeway is granted for the exercise of independent judgement and initiative. The nature of the work performed requires that an employee in this position establish and maintain effective working relationships with elected and appointed officials; city staff; business and community groups; developers; county, state and federal officials and the general public.

ESSENTIAL JOB FUNCTIONS:

Provides assistance in the development of short and long term economic and community development plans, as well as gathering information and preparing studies, reports and recommendations to achieve such goals. This involves the preparation and maintenance of information on utilities, taxes, zoning, transportation, community services, financing tools and incentives in order to respond to requests for information for economic development purposes, and coordination with other departments and agencies as needed.

Provides economic development advice and assists in the application and permitting process, and serves as an advocate for economic development in line with the Code for the City of Greenbelt.

Maintain as liaison with businesses, professional groups, and County and State agencies as they relate to the City's Economic Development goals.

Provides information and/or make presentations to City Council, boards, commissions, civic groups, businesses, individuals, and the general public on economic development issues, programs, services and plans.

Maintains an inventory of available buildings and business development sites within the City.

Makes site visits to businesses to support retention and expansion needs.

Maintains strong working relationships with the general public, area businesses, clients, the media, and others having an interest in, or impact on, economic development for the City of Greenbelt.

Keeps immediate supervisor and designated others fully and accurately informed concerning work progress, present and potential programs, and makes suggestions for new or improved ways of addressing such problems.

Attends meetings, conferences, workshops and training sessions to remain current on the principles, practices and new developments in assigned work areas.

Regularly communicates and coordinates with appropriate others to maximize the effectiveness and efficiency of interdepartmental operations and activities.

Serves as a member of various staff committees as assigned.

Willingly and cooperatively accepts other related duties and responsibilities as assigned.

IMPORTANT JOB FUNCTIONS:

Ability to read, analyze, and interpret common scientific and technical journals, financial reports and legal documents. Ability to respond to common inquiries or complaints from customers, regulatory agencies, or members of the business community. Ability to effectively present information to top management, public groups, and/or boards of directors.

Ability to calculate figures and amounts such as proportions, percentages, area, circumferences and volume. Ability to apply concepts of basic algebra and geometry to practical situations, including reports and analysis.

Ability to define problems, collect data, establish facts, and draw valid conclusions. Ability to interpret an extensive variety of technical instructions in mathematical or diagram form.

Ability to maintain and expand the City's on-line Business tool kit.

Ability to identify and prepare grant proposals and applications.

MATERIAL AND EQUIPMENT USED:

Computer General Office Equipment Automobile Mobile Telephone

MINIMUM QUALIFICATIONS REQUIRED:

Education and Experience:
Bachelor's degree from an accredited college or university in urban planning, marketing, economic development, public administration or other related field and at least 5 years experience in economic development, project management, strategic marketing or business management involved in planning, preparing and implementing proposals and project budgets or any equivalent combination or education and experience which meets the requirements of the duties and responsibilities.

Licenses and Certifications:

Designation as a Certified Economic Developer (CED), Economic Development Finance Professional (EDFP), or equivalent desired.

Valid Driver's License

KNOWLEDGE, SKILLS, AND ABILITIES:

Comprehensive knowledge of effective principles, practices, methods, and techniques of municipal economic development programming and administration.

Comprehensive knowledge of business concerns, needs, practices, and markets and relocation needs and initiatives.

Thorough knowledge of the techniques and principles of public relations, external community image building, and marketing.

Knowledge of the City's goals, plans and needs for improvement of the economic base.

Thorough knowledge of applicable federal, state and local laws, codes, and regulations governing urban economic development.

Thorough knowledge of and ability to prepare budgets and provide fiscal analysis of proposals.

Skill and ability in public speaking to make effective presentations to a variety of audiences.

Skill and ability in developing long and short-range plans and programs.

Ability to prepare and present accurate, logical, and reliable oral and written reports, recommendations and presentations following necessary research and analysis.

Ability to represent the department and the City in a professional manner.

Ability to interact professionally and cooperatively and establish and maintain effective working relationships with City officials and managers, local, regional, state, and federal officials, private sector executives and business representatives, developers, associates, the general public, and all those encountered in the course of work.

Ability to work collaboratively and build consensus around economic development initiatives.

Knowledgeable in economic development tools including but not limited to, Tax Increment Financing (TIF), tax abatement and State and County economic incentive/assistance programs.

Working Conditions:
Work is performed in a normal office environment with little exposure to outdoor temperatures or dirt and dust.

The incumbent's working conditions are typically quiet.

This class specification should not be interpreted as all inclusive. It is intended to identify the essential functions and requirements of this job. Incumbents may be requested to perform job-related responsibilities and tasks other than those stated in this specification. Any essential function or requirement of this class will be evaluated as necessary should an incumbent/applicant be unable to perform the function or requirement due to a disability as defined by the Americans with Disabilities Act (ADA). Reasonable accommodation for the specific disability will be made for the incumbent/applicant when possible.

ULI – the Urban Land Institute

The **mission** of the Urban Land Institute is to provide **leadership** in the **responsible use of land** and in creating and sustaining **thriving communities** worldwide.

Urban Land Institute
Washington

ULI Washington

A District Council of the Urban Land Institute

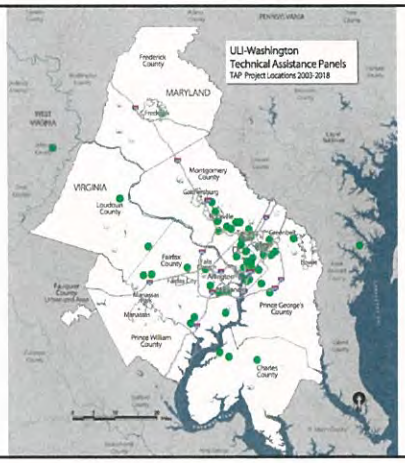
ULI at the local level: 2,200+ Members: developers, architects, planners, public officials, financiers, students...

Emphasis on sharing best practices and providing outreach to communities

- Technical Assistance Panels
- Sustainability, Regionalism, Housing Initiative Councils
- Regional Land Use Leadership Institute
- UrbanPlan Program
- Washington Real Estate Trends Conference
- Case Studies

Urban Land Institute
Washington

http://washington.uli.org



PANELISTS

- Marsha Kaiser, WSP - CHAIR
- Paul Bernard, ULI
- Lora Byala, Foursquare ITP
- Suzette Goldstein, HOK
- Nicole McCall, MWCOG
- Paul Moyer, Jacobs
- Josh Olsen, Monument Realty
- Dan Reed, Toole Design Group
- Merrill St. Leger, SmithGroup JJR
- Kyle Talente, RKG Associates
- Nkosi Yearwood, Montgomery County Department of Planning

Flow of the Day

1. What we heard and learned
2. Opportunities for study area
3. Mobility Possibilities
4. Land Use Enhancements
5. Market and Social Realities
6. Implementation Strategies
7. Final Thoughts

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What We Heard: It's a Mixed Bag!

- Love our restaurants! → Loss of Sir Walter Raleigh
- Lots of community services → Internally competition?
- Potential to serve as residential community for UMD faculty and staff → Area elementary schools are at or over capacity
- Mall is a large parcel →Mismatch btwn offerings and desires of part of community
  - Mixed vision for what the future of the Mall will look like
- A vision for multi-modalism, particularly bike/ped:
  - Many residents chose not to own cars
  - Ample bus routes and lines serving the area

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What We Heard: It's a Mixed Bag!

- Assets and amenities:
  - **Transportation:** Metro station, BW Parkway, I-495
  - **Industry:** NASA Goddard, UMD, nearby healthcare uses (Children's Hospital, Kaiser Permanente)
  - **Parks:** Trails, Greenbelt Park, Lake Artemesia
- BUT local tourism opportunities remain unleveraged
- Desire for the area:
  - More tech companies
  - Leverage nearby arts scene
  - Local hub
- Greenbelt Road is a:
  - Connector between Old Town College Park and Greenbelt
  - Main Street of Berwyn Heights

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What We Consistently Heard

- Four guiding principles:
  - Bike/ped improvements
  - Different kinds of retail
  - Quality open space
  - Aging in Place
- Why aren't we getting a …?

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What Remains Unclear

- Who is the **collective** community, and what do they want?
- Is there a specific champion?
- Where is the proactive voice?
- Where is the sense of urgency?
- What is the comprehensive vision?

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Opportunities

- Magnets
  - University of Maryland
  - Federal Courthouse
  - NASA Goddard
  - Greenbelt Park
  - Old Town Greenbelt
  - College Park Airport and Aviation Museum
- Untapped Assets
  - Unrecognized recreational facilities – trails, open space, green space
  - Vacant commercial property
  - Underutilized anchors on both sides of the corridor – opportunities for gateway

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Opportunities

- Regional Connections
  - Baltimore-Washington Parkway
  - I-495
  - Baltimore Avenue (Route 1)
  - Greenbelt Metro Station
  - Greenbelt MARC Station

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Influencing Forces, Policies, Players

- Forces
  - Regional housing demand
  - Consistent, cohesive vision for multimodal transportation
- Policies
  - County Zoning Re-writing
- Actors
  - Four Cities Coalition
  - One large landowner who is active in the conversation
  - Active local electorate
  - MDOT SHA
  - WMATA

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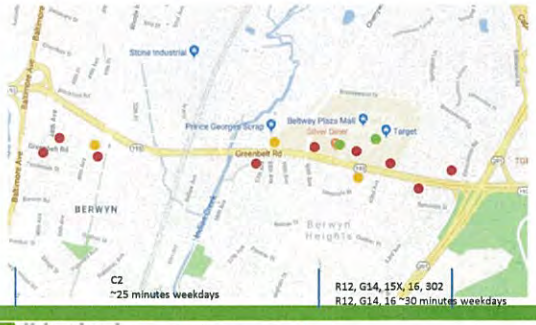
Existing Bus Service and Facilities



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- 50+ boardings/day
- 20-49 boardings/day
- 1-19 boardings/day

Metrobus Only

Bus Facility Suggestions

- Safety and ADA
  - Sufficient sidewalk and waiting space at all stops
  - Crosswalks and pedestrian signals
  - Ensure sidewalk connectivity from all stops
- Comfort using common design elements
  - Shelters – WMATA guidelines 50 boardings/day
    - Not funded by WMATA
- Bus priority treatments to speed up connections
  - US-1 to Cherrywood Lane a WMATA priority corridor – priority treatments
  - Could be viable from Cherrywood Lane to Kenilworth based on level of service

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Future The Bus Service Recommendations

- 15X: Limited stop service - Greenbelt Metro to Greenbelt Station Community
  - Improve peak frequencies to 30 minutes
  - Evening service to 10:00pm
- 16: Local on Greenbelt Road from Cherrywood to Kenilworth
  - Improve mid-day frequency to 45 minute; longer term mid-day to 30 minutes and peak to 20 minutes
  - Evening service to 10:00pm
  - Add Saturday service (every 45 minutes)

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Source: Draft recommendations from Prince George's County Transit Vision Plan

Metrobus and UMD Future Service

- Metrobus
  - G14 and R12 going into Beltway Plaza is not in-line with WMATA service design guidelines
- UMD Shuttle Route 143 – consider adding greater frequency and weekend service
  - Access to Giant and potential new development
  - Access to campus for faculty, staff, students in Berwyn Heights and Greenbelt

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Bicycle Facilities

- Additional bike facilities and crossings will require pubic education
  - Example - http://www.montgomerycountymd.gov/DOT-DIR/commuter/bikeshare/lookout.html
- Add wayfinding and entrance signage to direct bikers to trails and connections to rail

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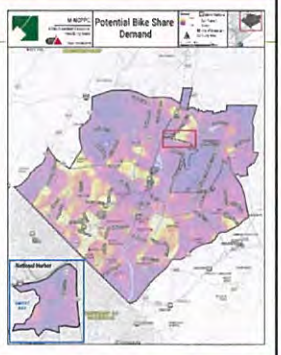
Bike Share

- Capital Bikeshare stations recommended for Phase 2 of Prince George's County implementation plan
  - In conjunction with new bike facilities and wayfinding
- Capital Bikeshare for regional connections, mBike for local trips



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Mobility

- Bus Rapid Transit (BRT) Alternatives
- Median: approximately 50 feet-would require lane reductions or expanded right-of-way.
- Mixed Traffic: typically curb lanes

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Mobility

- Queens Chapel Road (MD 500)
- Streetscape improvement project, including sidewalks, stormwater management, bike lanes and street lights.
- $18 M-some cost sharing from the municipalities of Hyattsville and Mount Rainier.

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Existing Greenbelt Road

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Existing Greenbelt Road

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Existing Greenbelt Road Conditions

- Approximately 96' curb to curb near Beltway Plaza
- 120' Right of Way
- Gaps in Sidewalk
- Limited to No Buffer between Sidewalk and Street
- Dedicated Right Turn Lanes with Slip Lanes

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Potential Greenbelt Road

- Re-plan existing travel lanes within 96' curb to curb area
- Incorporate bike lanes
- Eliminate dedicated right turn lanes
- Incorporate planting strip and sidewalk on both sides
- Add pedestrian refuge in median
- Consolidate curb cuts

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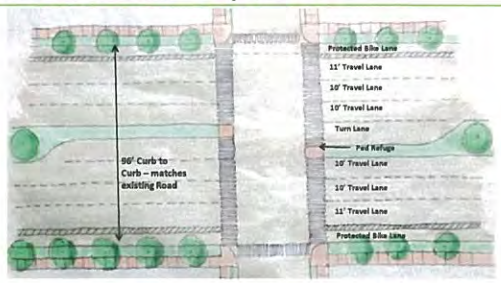
Greenbelt Road – Option 1



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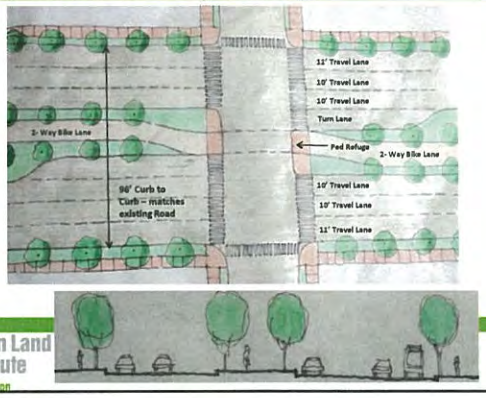
Greenbelt Road – Option 2



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Future Trail/Pedestrian Connections

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Existing Trail/Pedestrian Connections

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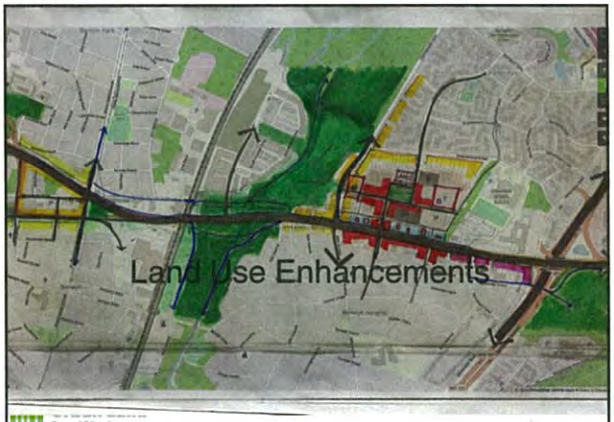

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Land Use – Road Network

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Land Use –Trails and Green Space

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Land Use – Medium Term Development

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Land Use – Medium Term Development

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Land Use – Medium Term Development

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Land Use – Long Term Development

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Land Use – Long Term Development

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Market Analysis

Retail Demand

Industry Group	Demand	Supply	Gap
Furniture & Home Furnishings Stores	$7,741,746	$5,332,767	$2,408,979
Furniture Stores	$4,613,915	$994,066	$3,619,849
Home Furnishings Stores	$3,127,831	$4,054,945	($927,114)
Electronics & Appliance Stores	$8,513,051	$8,688,330	($175,279)
Lawn & Garden Equip & Supply Stores	$973,482	$312,553	$660,929
Grocery Stores	$34,890,652	$104,379,849	($69,489,197)
Specialty Food Stores	$2,071,126	$735,028	$1,336,098
Beer, Wine & Liquor Stores	$4,346,588	$10,350,223	($6,003,635)
Health & Personal Care Stores	$13,143,742	$16,745,146	($3,601,404)
Gasoline Stations	$19,891,546	$58,568,341	($38,676,795)
Clothing & Clothing Accessories Stores	$15,405,146	$15,799,137	($393,991)
Clothing Stores	$10,513,764	$9,196,528	$1,317,236
Shoe Stores	$2,412,828	$3,575,756	($1,162,928)
Department Stores Excluding Leased Depts.	$23,517,265	$62,907,513	($39,390,248)
Food Services & Drinking Places	$24,130,872	$63,345,642	($39,214,770)
Drinking Places - Alcoholic Beverages	$713,242	$343,182	$370,060
Restaurants/Other Eating Places	$22,671,416	$58,234,685	($35,563,269)

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Market Analysis

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Market Analysis

Residential Demand

Two over two's from ~$350;
Full townhomes up to $600k

1BR from ~$1,500
2BR from ~$2,000

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Social Realities

What is Opportunity?

Opportunity is the set of circumstances or pathways that make it possible for people to achieve their goals—no matter their starting point. At Enterprise, we believe that all people should be able to live in communities in which the available pathways lead to positive outcomes—housing stability, education, health & well-being, economic security and mobility. These are the outcomes we strive to achieve every day for ourselves, our friends and families, and the broader communities in which we live.

Opportunity360 offers a framework for measuring opportunity at a neighborhood level using more than 160 data indicators from both public and proprietary sources.

To help you tell the story of opportunity in your neighborhood, we created index values for each opportunity outcome. The snapshot below illustrates how the values for your census tract compare to all other tracts in the nation. A score of 50 means the tract is in the 50th percentile—half of all tracts in the country have higher scores and half have lower scores. The region and state scores reflect the percentile ranking of the selected tract as compared to all other tracts within those areas.

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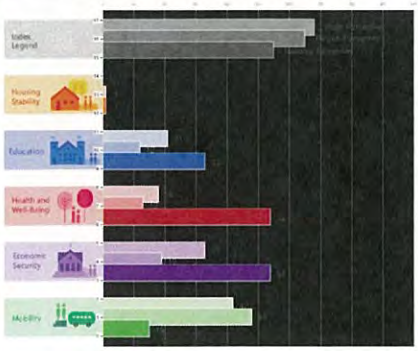
Source: **Opportunity360 Measurement Report**
Report for Census Tract: 8067.14
https://www.enterprisecommunity.org/opportunity360

Social Realities

What Does Opportunity Look Like for People Living in This Community?



Source: **Opportunity360 Measurement Report**
Report for Census Tract: 8067.14
https://www.enterprisecommunity.org/opportunity360

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Economic Development

- Enhance Capacity to Affect Change
  - Create 4-cities Economic Development Organization (EDO)
    - Resource pooling
    - Staff augmentation
    - Project prioritization
    - Proactive implementation

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Economic Development

- Build a brand
  - Create a brand for 4CD/municipalities
  - Define our future
    - Coordinate with County/State
  - Develop a proactive marketing and outreach strategy
    - Increase awareness of opportunities/vision
    - Guide your own future
    - Build relationships

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Economic Development

- Relationship Building… Partnership Building
  - University of Maryland
  - SHA
  - WMATA
  - NASA
  - M-NCPPC
  - U.S. Department of Interior
  - Catalyst site property owners
  - Residents
  - Capitol Office Park
  - Greenbelt Homes, Inc.
  - Financial institutions

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Economic Development

- Programs
  - Tax Increment Financing (TIF)
  - Rehabilitation Tax incentive (2014 ED Strategy)
  - Municipal bonding
  - General fund investment
  - Grants
  - Implementation partner programs
    - County
    - State
    - Federal

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Land Use Strategies

- Programs
  - Naturally occurring price appropriate housing protection
    - Advocacy to County
  - Inclusionary zoning
  - Open space property acquisition
  - Land swaps
  - Rezoning/overlay districts
    - Create value
    - Develop stronger marketplace
  - Transfer of Development Rights (TDR)
  - TOD parking strategies
  - Use development to help with other goals, but must balance with market and financial realities

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Transportation

- Funding Programs
  - Transportation Land Use Connections (TLC)
  - Transportation Set Aside Program (TAP)
  - Transportation Infrastructure Finance & Innovation Act (TIFIA)
  - Railroad Rehabilitation & Improvement Financing (RRIF)
  - Maryland Bikeways Program
  - Consolidated Transportation Program (CTP)

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Final Thoughts: How will you address the future?

- Are you bringing people **through** you or **to** you?
- Reactive v. proactive
- When it comes to multi-modal ambitions, don't let the tail wag the dog
- Consider the cost of the status quo
- Connect the pearls

You can influence your future – if you want to!

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ULI Washington Technical Assistance Panel

Greenbelt Road Corridor Improvements

Town of Berwyn Heights
City of College Park
City of Greenbelt

Table of Contents

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List of Sponsors

Town of Berwyn Heights

Incorporated in 1896, the Town of Berwyn Heights is approximately one square mile and home to 3,100 residents living in 1,050 single-family homes on the hillsides of the Indian Creek valley. Outstanding parks and recreational amenities, accessed by Greenbelt Road (MD 193), surround Berwyn Heights. Greenbelt National Park, Lake Artemesia, and the Anacostia Trails system offer year-round opportunities for hiking, biking and nature watching. Additionally, the nation's capital's numerous attractions are within easy reach from two stations on Metro's Green Line just outside the Town's boundaries. To learn more about Berwyn Heights, visit www.berwynheightsmd.gov.

City of College Park

The City of College Park was originally settled in 1745 and was incorporated as a municipality in 1945. The City is home to the University of Maryland College Park, the flagship campus of the University System of Maryland (UMD), with a combined undergraduate and graduate population of approximately 38,140 students. The estimated current population of the City is 32,301 with a median age of 22.5 and per capita income of $18,000. The City comprises approximately 5 square miles and has 52 miles of paved streets and 21 miles of sidewalks.

UMD is the City's largest property owner (tax exempt) and the City's largest employer. Other major employers include University of Maryland University College, National Archives and Records Administration II, National Oceanic and Atmospheric Administration, US Food and Drug Administration, American Center for Physics and IKEA comprising 72% of the City's workforce or 24,000 employees. Principal property taxpayers include owners of several multifamily buildings (student housing and market rate) as well as two large shopping centers. The City has over 1,000 businesses and an unemployment rate of around 6%.

College Park is home to the oldest continuously operated airfield in the United States as well as two neighborhoods listed on the National Register of Historic Districts. The City is served by the Green Line of the WMATA Metro system and will have four stations on the Purple Line light rail now under construction. To learn more about College Park, visit www.collegeparkmd.gov.

City of Greenbelt

The City of Greenbelt is in the history books as one of the first planned communities in the United States built as a federal venture in housing. From the beginning, it was designed as a complete city, with businesses, schools, roads, facilities for recreation, and a town government. Greenbelt was a planned community, noted for its interior walkways, underpasses, system of inner courtyards, and one of the first mall-type shopping centers in the United States. Today much of the original features of this planned community still exist. In addition to it, the city itself has expanded to include additional shopping centers, high rise office buildings, garden apartments, townhouses and private development. With the construction of the Baltimore-Washington Parkway, the Capital Beltway, Greenbelt Road and Kenilworth Avenue – which meet

in Greenbelt – the city has become a center of major residential and commercial development within the Prince George's County. To learn more about Greenbelt, visit www.greenbeltmd.gov.

Metropolitan Washington Council of Governments

The Metropolitan Washington Council of Governments (COG) is an independent, nonprofit association that brings together area leaders to address major regional issues in the District of Columbia, suburban Maryland and Northern Virginia. COG's membership is comprised of 300 elected officials from 22 local governments, the Maryland and Virginia state legislatures and the United States Congress. Policies are set through the COG Board of Directors, the National Capital Region Transportation Planning Board and the Metropolitan Washington Air Quality Committee. These three boards are responsible for a broad range of issues under the COG umbrella, including but not limited to transportation, land-use, public health and safety, education, the environment and more. Founded in 1957, COG is supported by financial contributions from its participating local governments, federal and state grants and contracts, and donations from foundations and the private sector. To learn more about COG, visit www.mwcog.org.

Urban Land Institute (ULI)

The Urban Land Institute (ULI) is a nonprofit education and research organization supported by its members. Founded in 1936, the Institute has over 30,000 members worldwide, representing the full spectrum of land use and real estate development disciplines working in private enterprise and public service. ULI's mission is to provide leadership in the responsible use of land and to help create thriving, healthy communities. ULI offers a number of programs, workshops and educational opportunities in support of this mission; the Washington District Council is one of ULI's largest District Councils, with almost 2,000 members.

The Technical Assistance Panel (TAP) Program is designed to provide expert, objective, market-based advice on complex land use and economic development issues. The Washington District Council draws on the expertise its members for TAP panel chairs and participants. For more information about ULI, go to www.washington.uli.org.

The Assignment

Summary of the Problem

The Greenbelt Road Corridor stretches through three Maryland municipalities, the Cities of College Park and Greenbelt, and the Town of Berwyn Heights. In College Park, Greenbelt Road serves as a gateway to the University of Maryland and Downtown College Park where there is significant revitalization underway, including the RISE District. In the smaller, historic Berwyn Heights, Greenbelt Road contains commercial and industrial sites, as well as developable frontage. Yet across the road in Greenbelt, Greenbelt Road is comprised of multiple shopping centers, including Beltway Plaza Mall, new and older residential development near the Greenbelt Metrorail station, the Federal Courthouse, and points east including the Greenbelt historic district, major office parks, the Baltimore/Washington Parkway, and NASA Goddard Flight Center. Both College Park and Greenbelt are MWCOG Activity Centers.

The Berwyn Heights, College Park, and Greenbelt Councils have agreed to work cooperatively to practically address Greenbelt Road improvements. Given the breadth of the Corridor, the technical assistance panel is requested to provide recommendations regarding one section of Greenbelt Road, from Rhode Island Avenue to Kenilworth Avenue (near the Greenbelt Middle School).

Plans for follow-up on TAP recommendations

The TAP recommendations are expected to serve multiple purposes. For example, the communities plan to use TAP recommendations to support community decision making regarding community planning, budgeting, and prioritization of action steps. The TAP recommendations are also anticipated to help the communities or private sector apply for future local, regional, state, and federal funding for MD193 streetscape improvements, private improvements, efforts, economic development, and transportation improvements. The TAP can provide insight on regional and state competitiveness, current and future market demand for inventory and services, the potential impact on current businesses and property owners, and needed economic development activity. Likewise, the findings should support local property owners in planned property improvements, business investment, and operations. Some property owners have expressed hesitancy in investments as the communities await the federal decision regarding the possible relocation of the FBI to Greenbelt.

Panel Questions

1) What should be the long-term vision for Greenbelt Road regarding proper mix, locations, and types of residential, commercial, and industrial space? How can current uses co-exist and what is the highest and best use for available land? What options are available for the public or private sector to address redevelopment (for example, Berwyn Height's small, limited parcels)? How do industrial properties fit into the long-term vision for the corridor? What options are available to address the transition among multiple land uses including residential, commercial, and industrial areas along the corridor? How can the communities and private sector incent new development and community improvements? What corridor improvements should be implemented regardless of the FBI headquarters decision?

2) What options are available to increase open space and recreation along the corridor? How can the communities encourage landowners or potential landowners to invest in properties while ensuring that adequate open and recreational space remains, along with adequate base of land to develop to support economic trends and the tax base?

3) What options are recommended to support safe pedestrian access connection along the corridor? For example, the safety of College Park senior citizens walking from Rhode Island Avenue to Beltway Plaza Mall in Greenbelt? Or walkers traveling from the new Greenbelt Station development to Beltway Plaza or other retail centers.

4) What action should be taken to support the Neighborhood Conservation Plan which has been on hold by the State of Maryland for many years? What methods should be used to make the case for the Maryland State Highway Administration to fund the updated design, engineering, and construction of a MD193 Corridor Plan for the application area?

5) How can the area be revitalized and enhanced through place making and/or design? What design elements can support streetscape, wayfinding, entry points, and sidewalk enhancement? How can subareas be delineated, while still integrated into the larger Greenbelt Road Corridor (Metrorail stations, industrial, commercial, and residential areas, as well as larger development such as Beltway Plaza Mall)?

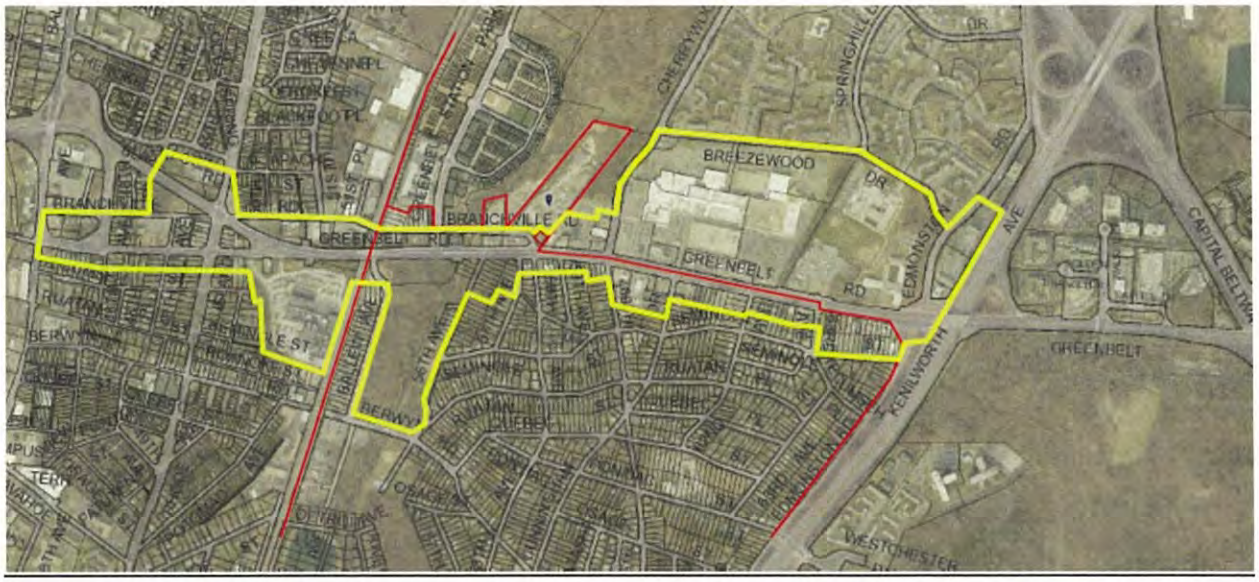
History of the Study Area

About 15 years ago, the three communities worked with the Maryland State Highway Administration to develop the Greenbelt Road Corridor Plan and the Greenbelt Road (MD 193) Community Enhancement or Streetscape Project. Implementation of the plan was hampered by a lack of State funding. Given a lack of local funding, the local communities have repeatedly lobbied the State of Maryland to reactivate and implement the Plan as the need continues to make Greenbelt Road more neighborhood, pedestrian, and bicycle friendly. This includes addressing community redevelopment, multi-modal transportation, the need to preserve and promote open space and recreation, and improving pedestrian and bicycle safety. The need to address Greenbelt Road has intensified given: both Berwyn Heights and Greenbelt are developing their first economic development programs and policy (per the Berwyn Height's Strategic Plan and recent recommendations by SAGE Group and the Hyattsville Economic Development Corporation for Greenbelt); College Park is successfully revitalizing the Route 1 Corridor; WMATA is facilitating redevelopment of the College Park Metrorail Station; construction of new residential development is underway immediately south of Greenbelt Metrorail Station and the State, County and Greenbelt are working hard to attract development to the Greenbelt Metrorail Station site.

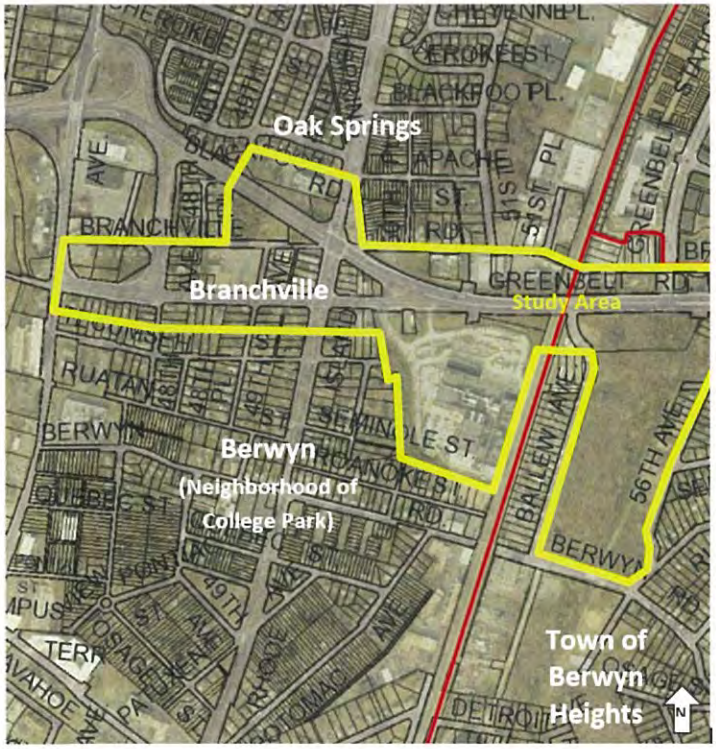
Description of the Study Area

Physical Description – Entire Study Area

The study area consists of MD 193/Greenbelt Road, between Rhode Island Avenue and Kenilworth Avenue. The area is 1.7 miles long, and stretches through the cities of College Park and Greenbelt and the Town of Berwyn Heights. In the study area, MD 193 varies from 4 to 6 lanes.



Overview of Study Area



City of College Park

This area of College Park is roughly bordered by a triangle formed from 3 major state roads: Baltimore Avenue (US Route 1), University Boulevard (MD 193), and Greenbelt Road (MD 430). The eastern boundary is the railroad tracks that service Metro, MARC and CSX. The neighborhood within the triangle is known as Branchville, while the area directly north is the Oak Springs neighborhood and the area directly south is the Berwyn neighborhood of College Park (not to be confused with the Town of Berwyn Heights).

City of Greenbelt

The City of Greenbelt is a suburb of Washington, D.C., located within Prince George's County, one of the largest and fastest growing counties in the country. Greenbelt is the intersecting point for four major highways, including the Baltimore-Washington Parkway and the Capital Beltway. As such, rapid access to much of the metropolitan area is available.

The study area within Greenbelt is located on the north side of Greenbelt Road (MD 193), and is bordered by Kenilworth Avenue to east. The western boundary extends just past Cherrywood Lane. This portion of the study area contains Beltway Plaza, an 800,000 square foot shopping center, a Middle School and additional strip commercial that predominantly has shares common ownership with Beltway Plaza. While just outside the study area, a new townhouse and multi-family development consisting of 502 units is located just north of the study area boundary off MD 193 just west of Branchville Avenue.

Transportation and Access

Berwyn Heights

Several intersections are located in Berwyn Heights, including 58th Avenue/Greenbelt Road/Branchville Road, and intersections providing access to Beltway Plaza Mall (62nd Avenue, Cunningham Drive, and 60th Avenue/Cherrywood Lane). All of these intersections provide challenges to pedestrians and bicyclists, especially for those bicyclists connecting to Metro's Green Line, East Coast Greenway, Indian Creek Trail, Lake Artemesia, and Greenbelt National Park. Greenbelt Road is the corridor that connects the Town of Berwyn Heights to our municipal neighbors, the Cities of College Park and Greenbelt.

College Park

Several critical intersections are located in College Park. Baltimore Avenue, which acts as the City's Main Street, intersects Greenbelt Road and provides a direct connection to the Capital Beltway to the north and the District of Columbia to the south. Rhode Island Avenue, a county road, bisects the study area and intersects both University Boulevard and Greenbelt Road. Rhode Island Avenue serves the residential neighborhoods of North College Park and is an alternative to travel on Baltimore Avenue although it terminates at MD 430. The off-ramp from University Boulevard to Baltimore Avenue also intersects with Greenbelt Road. All of these intersections provide challenges to pedestrians and bicyclists and there is no direct vehicular access from Greenbelt Road to the north between the railroad and Rhode Island Avenue. Greenbelt Road is the corridor that connects the City of College Park to our municipal neighbors, the City of Greenbelt and the Town of Berwyn Heights and has an Average Annual Daily Traffic (AADT) of approximately 47,800 vehicles, according to State Highway Administration 2017 figures.

Greenbelt

Major access roads that connect to the study area are Kenilworth Avenue (MD 201) and Cherrywood Lane. Kenilworth Avenue provides a direct connection to the Capital Beltway. The intersection of MD 193 and MD 201, both State roads, presents challenges for pedestrians and bicyclists. Cherrywood Lane, a City road provides a connection to the Greenbelt Metro Station and connects to MD 201 to the north. Cherrywood Lane serves the residential neighborhood of Franklin Park at Greenbelt Station (a 2,998 unit apartment complex) and Capital Office Park. Cherrywood Lane has in road bike lanes that terminate approximately 1200 feet north of its intersect with MD 193. The City is currently in the design phase to make Cherrywood Lane a complete green street. In this portion of the study area, MD 193 has sidewalks on the north side with the exception of the segment between the entrance to Beltway Plaza at 62nd Avenue and Cherrywood Lane. In this segment there are no facilities for pedestrians. Certain portions of MD 193 in this area do have narrow in road bicycle lanes. There are two signalized intersections that provide direct access into the Beltway Plaza Mall site, and a third signalized intersection that provides

vehicular access to a Prince George's County school bus storage yard and the Dora Kennedy French Immersion School. This intersection also serves to connect pedestrians the Berwyn Heights Community to the south to the Greenbelt Middle School and the Dora Kennedy French Immersion School.

Just north of the study area of Cherrywood Lane is the Greenbelt Metro Station and Marc Station. This station is the terminus for the Green Line. The Station is served by multiple Metrobus and TheBus routes.

Land Use and Development

Berwyn Heights

There is a diverse mix of land uses within the study area. They include recreation and open space (generally through the Maryland-National Capital Park & Planning Commission), light industrial property near Branchville Road, and the remaining zones are commercial shopping center or commercial office. There are single family homes in close proximity to the property zoned commercial shopping center and commercial office.

The Study Area is located within Prince George's County's Greenbelt Metro Area and MD 193 Corridor Plan from March 2013.

College Park

There is a diverse mix of land uses within the study area. They include single-family homes, warehouse and light manufacturing in the Branchville Industrial Park, motor pool and office uses in the Severn Building owned by the University of Maryland, hotel, retail and auto-related services in the smaller triangle area and along Greenbelt Road, senior citizen housing (Attick Towers) on Rhode Island Avenue and the Branchville Volunteer Fire Department. There are a few small, vacant properties that provide infill opportunities for both single-family and multi-family residential development. Some land in the industrial park is beginning to transition to residential and less impactful uses such as public storage. Property on the western boundary at Baltimore Avenue falls under the Central US 1 Corridor Sector Plan and is proposed for mixed-use development.

Greenbelt

Along the MD 193 Corridor On the north side of MD 193 in the Greenbelt portion of the study area there is predominantly retail uses, with the exception of two public schools and a County bus storage lot. Beltway Plaza Mall represents the majority of retail in this segment of the corridor. The mall consists of approximately 800,000 square feet retail, and in addition to larger mall it has several pad sites including drive-thru fast food establishments, banks, dine-in restaurants, CVS pharmacy, and other smaller retailers. Beltway Plaza Mall has discussed redevelopment plans for the mall property, and currently has a conceptual plan filed with the County but that review has been inactive for several years. The concept plan proposes a mixed use development with retail and residential development. In this segment of the corridor there are no undeveloped parcels. Just north of the study area off Cherrywood Lane is the Greenbelt Metro Station that has an approved conceptual site plan for a mixed-use transit oriented development. Most recently, the Station was being considered as one of three potential sites for a new FBI headquarters. This project is currently on hold.

Bicycle and Pedestrian Infrastructure

Berwyn Heights

Within the study area, sidewalks are located along Greenbelt Road, portions of Branchville Road, 58th Avenue, and 60th Avenue.

College Park

Within the study area, bike lanes are located on Greenbelt Road from Baltimore Avenue to Rhode Island Avenue and along Rhode Island Avenue. Sidewalks are located along Greenbelt Road and Rhode Island Avenue. There is a sidewalk along University Boulevard from Rhode Island Avenue eastward past the railroad tracks. A north-south bicycle/pedestrian path known as the Trolley Trail runs south from Greenbelt Road along Rhode Island Avenue. Another bike/ped path, the Paint Branch Trail, is located in park land just west of Baltimore Avenue. The City and University have a bike share system known as mBike with 23 stations.

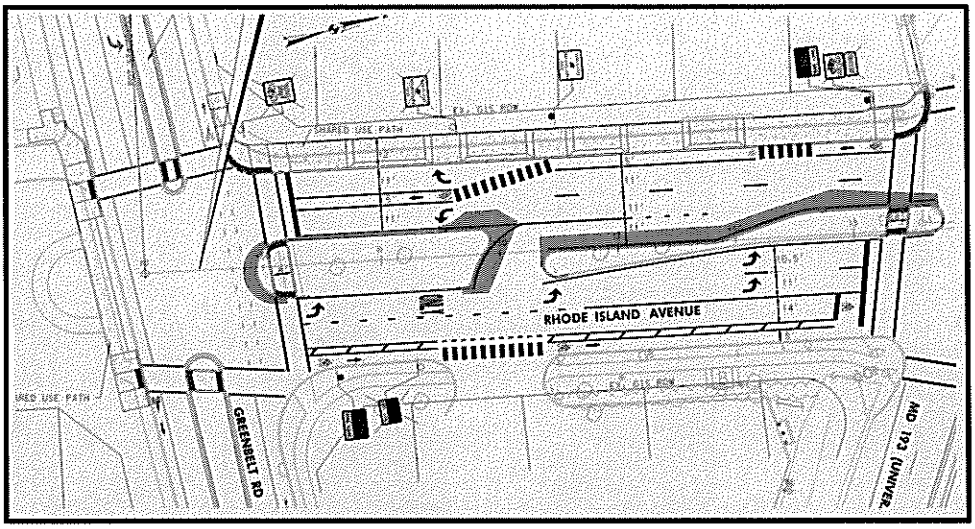
Transportation Projects Underway in the Study Area

Berwyn Heights

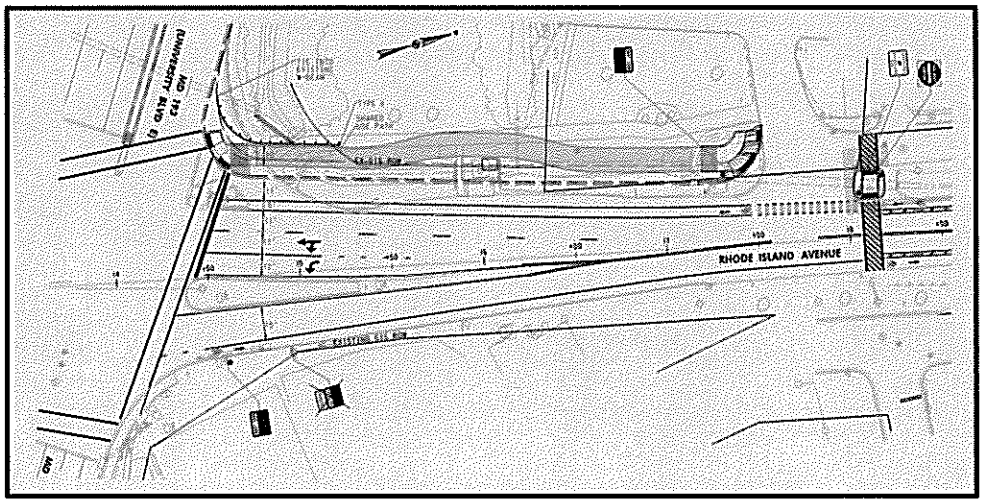
The Town is undertaking a significant mill and repaving project in FY 2019 with work occurring near the Greenbelt Road intersections with 58th Avenue and 60th Avenue.

College Park

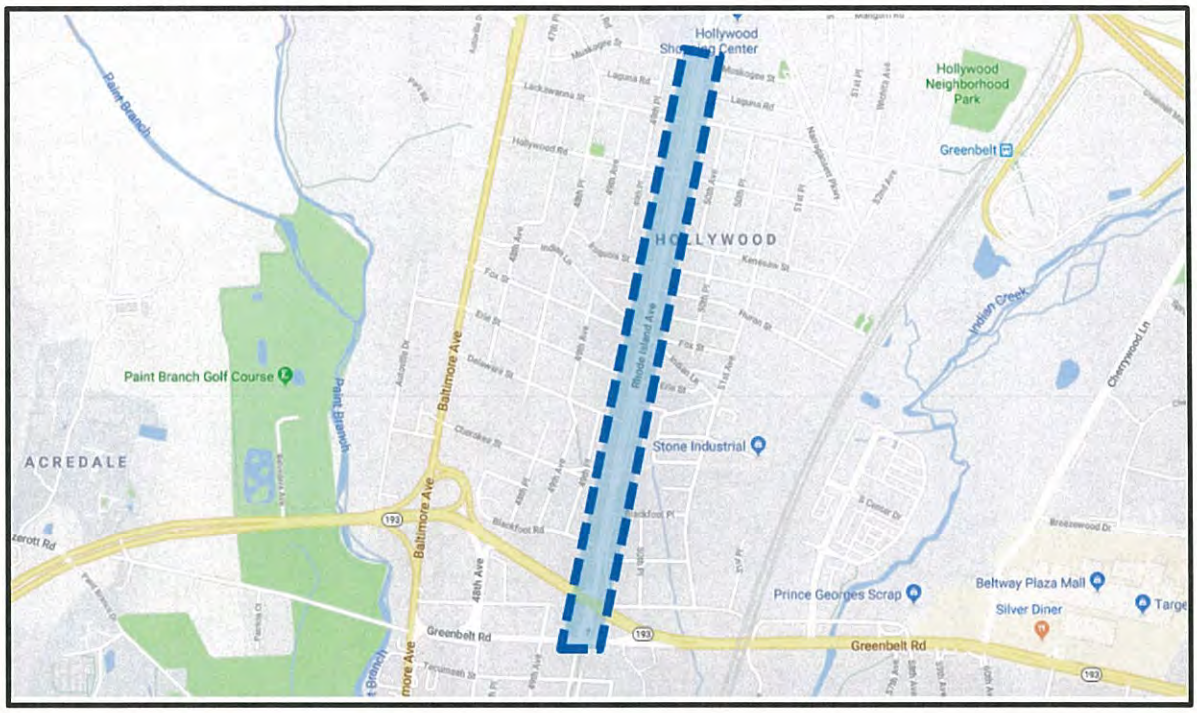
1. A State Highway project is in final design for intersection improvements at Rhode Island Avenue and University Boulevard. The southbound slip lane on Rhode Island Avenue will be removed and a full right turn added.



2. A State Highway project to improve pedestrian crossings at the intersection of Rhode Island Ave and Greenbelt Road is in preliminary design.



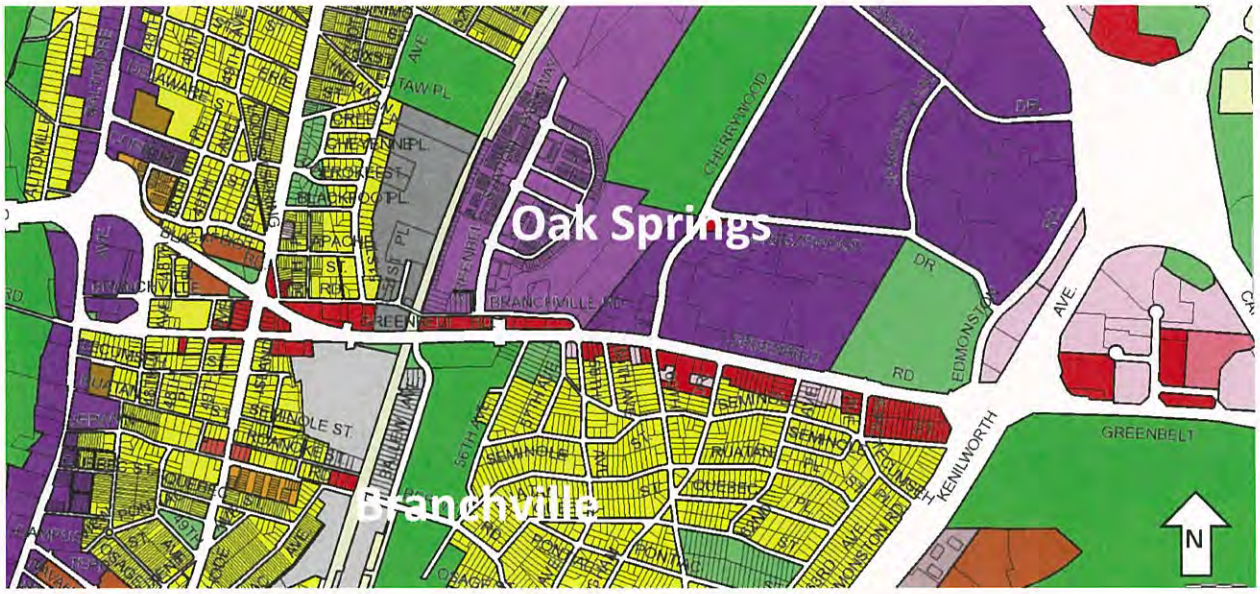
3. The City was awarded a Metropolitan Council of Governments Transportation Land Use Connections Grant to fund a study and 30% design of protected bike lanes along Rhode Island Avenue north of Greenbelt Road. The aim is to improve safety and increase comfort among less-experienced bicyclists travelling this road. This TLC study may recommend protective vertical or buffer improvements to the exiting bike lanes and/or recommend the use of one or both service roads along Rhode Island Avenue for bike lanes that are more appropriate for novice riders.



Rhode Island Avenue Protected Bicycle Lanes Concept:

Zoning

The study area has nine zoning categories applied along the 1.7 mile long corridor: R-O-S (Reserved Open Space), O-S (Open Space), R-55 (One-Family Detached Residential), M-X-T (Mixed Use-Transportation Oriented), M-U-I (Mixed-Use Infill), C-S-C (Commercial Shopping Center), C-O (Commercial Office), I-1 (Light Industrial) and I-2 (Heavy Industrial).



Residential Zones*

R-O-S: Reserved Open Space - Provides for permanent maintenance of certain areas of land in an undeveloped state, with the consent of the property owners; encourages preservation of large areas of trees and open space; designed to protect scenic and environmentally sensitive areas and ensure retention of land for non-intensive active or passive recreational uses; provides for very low density residential development and a limited range of public, recreational, and agricultural uses.
Minimum lot size - 20 acres*
Maximum dwelling units per net acre - 0.05
* Except for public recreational uses, for which no minimum area is required.

O-S: Open Space - Provides for areas of low-intensity residential (5 acre) development; promotes the economic use and conservation of land for agriculture, natural resource use, large-lot residential estates, non-intensive recreational use.
Standard lot size - 5 acres
Maximum dwelling units per net acre - 0.20

R-55: One-Family Detached Residential - Permits small-lot residential subdivisions; promotes high density, single-family detached dwellings.
Standard lot sizes - 6,500 sq. ft.
Maximum dwelling units per net acre - 6.70
Estimated average dwelling units per acre - 4.2

Mixed Use Zones*

M-X-T: Mixed Use - Transportation Oriented - Provides for a variety of residential, commercial, and employment uses; mandates at least two out of the following three use categories: (1) Retail businesses; (2) Office/ Research/Industrial; (3) Dwellings, hotel/motel; encourages a 24-hour functional environment; must be located near a major intersection or a major transit stop or station and will provide adequate transportation facilities for the anticipated traffic or at a location for which the applicable Master Plan recommends mixed uses similar to those permitted in the M-X-T Zone.
Lot size and dwelling types - No Restrictions
Maximum floor area ratio - 0.4 without optional method;
- 8.0 with optional method (provision of amenities)

M-U-I: Mixed-Use Infill - Promotes Smart Growth principles by encouraging the efficient use of land, public facilities and services in areas that are substantially developed. These regulations are intended to create community environments enhanced by a mix of residential, commercial, recreational, open space, employment and institutional uses in accordance with approved plans. The infill zone may only be approved for property located in a Transit District Overlay Zone or a Development District Overlay Zone.

Commercial Zones*
C-O: Commercial Office - Uses of a predominantly nonretail commercial nature, such as business, professional and medical offices, or related administrative services.

C-S-C: Commercial Shopping Center - Retail and service commercial activities generally located within shopping center facilities; size will vary according to trade area.

Industrial Zones*
I-1: Light Industrial - Light intensity manufacturing, warehousing, and distribution uses; 10% green area required.

I-2: Heavy Industrial - Highly intensive industrial and manufacturing uses; 10% green area required.

Development District Overlay Zone
A portion of the study area is located in a Development District Overlay Zone (DDOZ). The DDOZ was superimposed over the Greenbelt Metro Metropolitan Center and portions of the MD 193 corridor west of Kenilworth Avenue and east of the WMATA rail tracks. The DDOZ is intended to ensure that development meets the goals and objectives of the Approved Greenbelt Metro Area 193 Corridor Sector Plan and Sectional Map Amendment. Development within the

DDOZ boundaries is subject to development district standards related to building form, architectural elements, sustainability and the Environment and streets and open space. In some instances the DDOZ also amends the table of uses for the underlying zones.

Business Overview of the Study Area (narrative description of the reports included in Appendix)

The ESRI Business Summary table states that there are 263 businesses and 3,954 employees working in the study area. The study area is composed primarily of retail businesses, with retail businesses focusing on clothing sales. The second largest business type is Health Care and Social Assistance. Similarly, retail businesses hire the largest number of employees, while construction has the second largest number of employees. Both Public Administration and Food Services hire roughly equal amounts and hire the third most of all business types.

The CoStar forecast report shows the vacancies in the area and a trend that has been heading downward for the last 5 years with the vacancy rate for this area is 1.4% which is very low. Currently, the average rent for commercial space is $17.95 per square foot. In comparison, while vacancy for the Greater DC metropolitan area has also decreased over the past 5 years, the vacancy rate is now roughly 8.2% and has an average rent per square foot of $19.46. There have not been any commercial properties delivered to the study area within the last 5 years.

Relevant Studies, Plans and Reports

1. Approved Greenbelt Metro Area and MD 193 Corridor Sector Plan and Sectional Map Amendment (March 2013)
   http://mncppcapps.org/planning/publications

2. Plan Prince George's 2035 Approved General Plan (May 2014)
   http://mncppcapps.org/planning/publications

3. Bus Stop Safety and Accessibility Study, Greenbelt (June 2013)
   http://www.greenbeltmd.gov/index.aspx?NID=693

4. Bicycle and Pedestrian Master Plan, Greenbelt (January 2014)
   http://www.greenbeltmd.gov/index.aspx?NID=693

5. An Economic Development Strategy for Greenbelt, MD (December 2014)
   http://www.greenbeltmd.gov/DocumentCenter/View/2613

6. Greenbelt Competitive & Collaborative Analysis, Draft (June 16, 2016)
   http://www.greenbeltmd.gov/DocumentCenter/View/3258

7. MD 193 – Greenbelt Road Streetscape (2002)

WORK SESSION OF THE GREENBELT CITY COUNCIL held Tuesday, July 5, 2016, to discuss the Economic Development Study.

Mayor Jordan started the meeting at 8:00 p.m. The meeting was held in the Council Room of the Municipal Building.

PRESENT WERE: Councilmembers Judith F. Davis, Konrad E. Herling, Leta M. Mach, Silke I. Pope, Edward V. J. Putens, Rodney M. Roberts and Mayor Emmett V. Jordan.

STAFF PRESENT WERE: Michael McLaughlin, City Manager; Terri Hruby, Assistant Director of Planning; and Cindy Murray, City Clerk.

ALSO PRESENT WERE: Stewart Eisenberg and Molly O'Connell, Hyattsville Community Development Corporation; Kap Kapastin, Beltway Plaza; Susan Walker, Greenbelt Community Development Corporation; Patricia Walters, Greenbelt Station Development; Caitlin McGrath, Greenbelt Theatre and Roosevelt Center Merchants Association; and others.

Ms. Hruby said she has been working with Mr. Eisenberg and Ms. O'Connell of Hyattsville Community Development Corporation (HCDC) on the development of an economic development toolkit for the City. She said HCDC had met with Councilmembers, residents and business owners, held community sessions with the business community and interest groups, and interviewed other economic development professionals in the region to determine what economic development programming will work best for the City.

Mr. Eisenberg and Ms. O'Connell provided a PowerPoint presentation. They reviewed economic development programming actions already taken to show City support of its business sector, such as resource and marketing materials, interactive maps, business directory and property database information. Ms. O'Connell said this information is available on the City's website.

Mr. Eisenberg discussed what economic development actions have worked in other areas, such as a commercial façade improvement grant program, development facilitation and tax credits. He mentioned that police services are one of the best "tools" municipalities can offer. He said a number of municipalities in Prince George's County are active in economic development, including the Cities of Bowie, College Park, Hyattsville, Laurel and New Carrollton.

Mr. Eisenberg reviewed the following recommendations for the City.

1. *Business Outreach*
    - a. *Goals*
        - i. *Promote and build upon the Business Toolkit*
        - ii. *Create closer relationships with existing business and property owners*
        - iii. *Build confidence in Greenbelt as a place to invest*
        - iv. *Attract new businesses and employers*
    - b. *Outcomes*
        - i. *More frequent communication between City and businesses*
        - ii. *Identifying where resources may be needed*

iii. City becomes the go to partner for its business community
iv. Opens further collaboration opportunities between City and employers
v. Build B-2-B network, the business version of neighborhood and community development

2. *Development Facilitation*
   a. *Goals*
      i. Build new and better relationships with the development community
      ii. Address City's long term needs and interests proactively
      iii. Leverage private investment to achieve municipal goals
   b. *Outcomes*
      i. Completed project that fulfills a City need and brings new investment, tax base expansion
      ii. Invites relationship building and collaborative interactions with development community
      iii. Strengthens staff and resident stakeholder vesting in the development process
      iv. Attracts new residents
3. *Public/Private Partnership*
   a. *Goals*
      i. Develop a mutually acceptable path forward
      ii. Adopt a comprehensive plan for future mixed-use at Beltway Plaza
      iii. Transform an underperforming site to vibrancy
      iv. Revenue generation for City and property owner
      v. Achieve a mix of uses on a current single-use site
      vi. Improve City's demand and supply capacity
      vii. Build confidence in the City for investment
   b. *Possible Outcomes*
      i. Comprehensive plan for Beltway Plaza
      ii. Accelerated redevelopment at Beltway Plaza
      iii. Build capacity for the mall to be regionally competitive
      iv. Build capacity for public transit and increase of City's tax base with new housing opportunities

In conclusion, Mr. Eisenberg and Ms. O'Connell said the City needs to:

1. *Define a clear, concise vision and goals for economic development and consistently promote and utilize said vision;*
2. *Engage with the business and development community proactively;*
3. *Address City's economic development needs through programming designed to address multiple goals; and*
4. *Empower staff to pursue economic development outcomes.*

There was discussion regarding 18 examples of municipal economic development goals provided by Mr. Eisenberg and Ms. O'Connell. They stressed the importance of setting the goals in order to move forward with economic development. Mr. Eisenberg said he recommended Council define three (3) major goals.

The meeting ended at 11:15 p.m.

Respectfully Submitted

Cindy Murray
City Clerk

WORK SESSION OF THE GREENBELT CITY COUNCIL held Monday, August 15, 2016, to discuss the Housing Affordability Study.

Mayor Jordan started the meeting at 8:02 p.m. The meeting was held in the Council Room of the Municipal Building.

PRESENT WERE: Councilmembers Judith F. Davis, Konrad E. Herling, Leta M. Mach, Silke I. Pope, Edward V. J. Putens, Rodney M. Roberts and Mayor Emmett V. Jordan.

STAFF PRESENT WAS: David Moran, Assistant City Manager; Mary Kolar, Maryland Municipal League Intern; and Cindy Murray, City Clerk.

OTHERS PRESENT WERE: John Drago, Colin Byrd, Marge Owens and others.

Ms. Kolar said that her intern work in Greenbelt this summer had been focused on the study of affordable housing in Greenbelt. She explained that housing affordability is a concern across the Washington DC metropolitan region. Although Greenbelt has lower housing costs than in other parts of the region, there are significant challenges for many low-income and moderate-income residents. In addition, the City has an aging population and retiring households often rely on fixed incomes that cannot absorb significant increases to housing costs.

Ms. Kolar presented a PowerPoint presentation highlighting the findings of her review of other programs and policies in similar jurisdictions around the region, summarizing the findings of a community-wide survey on housing concerns of Greenbelt residents, and outlining policy recommendations for Council to consider.

Background on Housing Costs and Affordability

A widely held convention in public policy is that households should spend no more than 30% of income toward housing costs. When housing costs exceed 30% of income, they are typically considered unaffordable because they challenge a household's ability to afford other non-discretionary items. The Department of Housing and Urban Development (HUD) considers households paying between 30-50% of income towards housing "cost burdened" and those paying more than 50% "severely cost burdened."

According to the National Low Income Housing Coalition, Prince George's County's 2016 "housing wage," or the hourly wage a renter must earn in order to afford a two-bedroom apartment at the current fair market rent (FMR) of $1,623 per month, is $31.21 ($64,920 annually). At the County's prevailing minimum wage, a renter household must work approximately 131 hours per week in order to afford a two-bedroom unit.

Local Affordable Housing Programs

Moderately Priced Dwelling Unit Programs: A number of jurisdictions in the metropolitan region have policies in place to increase affordable housing options. Many have enacted inclusionary zoning policies, widely known as Moderately Priced Dwelling Unit (MPDU) programs. Inclusionary zoning ("inclusionary housing") generally refers to zoning policies that require developers to include affordable housing units in proposed development plans in order to receive approval to build.

Prince George's County does not currently have any inclusionary zoning policies in place and the City's zoning authority rests with the County.

Montgomery County, Frederick County and the Cities of Frederick, Rockville, Gaithersburg and Laurel have inclusionary zoning policies.

Rent Stabilization: Rent stabilization and rent control policies are not typically designed to target households at specific income levels, nor do they enforce the 30% affordability standard. Rent control usually applies to a broad base of units and controls rent increases. A municipal agency or body determines, often annually, the maximum rent increase that a landlord may charge tenants, as well as notification requirements and eligible exemptions.

The City of Takoma Park has had a Rent Stabilization Program in place since 1981.

Survey Findings

A brief, anonymous, community-wide survey was recently conducted in order to better understand the housing needs and concerns of residents, particularly in regard to affordability. The survey was open online, distributed via social media and printed in two issues of the Greenbelt News Review. Additionally, the survey was distributed by property management companies in Franklin Park Apartments, University Square Apartments and Greenbelt Homes Inc. Some key data points include:

- *A majority of respondents were female (76%), white (74%), homeowners (59%) with no children (77%).*
- *A plurality of respondents were Greenbelt Homes, Inc. residents (39%)*
- *An overwhelming majority (91%) live in 1-person or 2-person households.*
- *More than half (58%) of total respondents pay at least 30% of income towards housing costs (41% pay between 30% and 50% and 17% pay more than 50%).*
- *Forty (40%) of respondents indicated that they are burdened or severely burdened by housing costs, saying that these costs sometimes or regularly prevent them from purchasing other necessities, such as groceries, medicine, or transportation-related costs.*
- *Fifty-eight (58%) of respondents indicated that they feel less than secure in their current housing status.*
- *Thirty-four (34%) of respondents consider their housing cost a serious concern, 29% consider it a moderate concern.*
- *More respondents consider housing cost a serious concern than consider physical conditions, accessibility, landlord or management company non-responsiveness or energy/utility costs a serious concern. (Energy/utility costs are the category with the second highest rating of serious concern at 25%).*
- *Seventy-two percent (72%) of respondents indicated that increasing housing options affordable to low-income seniors is a very important or important priority for the City.*
- *Sixty-seven (67%) of respondents indicated that increasing housing options affordable to low income residents is a very important or important priority.*

- *Sixty-seven (67%) of respondents indicated that increasing independent living options affordable to low income or very low-income people with disabilities is a very important or important priority.*
- *Sixty-two percent (62%) of respondents indicated that increasing housing options affordable to very low-income people is a very important or important priority.*

Recommendations

Ms. Kolar said given the survey results, information about mounting housing costs in the Washington metropolitan region, and Greenbelt's founding goal and continued principle of providing affordable housing for working families, Council should pursue policy guidance that will help preserve existing and create new affordable housing resources targeted to low-and -moderate-income households.

She suggested the following recommendations be considered:

1. *Create standards for City support of proposed development, in line with nearby MPDU programs. While the City cannot create a legally binding MPDU program without zoning authority, it could develop a set of criteria with which proposed developments must comply in order to receive municipal support.*
2. *Renew Green Ridge House's project-based Section 8 Housing Assistance Payment contract with HUD prior to contract expiration in 2019. Green Ridge House, with 101 units of rental housing affordable to very low-income seniors and people living with disabilities, is an important housing resource for the City.*
3. *Explore opportunities for new affordable housing development and ensure that wherever economic development occurs, an affordable housing component, if at all feasible, be included.*

There was brief discussion about landlords refusing to rent to potential tenants solely based on their payment with a federal housing subsidy. Ms. Kolar said some states, along with the District of Columbia, have adopted legislation outlawing "income discrimination.

Ms. Davis mentioned a resident had shared information on a successful mixed housing and business use in vacant buildings in Washington, DC, but questioned whether current zoning law would allow this type of mix in our area. It was suggested that the idea be discussed at the upcoming work session with Maryland-National Capital Park and Planning Commission.

Mr. Byrd, 7014 Mathew Street, noted that 21.5% of survey respondents were Black/African American which is not representative for the demographics of the City. He also suggested that the City adopt an ordinance to prevent income discrimination. Ms. Kolar said she was unsure if any Maryland municipalities had adopted an ordinance to prevent income discrimination. Mr. Moran will check with the Maryland Municipal League.

Tom Taylor, Laurel Hill Road, asked for a definition of "affordable" housing. Ms. Kolar said there is not one specific definition, but the measure most widely used is "affordable housing," considered no more than 30% of total income.

Council thanked Ms. Kolar for her work on affordable housing. They requested: 1) a follow up meeting be included on Council's work session schedule; and 2) affordable housing be included on the agenda for the work session with the County Executive in September.

Mr. Orleans asked and was provided answers to several questions.

Informational Items

Mr. Herling said he, along with Mayor Jordan, attended the Fashion Show at Beltway Plaza on Saturday.

Mayor Jordan reported on the closing of Chef Secret's Restaurant. He noted that Gus's World Famous Fried Chicken would be the new tenants in the space.

Several other informational items were discussed.

The meeting ended at 10:13 p.m.

Respectfully Submitted,

Cindy Murray
City Clerk

WORK SESSION OF THE GREENBELT CITY COUNCIL held Monday, June 12, 2017, on Affordable Housing.

Mayor Jordan started the meeting at 8:06 p.m. The meeting was held in the Council Room of the Municipal Building.

PRESENT WERE: Councilmembers Judith F. Davis, Konrad E. Herling, Leta M. Mach, Silke I. Pope, Edward V. J. Putens, Rodney M. Roberts and Mayor Emmett V. Jordan.

STAFF PRESENT WERE: Nicole Ard, City Manager; Jessica Bellah, Community Planner; and David Moran, Assistant City Manager.

ALSO PRESENT WERE: Hillary Chapman, Metropolitan Washington Council of Governments (COG); Jesse Buggs, City of Bowie; Stephanie Proestel, Housing Initiative Partnership (HIP); Bill Duncan (formerly with Enterprise Community Partners); Nicole Williams, Advisory Planning Board; Maya Patterson, City of Bowie MML Intern; and Jim Giese, News Review.

Mayor Jordan welcomed everyone and there were introductions.

Ms. Chapman cited a projected 10% population growth rate and 18% employment growth rate in the County between now and 2045. She stated there were more people coming to the County than available housing units. Ms. Chapman stated that COG regularly studied housing issues and there was a need for affordable housing.

Ms. Chapman asked what recommendations were implemented by the intern and/or what had changed since the intern's report. Mayor Jordan responded that undeveloped land was not available in the City and Greenbelt's challenges were maintaining affordability, especially on the apartment side, citing Franklin Park as an example. Mayor Jordan stated the recommendation that stood out was rent stabilization. Ms. Mach favored establishing limited equity cooperative housing. Mr. Herling stated that the Greenbelt Homes Incorporated (GHI) owned apartments were the most reasonably priced. Ms. Davis stated that folks desire affordable housing near Metro stations. Ms. Pope stated that the new Verde apartments were more focused on young working couples. Mayor Jordan indicated there was a nice variety of housing stock in the City.

Ms. Proestel summarized HIP's efforts including creating multi-family housing. She noted they provide housing counseling as well.

Mr. Roberts stated that Franklin Park provided a huge opportunity to convert some of the apartments into for sale units. Mr. Herling stated that Montgomery County's Moderately Priced Dwelling Units (MPDU) approach was a good model. Mr. Putens stated that the City has a Section 8 apartment building for low income senior and disabled residents (Green Ridge House).

Ms. Proestel commented on the right of first refusal law granting the County an opportunity to purchase properties. She suggested communication with the County Housing Department. Mayor Jordan stated that some of Greenbelt's goals don't necessarily align with the County's. Ms. Proestel suggested partnering with non-profit organizations. Ms. Proestel referenced the County's strategic planning process. Mr. Putens asked about the vacant nursing home site and

how to stimulate development there. Ms. Proestel responded that non-profit developers were a good partner.

Ms. Davis summarized the County's history of pursuing higher end development to balance the types of housing in the County. She expressed concern about older neighborhoods becoming gentrified. Ms. Davis also suggested considering a rent stabilization similar to Takoma Park's program.

Mayor Jordan asked about Bowie's affordable housing program. Mr. Buggs stated that some of the non-profit entities can bring in financing. Mr. Buggs discussed a meeting in Bowie three years ago where senior citizens showed up and asked for three items: rent stabilization for senior housing facilities, rent control and rental assistance. He stated that Bowie is currently accommodating three new developments: Melford, Karrington (South Lake) and Amber Ridge. He noted 5% of the Melford units would be affordable. Mr. Buggs stated that affordable senior housing was a serious problem in the region. Mayor Jordan asked about the mood at the Department of Housing and Urban Development (HUD). Mr. Buggs responded that potential pain from proposed HUD cuts would be devastating. He suggested combining programs to leverage funds.

Ms. Chapman stated that the affordable housing challenges are region-wide. She indicated that the way jurisdictions address these challenges differs, but many of the tools used are the same. Ms. Chapman noted that the City of Rockville had completed a housing needs assessment. She mentioned using a database to track available properties and/or GIS to track where seniors are living.

Mr. Buggs suggested the City review and obtain a State study resulting from House Bill 991. Mayor Jordan asked about the right of first refusal and believed municipalities should also have this right. Mr. Buggs cited efforts in Bowie to obtain more planning authority.

Ms. Proestel noted that the County had not yet exercised its right of first refusal. She stated that the County was willing to partner with jurisdictions that had resources.

Mr. Roberts stated one of the benefits of Greenbelt was that a young person could start out in an apartment, then move to GHI and finally a single-family home. Mr. Herling suggested providing an environment that was more conducive to cooperatives. He cited transportation costs to drive to jobs outside the County. Mr. Herling reiterated using a MPDU program and suggested mixed use zoning with incentives.

Mr. Duncan stated that the GHI Cooperative was one of the best sources of affordability in the area. He suggested that the City consider a study similar to the one done in Rockville.

Ms. Davis stated that the City and County don't have money and that non-profits were liable to be hurt by Federal budget cuts. She cited investor purchases of condo units at Greenbriar as a challenge. Mr. Buggs noted that cash purchases were becoming more common.

Mr. Herling asked if the City could implement rent control. Mr. Buggs referenced an opinion from Bowie's City Attorney stating that the City could implement rent control. Ms. Davis suggested contacting Takoma Park to gauge their experience with rent control.

Mr. Orleans asked if the right of refusal legislation applied to municipalities. He also asked what kinds of people the City wanted to help with affordable housing.

There was discussion regarding "Source of Income" discrimination. Ms. Davis and Mr. Putens asked if the City can implement this on their own.

Mr. Herling asked about rent-to-own programs. Ms. Proestel indicated there was limited success with these programs and that often people keep renting.

Ms. Chapman stated that there is an opportunity to continue the conversation. She shared some tools and resources. She announced the release of a guidebook for increasing housing affordability in the Washington region. She suggested inviting Sara Daines from Takoma Park to discuss their rent stabilization program.

Ms. Proestel stressed partnerships on a variety of different levels. She suggested a careful inventory of land and commercial buildings. Ms. Proestel highlighted resources to help homeowners remain in their homes.

Informational Items

Mr. Moran briefed Council on an opportunity to extend the City's electricity supply contracts for three years at a rate 42% lower which would save approximately $96,000 annually.

Mayor Jordan suggested the City announce that City facilities are available if residents need a cool space.

Ms. Davis asked to have the Recreation Department at the July City Council meeting for a presentation.

The meeting ended at 10:03 p.m.

Respectfully Submitted,

David E. Moran
Assistant City Manager

WORK SESSION OF THE GREENBELT CITY COUNCIL held Monday, October 19, 2017, on Economic Development.

Mayor Jordan started the meeting at 8:02 p.m. The meeting was held in the Council Room of the Municipal Building.

PRESENT WERE: Councilmembers Judith F. Davis, Konrad E. Herling, Leta M. Mach, Silke I. Pope, Rodney M. Roberts, Edward V. J. Putens and Mayor Emmett V. Mayor Jordan.

STAFF PRESENT WERE: Nicole Ard, City Manager; Terri Hruby, Assistant Planning Director and Bonita Anderson, City Clerk.

ALSO PRESENT WERE: David Iannucci, Assistant Deputy Chief Administrative Officer for Economic Development and Public Infrastructure for Prince George's County; Jim Coleman, President & CEO ,Prince George's County Economic Development Corporation (EDC); David K. Lewis, Director of Business Development, EDC; Garth Beall, Manager of Renard Development Corporation; Ken McCreedy, Senior Director, State of Maryland Office of Cybersecurity and Aerospace; Alfred Mecum, Senior Technology Manager for the Strategic Partnership Office at Goddard Space Flight Center; Nicole Williams, Advisory Planning Board and Jim Giese, News Review.

The Council discussed with County officials, possible future development opportunities and ways in which to proceed. The City is looking into an alternative plan for the potential parking issues at Greenbelt Station if the FBI were to relocate to the City.

Mr. Iannucci indicated that the idea of relocating the FBI headquarters facility is still greatly needed and that the proposed location at the Greenbelt Metro Station is still the best location. There's a need to build another FBI building due to the deterioration of the Hoover building. Congress had ordered that the General Services Administration (GSA) re-study the matter. He also stated that GSA would start with three designated possible sites, Springfield, Va., the site of former Landover Mall and at the Greenbelt Metro Station. Mr. Iannucci mentioned that the environmental studies have been completed for the current three sites.

Mayor Jordan expressed concern for loss of funding and noted that the state requires the project to be a designated priority of the county. Mr. Iannucci assured the Council that the project was still on the county's priority list.

Mr. Roberts asked if Governor Hogan's proposal to add lanes to the Beltway would affect the project. Mr. Iannucci stated that he was under the impression that the project would commence 10 to 20 years down the road.

Ms. Davis was concerned that the State might take away funding. Mr. Beall replied that the project was on hold and everything would be fine. He also indicated that Amazon had announced a nation-wide search for a site for a second headquarters facility. The facility would house 50,000 employees and Maryland is one of the jurisdictions that will submit a bid. Governor Hogan expressed his preference for a site in the Baltimore area. The three sites that the County proposed are College Park, Greenbelt and New Carrollton. All locations are metro accessible. County Executive Baker visited all three sites, and expressed interest with the New Carrollton site, which would offer more transportation options.

There was discussion about the potential for new businesses in technology and cyber-security, with some implementation of new patents resulting from Goddard's space exploration.

Mr. Iannucci presented to the Council the completed Retail Marketability and Competitiveness Study prepared for the Maryland-National Capital Park and Planning Commission (M-NCPPC). He reviewed a map which identified the high-end retail demographic areas of concentration and showed Greenbelt as one of the areas. He also mentioned that the county's concentration of population density is inside the beltway.

Mr. Iannucci indicated that there would be a ground breaking ceremony for the new County Regional Medical Center in Largo in November 2017.

Informational Items

Ms. Davis suggested that the city move forward with hiring a Marketing Director or Economic Director.

The meeting ended at 9:56 p.m.

Respectfully Submitted,

Bonita Anderson
City Clerk

DRAFT

Sage Policy Group, Inc.

An Economic Development Strategy for Greenbelt, MD

Submitted by:
Sage Policy Group, Inc.

Submitted to:

The City of Greenbelt

December 2014

An Economic Development Strategy for Greenbelt, MD

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Executive Summary

- 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 half 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 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 living room. 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.

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[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, provide 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.

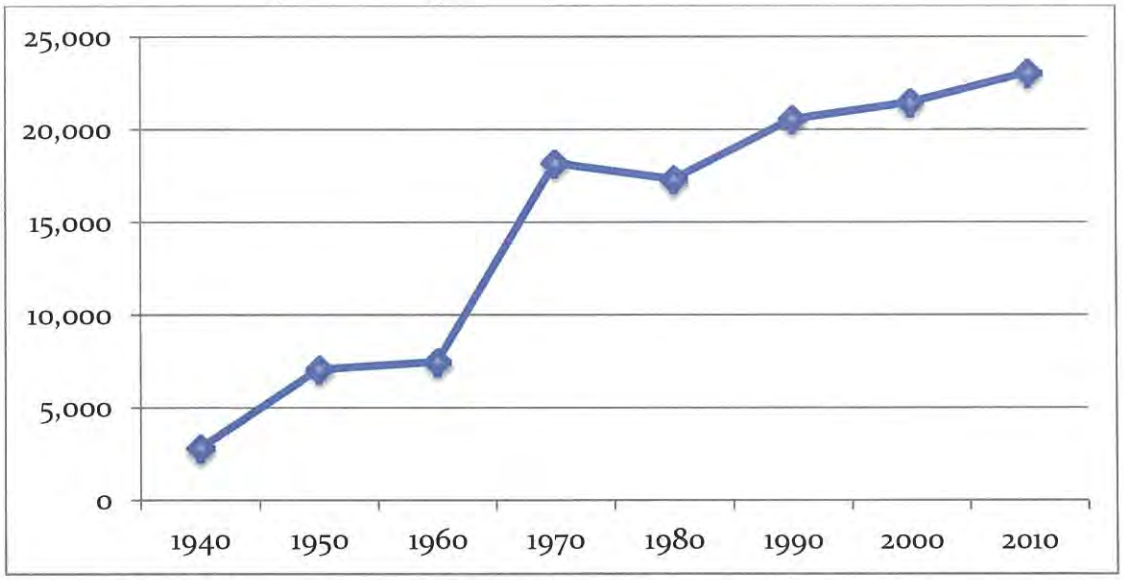
By the mid-1960s, Greenbelt was no longer isolated, but for a variety of reasons, including a desire by Greenbelt's original residents to maintain the original character of the community, Greenbelt did not develop as rapidly as many other Washington metropolitan area communities. An ongoing desire to 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 amongst 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.

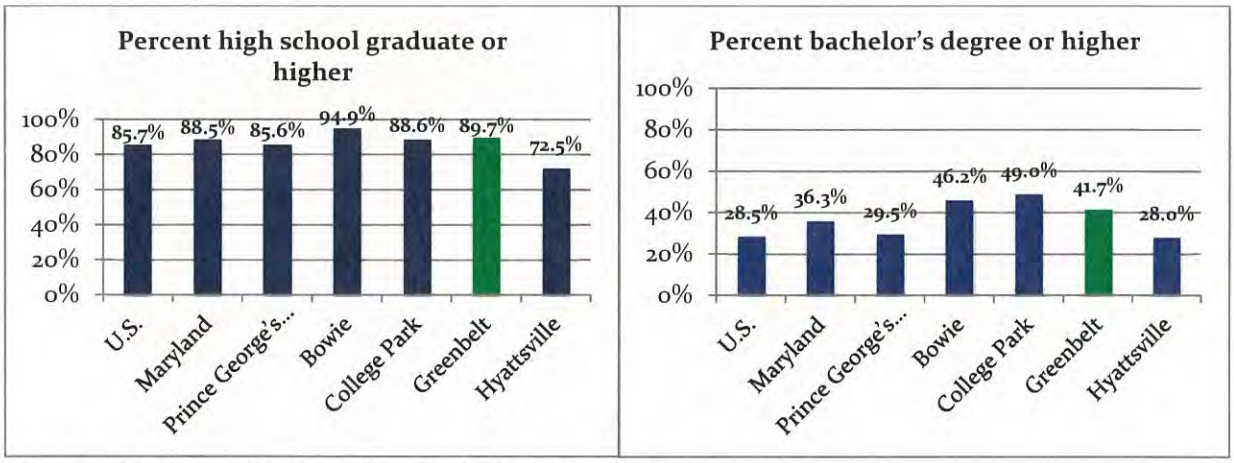
Exhibit 4. Greenbelt Population by Gender and Age, 2000 v. 2012

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

But community incomes 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 in many other communities, helping to attract many families that are highly educated, but do not necessarily work in high-wage occupations.

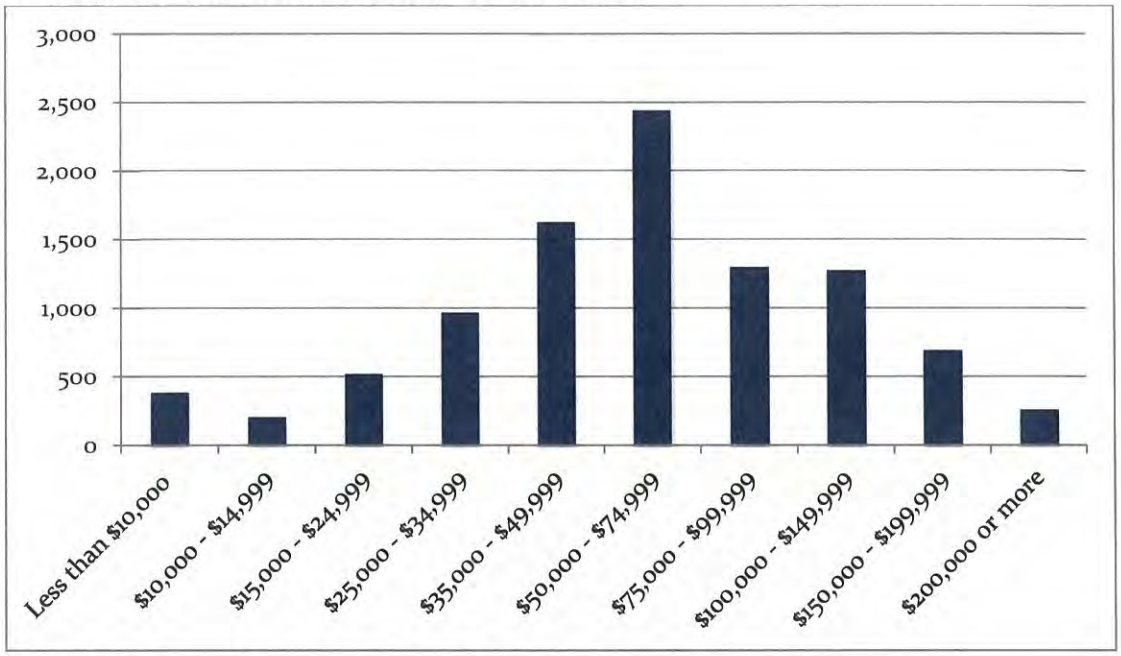
Exhibit 6. Median Household Income, 2000 v. 2012

	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.

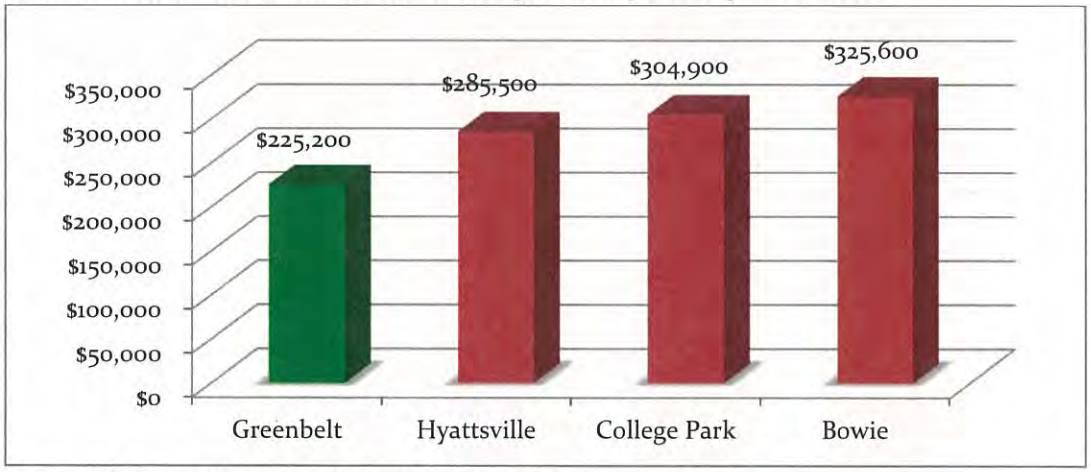
less than 15 years old. As indicated by Exhibit 10, Greenbelt also represents a relative oasis of affordability in the Washington metropolitan area and in Prince George's County.

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

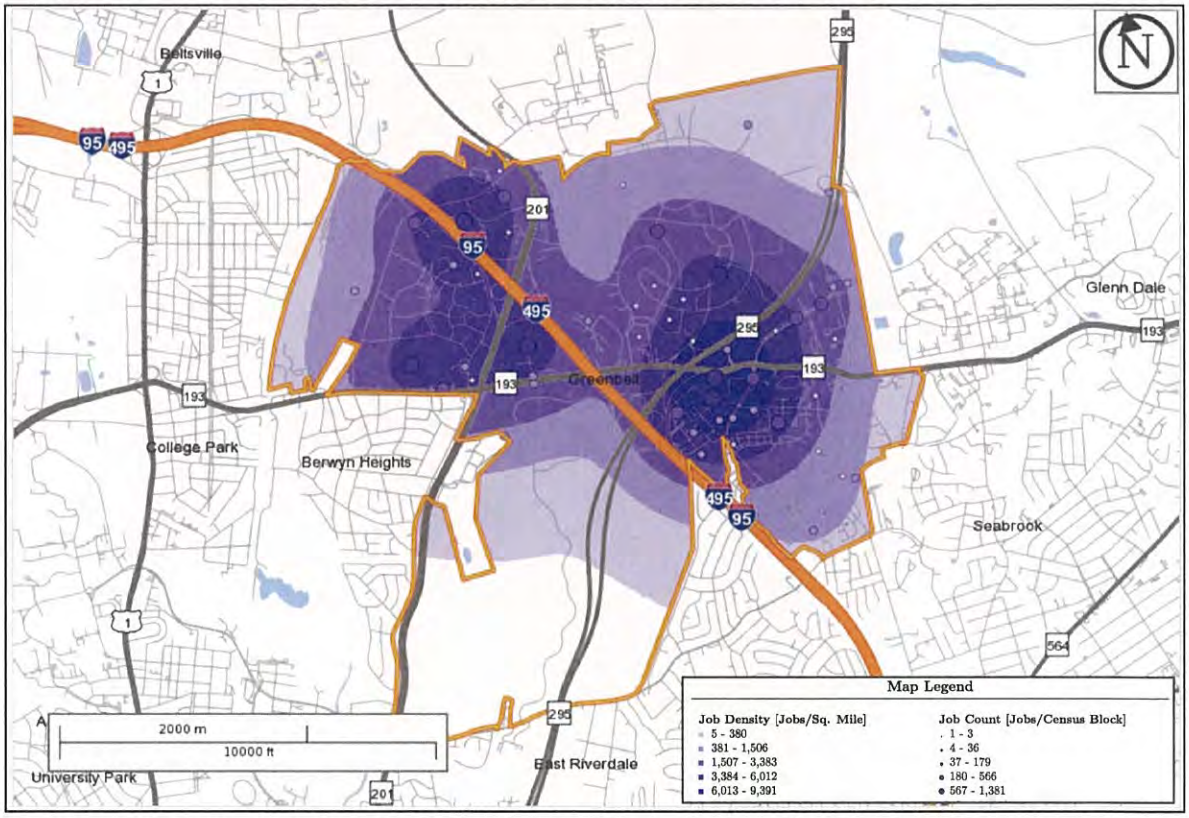
Exhibit 12. Total Employment, All Industries, 2005 & 2011

	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.

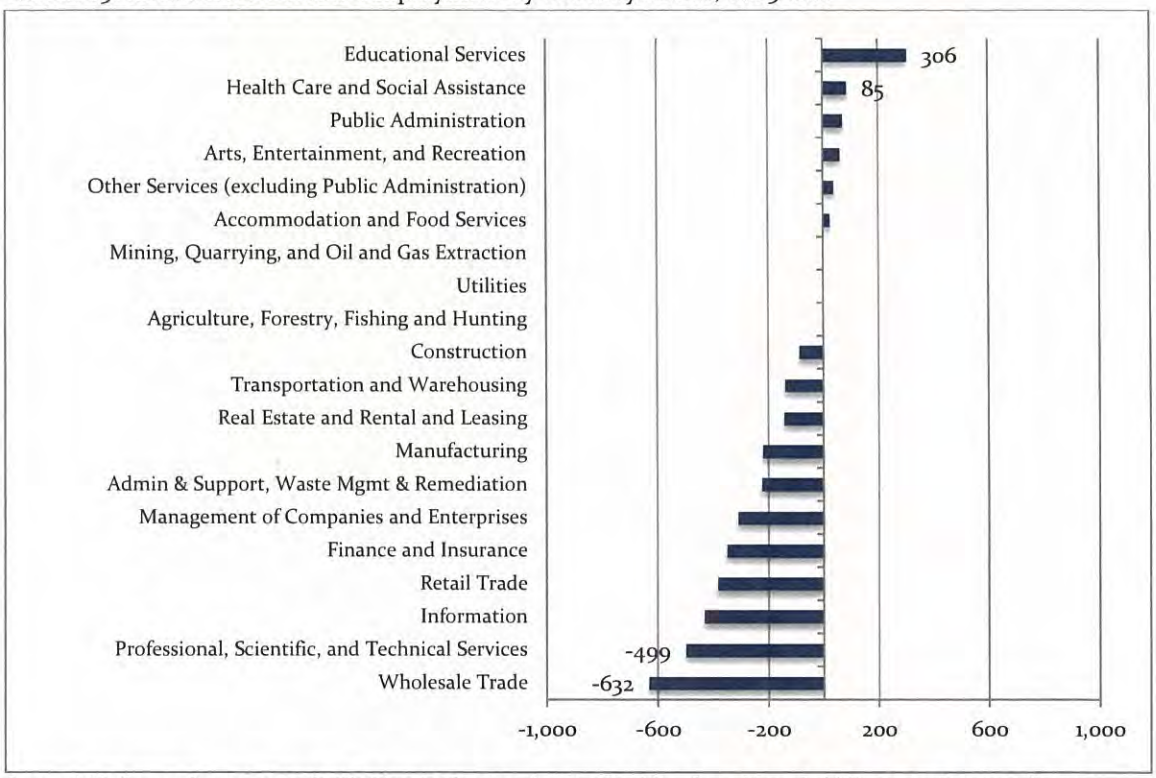
Exhibit 14. Greenbelt Employment by Industry, 2011

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 who 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%

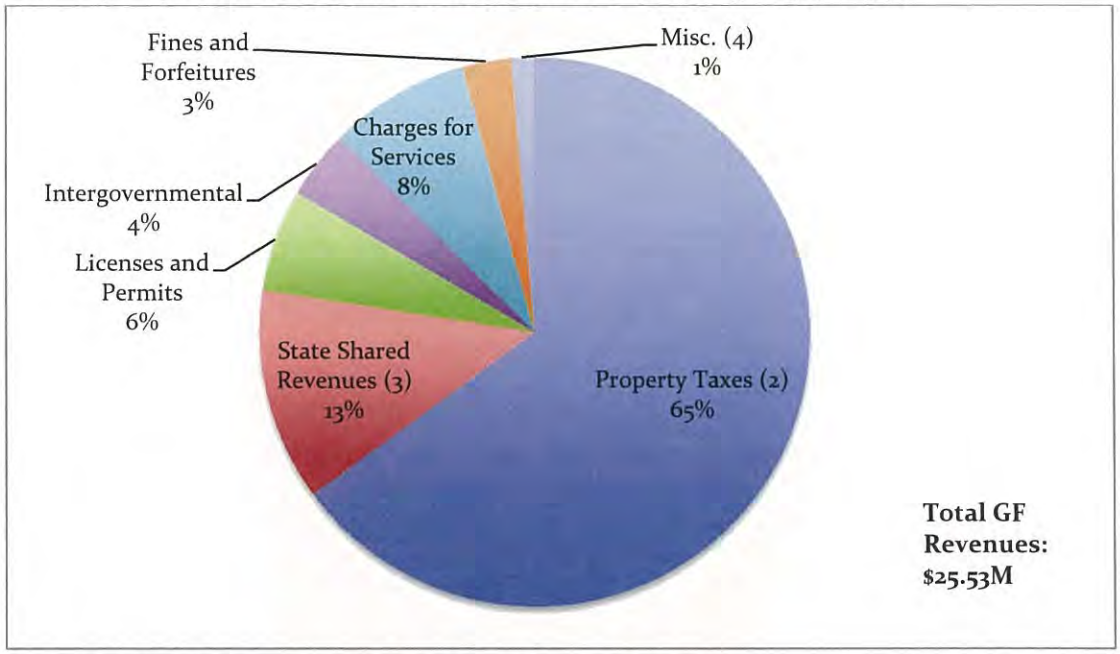
Source: U.S. Census Bureau. 2013. OnTheMap Application. Longitudinal-Employer Household Dynamics Program.
Notes: 1. Numbers represent *primary* jobs, not total jobs. Primary Jobs: Public and private-sector jobs, one job per worker. A primary job is the highest paying job for an individual worker.

- 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.

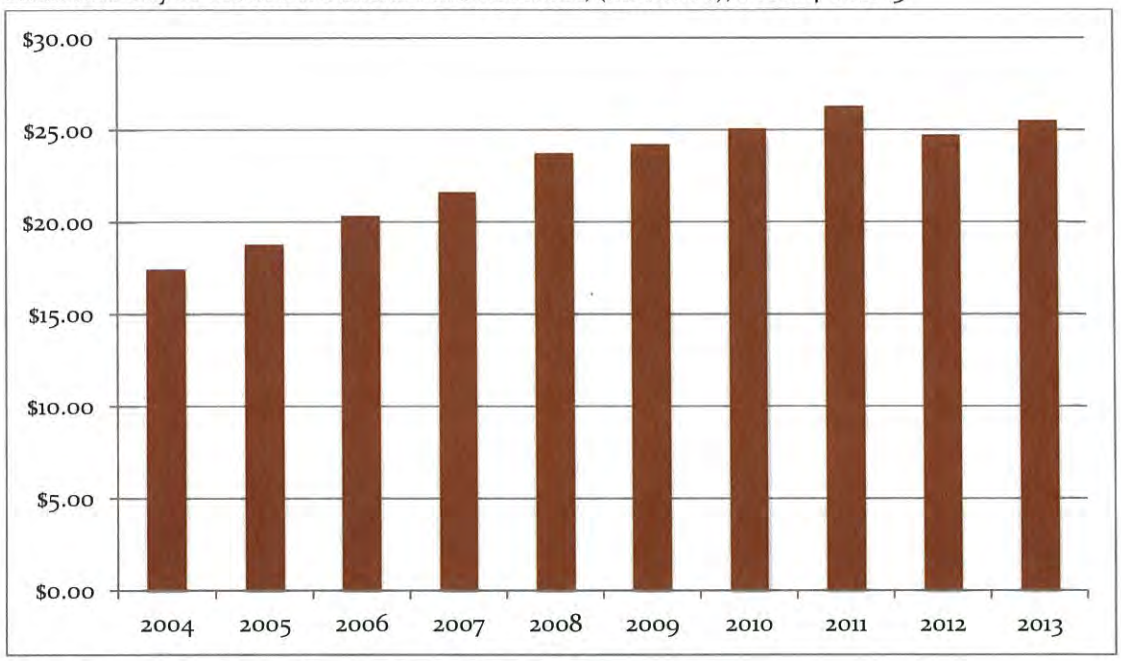
Exhibit 20. City of Greenbelt Property Tax Revenues as a Share of Total Tax Revenues (Millions $), FY2004-FY2013

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

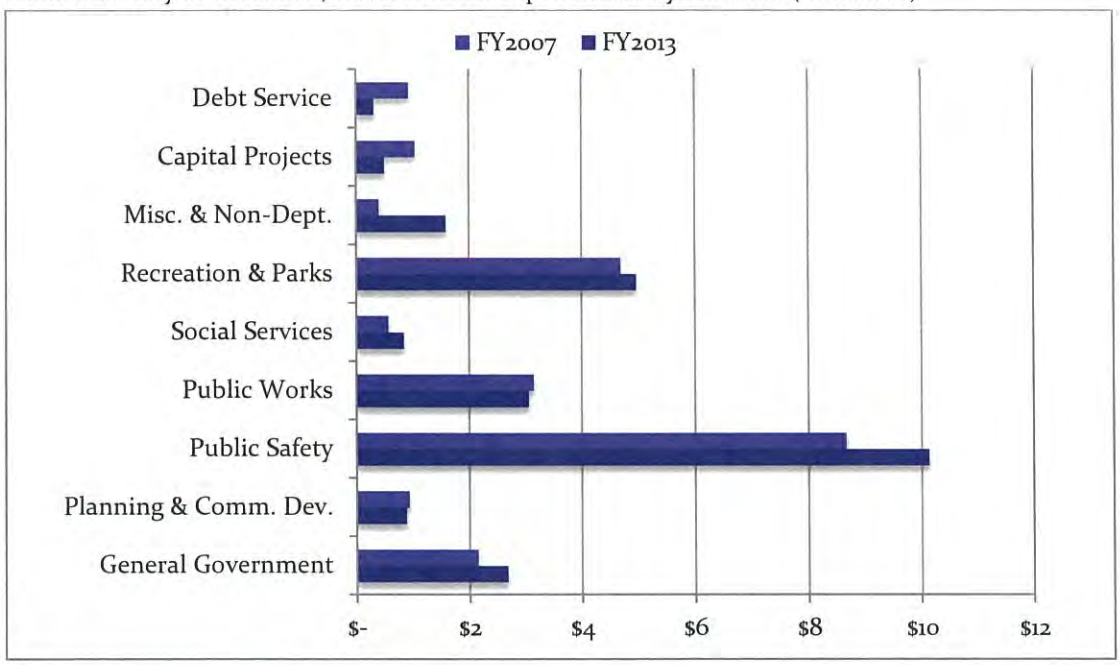


City of Greenbelt, Comprehensive Annual Financial Report (CAFR), 2013.

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.

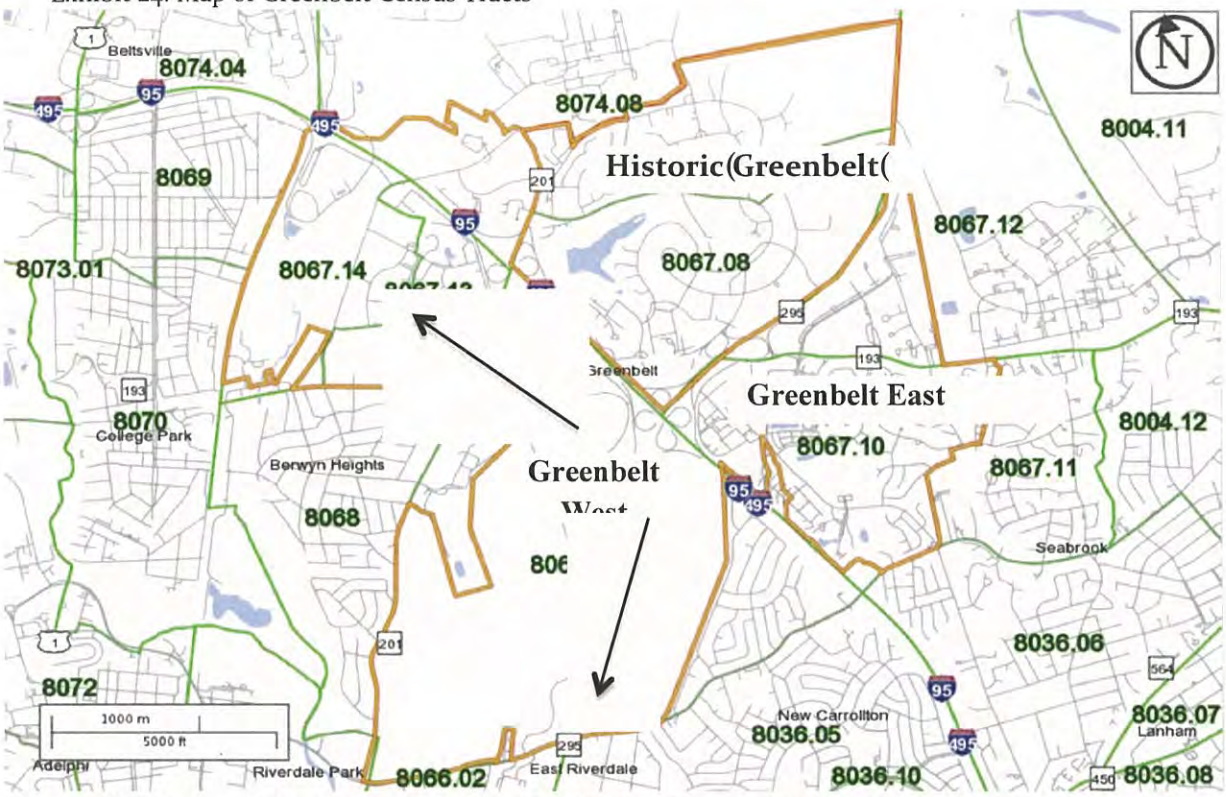
Exhibit 23. Census Tracts Pertinent to the City of Greenbelt

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 and 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.

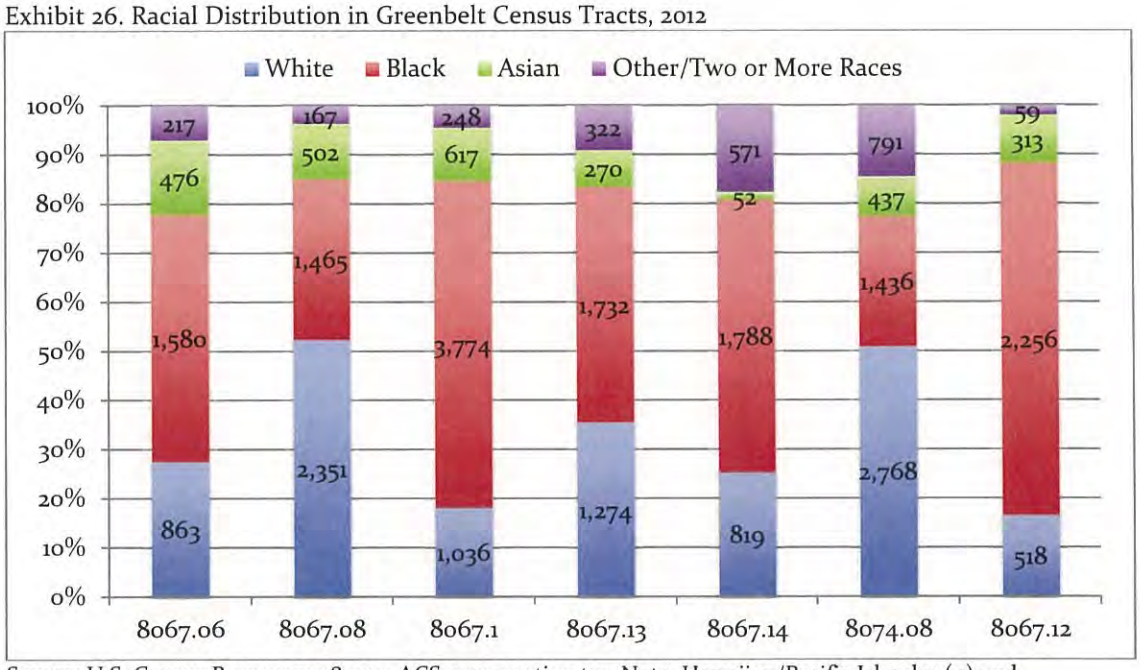
Exhibit 25. Select Demographic Characteristics, 2012

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.

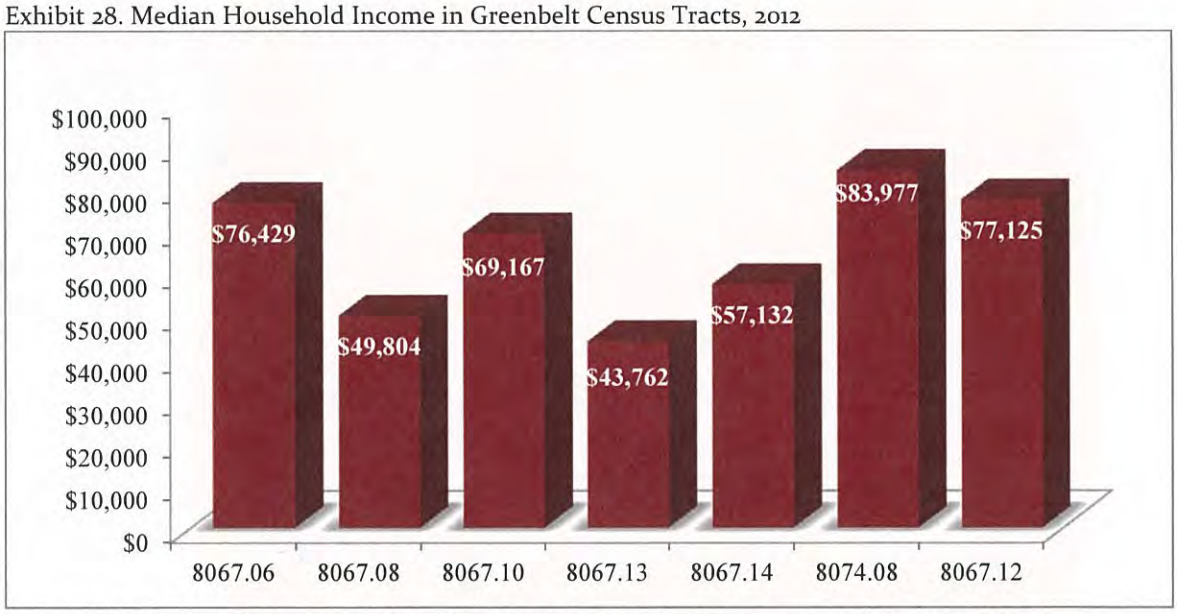
The various sections of Greenbelt also differ by educational attainment. Arguably, the most educated Census tracts are 8067.10 and 8074.08 (which also reports the highest median household income – see Exhibit 28), where more than 50 percent of the population has at least a bachelor's degree. The smallest 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 tend to 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. However, they noted 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 2232 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 half 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%

[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 living room. 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.

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[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.

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[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 ones. 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 about 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 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 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 it 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".

Greenbelt Competitive & Collaborative Analysis

DRAFT

Hyattsville Community Development Corporation

6/16/2016

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APPENDIX

1. A Competitive Assessment of the Greenbelt Community as an Economic Development Entity

A. Evaluation Methodology

HCDC conducted 50+ selected psychographic interviews or visits with a swath of self-identifying Greenbelters: political leaders, stakeholders, community members, civic groups and City staff. HCDC staff also visited various Greenbelt locations and observed scores more individuals in various social venues: public meetings, offices, restaurants, malls and farmers' markets. Comparison of these confidential interviews, along with observed public discourse, revealed important commonalities in the life arcs of most Greenbelters interviewed; critical contradictions within and across groups within the Greenbelt community were also suggested and bear consideration.

Why analyze economic identity?

Scholarly and analytic branches of economics, sociology, and psychology have explored how "*Identity*" can and does affect economic transactions and the climate in which parties act upon the economic life of a community.[1] Understanding some of the dynamics in which self-identification influences economic behavior and economic drivers can deepen one's approach to strategically addressing economic conditions: from the impact of group discrimination on personal income (a highly detrimental influence); to how collective bargaining affects the economic productivity of classes of workers; or how collective political action affects development outcomes. Our staff sought to get a more intimate perspective on how community members relate to their City and thus influence its economic climate.

In small business marketing, one term for getting to know your stakeholders or customers is psychographics: a study of personal characteristics, attitudes, interests, and lifestyles. Data is typically gathered through surveys, face-to-face interviews, personal or employee observations or focus groups as well as background demographic information. Staff gathered a great deal of demographic information for the Small Business Toolkit from the American Communities Survey, US Census data, and prior Greenbelt studies.

[1] Akerlof, G. A., & Kranton, R. E. (2000). Economics and identity. Quarterly Journal of Economics, 115, 715-753.

1. A Competitive Assessment of the Greenbelt Community as an Economic Development Entity

B. Economic Identity Summary

Observations

1. Greenbelt residents stay in both vocal and quiet possession of their community, even across the differentiable "Three Greenbelts" referenced in the Sage Economic Development Strategy Proposal.

The narrative commonalities from our pool of respondents and interviewees relate to how younger, career-starting individuals and families that were initially attracted to the ease of commuting to work from Greenbelt, and / or the consistent affordability of housing options along an evolving spectrum of life-cycle needs, got hooked on the Greenbelt community identity. An overwhelming majority of our respondents have grown into an identity that is deeply defined by some or many unique aspects of Greenbelt's municipal and social life. Some respondents suggested a "Greenbelt identity" was even an inheritable trait, passed-on through generational associations, recruitment, and sustained membership in the multitude of civic and social organizations that the city is replete with.

Deepening engagements in the schools, co-ops, recreation groups, local committees, homeowner's associations, social and environmental groups, and arts organizations lead to a community vesting that yields a pervasive perspective. It seems as if, throughout the Greenbelt community, - whether considering its parks, its quiet neighborhoods, certain underperforming commercial centers, trails and byways, community centers, businesses or public spaces, transit or obstructive state highways - these facets of the community, both the positive and the negative, all *belong* to Greenbelters. The sense of resident ownership of the community's amenities and resources is intense, laying the potential groundwork for the strongest kinds of community engagement regarding their disposition.

2. *As a result of this pervasive sentiment: for anything substantial to happen, or to change in Greenbelt, the consent of its residents is expected to be elicited.* Residents expect and receive a high level of local government engagement from their leaders and municipal staff, whether the affected sphere may be public or private in nature. This sense of belonging: in both the possessive sense: "*it belongs to us/me*" and in the associative sense of the word, as in "*We/I belong here,*" leads many in Greenbelt to see their status quo as extremely desirable. In conjunction with the higher levels of municipal service associated with Greenbelt, many respondents observe that Greenbelt is *a naturally occurring retirement community*: a "**NORC**."

Continuity of residence is a strong likelihood in Greenbelt. Enlistment in the Greenbelt way of democratically-engaged, closely-planned governance lends itself to a lifelong commitment.

Due to this community allegiance and many other unique cooperative and vesting properties, and its resultant high quality of life:

3. *Greenbelt is a community where, by and large, its residents commit more strongly to their community identity than in other area municipalities*. This is a phenomenon observed within both tenant and homeowner groups. Residents may constantly seek community engagement and improvement as technical knowledge and environmental philosophies evolve, and activists' availability waxes and wanes; but paradoxically, in Greenbelt, change to the built environment comes very slowly.

High planning standards, respect for the historicity of the community, and a desire to maintain the high quality of life contribute to the City's conservative approach to growth. Growth and density are perceived to threaten an important basis of the Greenbelt identity, namely its sense of place. Resident advocates for some measures of local growth and economic development refer to a *"Fortress Greenbelt"* mentality in response to the resistance to infill development and prospective increases to commercial or residential densities, where proposed, except that placed proximate to the Greenbelt Metro Station.

These values associated with the *Greenbelt identity* give both strength to communal life and represent a challenge for the municipality as it copes with its fluctuating tax base and current estimated 31% office vacancy rate.[2] As Greenbelt considers and addresses its economic development policies and programming, the Mayor, Council, and City Manager should take note that where economic development services are offered in municipalities in Prince George's County, those staff responsible for its implementation perceive and unanimously identify citizen opposition to development as a significant barrier to attaining economic development goals.

Therefore, given the civic culture in Greenbelt, it is imperative that the City build a consensus for its economic develop and redevelopment plans well in advance of attempting to undertake them.

[2] WASHINGTON METRO AREA MARKET WATCH, MAY 2016, Transwestern

1. A Competitive Assessment of the Greenbelt Community as an Economic Development Entity

C. Greenbelt Value Propositions

Notwithstanding the observations above, the value proposition of being a resident of Greenbelt is high, and starts with:

A powerful sense of community and neighborliness,

Extensive community and political engagement,

Superior recreational and cultural facilities and services,

A welcoming, intimately planned human scale to Historic Greenbelt and the Roosevelt Center,

Strategic proximity to transit, rail, trails, and well-placed highway facilities: serving for an advantageous commute and regional connectivity,

Abundant, welcoming civic and nonprofit community programming,

Relatively affordable housing with respect to the region,

Community-engaged, well-regarded public schools,

Pro-active community-oriented policing serving quiet, safe neighborhoods,

An engaging, membership-oriented, cooperative-driven local culture, and

Responsive governance.

As a place to live, Greenbelt stands out as a highly desirable destination to most, but not all, demographic cohorts. Actively marketing the high quality of life, Greenbelt's deep concentration of community amenities, and its high levels of community engagement across the region will fill a critical missing element in building the economic development capacity of the City. Recruiting new residents, in concert with diversification and expansion of housing opportunities, will increase Greenbelt's visibility and ensure that the City can remain competitive in the regional marketplace.

2. Inventory of Municipal Tools

HCDC staff took an inventory of municipal tools used by Prince George's County municipalities for economic development purposes. We focused our efforts on municipalities in the northern area of the County, and on those with active economic development staff. The inventory is in two parts: a website review, followed by a breakdown of grants, tax incentives, programs, and other techniques being used to support economic development goals.

A. Website Review

We reviewed the websites of all the municipalities in Prince George's County, but focused on those with full-time economic staff. We examined the content of their sites, the ease of accessing relevant information, whether the website successfully displayed economic development information. We also reviewed the City of Greenbelt's website.

Websites were evaluated based on the following categories: **Marketing & Tourism**, **Business Support**, and **Planning & Programming**. These 3 elements are crucial factors in any successful economic development strategy and should be addressed, to the fullest degree possible, in a municipal website.

Marketing & Tourism covers any information that visitors to the area might need – business data, dining, events, information about parking, and getting to and from. Information should be clear and concise; meant as a marketing tool and not as in-depth source of information, which can be reserved for other parts of the site that are primarily geared towards residents or investors.

Business Support covers the needs of the business community, including communications about business associations, tax information, any municipal programs or incentives, and information about permits and licensing. The transparency of the website, and the ease of accessing information, ensures businesses that support and assistance is available and encourages business owners to self-help using the site.

Planning & Programming information is essential for attracting new investment. Community plans lay out clear goals for the future, and include programs that facilitate the implementation of these goals. For example, a planning goal could be the revitalization of an older business district. The zoning for the district should be set up to promote business opportunity and enable a mix of business uses to ensure maximum ability to attract tenants. Complimentary programming, such as a commercial façade program or a business tax incentive, can then be instituted as programming support. Having as much of this information available online provides developers, investors, and prospective business owners with important research tools. Coordinating the presentation of this information sends a powerful signal that the community is serious about accomplishing its planning goals.

Individual aspects of each website were graded on the following scale:

Check Minus	Check	Check Plus
Exists, but not easily accessible	Accessible	Easily Accessible
Not user friendly	User friendly	Very User friendly
	Good quality	Great quality

The following page shows the Matrix Results.

	Hyattsville	Mount Rainier	College Park	New Carrollton	Laurel	Bowie	Greenbelt*
MARKETING & TOURISM							
Business Directory		✓ +	✓ +			✓	
Dining Directory			✓ +	✓ -			
Arts & Entertainment Programming	✓		✓ +			✓	✓
Event Calendar	✓ +	✓ +	✓ +	✓	✓		✓
Parking & Directions	✓		✓	✓	✓		✓
Municipal Map	✓ +	✓	✓ +	✓	✓ +	✓ +	✓
Transit Info	✓ -	✓	✓ +			✓	✓
BUSINESS SUPPORT							
Business Home Page	✓ +	✓ +		✓ -		✓ +	
Links to Permits	✓ +	✓ +	✓ +	✓	✓		✓ -
Links to Licenses	✓ +	✓	✓ +	✓	✓ +		✓
Code Info	✓ +	✓ +	✓		✓	✓ +	✓
Zoning Info	✓	✓ +			✓ +		
Staff Contact	✓ +	✓	✓ +	✓ -		✓	✓
Municipal Tax Credits	✓ +		✓		✓ -		
Other Municipal Incentives							
City Data & Demographics	✓ +	✓ -	✓			✓	✓ -
Vacant Property Database							
Real Estate Resources						✓ +	
Newsletter	✓	✓	✓ -		✓	✓ +	✓
Market Data or Analyses		✓ -	✓			✓	
Business Association(s)		✓	✓				
Links to Resources/Guide			✓ +		✓	✓	✓
Links to Grants/Loans	✓ +		✓		✓	✓ +	
Business Workshops							
PLANNING & PROGRAMMING							
Econ Dev Plan or Report			✓ +		✓		✓ -
Municipal or Area Plan	✓ +	✓ +	✓ +		✓	✓ +	✓
Other Financial Programs			✓ +		✓	✓	
Façade Programs	✓		✓				

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Prior to the implementation of the Business Toolkit, in comparison with other municipalities' websites in terms of readily-available business and economic development information, Greenbelt fell in the middle. The City's website had a large amount of information to provide, but some of the information was hard to find and there was no clear section dedicated to business activity. HCDC and Greenbelt staff have working together to re-design part of the website menu to include a Business section, consolidate business-related information, and bring to the forefront information that is relevant to developers, visitors, and those outside the City wishing to learn more.

*Please note that the initial assessment of the Greenbelt website was taken before the updates to the website were completed as a part of HCDC's contract to provide a Business Toolkit for the City. Refer to the Appendix for an updated assessment of the website.

2. Inventory of Municipal Tools

B. Program Snapshots

During the review process of municipal websites, we researched and catalogued the following tools and information that reflect the goals and activities of the various economic development efforts related to supporting the business community. The following narrative delves into each municipality's activities and all information is publicly accessible.

i. College Park

The City of College Park has had a longstanding and active economic development department, a subset of their planning department. They developed the SHOP College Park website, a very effective promotional tool for businesses in the City and an easy-to-use platform for consumers. They also offer a variety of grant programs for local, small businesses including façade and interior build out grants. Most recently, the City – in partnership with the University of Maryland, established an Innovation District to support and encourage growth in this business sector, ultimately strengthening the entire business community in the City.

Permits & Licensing
City Non-Residential Occupancy Permit *Annual, includes inspection of property* Building & Construction Permit *Must be obtained along with County permit* Sign Permit
Business Programming, Outreach & Tools
SHOP College Park *Promotional website for all CP businesses, run by the City's Economic Development staff* Business Resource Guide *How-to Guide for starting a business in CP*
Grants
Business & Multi-Family Apartment Recycling Grant Program *Funding for businesses to start or expand recycling programs that meet County requirements* Business Retention Fund *Up to $5,000 for leasehold improvements of existing, locally-owned retail businesses* Retail Attraction & Expansion Fund *Up to $25,000 in leasehold improvements to new or expanding retail businesses, with a focus on filling retail gaps*

Hollywood Commercial Facade Improvement Program *Created to invigorate the Hollywood Commercial District* Commercial Tenant Improvement Program *Up to $25,000 in leasehold improvements to commercial retail space*
Tax Credits
Revitalization Tax Credit Program *Qualifying projects are eligible to receive a 5 year tax credit on city real property taxes* Innovation District *Tax Credit of at least 50% (1st year) to qualifying businesses, 10% (2nd-5th year)*
Committees
Advisory Planning Commission *Conduct hearings on development applications requesting variance from County zoning standards, make recommendations to the Mayor & Council on development applications; land-use issues and plans; grant requests and capital improvements; and may develop a long-range comprehensive plan for the City as directed by the Mayor and Council*

ii. Hyattsville

The City of Hyattsville did not provide any business-related programming other than grant programs and incentives, but is considering expanding their efforts in the future, according to their current Director of Economic and Community Development. The City has successfully run multiple Commercial Façade Improvement Programs over the years which have, in most cases, resulted in significant improvement of the location and/or tenancy of the building (if not occupied at the time of application). The City has also utilized its recently adopted Revitalization Tax Credit to finance a significant previously phased project whose timely completion at University Town Center (a mixed-use town center whose commercial and residential marketplace stalled and collapsed as a result of the mortgage finance crisis and subsequent recession of 2007) to benefit the community.

Permits & Licensing
Business License *Annual license with inspection* Alcoholic Beverage Sales License *20% of County fee*
Grants
Commercial Façade Improvement Grant Program *Dollar-for-dollar matching grant of up to $45,000 funded through Community Legacy grant*
Tax Credits
Revitalization Tax Credit *Financial incentives for economic development and redevelopment in 3 revitalization districts*

Committees
Planning Committee *Reviews incoming development proposals and submits recommendations to Council*

iii. Bowie

Unlike many other incorporated municipalities in Prince George's County, the City of Bowie does *not* have a business license requirement of its own. It does maintain a building permit program in order to review and track development within the City, but prefers to let businesses only go through the County system. The Business Incubator, which was an initiative from the City that has now become its own nonprofit, in partnership with Bowie State University, is a recent enterprise that fosters entrepreneurs and innovators in their first stages of business development and serves the greater area of Prince George's County. The City's main strategy for growing the tax base has been strategic annexation of unincorporated parcels; some of these are developed into residential communities and some into commercial complexes, and each contributes to the City's annual tax revenue and ultimately, the City budget.

Permits & Licensing
Building Permit *All efforts requiring County permit also require City permit*
Business Programming, Outreach & Tools
Business Incubator *Conceived by City and now managed by non-profit in partnership with Bowie State University*
Grants
Commercial Façade Improvement Grant *Past program run for businesses in Bowie's Historic District*
Loans
Revolving Business Loan Fund *For new or expanding businesses, as determined by staff and Mayor*
Committees
Economic Development Committee

iv. Laurel

As the only municipality in Prince George's County with separate zoning authority, Laurel is unique. Most permits are processed by the City, but water, sewer, and stormwater permits are processed by the County. The City has developed a range of funding opportunities for small businesses, particularly to support its efforts to revitalize the City's Main Street, and these efforts largely have been successful. Additionally, Laurel uses overlay zones that are closely coordinated with accompanying tax benefits to incentivize redevelopment in primary commercial areas to mixed-use centers. To that end, the Community Redevelopment Authority (CRA) was created as a separate entity and adequately funded with a mission to create additional economic development opportunities through multiple techniques, such as:

purchasing vacant lots and converting to parking for Main Street area; purchasing vacant buildings and renovating to sell, and/or issuing well defined redevelopment RFQs and RFPs. While the CRA takes it mandate from City defined goals, it has the flexibility to work in ways the municipality cannot, coordinating with private sector marketing agents in order to achieve the City's economic development goals.

Permits & Licensing
Business Permit *Annual license with inspection for certain enterprises* Building & Development Permit* *All types of construction except for stormwater management* Sign Permit *For permanent commercial and advertising signage and temporary/event signage* *Laurel is unique it has separate zoning jurisdiction from Prince George's County.
Business Programming, Outreach & Tools
Main Street Messenger *Monthly newsletter with events, new businesses, and updates on revitalization*
Grants
Main Street Relocation Grant Program *Reimbursement of up to $10,000 to eligible business to relocate to Main Street* Main Street Grant Sign Program *Up to $2,500 match for improvements to signage on commercial Main Street buildings* Main Street Retail Storefront Façade Improvement Program *Up to $10,000 reimbursement for façade improvements on ground floor retail* Main Street Commercial Property Improvement Program *Reimburses new or expanding tenants for their leasehold improvements or interior fit-outs*
Tax Credits
Revitalization and Economic Development Tax Credit *Applies to certain areas under overlay zones*
Committees
Planning Commission *Holds public hearings on all matters related to development and zoning within the City* Community Redevelopment Authority *City's principal development/redevelopment authority with a focus on creating additional economic development opportunities for property owners within the City*
Other

Foreclosure Registration Program *Goal is to aid the City in identifying responsible parties of foreclosed properties and increase code compliance on said properties*

v. Mount Rainier

Although a small municipality, Mount Rainier's Economic Development Department has recently become very active. Mt. Rainier offers a range of business programming, and is one of the few municipalities that specifically states its office is available to discuss general business inquiries (although most municipalities do respond to these questions, not all state this explicitly on their website). They recently hired an economic development coordinator who has been instrumental in modifying the City's website to provide economic development information and creating several new grant program opportunities for local businesses.

Permits & Licensing
Business License *Annual license with inspection, plus Mount Rainier Business Association fees (optional)* Building Permit *Required for all projects that also need a County permit* Property Registration *Required for vacant lots or buildings*
Business Programming, Outreach & Tools
Mount Rainier Business Association *Mission is to enhance the economic viability of Mount Rainier* Business Locator Map *Increase visibility of local businesses; all licensed business can be found on the map* Business Friendly Survey *Recently implemented survey to assess business needs and ways City can assist local enterprises* General Business Assistance *City responds to calls for assistance from businesses on varying topics* Business License Quick Guide *Short doc outlining license process*
Grants
Town Center Business Attraction and Expansion Program *Matching funds up to $10,000 for businesses located in MUTC*
Committees
Economic Development Committee

Economic Development Workgroup

vi. New Carrollton

The City of New Carrollton has not been able to match the economic development efforts of other municipalities with dedicated staff, or at the very least, the City's website does not reflect all the efforts that staff may be undertaking. With the New Carrolton Metro Station in an unincorporated portion of the County, the City faces jurisdictional challenges to implementing its goals.

Permits & Licensing
Business License *Annual license with inspection*
Grants
New Carrollton Revitalization Fund and Incentives *Financial assistance and matching funds for business relocating to City*

vii. Greenbelt

When compared with other municipalities, especially those with robust business communities and larger municipal governments, Greenbelt is permit/license heavy with no business-focused programming, financial incentives, or outreach.

Permits & Licensing
Commercial Occupancy License *All businesses in the City require a Commercial Occupancy License* Liquor License Building & Construction Permit *Any efforts requiring a County permit also require a City permit* Sign Permit *All signage projects requiring a County permit also require a City permit* Alarm Permit *All alarm systems must be registered and permitted with the City*
Committees
Advisory Planning Board *Meets monthly to provide Council with feedback on development activities, zoning, codes, etc.*

2. Inventory of Municipal Tools

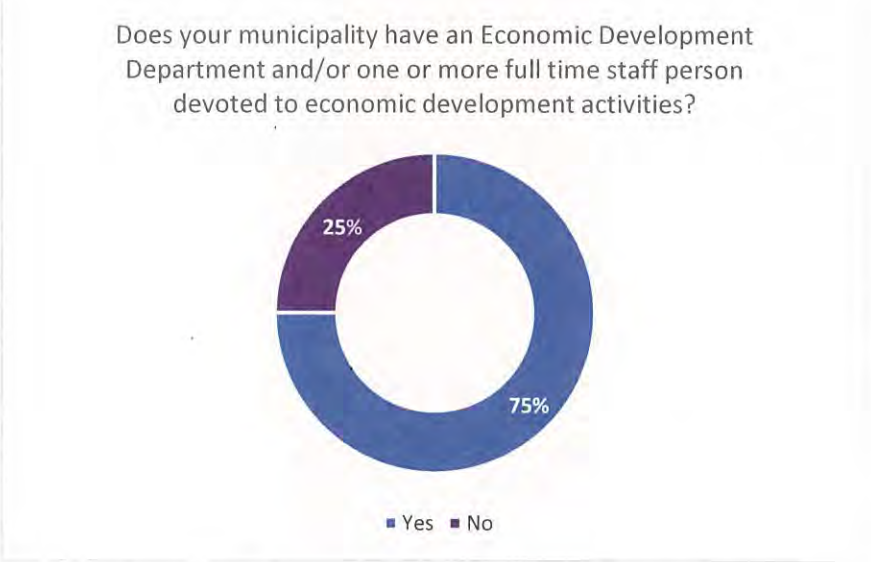
C. Economic Development Services Survey

Purpose: In order to compare the City of Greenbelt's economic development capacity and current initiatives, HCDC distributed a survey to Prince George's County municipalities with active economic development staff to better understand successful tools and strategies being utilized in the area.

Methodology: An initial online survey was designed using Google Forms and sent via email to all participants. It contained 11 questions, some short answer, some selected choice, some multiple choice, and one ranking question. The questions were designed to glean basic information about the municipality's economic development programming, funding resources, and overall thoughts on factors that could affect the success or failure of any programming. The survey answers were used as quantifiable data, and as a baseline to more specific questions that were asked in a follow-up interview. These answers are more qualitative in nature.

Results & Discussion: The results of the online survey revealed that all of the municipalities, whether or not they had a full-time economic development staff person, had a written economic development plan.

Figure 1

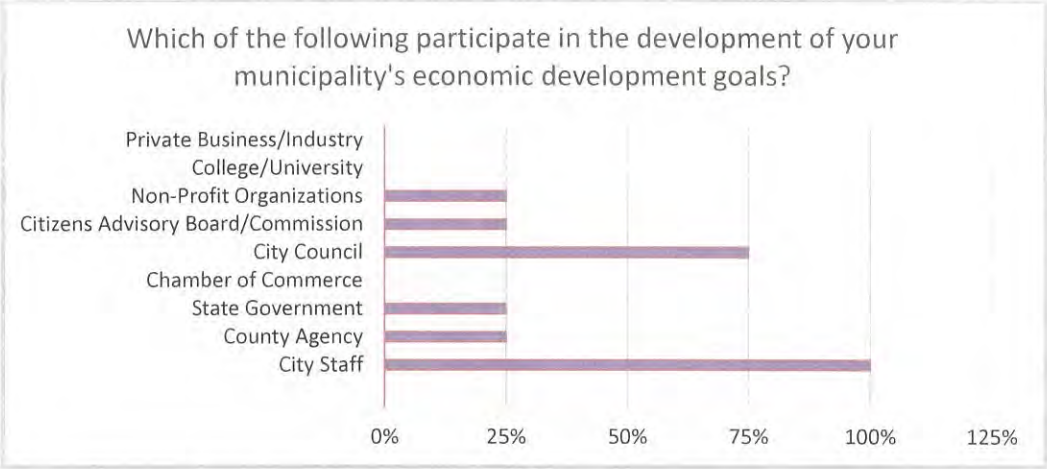


In some cases, the plan was folded into an existing planning document which covered more than just economic development; in other cases, it was a standalone document.

Not surprisingly, all respondents had City Council and Staff listed as participants in the development of municipal economic goals (Figure 2). However, fewer listed any citizen advisory boards or other government agencies as participants, and none listed any private business or

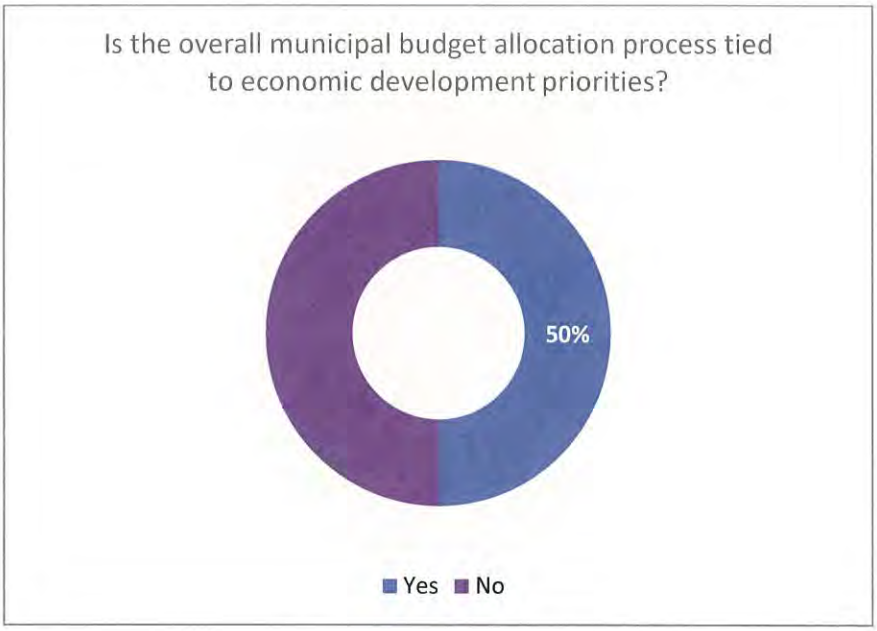
chamber of commerce participation. During follow up questioning, respondents working within a City Manager form of government reported a strong level of input and guidance from staff as the main directive in the development of economic goals.

Figure 2



Half of the respondents indicated that the municipal budget process was tied to economic development priorities.

Figure 3



Respondents reported a varying range of economic development budgets. In follow-up interviews, it was determined the definition of "economic development funding" - apart from salary allocation – varied across respondents, with no uniform methodology apparent. Some considered any funding for public infrastructure improvements under economic development,

and thus had larger budgets; while others defined the budget as only pertaining to programming with "economic development" in the title, regardless of whether or not they implemented other programming that could be considered economic development. Attempting to compare municipal budgets to determine the extent or degree of programming or commitment to economic development yielded little intelligence of value about the effectiveness of the services provided.

The majority of funding for economic development programming came from the local government's revenues/general fund, and many also used state and county grants to supplement programming funds.

The types of programming implemented varied across respondents. The following were identified as commonly utilized programming, policy, and/or strategies:

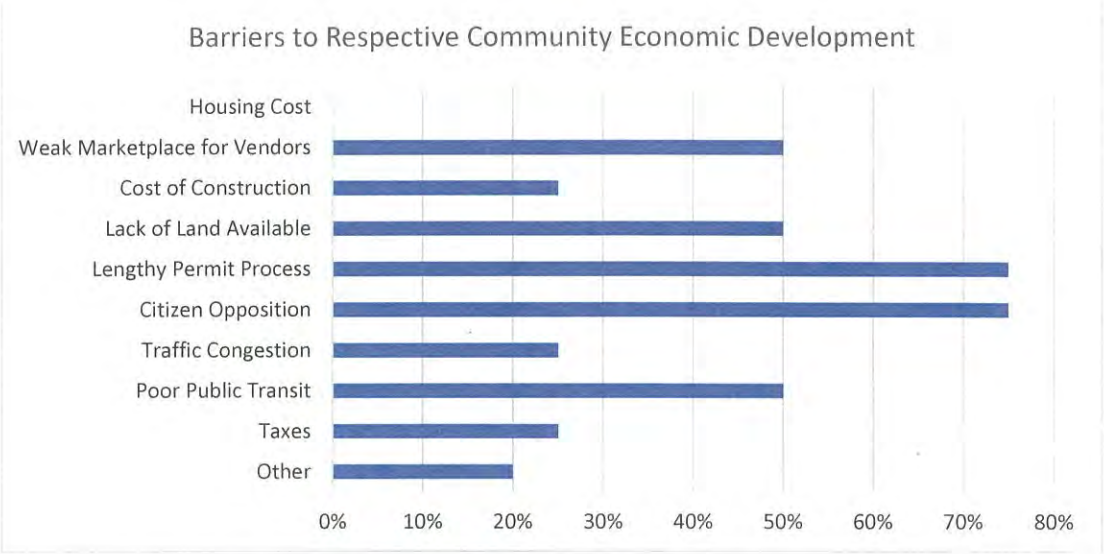
Table 1

BUSINESS SUPPORT	INCENTIVE	DEVELOPMENT SUPPORT	FORMAL PROGRAM
Needs Survey of Local Businesses	Revitalization Tax Credits	Development Facilitation	Business Recruitment
Marketing Assistance	Tax Credits (Other)	Public/Private Partnerships	Commercial Façade Improvement Grants
Business Incubator	Tourism/event sponsorships	Site Selection	Improvement Grants (Other)
Merchants Association			Main Street Program

Commercial Façade Improvement Grants was the most commonly reported program. The provision of County and State funding for these grants, as well as the prevalence of the program nationally, make it an easy option for municipalities to obtain funding and implement.

Respondents were also asked to select, from a given list, the factors they considered barriers to economic development in their community. The most commonly chosen factors were Citizen Opposition and Lengthy Permit Process. We had anticipated the latter as a potential issue, based on local, first-hand experiences with development in the area; the near 100% selection of Citizen Opposition speaks to the power and influence of organized residents.

Figure 4



Finally, respondents were given a series of elements and were asked to report their negative or positive influence on economic development in their community (Table 2 – next page).

Table 2

	Very Negative	Negative	Neutral	Positive	Very Positive
Recreation Opportunities			●●	●●	
Quality of Life				●●●	●
Environmental Quality			●	●●●	
Community Safety				●●	●●
Economic Growth Potential				●●	●●
Availability of Capital		●	●	●●	
Medical Facilities		●●	●	●	
Population Density			●●●	●	
Access to Markets and Customers				●●●●	
Shopping Facilities		●	●	●●	
Sustainability			●●	●●	
Cost of Living		●	●●		●
Public Education System	●	●	●●		
Community Attitudes			●●	●●	
Growth Management Policies			●	●	●●
Affordable Housing		●	●●		●
Workforce Availability		●		●●●	
Cost of Doing Business		●●	●	●	
Transportation System		●	●	●●	
Availability of Land	●		●●	●	
Traffic Congestion		●●	●●		
Utilities Cost	●		●●	●	
Infrastructure			●●●●		
Availability of Technology		●	●●	●	
Parking	●	●	●●		

Interestingly, Community Attitudes were listed as having a Neutral or Positive effect; it's possible that listing the item as Community Attitude instead of Community Opposition changed the way respondents reacted to it. Or, as we found in some follow-up interviews, respondents drew upon their past experiences with Community Opposition to define it as a barrier to economic development, but thought that the current communities they worked in did not have those same attitudes and in fact were contributing to and supportive of growth.

Respondents listed Quality of Life, Community Safety, and Economic Growth Potential as Very Positive influences on economic development. These factors are also very marketable to new residents and new businesses, which can in turn contribute to a positive feedback loop. Respondents also listed Access to Markets and Customers as a positive effect. Prince George's County's close proximity to the District of Columbia, Annapolis, and Baltimore provides many

opportunities to attract multiple types of consumers. Capitalizing on these market forces will be key to success and economic vitality.

Respondents pointed to factors like Parking, Cost of Doing Business, Traffic Congestion, and the Public Education System as negative factors. During further discussion, respondents indicated that perceptions of the Public Education System in the County were detrimental to attracting larger industries to relocate.

During the follow-up interviews, respondents were asked a series of base questions, customized according to their survey responses, to gather additional insight about goals and strategies for achieving economic development. Table 3 lists the Goals discussed by respondents and the strategies used to achieve those goals.

Table 3

GOAL	**Preserve & Increase Non-Residential Tax Base**
STRATEGIES	• Actively recruit private development • Utilize incentives, such as permit assistance and tax credits • Streamline licensing process for construction and businesses • Annex new land, where possible
GOAL	**Promote Revitalization of Commercial Areas**
STRATEGIES	• Use creative parking solutions – such as a shared parking district – to ease parking burden on businesses • Façade Improvement Grants: start with credible partners and start simple to gain traction • Create Overlay Zone to allow mix of uses • Release preliminary RFP or RFQ to gauge and encourage private market response
GOAL	**Decrease Commercial Vacancy**
STRATEGIES	• Support or provide business programming, such as a Merchant's Association, Technical Workshops, or a Business Incubator • Develop loan fund to support business relocation or development
GOAL	**Encourage In-fill Development**
STRATEGIES	• Modify zoning to increase density and expand allowable uses • Use municipal infrastructure investment as a catalyst/incentive for developers • Establish TIF districts to support projects, where needed

GOAL	**Ensure Equitable Growth**
STRATEGIES	• Include affordable housing component in new residential development, ex. MPDU in Montgomery County • Develop strong community vision for developer's to adhere to • Include vision in any RFP's or RFQ's to guide development

Conclusions: Municipalities with the most successful programming had the following in common: 1) a clearly defined goal or set of goals for economic development, and 2) multi-point strategies in place to pursue the realization of stated goal(s). The goals were either articulated specifically on the website or through planning documents and other reports and studies. Staff reported being given clear mandates and legislative support to pursue the articulated municipal vision. Interviews revealed that many municipalities were in direct contact with regional brokers and real estate agents to help extend their message and attract new investment.

3. Economic Programming Recommendations and Feasibility

A. Review and Summary of Past Plans

The City of Greenbelt has at least five prior published sources assessing and recommending aspects of economic development policy, operations, and programming. All have relevant, actionable, and timely recommendations to offer. The sources HCDC studied in addition to our own research were:

- *The Greener Greenbelt Initiative's Roosevelt Center Focus Session* conducted in conjunction with the University of Maryland's Architecture Program **(2007)**
- *The Sustainability Plan Framework for the City of Greenbelt* from the Greenbelt Advisory Committee on Environmental Sustainability **(2013)**
- *The Organizational Assessment Final Report* from the Matrix Consulting Group **(2013)**
- *The Greenbelt Metro Area Sector Plan* from MNCPPC, Department of Planning **(2013)**
- *An Economic Development Strategy for Greenbelt, MD* from the Sage Policy Group **(2015)**

Those recommendations have been condensed, simplified, categorized, and entered into tabular form for easy comparison, along with HCDC's recommendations.

The first of HCDC's Preliminary Set of Action Recommendations for the FY 2017 Budget[3] calls for the Mayor and Council to work with Staff to legislatively define, prioritize, and communicate its desired economic development outcomes, and establish those considerations in the context of other related departmental functions, such as prioritizing infrastructure improvements, or balancing development plan review recommendations against economic development outcomes. It is the necessary first step to undertake and will undergird and critically shape all other economic development activity considerations to be addressed.

In light of this proposed action, we strongly recommend reviewing, considering, and adopting certain economic development policies from these or other known past professional advisements, in addition to those issued in this report. If and when Mayor and Council decide to clarify their policy aims and expectations for the staff implementation of its operations, and any subsequent economic development related activities, they should draw from as many perspectives and sources of expertise as they have available.

[3] The HCDCs Preliminary Set of Action Recommendations for the FY 2017 Budget were previously delivered to Staff via email, and are located in the Appendix to this report.

The *Greener Greenbelt Initiative's Roosevelt Center Focus Session* features a study of a possible municipally-led, in-fill development project meant to energize the Historic Greenbelt commercial center and enhance its infrastructure and public spaces. It outlined a pathway to create more contemporary housing options; more downtown vitality; improved use of public resources; and was heavily influenced by the paradigms of sustainability.

With respect to economic development, *The Sustainability Plan Framework for the City of Greenbelt* emphasizes the importance of the role of public transit and the reliance for positive economic development outcomes on the effective provision of transit services and offering diverse transit options.

The Matrix Group's *Organizational Assessment* features a proposal for the staff adoption of certain economic development functions, initially as a contracted service, and then transitioning over time to a full time staffing recommendation. That position would ultimately merge marketing and promotional communication functions for the City with the responsibility for economic development programming and grant acquisition and management. HCDC found this approach very feasible, as it provides for transition and builds capacity simultaneously. Additionally, the linkage between effective economic development outcomes and community promotion is very direct.

The Greenbelt Metro Area Sector Plan contains a higher altitude set of recommendations, a set of philosophies, with the exception of specific, and obvious land use recommendations that would ultimately affect the market mix of the Greenbelt commercial corridors surrounding the Metro Station. The City has long ago embraced Smart Growth principles, but the recommendations are worthwhile to consider for the adoption of policies and plans that focus specifically on aspects of future economic development in addition to land usage.

The recommendations outlined in the executive summary of Sage Policy Group's *An Economic Development Strategy for Greenbelt, MD,* comprise a very limited strategy, given the community needs their very thorough and comprehensive analysis revealed. The approach is a set of loosely coordinated, basic economic development tasks, but without any roll out or implementation support or cost benefit considerations attached. The recommendation for "Support of Owner-Occupied Housing Development in Greenbelt East and West," is solidly anchored in an excellent contextual analysis of Greenbelt's current state and heavily backed by demographic information, but it is not clear what the scale of effort required on the part of the City might be to effectively influence the marketplace, or whether the economic feasibility of private sector efforts to add owner-occupied housing products to form mixed-use sites at current commercial-use only areas even exists to support this strategy element. Many interim steps are required to roll out an effective implementation of this particular recommendation.

Greenbelt has a wealth of excellent guiding principles and policy perspectives to source in coming up with its own direction and priorities.

3.A. Summary of Recommendations

SOURCE	YEAR	RECOMMENDATIONS						
		Legislative Policy: Mayor & Council	Organizational Operations: City Staff	Business Support & Programming	Development Approaches	Influencing the Commercial Marketplace	Influencing the Housing Marketplace	Infrastructure Enhancements
HYATTSVILLE CDC	2016	Legislatively defining desired economic development outcomes to provide staff direction and clarity for priorities	Reallocation of Planning staff activity to incorporate economic development considerations	Small business outreach and support programming	Municipally-Guided Pilot Development	Actively promote Greenbelt in the marketplace through engagement w/ commercial brokers, owners, employers	Recruit for limited scope demolition and upscale redevelopment of strategic Springhill Lake apartment blocks	
SAGE POLICY GROUP	2015	Reconsider previous redevelopment plans at Beltway Plaza	Reconsider previous redevelopment plans at Beltway Plaza	Provide tax breaks to catalyze rejuvenation of older commercial areas	Strive for change of ownership at Roosevelt Center		Support owner-occupied housing development in Greenbelt East & West	
GREENBELT METRO AREA SECTOR PLAN	2013	Establish policies to attract quality businesses and a better mix of businesses	Establish strategies to attract quality businesses and a better mix of businesses		Focus on community-scaled business investment & providing pedestrian-oriented elements & amenities	Eliminate unattractive & incompatible heavy industrial uses in the Sector Plan Area		Implement Smart Growth and County growth policies & plans that promote compact, TOD near rail stations.
			Continue to identify economic assets & market strengths. Explore public & private sector financial and technical assistance programs.		Implement a revitalization strategy for mature commercial areas	Attract high-tech-based companies to the County Economic Development Corporation's "High-Tech Triangle"		
						Market the vision & goals of the Sector Plan by promoting new transit-oriented mixed-use centers and residential linked to the wider community, having high quality design & identity & establish a sense of place.		
				The businesses in this area need to organize an incorporated business association.		Sector Plan Area is considered a prime location for future upscale hotel development		
MATRIX CONSULTING GROUP: ORGANIZATIONAL ASSESSMENT	2013		Pursue an economic development initiative w/ sufficient resources. In near-term, growth of capacity should focus on use of a contract service provider. Effort may shift to a dedicated staffer over time to more cost effectively continue & expand efforts.					
			Create a new position in the longer term: Director of External Relations to provide comprehensive, coordinated effort in areas of grant management, communication & economic development.					

SOURCE	YEAR	RECOMMENDATIONS						
		Legislative Policy: Mayor & Council	Organizational Operations: City Staff	Business Support: Programming	Development Approaches	Influencing the Commercial Marketplace	Influencing the Housing Marketplace	Strategic Infrastructure Enhancements
SUSTAINABILITY PLAN	2013	Support economic vitality through local businesses; green jobs / businesses; being an incubator of ideas/research; and supporting the tax base.			Improved funding for transportation, including development tax on new buildings or new ownership of existing buildings			
UMD/GHI: GREENER GREENBELT	2007	Foster a community-wide process to establish development goals for the Roosevelt Center	Define an economically viable approach to redevelopment of the Roosevelt Center	Develop a market study of retail opportunities for the Roosevelt Center	Pursue projects in partnership with the City on its land (there is +/-170,000 square feet of parking lot alone)	Engage the Center's owners more fully and explore options to increase local ownership of Center properties	Consider having people living above/around Roosevelt Center. Make the space more active	Improve street furniture, urban infrastructure, lighting, kiosks, banners, murals, etc. to provide coherence and comfort to paths, underpasses and open spaces.
				Pursue projects in partnership with the Roosevelt Center Merchants' Association	Develop the "urban design", architecture and landscape to support a sustainable, attractive, pedestrian, mixed-use, user-friendly Roosevelt Center	Pursue projects in partnership with the City on its land (+/-170,000 SF of parking lot alone). Foster investment in the Center by formulating & issuing RFPs to attract private developers		
						Provide more diversity of uses at the Roosevelt Center		

3. Economic Programming Recommendations and Feasibility

B. Economic Development Needs in Greenbelt

Optimally, a municipality's economic development programming is predicated on its community's strategic needs and the Mayor and Council's planning priorities to address those needs. As a result, we see the most pressing economic development priority for the City is for the Mayor and Council to identify what it wants economic development outcomes to look like, and to adopt policy priorities that give staff and the private sector clear direction in implementing activities which deliver those outcomes. As our review of extant municipal economic development services and programming in Prince George's County revealed, a clearly defined goal or set of goals for economic development enabled the most effective programming to be delivered in other communities.

Many subsequent action steps will fall into place as a result of affirmative policymaking from the Mayor and Council. A caveat should be noted, though: meeting economic development needs through programming endeavors should also reflect and match the organizational capacity to deliver the programming in order to use resources effectively, and not overreach. With this in mind, the importance of partnerships and the recruitment of both local stakeholder and external investments cannot be overemphasized.

By its own recognition, as well as through multiple consultants' advisement, the City of Greenbelt has begun to address one of its historic, tactical weaknesses: an underutilized relationship with its business community. By developing new information and resources, and starting to provide business-oriented services and support, a more welcoming business climate may grow.

HCDC's earlier review of Greenbelt's current conditions revealed low-hanging fruit that could be addressed with the creation of the Greenbelt Business Toolkit. Our Competitive Assessment interview process has also yielded important feedback from residents and the business community regarding the pressing need for the City to continue to systematically build better, closer relationships with private employers, commercial property owners, the development community, and business owners throughout the City. The problems and challenges that these parties experience now or face in the future are certainly Greenbelt's problems as well. While some businesses can move away from problematic market conditions, a municipality - a community - is rooted and cannot. If the business community in Greenbelt were to experience a similar kind of community identification and engagement with the City's civic, social and cultural life as its residents do; a great deal of new energy, and investment could be unleashed.

Beyond the positive engagement and vesting of its business community, after considerable review, HCDC sees Greenbelt's three most pressing economic development needs as follows:

- Tax Base expansion/diversification
- Establishment of marketplace confidence in Greenbelt as an investment destination
- Grow Greenbelt's ability to recruit and attract employers and investment

In this report, we do not seek to reinvent the wheel, but combine our research and analyses with past recommendations to bring to bear a comprehensive look at economic development strategies the City can utilize. For example, the Sage *Strategy* document communicated 18-Weaknesses and 8-Threats from stakeholder input in its SWOT analysis. These points should also heavily inform the Mayor and Council's identification of the economic needs to be addressed by any future programming initiatives.

In turn, several of those community-articulated conditions pose problems for sustainability of the tax base, which, if not adequately addressed, will ultimately diminish the levels and mix of municipal services, the pace of infrastructure maintenance and investment, environmental compliance, and the overall quality of life for Greenbelters. These items include:

- Continued commercial vacancies, and incipient blight at underperforming commercial centers
- Climbing office vacancy rates (31%)
- Anemic tax base growth relative to emergent service demands
- Relatively less local private investment compared to similarly-scaled and comprised municipalities

Several of these issues are interrelated and overlap with other perceived and previously identified challenges that require an economic development approach to resolve.

The evolution regionally of competing instances of localized, inner-beltway commercial and retail capacity, as well as changes in shopping preferences over the past two decades, has seriously affected the market-share capture and viability of Beltway Plaza during the period. Once serving as a regional commercial center, it is now a center whose geographic draw continues to shrink. Shoring up local demand by growing a larger, residential customer base could be one approach to make that center more viable, competitive, and able to recruit new businesses that could address new, upscale demand preferences.

To further pull on a related thread, if the first Sage recommendation for support of new owner-occupied housing development is adopted as a policy goal or sought after as an economic development outcome, the approach could have salutary effects addressing multiple economic needs. The *Strategy* document asserted that new owner-occupied housing types will serve to attract younger families. The two principal shrinking age cohorts within Greenbelt to be recruited for are 20 -24 year olds and 35-44 year olds. With the mean age for first birth of a

child at 22.8 yrs. old among women 15-44, and 25.4 yrs. old among men 15-44[4]: having the housing that will be sought after by these cohorts in place will also be critical to restoring important spending drivers in the local economy since individuals in these age groups are approaching peak earning capacity. This is one instance to present how carefully selected programming activities can and should address multiple economic development needs.

[4] 2011 -2013 National Survey for Family Growth, National Institute for Health Care Statistics

3. Economic Programming Recommendations and Feasibility

C. Economic Development Programming Options

Activity	Purpose
Business Incubator	Nurture start-ups to become viable. Local business development
Business Recruitment	Attract new businesses and lower vacancy rates
Commercial Façade Improvement Grant	Revitalize tired business exteriors, promote new investment, enhance tax base
Community Development Corporation	Activate a nonprofit revitalization agent and partner
Community Development Financial Institution Fund (CDFI)	Dedicates nonprofit small business lending institution funding, makes capital available to traditionally less attractive local borrowers
Community Land Trust	Converts persistently vacant buildings, lots or tracts of land into productive properties, often assisting low-income entrepreneurs
Development Facilitation	Induces faster blight rehabilitation, in-fill or new development
Employment Training	Improve skills for participating workers
Improvement Grants (Other)	Improves business appearances for interiors or other equipment, promote new investment, enhance tax base
Local Market Development	Creation and operating assistance for farmer's or other specialty marketplace
Loan Guarantees	Support start-up businesses or select development proposals
Main Street Program	Create a mechanism to implement mixed strategy approaches for stabilizing or revitalizing downtown areas
Market Research and Studies	Identification & analysis of competition, customer base, or area demand capacity & preferences
Marketing Assistance	Expand access to new customers for local business through various means, media & training (i.e. Restaurant Week promotional campaign)

C. Economic Development Programming Options (cont)

Activity	Purpose
Merchants Association	Giving greater voice & an advocacy platform for businesses
Promotional Marketing	Enhance the community's reputation as a destination. Establish local market presence in the regional marketplace. Brand and identity management
Public/Private Partnerships	Engage in collaborations to share risk, planning & financial resources for improved development outcomes or to solve complex or otherwise intractable problems
Retail Needs Survey	Identification of marketplace service gaps and needs for a locality
Revitalization Tax Credits	Lowers market entry or operating costs for targeted development
Site Selection	Provide for faster commercial tenancy/entry to market through information management, networking and better broker access
Small Business Outreach	Community building in the commercial sector
Small Business Technical Assistance	Enable entrepreneurs and extant merchants to have access to resources, networking, and specialized training opportunities tailored to their current needs; or to emergent marketplace or regulatory conditions: and to share the experiences of experts and their peers
Tax Credits, TIFs, and STDs	Enable lower market entry, operating, and financing costs generally. Obtaining the project-supporting infrastructure desired.
Tourism/event sponsorships	Provide for more exposure to extant & new customers for participants
Urban Renewal	Catalyze land use changes and eliminate blight
Workforce Development	Create pools of ready-to-hire, skilled workers for select industry/trades

Note: this list may not be exhaustively complete: many variations and combinations of these program options exist.
The intent is to provide Greenbelt with a comprehensive look at its likely program options

Programs in Application

When a municipality is considering its economic development goals and its capacity to achieve them; it will discover that certain goals require or could benefit from a slew of coordinated programs to support or achieve the desired outcomes. As an example, take the Sage *Strategy*-recommended goal to "**support owner-occupied housing development in Greenbelt East and Greenbelt West.**" Programming activity to progress this goal could source from, but would not be limited to, any combination of the following economic development programs:

- CDFI
- Development Facilitation
- Market Research and Studies
- Public /Private Partnerships
- Site Selection
- Tax Credits
- Urban Renewal

A municipality might not have maturely developed programs in all these areas, but could choose to outsource expertise as needed to conduct a campaign to advance or achieve the goal. Having a housing market study on hand to establish or document sufficient product demand would help multiple land owners or developers demonstrate project viability to gain support for the financing of their project. Access to extant zoning maps, density studies, and ownership data could facilitate identifying developable tracts or candidates for likely-to-pass zoning amendments to assist land owners and developers in site selection.

Applicable tax credits tied to development consistent with the City's goals could lower project costs. By sweetening a deal, marginal or riskier projects can be made viable. If affordable or cooperative housing development is in the picture, a strong relationship with an experienced community-oriented financial institution familiar with non-standard housing operating models could mean the difference between financing approval or rejection. Rarely does achieving an economic development goal fit neatly into any one program category.

3. Economic Programming Recommendations and Feasibility

D. Top Three Recommended Programming Options for Greenbelt for 2017

In consideration of the current stage of Greenbelt's economic development programming capacity, its current economic development needs, and the economic climate and competitive conditions throughout the region, HCDC staff recommends the following programming activities be addressed or commenced in FY 2017:

Small Business Outreach

To both promote and build upon the positive steps of community outreach that the Business Toolkit represents. This program activity addresses the need to build confidence in Greenbelt as a place to invest business resources and furthers Greenbelt's capacity to attract businesses and employers.

Development Facilitation

In the singular, not programmatic, form of a limited scope, municipally-guided pilot development project on publicly-owned land at Roosevelt Center: and set upon a phased RFQ/RFP platform. In carrying out and seeing through one modestly scoped project - from planning parameters to RFP selection to use and occupancy permitting - Greenbelt could address all three cited economic development needs, gain valuable experience, and build new and better relationships with the development community while addressing its long term economic and place-making interests .

Public/Private Partnership

Initiating a dialogue leading to the joint planning and cooperative implementation of municipally supported in-fill redevelopment at Beltway Plaza. Geared to the goal of ultimately achieving a mix of economically feasible new uses at Beltway Plaza. A partnership would infuse new energy, customer interest, and activity but also ground the project in adequate levels of jointly-supported connective infrastructure and pedestrian friendly amenities. This activity would also address all three cited economic development needs: expanded tax base, building confidence in Greenbelt, and building on its ability to handle and attract investment.

In considering these options HCDC is advising the City of Greenbelt to stop waiting for and reacting to the private sector's approaches and begin both leading and aiding or partnering with the private sector in achieving mutually shared economic development and planning goals. With so much invested already in the outcomes of any future development, putting some skin in the game to support desired infrastructure and amenities in order to have a better chance to guide development upfront; and foster desired outcomes may flip the script that has been

written over many years in how investment and development happen or don't happen in Greenbelt.

Greenbelt has both the staff capacity and has dedicated budgetary resources to set these recommendations in motion. Small Business Outreach adds a very modest level of programming into the future municipal services mix and is an excellent way to build community and engagement within a long untapped segment of Greenbelt.

How Does it Work?

Small Business Outreach

After determining whose direct oversight this nascent program becomes, this task could partially be accomplished by a pair of qualified, paid, part-time interns conducting municipal business outreach as a new communications function. This would be somewhat as envisioned in the Matrix *Final Report*.

Both outreach and message should be implemented in conjunction with the Public Information and Communications Coordinator's oversight. Initial functions include promoting the Business Toolkit communitywide, building up the business/ municipal relationship, assisting in the development of a local B-2-B network and determining the demand or need for other small business support programs, such as expert-subject seminars. The ongoing Business Breakfast initiative, commenced by Greenbelt in 2015, could be folded into the broader Business Outreach effort.

Development Facilitation

The City of Greenbelt, with its highly engaged and competent Planning Staff, and its dedicated and passionate Planning Advisory Committee members, is uniquely qualified to commence, instantiate, and solicit a historically site-sensitive, appropriately-scaled in-fill project to address its economic and community needs. Through the careful drafting and issuance of a Request for Qualifications for a development team, as a prelude to an invitation to participate in an ensuing, equally carefully-drafted Request for Proposals for the most qualified and compatible teams to submit for, the stage could be set for a welcomed, ground-breaking project that harnesses private sector capital and creativity to build a project under a thoughtfully-derived, locally-legitimized set of project parameters.

The City itself could recruit a willing, qualified development team or teams that understood expectations upfront. Then facilitate the development of a needed new housing or mixed-use type, influenced by community input from the start. Controlling the site selection, the development and architectural standards, and the very planning process itself to ensure a viable, site compatible proposal is ultimately selected for construction. The establishment of a

collaborative, non-confrontational development model for the City of Greenbelt is also an important market signal to send.

Public/Private Partnership

As with the prior development facilitation recommendation, this singular instance of what could and should ultimately become a programmatically-based approach to development (and economic development) for the City of Greenbelt is being offered for its timeliness, due to extant market conditions and pending competitive pressures, as well due to the presence of the Sage *Strategy* recommendation to "**reconsider redevelopment plans at Beltway Plaza.**" Please note that HCDC is not suggesting Greenbelt Staff or Mayor and Council reconsider prior proposals.

We are proposing a much more radical approach. Greenbelt Council has articulated that it wishes to see a comprehensive redevelopment plan for the Shopping Center and is reluctant to approve project segments piecemeal. The City of Greenbelt has twice responded to development proposals brought forward by the center's owners, but have foregone providing support for those proposals without the proposals meeting contingent conditions that the owners were not willing to address. Whether it was perceived economic infeasibility or a lack of market viability due to the conditions proffered: the project did not proceed, and it is almost immaterial at this point. All that is past. However, the center remains an underperforming, only partially-developed resource; a question mark for both its management and the City. Residents and stakeholders interviewed for this, and many other reports and plans, have expressed a variety of dissatisfactory views over the center's configuration and the experience it offers.

Mahatma Ghandi wrote: "The best propaganda is not pamphleteering, but for each one of us to try to live the life we would have the world live[5]."

A phased and partial redevelopment of the center may be the only means of revitalizing it that the management has at its disposal. A partial redevelopment does not preclude a comprehensive plan from being a starting point for designing an initial project phase, and there could be many advantages to that approach. Nor does the existence of a comprehensive plan preclude the continued development or redevelopment of the center in phases, as is feasible. Nor should a comprehensive plan be a confining constraint for future investment that is to be responsive to changing market conditions.

We are recommending that the City determine what its most compelling interests are for the future redevelopment of the site, then approach the management at Beltway Plaza and see how, together, the City can support and induce the creation of the comprehensive plan that it wants to see from the management. The parties should jointly explore how the City can use

[5] *Experiments With Truth: Essential Writings By And About Mahatma Gandhi*, p. 106

certain tools that it has at its disposal - tax increment financing (TIFs), Special Taxing Districts (STDs), Revenue Bonds and a multitude of potential infrastructure and revitalization grants - to enable the creation of better connectivity and pedestrian accessibility improvements to support phased redevelopment of the center in a way that includes and makes feasible the critical infrastructure planning necessary to achieve what all parties want to see from the redevelopment of the site.

Since Beltway Plaza is such a highly visible commercial resident of the City, and one of the more engaged and dedicated corporate citizens in Greenbelt; progress with revitalization at this location will have very symbolic importance for future economic activity with other external stakeholders. There is no guarantee that a successful conclusion will follow an attempt to create a public/private partnership in this circumstance, but who better to strive to plan and to build the community; offering and using its best planning aspirations, intentions, and resources, than Greenbelt itself.

Greenbelt City Council
Work Session

Housing Affordability Study

Monday
August 15, 2016
8:00 p.m.

Council Room
Municipal Building

TO: City Council

FROM: Mary Kolar MK
Intern, Maryland Municipal League/University of Maryland School of Public Policy

DATE: August 12, 2016

RE: Recommendations for Affordable Housing Guidance

Housing affordability is a growing concern across the Washington, DC metropolitan region. In the City of Greenbelt, housing costs, while lower than in other parts of the region, still present significant challenges for many low-income and moderate-income residents. Renters face particular challenges when they are confronted with sometimes frequent and unpredictable rent increases that outpace household budgets and incomes. As housing expenses demand an increasing portion of incomes, residents are left with difficult and problematic choices. Facing the threats of late fees, damage to rental and/or credit histories, eviction, and even homelessness, many renters who are housing cost burdened must forego important necessities, including groceries, health care services, adequate child care, transportation services, and more. In some cases, households are one or two unanticipated expenses away from crisis. Additionally, the City of Greenbelt has an aging population. Retiring households often rely on fixed incomes that cannot absorb significant increases to housing costs.

In order to ensure that long-time residents are able to remain in Greenbelt as they age, to address the needs of low- and moderate-income households, and to foster a diverse and mixed-income community, Council could consider policies to preserve the affordable housing options that already exist as well as ways to increase such options.

This memo highlights policies enacted in similar jurisdictions around the region, summarizes key findings of a community-wide survey on housing concerns of Greenbelt residents, and outlines policy recommendations for Council to consider.

Background on Housing Costs and Affordability

According to the National Low Income Housing Coalition, Prince George's County's 2016 "housing wage," or the hourly wage a renter must earn in order to afford a two-bedroom apartment at the current fair market rent (FMR) of $1,623 per month, is $31.21 ($64,920 annually). This means that at the County's prevailing minimum wage of $9.55 per hour, a renter household must work approximately 131 hours per week, or 3.3 full-time jobs at 40 hours per week, in order to afford a two-bedroom unit. (Effective October 1, 2016, Prince George's County minimum wage will increase to $10.75. At this rate, a household will have to work approximately 117 hours, or 2.9 full-time jobs in order to afford a two-bedroom unit, assuming housing costs remain the same.)

A widely held convention in public policy is that households should spend no more than 30% of income toward housing costs. When housing costs exceed 30% of income, they are typically considered unaffordable because they challenge a household's ability to afford other non-discretionary items. The Department of Housing and Urban Development (HUD) considers households paying between 30-50% of income toward housing "cost burdened," and those paying more than 50% "severely cost burdened."

If the 30% standard is recognized, the next important question to address in developing any affordable housing policy or program is, "affordable to whom?" A common measure used to determine the "targeting" of programs is percentage of area median income (AMI). The higher a threshold, the more "deeply targeted" the program is considered. For example, a program requiring housing to be affordable to households at 30% of AMI has deeper targeting than a program requiring affordability for those at 50% of AMI.

HUD considers households earning at or below 80% of AMI to be "low-income," those earning at or below 50% of AMI to be "very low-income," and those earning at or below 30% of AMI to be "extremely low-income." The 2016 annual AMI for the Washington, DC region is $108,600. At this level, a family of four is considered low-income if they earn less than $70,150 annually, very low-income if they earn less than $54,300, and extremely low-income if they earn less than $32,600. For a single-person household, these thresholds are, respectively, $49,150, $38,050, and $22,850.

Highlighted Local Affordable Housing Programs

Moderately Priced Dwelling Unit Programs

A number of jurisdictions in the Washington metropolitan region have policies in place to increase affordable housing options in their communities. Many have enacted inclusionary zoning policies, widely known as Moderately Priced Dwelling Unit (MPDU) programs. Inclusionary zoning (sometimes called "inclusionary housing") generally refers to zoning policies that require developers to include affordable housing units in proposed development plans in order to receive approval to build. Montgomery County is widely considered to have enacted the first inclusionary zoning policy in the mid-1970s. Now, municipalities all across the country practice inclusionary zoning. It is important to note that Prince George's County does not currently have any inclusionary zoning policies in place, and that the City of Greenbelt's zoning authority rests with the County.

Municipalities in the region with inclusionary zoning policies include, but are not limited to, Montgomery County, Frederick County, the City of Frederick, Rockville, Gaithersburg, and Laurel. Enclosed is a chart that provides an at-a-glance comparison among these programs, as well as program spotlights that provide more in-depth information about the programs in Montgomery County and Laurel.

The primary criteria for inclusionary housing programs are:

- Minimum units in a proposed development to trigger the inclusionary housing requirement
- Applicability to rental housing development, ownership development, or both
- Percentage of units that must be set aside as affordable
- Affordability targeting (the "affordable to whom" question)
- Control period, or how long the regulation applies to the development

The programs included on the comparison chart have minimum unit requirements that range from 20 to 50 units, set-aside rates ranging from 6% to 15%, income targeting ranging from 50% of AMI to 80% of AMI, and control periods ranging 15 years to 99 years. Laurel's program applies to rental housing development only, all other highlighted programs apply to both rental and homeownership development. Frederick County and the City of Frederick offer developers the option to make payment-in-lieu of development (in both cases, this option was not initially available, but later added). Frederick County allows a payment-in-lieu rate of $17,500 per unit not built; the City of Frederick offers a rate of $16,100 per unit. In both cases, a primary impetus for institution of this option was the effect of the recent national foreclosure crisis on Frederick. In both cases, payments collected in lieu of MPDU development are directed to the government's housing fund.

In addition to increasing availability of affordable units, inclusionary housing policies help ensure more equitable growth by requiring that as communities benefit from housing and economic development, low- and moderate-income residents are not priced out.

Rent Stabilization

Another municipal housing program in the region is Takoma Park's Rent Stabilization Program. Unlike inclusionary zoning programs, rent stabilization and rent control policies are not typically designed to target households at specific income levels, nor do they enforce the 30% affordability standard. Rent control usually applies to a broader base of units and, as the term implies, controls rent increases. A municipal agency or body determines, often annually, maximum rent increases that a landlord may charge tenants, as well as notification requirements and eligible exemptions. Takoma Park has practiced rent control since 1981. Its policy applies to all rental units, with certain exceptions (detailed in the enclosed program spotlight). The City uses rental license approval as the mechanism by which to enforce its Rent Stabilization Law. In order to be approved for rental license, landlords must agree to comply with the law. If they subsequently violate the law, they face legal penalties. Policies like that of Takoma Park are important tools for controlling, or stabilizing, the broad rental market in a jurisdiction in order to help ensure that rental costs do not skyrocket beyond residents' abilities to afford them.

<u>Survey Findings</u>

A brief, anonymous, community-wide survey was recently conducted in order to better understand the housing needs and concerns of residents, particularly in regard to affordability. Survey respondents were not drawn from a random sample and are therefore not representative. The survey was open online through the City's Survey Monkey account from

July 20 through August 7. The web link to the survey was distributed via social media and was printed in the July 21 and July 28 issues of the *Greenbelt News Review*. Additionally, the survey was distributed by property management companies via email to residents of University Square Apartments, Franklin Park Apartments, and Greenbelt Homes, Inc. The property management company of Parkway Apartments distributed paper copies of the survey to residents.

Three-hundred thirty-one (331) surveys were completed. Of these, 288 were completed online and 43 were completed by paper (36 from the *Greenbelt News Review*, 7 from Parkway Apartments residents). Full findings from the survey are enclosed. Some key data points* include:

- A majority of respondents are female (76%), white (74%), homeowners (59%), with no children (77%).
- A plurality of respondents are GHI residents (39%).
- An overwhelming majority (91%) live in 1-person or 2-person households (split roughly in half between the two sizes – 45.4% in 1-person households and 45.7% in 2-person households).
- More than half (58%) of total respondents pay at least 30% of income toward housing costs (41% pay between 30% and 50%, and 17% pay more than 50%).
    - Among renter households, 79% pay 30% or more toward housing costs.
    - Of these 79%, over a quarter (26%) pay more than 50% toward housing costs.
    - Among households with annual incomes below $50,000, 85% pay 30% or more toward housing costs.
    - Of these 85%, nearly a third (32%) pay more than 50% toward housing costs.
- Forty percent (40%) of respondents indicated that they are burdened or severely burdened by housing costs, saying that these costs sometimes or regularly prevent them from purchasing other necessities such as groceries, medicine, or transportation-related costs.
    - Sixty-two percent (62%) of renter households indicated that they are burdened or severely burdened.
    - Of these 62%, almost a fifth (19%) are severely burdened.
- Fifty-eight (58%) of respondents indicated that they feel less than secure in their current housing status. Forty-four (44%) are somewhat secure, saying that they have enough income to cover costs currently, but worry that an unforeseen expense could jeopardize their housing status, 12% are insecure, saying that they struggle to pay monthly housing costs and regularly worry about their status, and 2% are very insecure, saying they are behind on their rent or mortgage payments and fear they may soon lose their housing.
    - Seventy-nine percent (79%) of renters are less than secure. Fifty-six percent (56%) are somewhat secure, 19% are insecure, and 4% are very insecure.

**All data points rounded to the nearest percent. For figures rounded to the tenth of a percent, see enclosed survey data.*

- Thirty-four (34%) of respondents consider their housing cost a serious concern, 29% consider it a moderate concern.
- More respondents consider housing cost a serious concern than consider physical conditions, accessibility, landlord or management company non-responsiveness, or energy/utility costs a serious concern. (Energy/utility costs are the category with the second highest rating of serious concern, at 25%).
- Seventy-two percent (72%) of respondents indicated that increasing housing options affordable to low-income seniors is a very important or important priority for the City (45% consider it very important, 27% consider it important).
- Sixty-seven (67%) of respondents indicated that increasing housing options affordable to low-income residents is a very important or important priority (40% consider it very important, 27% consider it important).
- Sixty-seven percent (67%) of respondents indicated that increasing independent living options affordable to low-income or very low-income people with disabilities is a very important or important priority (41% consider it very important, 26% consider it important).
- Sixty-two percent (62%) of respondents indicated that increasing housing options affordable to very low-income people is a very important or important priority (39% consider it very important, 23% consider it important).

Two qualitative questions were included in the survey, asking residents to describe particular or additional housing-related concerns. One hundred seventy-six (176) total submitted responses to these questions are being tabulated and will soon be available to Council.

Recommendations

Given the survey results, information about mounting housing costs in the Washington metropolitan region, and Greenbelt's founding goal and continued principle of providing affordable housing for working families, Council should pursue policy guidance that will help preserve existing and create new affordable housing resources targeted to low- and-moderate-income households. The following are recommendations for Council to consider:

1. Create standards for City support of proposed development, in line with nearby MPDU programs. While the City cannot create a legally binding MPDU program without zoning authority, it could develop a set of criteria with which proposed developments must comply in order to receive municipal support. Specifically, such standards could:
    a. Apply to any proposed development of 20 units or more.
    b. Apply to both proposed rental and homeownership projects.
    c. Require developers to set aside 7.5% of proposed rental units as affordable to households earning at or below 60% of the Prince George's County median income, and 7.5% as affordable to households earning at or below 50% of Prince George's County median income (for a total set-aside of 15%).

d. Require that developers set aside 15% of proposed homeownership units as affordable to qualifying first time homebuyer households earning at or below 80% of Prince George's County median income.
e. Require these affordability commitments remain in place for a minimum period of 20 years.
f. Where multiple developers are presenting competing bids for development of available sites, weigh additional commitments to affordable housing (beyond the baseline standards) as an important element in awarding support. Additional housing commitments might include, but are not limited to, set-aside greater than the baseline of 15%, deeper income targeting, i.e. making all or a portion of the set-aside affordable to extremely low-income residents (those earning at or below 30% of AMI), and extension or affordability commitment beyond 20 years.

2. Renew Green Ridge House's project-based Section 8 Housing Assistance Payment contract with HUD prior to contract expiration in 2019. Green Ridge House, with 101 units of rental housing affordable to very low-income seniors and people living with disabilities, is an important housing resource for the City. The project-based Section 8 contract which keeps Green Ridge House affordable to this population ensures that households pay no more than 30% of their income toward rent. The federal government, through HUD, subsidizes the remaining portion of each tenant's rent, up to a specified "contract rent" for the unit.

   The property's project-based Section 8 contract is set to reach the end of a 40-year term on March 31, 2019. Prior to contract expiration, the City will have the option to renew the contract. Given the aging population of Greenbelt, the City should exercise this opportunity to preserve this critical housing resource by renewing the project-based Section 8 contract for the maximum allowable term.

3. Explore opportunities for new affordable housing development, and ensure that wherever economic development occurs, an affordable housing component, if at all feasible, be included. For example, if the City pursues redevelopment of the Maryland National Guard Armory site (or the current Greenbelt Volunteer Fire Department site, should the department re-locate to the Armory site), it should work to ensure that development include a component that is affordable (using the 30% of income standard) to extremely low-income, very low-income, and/or low-income households (those earning, respectively, 30%, 50%, and 80% of AMI). Given the City's experience with Green Ridge House, it may consider working with HUD to develop an affordable housing development with a similar financing structure.

One of the principles guiding the design and development of the City of Greenbelt was a commitment to providing affordable housing options for low- and middle-income working households. Almost 80 years after the first families moved into their affordable homes, the now-diverse community remains one rooted in the values upon which it was founded. Indeed, many residents who responded to the housing survey indicated that while they themselves feel

comfortable and secure with their current housing costs, they recognize the importance of increasing housing affordable to lower-income households. The sense of responsibility that residents feel not just for themselves but for their current and future neighbors is a unique resource available to the City. As housing costs across Prince George's County and the Washington region continue to outpace incomes, the City should harness the resource of its legacy and committed citizenry and take action to ensure equitable development.

cc: Michael McLaughlin, City Manager
David Moran, Assistant City Manager
Celia Craze, Director of Planning and Community Development
Liz Park, Director of Greenbelt CARES
Terri Hruby, Assistant Director of Planning
Jessica Bellah, Planner

Greenbelt Housing Survey

The City of Greenbelt is conducting the following short survey in order to better understand the housing needs and concerns of residents, particularly in regard to affordability. The survey is anonymous and should take approximately 10 minutes to complete. Responses will be consolidated into a report to be presented to the City Council and made available to the public. Please send completed surveys to the City Office at 25 Crescent Road, Greenbelt, Maryland 20770. You may also complete the survey online at https://www.surveymonkey.com/r/greenbelthousingsurvey, through 11:00 PM on Sunday, August 7. **Thank you for your participation!**

1. Which best describes your current housing unit? ***(330 responses; 1 item non-response)***

38.8% (128): Apartment
6.1% (20): Condo
13.3% (44): Single family detached house
41.8% (138): Single family attached house (i.e. row house, townhome, duplex)
4.8% (16): Other (*please describe*)

Fourteen (14) respondents marked other and indicated they reside in GHI units (factored in as single family attached); 2 indicated that they reside in rental units (1 indicated rental studio, 1 indicated rental basement apartment; factored in as apartment).

2. How many bedrooms are there in your unit? ***(327 responses; 4 item non-responses)***

3.1% (10): 0 (studio/efficiency)
21.4% (70): 1
40.1% (131): 2
24.2% (79): 3
11.3% (37): 4 or more

3. How many adults (including yourself) reside in your unit? ***(326 responses; 5 item non-responses)***

45.4% (148): 1
45.7% (149): 2
4.9% (16): 3
4.0% (13): 4 or more

4. How many children (under the age of 18) reside in your unit? ***(325 responses; 6 item non-responses)***

76.9% (250): 0
11.1% (36): 1
7.7% (25): 2
2.5% (8): 3
1.8% (6): 4 or more

5. Do you: ***(329 responses; 2 item non-responses)***

41.0% (135): Rent
59.0% (194): Own

6. About how much of your gross income (before taxes) do you pay toward your monthly housing costs (*including rent/mortgage; property taxes; co-op/condo/homeowners' association fees; utilities*)? ***(322 responses; 9 item non-responses)***

41.6% (134): Less than 30%
41.0% (132): 30% to 50%
17.4% (56): More than 50%

7. Which **best** describes how you feel about your monthly housing costs? ***(327 responses; 4 item non-responses)***

60.2% (197): Not burdensome. My monthly housing costs do not prevent me from purchasing other necessities (i.e. groceries, medicine, transportation-related costs, etc.)
28.4% (93): Burdensome. My monthly housing costs strain my budget and sometimes prevent me from purchasing other necessities.
11.3% (37): Severely burdensome. My monthly housing costs regularly prevent me from purchasing other necessities.

8. Which of the following **best** describes how secure you feel about your housing status? ***(328 responses; 3 item non-responses)***

42.4% (139): Secure. I always have enough income to cover my monthly housing costs and expect to for the foreseeable future. I do not really worry about eviction/foreclosure.
43.6% (143): Somewhat secure. I have enough income to cover my monthly housing costs right now, but worry that an unforeseen expense (i.e. health care, car issues, job loss) could lead to problems affording my housing in the future.
11.6% (38): Insecure. I struggle to pay my monthly housing costs and regularly worry about it.
2.4% (8): Very insecure. I am behind on my rent/mortgage or other housing costs and am very worried about foreclosure/eviction/having to move in with friends or family/having my utilities shut off, etc.

9. Do you receive rental assistance? ***(325 responses; 6 item non-responses)***

0.6% (2): Section 8 / housing voucher
0.0% (0): Rental Allowance Program (RAP) assistance through Prince George's County
98.2% (319): I do not receive rental assistance
1.2% (4): Other (*please specify*)
One (1) respondent indicated that they receive a Maryland Renters' Tax Credit; 1 respondent indicated that they receive some assistance for utility payments (did not specify program); 2 respondents indicated that they receive assistance from family or friends.

10. Please indicate how much of a concern the following housing related issues are to you.

	Not at all a concern	Minor concern	Moderate concern	Serious concern
Affordability/cost ***(327 responses)***	**15.0%**	**22.9%**	**28.5%**	**33.6%**
Physical conditions ***(325 responses)***	**13.8%**	**29.9%**	**33.5%**	**22.8%**
Accessibility ***(322 responses)***	**29.8%**	**27.0%**	**29.5%**	**13.7%**
Landlord/management non-responsiveness ***(316 responses)***	**39.5%**	**22.5%**	**17.1%**	**20.9%**
Energy/utility costs ***(326 responses)***	**8.6%**	**29.8%**	**36.5%**	**25.1%**

11. Do you have any housing-related concerns other than those listed above?
See qualitative responses.

12. Please indicate how important it is to you for the following housing types to increase in the City of Greenbelt.

	Very important	Important	Moderately Important	Somewhat important	Not important
Market rate housing ***(292 responses)***	**28.8%**	**21.2%**	**21.9%**	**13.4%**	**14.7%**
Housing affordable to low income residents (earning between $54,300 and $70,150 annually*) ***(320 responses)***	**40.3%**	**26.9%**	**11.6%**	**10.3%**	**10.9%**
Housing affordable to very low income residents (earning below $54,300 annually*) ***(316 responses)***	**38.9%**	**23.1%**	**10.1%**	**13.3%**	**14.6%**
Market rate housing for seniors ***(316 responses)***	**38.6%**	**23.4%**	**19.6%**	**11.1%**	**7.3%**
Housing affordable to low income seniors ***(317 responses)***	**45.2%**	**26.8%**	**10.7%**	**8.5%**	**8.8%**
Market rate independent living options for people with disabilities ***(312 responses)***	**35.6%**	**26.9%**	**19.5%**	**10.6%**	**7.4%**
Independent living options affordable to low income or very low income people with disabilities ***(314 responses)***	**40.8%**	**26.4%**	**14.7%**	**10.8%**	**7.3%**
Assisted living ***(313 responses)***	**33.2%**	**30.7%**	**16.6%**	**10.9%**	**8.6%**

**2016 US Department of Housing and Urban Development (HUD) income limits for a family of four in Prince George's County*

13. Please share any additional feedback
See qualitative responses.

Demographic Questions

14. What is the name of your housing development or neighborhood?
(300 responses; 31 item non-responses)

Housing Development/Neighborhood	Total Number	Percentage of Item Responses	Percentage of Total Responses
Greenbelt Homes, Inc.	117	39.0%	35.3%
University Square Apartments	54	18.0%	16.3%
Franklin Park Apartments	29	9.7%	8.8%
Boxwood Village	16	5.3%	4.8%
Parkway Apartments	14	4.7%	4.2%
Lakeside North Apartments	10	3.3%	3%
Lakewood	10	3.3%	3%
Other development/neighborhood	10	3.3%	3%
Greenbriar Condominium	7	2.3%	2.1%
Old Greenbelt, no development specified	5	1.7%	1.5%
Charlestowne Village Condominium	4	1.3%	1.2%
Windsor Green	4	1.3%	1.2%
Charlestowne North	3	1.0%	0.9%
Greenbelt Lake Village Condominium	3	1.0%	0.9%
Greenbelt Station	3	1.0%	0.9%
Lawrence Apartments	3	1.0%	0.9%
Belle Point	2	0.7%	0.6%
Glen Oaks Apartments	2	0.7%	0.6%
Greenspring	2	0.7%	0.6%
Parke Crescent Apartments	2	0.7%	0.6%
Item non-response	31	--	9.4%

Other developments/neighborhoods (1 response each):

- Crescent Square Apartments
- Greenbrook Estates
- Greenwood Village
- Hunting Ridge Condominium
- Verde at Greenbelt Station
- Lakecrest
- Mandan Terrace
- North End
- Parkbelt
- Ridge Road

15. Age ***(321 responses; 10 item non-responses)***

1.9% (6): 18-24
16.8% (54): 25-34
18.7% (60): 35-44
18.7% (60): 45-54
19.6% (63): 55-64
16.5% (53): 65-74
7.8% (25): 75+

16. Gender ***(319 responses; 12 item non-responses)***

75.9% (242): Female
22.9% (73): Male
1.3% (4): Other

17. Race/Ethnicity (*select all that apply*) ***(317 responses; 14 item non-responses)***

2.2% (7): American Indian/Alaskan Native
2.2% (7): Asian
21.5% (68): Black/African American
4.4% (14): Latino/Hispanic
0.0% (0): Pacific Islander/Native Hawaiian
74.1% (235): White
2.2% (7): Other (*please specify*)
Responses include: Ashkenazi Jew; Brazilian; European-Scandinavian American; biracial

18. Annual Household Income (before taxes) ***(311 responses; 20 item non-responses)***

5.5% (17): Less than $25,000
6.8% (21): $25,000 to $34,999
11.9% (37): $35,000 to $49,999
33.1% (103): $50,000 to $74,999
17.7% (55): $75,000 to $99,999
16.7% (52): $100,000 to $149,000
5.8% (18): $150,000 to $199,999
2.6% (8): $200,000 or more

19. Which best describes your current employment?
(320 responses; 11 item non-responses)

59.4% (190): One full-time job (30 hours per week or more)
3.4% (11): More than one full-time job
6.6% (21): One part-time job (less than 30 hours per week)
1.9% (6): More than one part-time job
21.6% (69): Retired
1.6% (5): Currently unemployed
5.6% (18) Other (*please specify*)
Responses include: Disabled; Full-time student; Retired with part-time supplemental job; One full-time job and two part-time jobs; Self-employed

20. How many years have you lived in Greenbelt? ***(322 responses; 9 item non-responses)***

9.0% (29): Less than 1 year
28.0% (90): 1 to 5 years
16.1% (52): 6 to 10 years
18.6% (60): 11 to 20 years
12.1% (39): 21 to 30 years
16.1% (52): More than 30 years

Thank you! If you have questions or comments, please contact Mary Kolar at mkolar@greenbeltmd.gov or 301-474-8000.

Moderately Priced Dwelling Unit Programs – At-a-Glance Comparison Table

Jurisdiction	Program	Year Enacted	Rental	Homeownership	Minimum Development Size	Set-aside Amount	Current Maximum Annual Income (family of four)	Control Period
Montgomery County	Moderately Priced Dwelling Unit Program • Homeownership MPDU • Rental MPDU	1974	Yes	Yes	20 units	12.5%(*)	$76,500 $76,500/$71,000 (high rise apartments/ (garden apartments)	30 years 99 years
Laurel	Affordable Housing Program • Moderately Priced Dwelling Unit • Work Force Housing Unit	2008	Yes	No	50 units	(6% total) 3% 3%	$65,150 (60% AMI) $54,300 (50% AMI)	20 years
Rockville	Moderately Priced Dwelling Unit Program • Homeownership MPDU • Rental MPDU		Yes	Yes	50 units	12.5%(*)	$65,500 (60% AMI)	30 years
Gaithersburg	Affordable Housing Program • Homeownership Moderately Priced Dwelling Unit • Homeownership Work Force Housing Unit • Rental Moderately Priced Dwelling Unit	2006	Yes	Yes	20 units	7.5% (15% total) 7.5% (15% total 15%	70% AMI 90% AMI 60% AMI	30 years
Frederick County	Moderately Priced Dwelling Unit Program • Homeownership MPDU • Rental MPDU	2002	Yes	Yes	25 units	12.5%(*)(**)	70% AMI 50% AMI	15 years 25 years
City of Frederick	Moderately Priced Dwelling Unit Program	2008	Yes	Yes	25 units	12.5%(***)	80% AMI	30 years

**Montgomery County, Rockville, and Frederick County allow for a density bonus of up to 22%, which corresponds with a set-aside of 15% total units.*

***In 2011, Frederick County added a pay-in-lieu provision which allows developers to opt out of developing MPDUs, requiring them to pay the County $17,500 per unit not developed.*

****In 2013, the City of Frederick added a pay-in-lieu provision which allows developers to opt out of developing MPDUs, requiring them to pay the City $16,100 per unit not developed.*

Jurisdiction: Montgomery County
Program: Moderately Priced Dwelling Unit program
Year Program Started: 1974

Program Summary: In response to growing concerns over a shrinking supply of affordable housing, the Montgomery County Council enacted its Moderately Priced Dwelling Unit (MPDU) law in 1974. The MPDU program was the first residential inclusionary zoning program in the United States, and is widely regarded as the "gold standard" for such policies. Today, more than 400 jurisdictions across the country implement inclusionary housing programs.

Montgomery County's MPDU program has two components, a homeownership piece and a rental housing piece. The law has been amended several times since its inception. Current program standards follow.

Homeownership *and* Rental Housing Development

- All new development of 20 units or more must execute an MPDU agreement, regardless of whether development is phased in and/or scattered site.
- Where no density bonus exists, at least 12.5% of developed units must be MPDUs.
- MPDU required adjusts in accordance with density bonus achieved. The law allows for a density bonus up to 22% above normal density permitted in a zone. Developers that achieve the maximum density bonus are subjected to a 15% MPDU requirement.
- In single-family dwelling unit developments, each MPDU must have three or more bedrooms.
- In multi-family dwelling unit developments, the number of efficiency and one-bedroom MPDUs must not exceed the ratio of efficiency and one-bedroom market-rate units to the total number of market-rate units.
- MPDUs must be built along with or before market-rate units.
- The last building built must not contain only MPDUs.
- Once a developer is ready to offer MPDUs for sale or rent, developer must first notify and offer units for sale to Montgomery County's public housing agency, the Housing Opportunities Commission (HOC), and to certain other designated not-for-profit agencies. These agencies have 21 days to exercise a right to purchase up to 40% of available MPDUs. HOC itself may purchase the first 33% of these.
- Units not purchased by HOC or another not-for-profit are offered to eligible residents via lottery conducted in concert with the Montgomery County Department of Housing and Community Affairs (DHCA).

Homeownership Development

- For a control period of 30 years from initial development:
    - Owner must reside in home (unit cannot be rented out)
    - Owner can only sell the home at the established controlled resale price through the MPDU Program to an approved MPDU purchase program participant
    - Owner must not purchase another property

    - When owner sells unit after control period expires, 50% of profit must be paid to Montgomery County
- To be an eligible MPDU purchaser, participants:
    - Cannot currently own a home or have owned a home in the past 5 years
    - Annual gross income must be between $35,000 (1 person household) and $101,000 (8 person household)
    - Must be able to make down payment, qualify for a mortgage, pay settlement fees including advance taxes and advance insurance; and pay a monthly mortgage payment, utilities, and other costs (HOC has assistance programs for some of these criteria)
    - Must take a first time homebuyer class, orientation seminar, and application session through the county

<u>Rental Housing Development</u>

- For a control period of 99 years from initial development:
    - Units must be rented to residents with maximum household incomes of no more than 65% of area median income (AMI) of the Washington Metropolitan Statistical Area
    - For households who fall below 65% of AMI, DHCA uses a housing cost standard under which households pay no more than 25% of their gross monthly income toward rent Individual unit rents must be set by landlords accordingly
    - Rents may be adjusted to reflect utilities paid by apartment developments
    - Developer is responsible for verifying income and checking credit history of applicants for rental MPDUs
    - DHCA maintains a list of MPDU eligible applicants and provides contact information to developers, but does not act as an intermediary during the application or leasing processes
    - Developer is responsible for re-certifying income eligibility of MPDU renters each year
    - Upon re-certification, MPDU renters may continue to reside in a unit provided they earn below 130% of maximum MPDU income limits, based on family size (i.e. a one-person household that initially earns the maximum qualifying income of $49,500 may remain in her or his unit upon income re-certification as long as she or he makes below $64,350)
    - Renters cannot qualify for units with a number of bedrooms that exceeds number of household members

Detailed 2016 Qualifying Income Limits by Household Size (effective March 17, 2016)

Household Size	Maximum Income for Renters		Maximum Income for Purchasers
	Garden Apartments	*High-Rise Apartments*	
1	$49,500	$53,500	$53,500
2	$57,000	$61,000	$61,000
3	$64,000	$69,000	$69,000
4	$71,000	$76,500	$76,500
5	$76,500	$82,500	$82,500

For more information:

- http://www.montgomerycountymd.gov/DHCA/housing/singlefamily/mpdu/index.html

Jurisdiction: Takoma Park
Program: Rent Stabilization
Year Program Started: 1981

Program Summary: Takoma Park's Rent Stabilization Law was passed in 1981. The measure has undergone revision in subsequent years but remains one of the city's primary affordable housing programs. It was designed to preserve the city's affordable housing stock and maintain economic and ethnic diversity by controlling the frequency and amount of rent increases that may be imposed by a landlord. Landlords of properties covered by the law may not increase rents above the city's rent stabilization allowance, which is determined on an annual basis every spring. Additionally, tenants in units covered by rent stabilization must be given at least two months advanced notice of any allowable rent increases. The law also requires landlords of applicable properties to submit an annual accounting of the rents and fees charged to their tenants and any rent increases that may have been imposed during the 12 month period between July and June of the preceding year. The Rent Stabilization Report is due on September 30 of each year.

The Rent Stabilization Law applies to all rental units in the City of Takoma Park, with the following exceptions:

- Single family houses
- Accessory units (i.e. basement apartments, carriage houses, garage apartments)
- Duplexes, when one of the units is occupied by the property owner as their primary residence

In certain additional circumstances, landlords may apply for exemption from the law. These include:

- Leasing to a tenant receiving rental assistance (i.e. Section 8 Housing Choice Voucher)
- Providing affordable housing to low and moderate income households under contract with a governmental agency such as the State of Maryland

Newly constructed properties containing two or more units may also be granted exemption for five years following issuance of rental license. Properties that have been renovated or reconfigured do not qualify for this exemption.

The city determines and publishes the annual allowable increase every spring, to go into effect the following July 1. The allowance is equal to the annual increase in the Consumer Price Index for the Washington/Baltimore region. The 2015-2016 allowable increase, which expired on June 30, 2016, was 0.2%. The current allowable increase, which will be in effect until June 30, 2017, is 1.0%.

Landlords may apply for additional rent increases above the allowable increase if they can demonstrate that net operating income generated from rents capped at the allowable increase cannot meet escalated operating expenses. The city holds that landlords have a right to fair return on their rental properties. A fair return rent increase is intended to protect tenants from

unwarranted rent increases, while allowing rent levels that provide landlords with a fair return. When a landlord files for a Fair Return rent increase, the petition is processed by the city's Commission on Landlord and Tenant Affairs (COLTA). COLTA conducts a detailed review of the financial documentation included in the petition and then issues an administrative decision denying or approving the Fair Return rent increase. If tenants or the landlord file substantive objections to the decision, COLTA conducts a hearing on the matter.

For more information:

- https://takomaparkmd.gov/government/housing-and-community-development/rental-housing/rent-stabilization/
- https://takomaparkmd.gov/government/housing-and-community-development/rental-housing/fair-return-rent-increases/
- http://www.codepublishing.com/MD/TakomaPark/#!/TakomaPark06/TakomaPark0620.html

Jurisdiction: Laurel
Program: Affordable Housing Dwelling Unit Program
Year Program Started: 2008

Program Summary: Laurel's Affordable Housing Dwelling Unit Program requires new rental housing development to set aside a portion of units as affordable to people with low incomes. The city enacted the program in response to "a severe housing problem exists within the city with respect to the supply of housing relative to the need for housing for residents with low and moderate incomes" (Laurel Code of Ordinances, Chapter 11, Section III).

Under the program, new housing developments of 50 units or more include 3% set aside as Moderately Priced Dwelling Units, and an additional 3% be set aside as Work Force Housing Units. Moderately Priced Dwelling Units must be available to residents with annual incomes no higher than 60% of the median income of Prince George's County ($65,160 for a family of four; $45,660 for a family of one).* Work Force Housing Units must be made available to residents with annual incomes no higher than 50% of the median income of Prince George's County ($54,300 for a family of four; $38,050 for a family of one).** The program also allows for an optional density bonus. In revitalization overlay area developments, the number of Work Force Dwelling Units and Moderately Priced Dwelling Units must equal either the number of density bonus units or 3% each of the total number of units, whichever is greater. Work Force housing units and moderately priced housing units shall be of varying sizes with regard to family needs.

The city requires that Moderately Priced Dwelling Units and Work Force Housing Units produced through the program remain affordable in accordance with the program for a minimum of 20 years. Should a multi-family property be sold within the 20 year control period, the buyer is bound by all covenants and controls in place.

The mayor may waive in whole or in part, all or some city fees applying to proposed development after considering the following factors:

- The number of the affordable housing units provided
- The ratio of affordable housing units to the entire project
- The financial burden upon the applicant of providing affordable housing units
- The location of the affordable housing units
- Such other relevant factors as the mayor may deem appropriate

*The original ordinance enacted in 2008 required Moderately Priced Dwelling Units to be affordable to households with annual incomes no higher than 80% of Prince George's County area median income. In 2015, upon a program review, the city determined this guideline too high and amended the ordinance.
** The original ordinance enacted in 2008 required Work Force Housing Units to be affordable to households with annual incomes no higher than 70% of Prince George's County area median income. In 2015, upon a program review, the city determined this guideline too high and amended the ordinance.

For more information:

- https://www.municode.com/library/md/laurel/codes/code_of_ordinances?nodeId=CH11PLDE_ARTIIIAFHOPR

City Council
Work Session

Housing
Affordability Study

8 p.m. - Monday
June 12, 2017

Council Chambers
Municipal Building

Panelists

Mik Bauer – National Association of Housing Cooperatives

Jesse Buggs – City of Bowie

Hilary Chapman – MWCOG

Stephanie Prange Proestel – Housing Initiative Partnership, Inc.

Mik Bauer
Executive Director
National Association of Housing Cooperatives
1444 I Street NW, Suite 700
Washington, DC 20005-2210
www.nahc.coop

Mik Bauer has worked with a variety of clients in the professional and medical fields. His emphasis now is with trade associations in the housing and bioscience industries. He currently serves as the Executive Director of the National Association of Housing Cooperatives and the Director of Administration for the International Biometric Society. He has experience working with boards, committees, consultants, certification program management, managing large international membership chapters as well as educational programming and meeting planning. His primary focus is to strengthen board governance and provide effective communication with members and prospective members, consumers and other industry professionals. Additionally, he delivers a strong emphasis on membership support, volunteer management and communication development services.

He studied Business Administration and earned his Associate Degree in Business from Tulsa Community College.

Jesse Buggs
Director of Office of Grant Development and Administration
City of Bowie
15901 Excalibur Road
Bowie, MD 20716
www.cityofbowie.org

Jesse Buggs is the director of the Office of Grant Development and Administration for the City of Bowie, Maryland and the Chair of the Metropolitan Washington Council of Governments Housing Directors Advisory Committee. He serves on the Steering Committee of the National Grants Partnership and the Grants Editorial Advisory Board of Thompson Information Services.

The Office of Grant Development & Administration (OGDA) works closely with the State of Maryland Department of Housing and Community Development (DHCD).

Hilary S. Chapman
Housing Program Manager
Metropolitan Washington Council of Governments
777 N Capitol Street NE, # 300
Washington, DC 20002
www.mwcog.org

Hilary S. Chapman, Development Manager, is responsible for the development and marketing of homeownership opportunities for TCG Development Services, including 130 homes in North Charleston, South Carolina, 95 homes in Frederick, Maryland, as well as 104 homes in Duluth, Minnesota. Each development includes affordable as well as market rate components. Ms. Chapman previously served as Assistant Development Manager for the Daytona Beach HOPE VI revitalization projects. The revitalization plan for both grants included the development of 310 rental units and 88 homeownership units. In addition to her duties in Daytona Beach, Ms. Chapman worked on a HOPE VI community planning effort in Wilmington, NC. Prior to joining TCG Development Services, Ms. Chapman was a Capital City Fellow for the Government of the District of Columbia, with duties in performance management and transportation planning. Her background also includes experience in human rights advocacy, labor rights, and international development. Ms. Chapman is an urban planner with a master's degree in city planning from the Massachusetts Institute of Technology and an undergraduate degree from The College of William and Mary.

Stephanie Prange Proestel
Deputy Director
Housing Initiative Partnership, Inc.
6525 Belcrest Road, Suite 555
Hyattsville, MD 20782
www.hiphomes.org

Stephanie Prange Proestel is Deputy Director for Housing Initiative Partnership (HIP). With over 15 years of community development experience, Stephanie created HIP's single-family rehab program and served as project manager for the development of HIP's Artists' Housing, an award-winning, "green" development located in Mt. Rainier. She has also provided development consulting services to two tenant organizations in the District of Columbia, assisting them in the acquisition and renovation of their buildings. Prior to joining HIP, Stephanie was a Research Director for The Enterprise Foundation, a national technical assistance provider to small community development organizations. In this position, she researched best practices in the areas of finance, development, supportive housing, community planning, safety, and organizational development. She holds a B.A. from Saint Olaf College and a Masters of Real Estate from Johns Hopkins University. In her spare time, Stephanie has been twice talked into participating on HIP's sprint triathlon team, amazingly completing both races!

Greenbelt City Council
Work Session

Affordable Housing

June 12, 2017
8:00 p.m.

Council Room

Agenda

- Welcome and Introductions

- Affordable Housing Panel Topics
  - Senior housing;
  - Housing affordability;
  - Incentives or tools to encourage development by non-profit, private, or government;
  - Partnerships (ex., foundations, non-profits, public-private);
  - Redevelopment; and
  - Innovative housing concepts.

- Other Items