



Market Analysis

One of the keys to creating a healthy city is ensuring economic opportunity for all residents. To that end, this plan seeks to maximize economic opportunity by working to bring sustainable employment opportunities to Baltimore, expand training opportunities, and promote job accessibility. **EARN** highlights the best use of City resources to capture as much of the growth the region is expected to experience over the next ten years as possible.

The Baltimore Workforce Investment Board (BWIB) was created in September 2000 to help prepare the City's businesses and residents to implement an economic growth strategy (See Appendix D: Baltimore City Economic Growth Strategy, Building on Strength). Based on existing assets and market analyses of potential strength, the BWIB identified six growth sectors that are poised to show strong increases in jobs and earnings within the City over the coming decades (See Appendix E: Baltimore Workforce Investment Board Targeted Industry Strategy). These sectors have been identified as Bioscience, Business Services and Real Estate, Construction, Computer, Internet and Data and Software-Related Services, Health Care and Social Services, and Hospitality and Tourism. According to the BWIB report, the sectors are defined as the following:

Bioscience

The Bioscience industries include both the manufacturing of and research and development for such fields as pharmaceuticals and medical supplies, analytical laboratory instrumentation and testing, and environmental, biotechnology and life sciences.

Business Services and Real Estate

The Business Services and Real Estate sector includes the following industries: accounting, tax preparation, bookkeeping, and payroll; management and management consulting; advertising; administrative and office support; and real estate brokering, mortgaging and titling.

Construction

The Construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects.

Computer, Internet and Data and Software-Related Services (CIDS)

The Computer, Internet and Data Services related industries include: internet publishing and broadcasting; internet service providers and web search portals; data processing services; and computer facilities management.

Healthcare and Social Assistance

The Health Care and Social Assistance sector comprises establishments providing health care and social assistance for individuals. Trained professionals deliver the services provided by establishments in this sector. Many of the industries in the sector are defined based on the educational degree held by the practitioners included in the industry.

Hospitality and Tourism

The Hospitality and Tourism sector includes the following industries: accommodation industries; food services and drinking places; convention and visitors bureaus; scenic and sightseeing transportation; performing arts and spectator sports; and retail trade and stores.

Housing Affordability by Baltimore Regional Jurisdiction, 2005

Baltimore City Growth Industries	% Change in Employment, 1990 to 2002	Number of Jobs	Avg. Weekly Wage	Maryland Wage Growth 1990-2000
Business Services	8.30%	45,000	\$550	43.40%
Construction	-32.60%	12,300	\$680	31.60%
CIDS	N/A	21,296*	\$962	47.20%
Health Care & Soc. Ass.	9.30%	67,200	\$588	32.40%
Hospitality/Tourism	-8.19%	30,300	\$404	35.60%

* 2000 Core CIDS workers in Greater Baltimore Region

Note: Data not available for Bioscience and Real Estate Industries. Information and Baltimore Workforce Investment Board Targeted Industries Report. September 2003

Over the next ten years, employment in these sectors is forecasted to grow by 50% in the Baltimore region. In order for the City to position itself to capture its share of this growth, the City needs to attract employers in these sectors and ensure that the labor force within the City has the requisite skills to fill the growth in jobs.

This chapter will investigate the market for each of these growth sectors, the workforce available to serve these sectors, and the transportation options available to serve both the industry and the workforce. By exploring how the City can best build on its strengths, we may set the foundation for a strategy for future growth.

Percentage of Jobs by Sector by Jurisdiction

	% of Total Employment, Professional and Business Services	% Total Employment, Construction	% Total Employment, CIDS	% Total Employment, Education and Health Services	% Total Employment, Hospitality and Tourism	% of Total Employment, Financial Activities
Baltimore City	13.1%	3.2%	1.9%	24.9%	7.4%	7.1%
Anne Arundel County	14.7%	7.2%	2.0%	9.7%	11.3%	5.3%
Baltimore County	13.5%	6.7%	1.7%	15.5%	8.8%	8.3%
Harford County	12.7%	8.4%	0.8%	10.0%	9.2%	4.4%

A. The Industry

Baltimore’s economy has changed dramatically in recent decades. The City once could rely on a robust manufacturing sector as the major source of employment for residents. However, the global and national economies have greatly transformed since the 1970s, and the domestic manufacturing sector has declined considerably. In order to restructure the City’s economic engines, a robust and diverse economy will need to be fostered and continuously replenished. For Baltimore’s economy to be truly successful, it must be viable both regionally and globally for businesses and firms to “buy Baltimore” and meet the employment needs of all types of City residents.

Understanding that the market is very different for each of the growth sectors, it is important to clarify that for each of the industries the desire is to strengthen the existing businesses and encourage more businesses to relocate to the City. Also, within the identified growth sectors there is a need to cultivate and attract entrepreneurs as a way to strengthen the economic base of the City and promote the identified growth sectors.

B. Customers

The customers for the City’s economic products fall into two general categories: employers and workers. Within these categories there are subcategories. For employers there are business owners and managers. For employees there are City residents of employment age as well as residents of other jurisdictions commuting to the City for employment purposes.

Employers

Employers are the businesses that fuel the City's economy and could span every aspect of the six growth sectors. When business entities look to locate or expand in an area they look for several items, including a suitable employment base, land, incentives, and access to suitable transportation networks (air, rail and road networks).

Business owners and executives are those individuals who have the power to positively impact the City through locating or expanding their business in Baltimore. The final decision to locate and grow a business in an area often lies with the upper level executives once the ground work of identifying and presenting options has been completed. These individuals could potentially negatively impact the City by moving their business away from the City or declining to expand or locate their business within the City.

Small businesses are an integral part of the City's economy. Entrepreneurs are independent business owners who provide the majority of neighborhood amenities and are the cornerstone of neighborhood shopping districts. The small business owner works in many industries and provides a multitude of services ranging from the professional spectrum of real estate businesses, medical services, and legal offices to the service spectrum of restaurants, beauty and wellness services, and entertainment establishments.

Entrepreneurs not only provide sources of employment, but they also support the six targeted growth sectors by providing professional business services and as a cornerstone for furthering research and advancing technologies in the healthcare, biotechnology and CIDS fields in particular. Many small businesses operate in cooperation with larger institutions, foundations and corporations. They are, therefore, able to assist with achievements such as further refining patented drugs, procedures and technologies, and providing the basis in which these advancements come to the broader public. The entrepreneur is very important to the advancement of the growth sectors, but also to the growth of the City's economy.

Employees

The City's residents are the human capital that business decision-makers will largely utilize in the conduct of their business. These individuals are also a key factor in the evaluation process that enters into a business location decision. To better promote the City as a place to establish new businesses and relocate or expand existing ones, an employment base with adequate job skills is extremely important.

Currently, the City's labor force participation rate is 56 percent, the lowest in the region. As of September 2005, the City of Baltimore experienced a 7.1 percent unemployment rate, much higher than the 4.2 percent figure in the metro area. Within these percentages are both highly trained professionals as well as skilled and unskilled workers that need job training and additional skills development for career advancement. It is crucial to provide a workforce that is prepared to participate in the growing industries at all levels of employment.

One of the keys to creating a healthy city is ensuring economic opportunity for all residents. To that end, **EARN** seeks to maximize economic opportunity by working to bring the right jobs to the City, expand training opportunities, and promote job accessibility.

City residents as customers include both existing City residents as well as those that will move permanently into the City. These potential customers include those who look for jobs in the Baltimore region or those who are selecting from multiple job prospects including one or more within the city or region. For these people, Baltimore may be judged as a possibility for both employment and residency in terms of the quality of the job prospects as well as the quality of life the city and region will offer.

Outside of employment, the factors that contribute to the City's attractiveness and quality of life are being addressed in the **LIVE** and **PLAY** sections. These qualities are highly important to out-of-town job seekers that are an integral part of maintaining and growing the City's economic base.

While the plan's goal is to enhance opportunities for Baltimore City residents, it should be recognized that a portion of the City's employment base comes from surrounding counties and neighboring states. These commuters must be recognized as helping to build the economy of Baltimore at all levels of the workforce from unskilled workers to professionals.

Baltimore's Labor Force

Baltimore's labor force consists of 249,373 people aged 16 and older. Baltimore's labor force can be combined with external residents to include:

- **154,463 workers who reside and work in Baltimore City;**
- **94,910 workers who reside in Baltimore City, but work outside the City;**
- **187,535 workers who reside outside Baltimore City, but work in Baltimore City.**

All employees, whether they live in the City or outside the City must commute to work, and thus it is important to discuss access and transportation networks. It is important to note that commuters do not all commute by car. Many commuters rely on mass-transit options, as well as non-motorized options such as walking and bicycling.

C. Market Size and Trends

While metropolitan Baltimore has grown greatly over the last few decades, the City's population and economic growth has been considerably flatter, with the number of City jobs remaining nearly constant. The City needs to strive to maintain its position as the core of the region's economy. Like many other struggling cities, Baltimore has been losing ground to its suburban competitors in terms of its share of regional job growth. Part of the reason for this trend is the fact that as middle-class City residents fled to the suburbs, employers often moved to be closer to the workers. This has led to a situation where many City residents, even the most mobile residents who live in the City by choice, are often forced to work outside city limits. At the present time, 154,463 workers live and work in Baltimore City, but 94,910 City residents work outside the City. The Baltimore region is expected to increase its employment totals by 50% by 2030. If the City does not significantly capture its share of regional

	Average Travel Time to Work (in minutes)	Residents Who Work in Own County	Workers Commuting Into the County	Workers Commuting Out of the County	Net Workers Commuting Into/ Out of the County
Baltimore City	31.1	154,463	187,535	94,910	92,625
Anne Arundel County	28.9	144,033	81,082	111,825	-30,743
Baltimore County	27.6	196,917	144,759	176,579	-31,820
Harford County	31.6	57,973	17,793	53,731	-35,938

growth, the City will find itself in a situation where a majority of its employed residents work outside of the city limits.

In order to strengthen the City’s share of the regional economy, the City must emphasize several key economic sectors which have been targeted as growth areas because the City already has demonstrable strength. These areas have also shown strong wage growth within Maryland and are anticipated to continue to add wages and jobs.

D. Location

Baltimore’s location along the Eastern Seaboard in the Mid-Atlantic region is a tremendous asset to the City’s economy. The advantages of Baltimore’s location are heightened by the extensive transportation network that serves the City. Perhaps most famously, the City is located along the Chesapeake Bay, which provides Baltimore with one of the strongest deep-water ports on the East Coast. For vehicular transportation, the City is located along the Interstate 95 corridor, stretching from Boston to Miami, which comes near virtually every city along the East Coast, as well as Interstate 70, which provides cross-county access to the West Coast. Additionally, the City is served by a major international airport, an extensive freight rail network as well as Amtrak passenger rail service.

	Percentage of Employed Residents Who Work in Own County	Percentage of County Jobs Held by Residents
Baltimore City	61.90%	45.20%
Anne Arundel County	56.30%	64.00%
Baltimore County	52.70%	57.60%
Harford County	51.90%	76.50%

Within the region, Baltimore remains the core location for business activity, as it has the area’s downtown as well as many important shipping terminals. However, Baltimore’s preeminence has been challenged by the trend of decentralization of employment that has been ongoing over a period of more than 50 years. This decentralization can be seen in the fact that in many of the area’s suburban counties, workers are more likely to work in their home county than commute into the central city.

Beyond transportation advantages, Baltimore’s waterfront location is also beneficial in that it provides a natural feature around which new business activities still have numerous opportunities to locate. The fact that Baltimore’s waterfront remains a “frontier” that has yet to be fully utilized leaves room for future business innovation as the waterfront redevelops and its image is remade.

E. Competition

- 1. National and International** - Baltimore's main competitors at the larger geographic scale are the world's port cities, the world's major medical and biotechnology centers, tourist destinations as well as other places that specialize in the industries in which Baltimore hopes to compete.
- 2. Regional** - Baltimore competes primarily with other metropolitan areas of similar size within the mid-Atlantic Region, stretching from Norfolk to New York City. Baltimore's relatively low cost for office space makes it competitive with most urban areas in the region. Downtown office spaces in Washington, DC, Philadelphia, Boston, and New York typically sell for \$600 to \$700 per square foot. Similar quality downtown office space in Baltimore trades at \$200 to \$300 per square foot. Additionally, for prospective resident-employees, our relatively low cost of living and housing makes it competitive with most of the cities in the region, especially the ones that can offer similar mixes of urban amenities, educational training and locational advantages as those that are offered within the City.
- 3. Local** - Within the Baltimore-Washington region, Baltimore's position has shrunk from being the major economic engine to being a node in a complex regional economy in which suburban edge cities are often able to attract major sources of employment away from traditional downtown settings. Regionally, these areas include Maryland counties of Baltimore County, Montgomery County, Anne Arundel County, Howard County, and Virginia jurisdictions of Arlington, Fairfax, and Alexandria. The high levels of population and employment growth in these areas has led to increased development cost, making the city competitive with these suburban employment centers. The City also often offers superior transportation options for employers and employees and access to urban amenities not available in suburban and outlying areas.

Conclusion

The City of Baltimore offers unique opportunities for employers to run successful businesses and employees to earn a comfortable income. Baltimore's emerging and established industries have access to business-friendly transportation options, a concentrated population with many of the skills necessary for serving these industries, and a local government ready and willing to foster partnerships that grow industry.



Products and Services

Baltimore possesses unique and specific — resources that define **EARN** in the City. Products offered are the land and labor that are required and are circulated throughout Baltimore. The services offered include the unique financing tools offered by the City to acquire land and continuing education and job training for workers. By aligning how we make our products and services available to employers and employees, Baltimore will be better equipped to meet the challenges of the 21st Century and successfully compete in the global marketplace.

Products

The core physical products used to **EARN** in Baltimore are land and labor. Baltimore has an abundance of development-ready land and land that is convertible to newer and more productive uses. The City is entirely serviced by infrastructure such as roads, rail, water and sewer lines, mass transit, data lines and more. This advantage reduces the cost for purchasing or leasing property, and increases the degree of choice for businesses seeking to come to Baltimore or move to a more advantageous location within the City. The built environment within the City includes the dynamic mix of buildings representing every economic niche, tourism and recreation attractions, and institutions of learning. Each of these directly contributes to the capability of businesses to locate within the City.

The City's workforce is also a key product that defines Baltimore for businesses, locally or internationally. Businesses seeking to locate or grow within the City will require a ready supply of skilled and educated workers, and a pool of candidates that can be trained or cross-trained into new fields. These employees should also have adequate access to jobs without undue friction or expense (both in terms of time and money).

Services

Financing and assembling land for employers and training the City's workforce are key pieces of an overall **EARN** strategy. Their interaction and complementary relationship with City products provides the economic mix that drives the City.

The City has notable business development and property tax incentives at its disposal, which are used to recruit businesses and invest in its own growth. The One Maryland Fund is a State program comprised of a set of targeted tax incentives for business start-ups and expansion that can provide tax credits of up to \$500,000 for firms to furnish and equip new facilities. Tax Increment Financing (TIF) is a tool for financing public sector costs associated with private development without creating new demands on scarce tax revenues. The Enterprise Zone (EZ) Property Tax Credit is a ten-year program that waives 80% of the property tax on non-residential properties for the first five years. Payments in Lieu of Taxes (PILOT) creates an economic incentive to spur jobs and physical development. The Brownfields Property Tax Credit waives up to 70% of the increase in tax assessment over five years for most projects, or ten years if the business is within an Enterprise Zone. Historic Preservation credits can be applied to renovation projects worth at least 25% of the property's full cash value. Income Tax Credits can be tailored to specific projects, each with its own set of requirements and restrictions. These are the types of financing services that Baltimore provides to help businesses **EARN**.

Creating education and job training programs to prepare or cross-train residents for jobs particularly within the identified six growth sectors is essential. Importantly, these opportunities in training and education should be planned to ensure employees upward mobility within their field. There are several formal educational institutions and other job training venues within the City that allow workers to receive new or additional training in a wide variety of skills. This provides a continuous supply of trained workers and the improvement-in-place of current workers. Aside from the general market that Baltimore enjoys, there are several specific incentives available to help Baltimore compete successfully for new businesses and job creation.

B. Competitive Advantage

The key proprietary positions and market strengths that currently exist in Baltimore are the Central Business District, the capacity and agglomeration opportunities, and the presence of identifiable growth sectors.

With more than 16,000,000 square feet of office space in 111 downtown buildings, over half of it Class A, Downtown Baltimore is the largest office market in the Baltimore metropolitan area, and one of the largest in the consolidated Baltimore-Washington region. The business market and infrastructure advantages that the City possesses give Baltimore an advantage, especially when compared to more dispersed areas and those that lack the amenities of a central city.

The agglomeration of key sectors is a calculated advantage for Baltimore. As a major metropolitan hub, Baltimore possesses multiple local, regional, and national leaders per industry, thus giving the City a measure of scale that is unique in the Greater Baltimore area. This advantage and capacity for growth leads to the identification of particular growth sectors within the City.

Within the wide range of services available to **EARN** in Baltimore, there are six specific niche services that warrant closer examination because they have been identified as growth industries by the BWIB. They are Construction, Computer, Internet and Data and Software-Related Services, Hospitality and Tourism, Healthcare and Social Assistance, Business Services, and Bioscience. These sectors have been identified as opportunities to increase how Baltimore can **EARN**.

C. Customer Perceptions

Baltimore's accessibility and size offer tremendous benefits to customers in terms of convenience. With first-rate air, rail, road, and water connections, Baltimore is well linked to markets worldwide. Domestically, Baltimore is in a prime location to access the large urban markets of the Northeast; three of the five largest metropolitan areas in the United States are within 200 miles of downtown. No other location in Central Maryland is more reachable than Downtown Baltimore, which is easily accessible by national and regional rail, metro subway, light rail, commuter and local buses, and private automobile. Potential customers also benefit from the size of downtown Baltimore, which has achieved the critical mass of businesses required to provide a wide array of amenities in a localized area. The proximity of numerous business support services will aid businesses in operating in the most efficient manner possible.

Affordability is another one of downtown Baltimore's greatest assets, with asking rents comparable to those of the suburban office markets, and much less than other major east coast urban centers. The City also has a number of office areas away from downtown with even more affordable rents that are ideal for young businesses not needing to be located in premier office space. The Port of Baltimore provides an affordable option for businesses dealing in cargo shipment. Baltimore's inland location on the Chesapeake Bay makes Baltimore the most proximate major port city to the Midwest market, allowing importers and exporters who ship through Baltimore to reduce costs associated with surface transportation.

The City of Baltimore provides numerous tools to businesses and jobseekers to enhance employment through the Mayor's Office of Employment Development (MOED) and the Baltimore Workforce Investment Board (BWIB). While many municipalities and states, including Maryland, provide some degree of service with respect to matching employers with potential employees, MOED and BWIB are particularly notable for offering the "Employer Toolkit," which connects employers with more than 500 services available through over 200 public and nonprofit agencies. MOED also provides additional services such as customized training, employee pre-screening, and assistance in helping large employers support employees affected by mass layoffs.

Downtown Baltimore still reigns as one of the Northeast's major urban centers and the premier business address in Central Maryland. The traditional significance of the downtown and the recent resurgence of Baltimore's residential and retail sectors make the City a competitive national brand.

D. Comparative Analysis

The City of Baltimore is unique, offering several assets that meet or exceed those of its local and regional competitors. While many of the products and services offered by Baltimore are similar to those in other urban and suburban areas, Baltimore can leverage its unique combination of these assets to grow investment in its chosen industry sectors.

Clearly, the City of Baltimore's location in the center of the East Coast of the United States is a unique asset that no other East Coast city offers. Its location makes it accessible to growing metropolitan areas like Philadelphia, New York, and Boston to the north, and Washington, DC, Richmond, and Atlanta, to the south. Due to its extensive, accessible interstate, railway network, and deep

water port, Baltimore is attractive to potential employers and employees alike, offering access to large markets around the nation and around the world.

One of Baltimore's greatest competitive advantages is the cost of development. The cost of development in Baltimore is significantly less than that of many of its urban and suburban competitors. While downtown office spaces in cities like Washington, DC, Philadelphia, Boston, and New York sell for \$600 to \$700 per square foot on average, office space in downtown Baltimore trades at \$200 to \$300 per square foot. Compared to regional competitors like Philadelphia or New York, and local competitors like Washington, DC, Montgomery and Baltimore counties, Baltimore City has more vacant residential and industrial buildings appropriate for redevelopment, and the cost is less expensive.

Baltimore also has significant water, sewer, mass transit, building stock, fiber optic, and road network infrastructure appropriate to new and expanding commercial development. In essence, Baltimore is a "built-out" city, with infrastructure completed in most of the buildable areas. The availability, age, and quality of this infrastructure are on par with that of other regional urban competitors like Washington, DC, New York, and Philadelphia, and in greater abundance and capacity than in suburban or rural areas. Commercial-related activities like transporting goods and people, manufacturing, shipping, and warehousing tend to be more cost-efficient in Baltimore, making it very competitive for expanding or relocating businesses in the targeted growth sectors and other commercial sectors. However, suburban competitors offering "green field" development often allow commercial developments the opportunity to construct new or state-of-the-art infrastructure to fit the needs of industries.

Baltimore is well-served by privately owned freight and passenger rail lines, making it competitive with regional competitors along the Northeast and Southeast corridors. In fact, Baltimore's passenger rail options far exceed those of all competitors to the south. Amtrak's Acela Express line provides high-speed passenger service along the Northeast corridor, connecting Baltimore to business travelers from Washington to Boston. The MARC regional passenger lines connect Baltimore to eastern West Virginia and the Washington suburbs. Freight lines include CSX and Conrail and serve Baltimore's

numerous industrial zones. In terms of mass transit, the City of Baltimore falls behind its closest competitor of similar size, Washington, DC. Washington and its suburbs have an advanced transit system that moves over 700,000 commuters, tourists, and residents each day. Baltimore, on the other hand, has struggled to build an effective transit network. Although 30% to 40% of Baltimore City's population is transit dependent, many complain that the City's transit lines do not adequately connect to employment centers in and around the metropolitan area. The State's Maryland Transit Administration controls the operations, maintenance, and capital budgets of Baltimore's and other Maryland jurisdictions' rail and bus lines, requiring the City to compete with suburban areas for transit resources. In order to promote transit and transit oriented development, Baltimore is developing transit supportive neighborhood master plans and recommending changes to zoning policies that will increase residential and commercial densities near transit stations.

The City of Baltimore's workforce may be its greatest challenge as it competes with other cities for commercial investment. The national transformation from a manufacturing-based economy to a service-and-information-based economy has left many Baltimore residents with skills that are not transferable to high paying jobs in emerging sectors. According to a study by the Brookings Institution, Baltimore lags behind other cities in the proportion of residents with college degrees, despite Baltimore's high percentage of jobs in health care, education, social, and business services which generally require advanced skills. Metropolitan areas like Washington, DC and New York have been able to attract a highly educated workforce and have fared much better in attracting business services, information technology, and biotechnology jobs. However, Baltimore is home to 14 institutions of higher learning, including the number one health care and biotechnology research institution in the nation, The Johns Hopkins University. By enhancing residents' access to the educational resources available within the City, attracting highly educated workers from other cities with higher costs of living, and retaining graduates of these institutions, the City of Baltimore will build a more viable workforce in the coming years.



Earn

Goals, Objectives, and Strategies

In 2000 the Baltimore Workforce Investment Board (BWIB) identified six industry sectors that are expected to grow in the metropolitan region: Bioscience; Business Services; Construction; Computer, Internet and Data and Software-Related Services (CIDS); Healthcare and Social Assistance; and Hospitality and Tourism. In order to attract and retain businesses in the fastest growing employment sectors as well as capture our share of projected employment growth in Central Maryland, Baltimore needs to leverage its many proven assets. The following three goals will support and foster economic development and maximize the City's potential to be a competitive place to **EARN**:

Goal 1: Strengthen Identified Growth Sectors

Goal 2: Improve Labor Force Participation Rate among City Residents

Goal 3: Improve Access to Jobs and Transportation Linkages Between Businesses.

These three goals and their subsequent objectives and strategies are the framework by which the City can utilize its capital budget, land use controls, and policy to guide economic development and transportation to support the City's workforce. By linking a highly qualified trained workforce with a diverse range of specialized private firms, nonprofit organizations and public agencies, Baltimore will become a leading source of innovation, productivity and global competitiveness. Endorsing policy decisions in conjunction with strategically placed Capital Improvement dollars favorable to the six growth sectors will help facilitate growth of local businesses as well as help the City be competitive in attracting new businesses and their employees. This plan will poise the City to take advantage of our assets and capitalize on our federal and state appropriations and local investment.



EARN Goals, Objectives and Strategies

Goal 1: Strengthen Identified Growth Sectors

Objective 1: Retain and Attract Businesses in all Growth Sectors

- Create non-residential Mixed-Use Zoning District
- Create Commercial Mixed-Use zoning district for mixed-use and flex office space
- Establish microenterprise loans for start up businesses specifically in the growth sectors
- Work with growth sector employers to identify training needs

Objective 2: Retain and Attract Business in Bioscience

- Create a Bioscience Development District
- Create incubator space around biotechnology areas

Objective 3: Retain and Attract Business in Business Support Services

- Identify and rezone nodes in the city that can support high-density, mixed-use commercial properties
- Preserve and enhance CBD office space

Objective 4: Retain and Attract Business in Computer, Internet, Data and Software (CIDS) Related Services

- Develop a master plan for the City's current and future CIDS infrastructure
- Provide Wireless Technology Zones in public areas throughout the City

Objective 5: Retain and Attract Business in Construction

- Assemble and market developable sites for construction industry-related businesses
- Create, tailor and market programs that assist and encourage construction entrepreneurs in acquiring low-cost bonding

Objective 6: Retain and Attract Business in Healthcare and Social Assistance.

- Create a mechanism to adopt health care facility master plans to provide institutions with predictability in the development review process
- Amend the Zoning Code to allow new land use categories for Assisted Living and Group Homes of varying sizes
- Amend the Zoning Code to broaden the definition of Health Clinics to include non-residential substance abuse treatment centers, and eliminate the existing substance abuse treatment center as an independent category in the Zoning Code

Objective 7: Retain and Attract Business in Hospitality and Tourism.

- Create a Strategic Convention Center Area Master Plan
- Install environmental and aesthetic improvements around tourist areas

Goal 2: Improve Labor Force Participation Rate Among City Residents

Objective 1: Align Employers with Job Seekers and Training Resources

- Create a Strategic Plan for MOED that links employers to job seekers
- Monitor and enforce First Source Hiring program.
- Expand outreach to encourage use of One-Stop Employment Centers
- Target MOED resources to under- and un-employed populations to better connect job seekers and employers.
- Prioritize drug treatment program access for job seekers working with MOED programs.
- Give preference for City-subsidized contracts to contractors with active apprenticeship programs

Objective 2: Increase Qualifications/Skill Sets of City Residents

(See LEARN, GOAL 3, Objective 3)

Goal 3: Improve Access to Jobs and Transportation Linkages between Businesses

Objective 1: Enhance Transportation Options to Provide Workers with Commuting Options and Mitigate Traffic Congestion

- Expand the number of participants in the Commuter Choice program throughout the Baltimore Region
- Support efforts to implement the Baltimore Regional Transit Plan
- Implement Transportation Demand Management (TDM) strategies with large employers and institutions
- Implement Bicycle Master Plan
- Increase number of water taxi stops catering to commuters

Objective 2: Promote Economic Development Throughout the City by Improving Business-to-business Connectivity via Transportation Linkages

- Restore and increase on-street parking in mixed-use and business districts
- Create Transit-Oriented Development zoning and incentive programs for transit nodes throughout the City (i.e. State Center, West Baltimore Marc)
- Integrate land use and transportation planning to ensure movement of freight into and throughout the City

Goal I: Strengthen Identified Growth Sectors

Objective I: Retain and Attract Businesses in all Growth Sectors

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Create non-residential Mixed-use Zoning District		•	•	Decreased number of variances for mixed use and less URP's. Increased mixed-use in industrial areas	Planning, BMZA, HCD, Law, Mayor and City Council	Years 2-4	General Funds	Increased tax base and density

Currently, our Zoning Code does not include all types of office uses in industrially zoned land (M-1 through M-3), and, where it is permitted, it requires approval by the Board of Municipal and Zoning Appeals (BMZA) at a public hearing. At the same time, our business districts that allow offices of all types as permitted uses, do not allow for industrial uses. In today's industrial market, a need for mixed-use developments has emerged. Baltimore will need to accommodate this need for a mixture of industrial and commercial uses by providing land with a zoning category that permits all of these uses under one roof that a modern industrial operator requires.

Create Commercial Mixed-use zoning district for mixed-use and flex office space.	•	•	•	Decreased number of variances for mixed-use and less URP's. Increased mixed-use in commercial areas	Planning, BMZA, HCD, Law, Mayor and City Council	Years 2-4	GO Bonds, General funds, state	Increased tax base and density
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Businesses in this sector have demonstrated a preference for flex office space, which has the lowest vacancy rate in the City. Creation of a mixed-use commercial district would also allow for "green" light-industrial users to locate in commercial parks where their non-commercial uses will not negatively impact the other commercial uses in the immediate area. City agencies should address this growing demand through the review/renovation of select existing buildings, and by amending the Zoning Code to provide for this kind of office product.

Establish micro-enterprise loans for start up businesses specifically in the growth sectors	•		•	Increased number of start up businesses	BDC, Finance	Year 2	GO Bonds, State Grants, General Funds	Increased jobs and businesses in growth sectors
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Remove barriers to start up companies by providing microenterprise loans to entrepreneurs in the growth sectors. Loan applications will be processed through the City's Small Business Resource Center.

Work with growth sector employers to identify training needs	•	•	•	Recommendations on how City can support internal and external organizations to most effectively utilize training resources	BWIB, MOED, BDC, Planning, Housing	Years 1-6	General Funds, Grants, Leveraged MOED budget	Stronger training programs, better equipped workforce, improved workforce, increased tax base, reduced dependency on social subsidies
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Focusing training resources on preparation for employment in the six identified growth sectors will assist in providing a workforce that is qualified and enticing to growth sector businesses looking to expand or relocate.

Objective 2: Retain and Attract Business in Bioscience.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Create a Bioscience Development District		•	•	Amended zoning code	Planning, BMZA, HCD, Law, Mayor and City Council	Years 2-4	General Funds	More jobs, predictability of development

Currently, two major universities are working to build bio-parks and additional lab space, but a special Bioscience Development District would allow for broader areas around the primary facility to benefit from the same mixture of uses. This type of district would allow property owners in the area to sell, lease, and retrofit buildings that would support both the research and manufacturing components of the biotechnology industry, giving them preference over other uses that are not Bioscience-related. This effort would be achieved through the establishment and creation of a new zoning district that would allow for the mixed-use development of business, office, lab research, production space, and other bioscience uses. The Biotechnology Development District would disallow certain uses that would lead to encroachment of non-contributing uses or increase property values in a way so that smaller biotechnology businesses or support structures could not afford to perform business. Currently, there is a great need to have space for biotechnology manufacturing as well as research.

Create incubator space around biotechnology areas	•		•	Increased square footage available for bio start-up businesses	MOED, BDC, Planning	Years 2-6	GO Bonds, General Funds, Federal Grants	Provides for start-up space near existing Biotech activities.
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While the Baltimore Development Corporation operates some incubator space for small businesses, many of the small business clients within the biotech field already have patents and/or research that is being supported through partnerships with major institutions and corporations but need a start-up space that is fully equipped with laboratory, and other specific needs, in close proximity to other biotech activities.

Objective 3: Retain and Attract Business in Business Support Services

Identify and rezone nodes in the city that can support high-density, mixed-use commercial properties.	•	•	•	Increased renovation of office space in targeted nodes.	BDC, HCD, Planning, Mayor and City Council	Years 2-4	General Funds, MVR, GO Bonds	More supply of new quality office space and mixed-uses that meets demand and curtails vacancy.
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The Department of Planning will work closely with HCD and BDC to identify key sites/opportunities for targeted mixed-use nodes. By providing increased density and the option for form-based designs, the renovation and adaptive reuse of office space will be directed to the targeted nodes.

Objective 2: Retain and Attract Business in Bioscience

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Preserve and enhance CBD office space	•		•	Decreased vacancy rates downtown	BDC, Planning, Downtown Partnership	Years 2-4	General Funds, State Grants, Historic Tax Credits	Maintaining downtown as the commercial center of the city

The majority of support services and other office uses should be located in the CBD. The greatest demand is for small office, large class A office, and flex office space. Vacancies are most extensive among mid-sized buildings between 50,000 to 100,000 sq.ft. Renovations in heating ventilation, air conditioning and telecommunications are major factors determining the vacancy rate in older buildings.

Objective 4: Retain and Attract Business in Computer, Internet, Data and Software (CIDS) Related Services

Develop a master plan for the City's current and future CIDS infrastructure.	•		•	Development of the plan. Increased CIDS-related employment.	Planning, BDC, DPW, Mayor's Office, DOT, Fiber Optic Installation Firms	Years 2-5	General Funds, MVR, GO Bonds, Federal DOT	New CIDS businesses locate and expand into the City.
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The City has a unique position in that the entire underground conduit system is controlled by a franchise agreement program. This allows the City to require projects that add conduit or capacity underground to include space for the City's use, at the cost of the project developer. This can then be used to market Baltimore as a "Connected City" with "High Tech Zones." However, the system is not comprehensive, is near capacity, and is expensive to improve. A master plan should be developed to positively identify the system capacities, occupancy, and specific needs. The City of Baltimore will then increase its opportunity to retain and attract CIDS businesses by offering quality infrastructure through increased bandwidth and telecommunication capabilities (fiber optics, wireless connectivity). Areas of the city where new underground systems are being built need to include similar infrastructure for CIDS support, and should be included as a policy for new construction projects.

Provide Wireless Technology Zones in public areas throughout the City.	•		•	Increased number of wireless locations	Planning, BDC, MOIT, Cable & Communications	Years 2-5	GO Bonds, General Funds, Federal DOT	Increased tax base and incentives
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While the City of Baltimore is enhancing a lot of its CIDS efforts on homeland security with video and surveillance cameras, the City should also capitalize on this initiative by marketing safe areas that can be used as wireless office spaces, cafés, parks, neighborhoods, schools, libraries, and commercial areas. Baltimore currently ranks 24th as the most-wired City. Development of wireless technology zones has great potential for significant public spaces at key locations such as along the I-95 corridor; MARC train stations, Montgomery Park, the Inner Harbor; Patterson Park, the Middle Branch, and the Howard Street corridor.

Objective 5: Retain and Attract Business in Construction.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Assemble and market developable sites for construction industry-related businesses.	•		•	Increased number of construction industry businesses in the city	BDC, Planning, Finance, and private companies	Years 1-6	General Funds, GO Bonds, State Grants, Tax Credits/Incentives	Return underutilized land to productive use. Fuel local economy. Low cost incentive and marketing to attract business to City.

The City agencies will explore land assembly and zoning options to help attract construction companies to City locations (See Analysis in Appendix B & D: Industrial and Commercial Land Use Study). The sites selected for assembly should be located in areas that have existing incentive programs or other benefits.

Create, tailor and market programs that assist and encourage construction entrepreneurs in acquiring low-cost bonding	•		•	Increased number of new construction businesses	BDC, Finance, SBRC, DBED, MOED	Years 2-6	General Funds, GO Bonds	More workers living close to jobs, More businesses to provide workers and residents goods and services, Increased property taxes, Increased income taxes
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Bonding and finding employees are two of the biggest hurdles for new construction companies. City should provide resources to companies that make an effort to employ City residents and ex-offenders.

Objective 6: Retain and Attract Business in Healthcare and Social Assistance.

Create a mechanism to adopt health care facility master plans to provide institutions with predictability in the development review process		•	•	Increased number of approved master plans, improved speed of development review, predictability in the development review process	Hospital and Health Care Facilities, City (Department of Planning), State government, neighborhoods	Years 2-3	Hospitals, General Fund	Improved relations between neighborhoods and Hospital institutions in terms of facility expansion.
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All health care institutions are encouraged to develop master plans for long-term growth. The City will develop a process to adopt master plans to provide institutions greater predictability during the development review process. By having the City participate in the development of facility master plans and formally adopt the plans, the City will be better prepared to support the recommendations in the plan, ranging from streetscape improvements to land acquisition. The intent is to ensure a better correlation between the City's Master Plan and the development/expansion of hospital campuses throughout Baltimore. A typical master plan should include a ten year physical plan as well as an economic impact statement, design guidelines, pedestrian safety standards, transportation/alternative commuting strategies, LEED-based environmental design objectives, etc. The master plan should also include strategies to reduce single occupancy vehicle trips to campus by discouraging parking, encouraging transit and carpooling, and providing on or near hospital residential opportunities for staff and family of long term patients.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Amend the Zoning Code to allow new land use categories for Assisted Living and Group Homes of varying sizes.		•	•	Compliance with ADA and Fair Housing Act	Planning, BMZA, Mayor and City Council	Year 1	General Fund	Facilities will be able to locate with reduced time and expenses required, encouraging the growth of this portion of the healthcare sector.

This change will bring our Zoning Code into compliance with the Americans with Disabilities Act (ADA) and the federal Fair Housing Amendments Act (FHAA), which will reduce liability for the City through legal challenges.

Amend the Zoning Code to broaden the definition of Health Clinics to include non-residential substance abuse treatment centers, and eliminate the existing substance abuse treatment center as an independent category in the Zoning Code.		•	•	Compliance with ADA	Planning, BMZA, Mayor and City Council	Year 1	General Funds	Facilities will be able to locate with reduced time and expenses required, encouraging the growth of this portion of the healthcare sector.
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This change will bring our Zoning Code into compliance with the Americans with Disabilities Act (ADA), which will reduce liability for the City through legal challenges.

Objective 7: Retain and Attract Business in Hospitality and Tourism.

Create a Strategic Convention Center Area Master Plan.		•	•	Adoption of plan	Planning, BC-DOT, BDC, MTA, BACVA, Convention Center	Year 3	General Funds	Expanded Job, Profit and Revenue Potential for the City
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The Department of Planning will work closely with City agencies to review and improve pedestrian amenities and transit access, and to pursue business/rehabilitation opportunities to create greater synergies between new facilities and the adjacent area. Job and business opportunities in the Tourism sector are generally available for: hotel workers, food industry workers (producing, selling, serving), waiters and waitresses, bartenders, cooks, security guards, musicians and singers, actors and performers (including re-enactors of historic events), tour guides and escorts, amusement and recreation attendants, landscaping and groundskeepers, janitors, cleaners and maintenance workers, producers and tour organizers, recreation workers, producers, general and operations managers, recreation workers, travel agents, reservation & transportation ticket agents, meeting planners, and spa- and health club operators.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Install environmental and aesthetic improvements around tourist areas	•			Increased number and quality of lights, Increased pedestrian activity in tourist areas	Planning, BACVA, BDC, Downtown Partnership, DOT	Years 2-4	General Funds, GO Bonds, Hotel Tax	Increased Hotel Tax Revenues. Improved perception of City of Baltimore by visitors

By improving the lighting and aesthetic environment around the City's tourist areas, we can successfully combat perceived safety issues. Hospitable areas will attract more visitors to the City, encourage exploration of City attractions and surroundings, and foster longer stays.

Goal 2: Improve Labor Force Participation Rate Among City Residents

Objective 1: Align Employers with Job Seekers and Training Resources

Create a Strategic Plan for MOED that links employers to job seekers			•	Increased workforce participation rate.	MOED, BWIB, BDC, HCD, BCPSS, BCCC, Planning, and other training programs.	Years 2-3	General Fund	Higher per capita income in the city, fewer recipients of social assistance
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By creating a strategic plan for MOED services, the city will be able to better manage all City-funded workforce development programs, increase and improve workforce development training opportunities, particularly apprenticeship programs, for targeted sectors. By making Baltimore City attractive to these businesses, the City can capture its fair share of the predicted employment growth in the greater Baltimore region.

Monitor and enforce First Source Hiring program.			•	Increased rate of use of Baltimore residents in the local workforce.	All city agencies	Years 1-6	General funds, also tie to contract money for indiv. projects	Involves more City residents in the local workforce. Reduction in City funding exported from City, more successful businesses and higher tax base
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Monitoring First Source Hiring by contractors for City-funded development will help ensure that City dollars employ City residents. By enacting legislation or issuing an executive order for a reporting mechanism that links the program payout to compliance, the City can ensure that City dollars contribute to the local economy and improve the lives of employable Baltimoreans. Currently, the program is operated on a voluntary compliance basis, and there is no way of enforcing local labor use pledges once money is awarded. By incorporating a better method of review and ensuring compliance, the investments for the use of local labor will go to those companies and projects that actually use local labor – not just those that make a promise to do so. Funding for MOED will need to be increased to meet this new requirement.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Expand outreach to encourage use of One-Stop Employment Centers			<ul style="list-style-type: none"> 	Increased number of residents using One-Stop Centers	BWIB/MOED	Years 2-5	General Funds, Foundation support	Increased labor force participation rate, decreased unemployment rate, increased tax base, reduced dependency on social subsidies.

Increase outreach to communities with high rates of unemployment and/or low rates of labor force participation in order to remind City residents that resources are available and encourage them to use available assistance to become more employable and/or gain employment. Offer a mix of programs available at each site by transferring oversight and coordination of all City-funded employment and improvement programs to MOED. Provide sufficient funding and staffing levels to ensure provision of adequate service and coordination.

Target MOED resources to under- and un-employed populations to better connect job seekers and employers.			<ul style="list-style-type: none"> 	Increased number of ex-offenders utilizing MOED resources, increased placement rate for ex-offenders in program	BWIB/MOED	Years 1-6	General, Foundation grants	Reduced recidivism, reduced crime, safer communities, increased property values.
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Targeting MOED programs to specific populations will help reduce barriers for connecting job seekers with potential employers. For example, MOED's Ex-Offender initiative seeks to break down those barriers and help ex-offenders gain long-term employment. Employment studies have shown that this is a key element in reducing recidivism.

Prioritize drug treatment program access for job seekers working with MOED programs.			<ul style="list-style-type: none"> 	Increase the quality of worker by minimizing the chance for relapse, and therefore loss of investment.	Health, BSAS, MOED	Years 2-4		Ensures that programs are coordinated and that the likelihood of success for participating individuals is increased.
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Intervention with drug treatment programs is not necessarily sufficient on its own to get addicts to become productive members of the workforce. By coordinating drug treatment programs with job training programs, it is much more likely that a positive change in lifestyle will become permanent and increase the cumulative effect of this investment in the quality of Baltimore workforce members.

Give preference for City-subsidized contracts to contractors with active apprenticeship programs			<ul style="list-style-type: none"> 	Increased number of apprenticeship programs, increasingly skilled workforce	All city agencies	Years 1-6	No direct cost	Wider range of training opportunities, Higher number of City residents qualified to work "good jobs"
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Giving preference to contractors with active apprenticeship programs will help support the expansion and utilization of apprenticeship programs, will encourage the use of training opportunities, and, in the long run, will provide more City residents with opportunities to work professional jobs that pay much more than minimum wage.

Objective 2: Increase Qualifications/Skill Sets of City Residents (See LEARN, GOAL 3, Objective 3)

Goal 3: Improve Access to Jobs and Transportation Linkages between Businesses

Objective 1: Enhance Transportation Options to Provide Workers with Commuting Options and Mitigate Traffic Congestion

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Expand the number of participants in the Commuter Choice program throughout the Baltimore Region			•	Increased number of employees and employers who participate in the Commuter Choice Program	BMC, MTA, BDOT	Years 1-6	General Funds	Cost savings to employers and employees, less congestion

Federal law states that employers can provide up to \$100 per month per employee in tax free benefits to reward transit ridership. The Commuter Choice program allows employers and employees to benefit from these tax savings through payroll deduction for transit passes. In 2005, the MTA estimates that roughly 300 companies and over 12,000 employees were participating in the program. It is in the City's best interest to work with public and private partners to expand transit ridership, provide cost savings to residents, and bolster our competitiveness for further transit funding.

Support efforts to implement the Baltimore Region Transit Plan	•		•	Increased number of Passenger Rail Lines in the region	MTA, BMC, MDOT, BCDOT, Housing, Planning	Years 1-6	FTA New Starts, MVR, CTP, MDOT and MTA	Transit Investments boost local economy and enhance competitiveness in attracting new business.
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The Baltimore Region Transit Plan as developed in 2002 is moving forward with Red and Green Line alignments as the designated top priority. To realize these projects, City agencies must devote resources towards policies that include: growth management, transit supportive corridor policies, supportive zoning regulations near transit stations, and tools to implement land use policies. The development of this comprehensive plan and subsequent rezoning throughout the city aims to address all of these issues.

Implement Transportation Demand Management (TDM) strategies with large employers and institutions			•	Reduced or managed traffic, increased car- and vanpooling, increased bus ridership, adoption of a traffic reduction ordinance, creation of transportation management associations	BDC, BMC Transportation, MTA, Planning	Years 2-4	General Funds	Cost savings to all city residents and developers through more efficient use of road and parking resources.
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A full Transportation Demand Management (TDM) Program will include an aggressive publicity campaign, partnerships with large employers, and alternatives to single-occupancy vehicles, including promoting employer-subsidized transit passes. Alternative parking requirements will be encouraged to help reduce the demand for single automobile use. Other TDM strategies, such as a traffic reduction ordinance to minimize single-occupancy vehicles, will be studied. In addition, alternative parking policies at parking facilities will be promoted to help reduce the demand for single automobile uses, including preferential parking for carpool vehicles.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Implement Bicycle Master Plan	•	•		Increased number of bike lanes and bike racks at employment centers.	Department of Planning, DOT, Private Partners.	Years 1-3	MVR, Federal Grants, General Funds	Improved Air Quality, Cost savings to City, employers and employees in terms of auto use, parking infrastructure, etc. Land use efficiencies that can translate into enhanced property values.

Recognizing the health, quality of life, and cost saving benefits of bicycle ridership, the City has developed a Bicycle Master Plan that will heighten the safety and attractiveness of bicycling to work as a commuting option for City residents. Implementation of the Bicycle Master Plan provides a platform from which to encourage bicycling as a viable commuting option.

Increase number of water taxi stops near employment locations	•		•	Increased number of water taxis, Increased number of water taxi passengers	Planning, DOT, MTA, Water Taxi Service, National Historic Seaport of Baltimore	Years 1-6	MVR, Federal grants, General Funds	Land and time efficiencies and cost savings related to parking.
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The water taxi and the harbor present a unique alternate transportation opportunity which could be expanded to accommodate commuter traffic. In addition, the water taxi could be expanded into the Middle Branch to accommodate new development. The City will be able to apply for federal funds that are authorized for ferries and terminals according to 23 U.S.C 149, which will lead to less dependence on vehicles and will, therefore, reduce vehicle trips.

Objective 2: Promote Economic Development Throughout the City by Improving Business-to-business Connectivity via Transportation Linkages

Restore and increase on-street parking in mixed-use and business districts	•		•	Increased on-street, high-turnover parking, Increased store-front occupancy	DOT, Planning, Parking Authority	Years 1-6	GO Bonds, General Funds, MVR	Greater accessibility to neighborhood businesses and retail
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Expanding use of the new high-turnover meter parking technologies in mixed-use and neighborhood business centers will give merchants more customer traffic, improving their trade. Return curb lanes, now used for through-traffic, to on-street parking and increase angled parking conversions where appropriate. This also creates an important psychological barrier between pedestrians and moving vehicles, increasing pedestrians' sense of safety while shopping or walking in the area.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Create Transit-Oriented Development zoning and incentive programs for transit nodes throughout the City (i.e. State Center, West Baltimore Marc)		•	•	Increased number of jobs within radius of transit stations, Improved pedestrian access to station	Planning, BMZA, HCD, Law/, Mayor and City Council	Years 2-4	General Funds	Increased development and property values near transit stations

In order to increase non-automobile accessibility to City businesses, the City will create zoning changes and develop incentive programs to promote Transit-Oriented Development around transit hubs. This approach has been demonstrated to improve land use efficiencies and property values in most cases across the United States. Transit-supportive land use strategies can be expected to yield return on investment for the City in terms of: reduced development and service costs, consumer transportation cost savings, and support for economic activities such as the key growth sector of tourism. High quality transit service would help provide cost savings and efficiencies to businesses and consumers, which would in turn increase productivity, expenditures on local goods, local business activity and employment. The City has already been pursuing projects and partnerships to bolster awareness and use of land near existing transit stations. Pilot projects being pursued with public and private partners at State Center, for example, will in turn be used to better market the City's transit assets for potential development and infill. By building principles of Transit Oriented Development into RFPs and RFQs for publicly owned property, and into the site plan and design review, City agencies will help developers achieve better products that support ridership and augment profitability.

Integrate land use and transportation planning to ensure movement of freight into and throughout the City		•	•	Integrated land use and transportation plan	Planning, BDC, DOT	Years 2-4	General Funds	Stronger industrial and commercial activity, fewer land use and transportation conflicts
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The City has a mature and functioning industry that is sustained by adequate port, rail, and truck access. By integrating land use and transportation planning, critical linkages in the transportation system will not be choked off by development.

