

State Center Virtual Community Meeting

Market And Conceptual Pre-Development Study

June 4, 2024



Project Team

Consultant Team

- Gensler (lead)
- RCLCO Real Estate Consulting
- Mahan Rykiel Associates Inc.
- K. Dixon Architecture PLLC

Planning Staff

- Caitlin Audette, Design and Land Use Planner
- Tarek Bolden, Western District Community Planner

Meetings to date

- Community Open House
- Stakeholder meetings with the University of Baltimore, UMMS, MDOT/MTA, Housing Authority of Baltimore City, and others
- Attendance at Community Meetings
 - Bolton Hill
 - Mount Vernon Belvedere
 - Invitations sent to Seton Hill, Upton, Madison Park

Project History

- The original development plan for State Center was conceived between 2005 and 2008. It included over 2.1 million square feet of office space, one quarter of which would be occupied by state agencies.
- Other major uses included 2,000 residential units, primarily consisting of rental apartments, as well as over 300,000 square feet of retail and a 50,000 square foot charter school.
- The retail planned on site included a 60,000 square foot grocery store, which was planned to occupy the Fifth Regiment Armory. While it is agreed that this building could greatly add to the redevelopment potential, it is currently not included in the planned transfer to the city of Baltimore.



Previous Conceptual Development Plan

Land Uses	Amount
Residential Units	2,000 units
State Office Space	515,000 sf
Additional Office Space	1,500,000 sf
Retail	250,000 sf
Grocery Store	60,000 sf
Charter School	50,000 sf



Pre-Development Study

Study Goals

Charge to the Consultants

- The goal of the study is to create a vision for the site as a Transit Oriented Development and an anchor for this critical part of Baltimore based on current and projected market conditions.
- Create a conceptual and aspirational pre-development plan, taking into consideration assets in the immediate vicinity and factors such as economic development initiatives underway or planned within a 3 – 5-year horizon.
- The plan should also address the possible future redevelopment of the adjacent McCulloh Homes site with mixed income housing within a to-be-defined catchment area that would include the site.

How it will be used

- Inform conversations between the city and state regarding the transfer of the site.
- Guide the city, state, and any future developer on the redevelopment of the site.

Key Design Drivers



Transit will be the Heart of the new State Center

Access to Amtrak, Light Rail and Baltimore Bus and Metro systems is unrivaled in the city, and should be amplified. Pedestrian paths to be enhanced, and multi-modal infrastructure to be connected to the city fabric to prioritize riders.



Create a vibrant mixed income community

State Center must include a mix of housing types to serve Baltimore's broader housing market and position the development for CHOICE neighborhood designation.



Reconnect to the existing city grid and adjacent neighborhoods.

"Complete Streets" designations will be honored, and pedestrian prioritizing measures introduced according to street use and program. Whenever possible, Right of Way should be maintained and restored, rather than altered.



Introduce Density

To truly complete the city grid, there must be some of the dense nature of the central business district across Martin Luther King Drive.



Adaptation is Preferred

Adapting existing structures and Right-of-Way reduces carbon footprint and presents an interesting narrative for the surrounding neighborhoods to re-imagine themselves. Designs should prioritize, but not solely select, adaptation.



Reduce Urban Heat Island potential

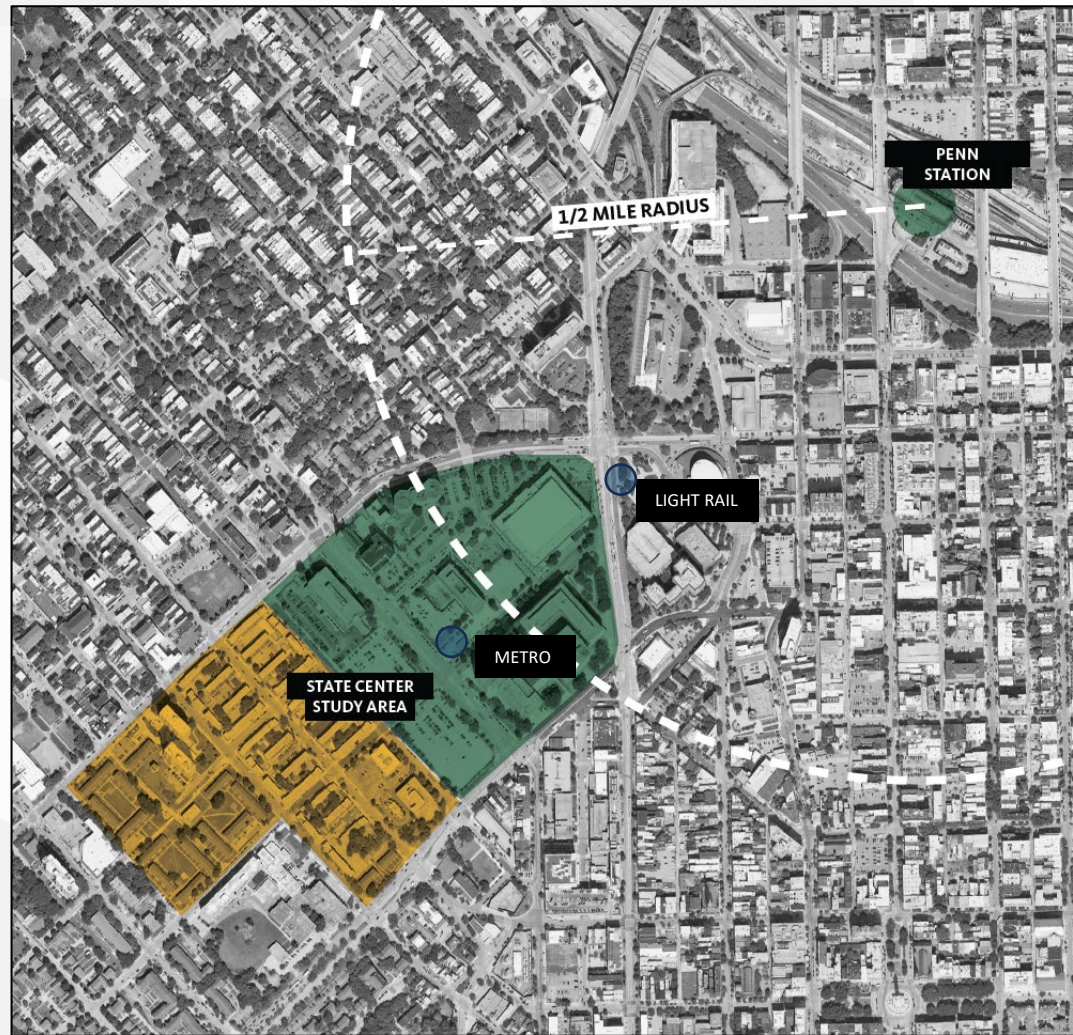
Tree canopy, habitat, permeable ground plane and high albedo surfaces are key design elements to be included on every parcel. Public open space of varying scale and program is a critical characteristic of the new State Center.



There is not one answer.

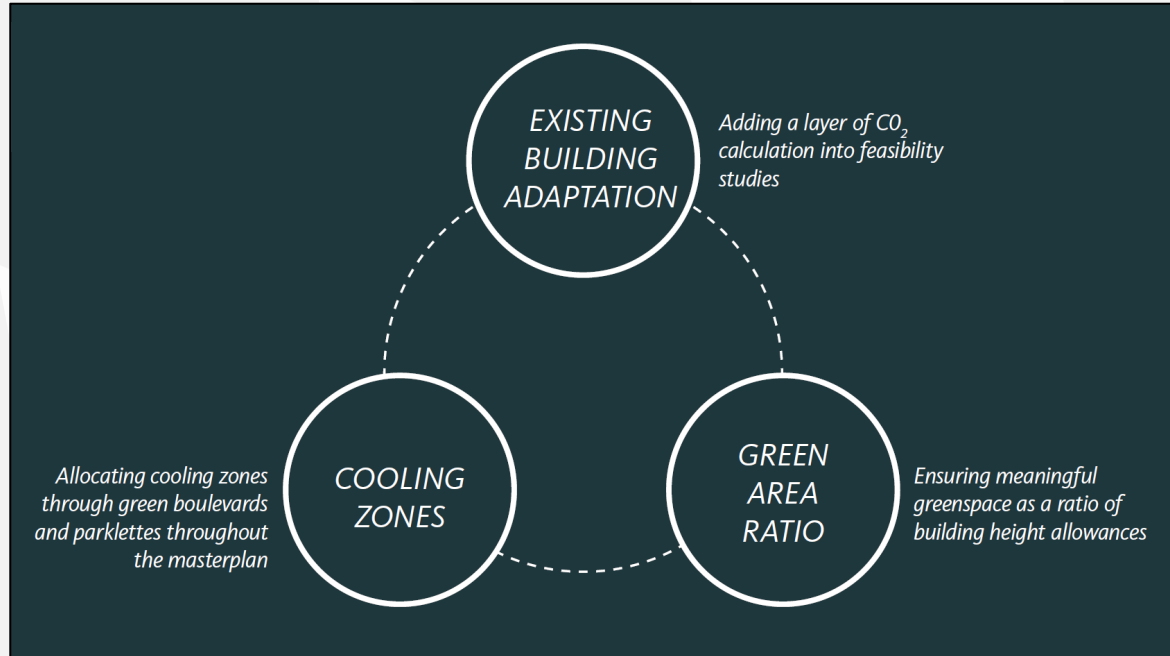
The designs must be viable based on market analysis, but also allow for variability in the design to reflect future conditions, partnerships and stakeholder engagement.

Transit Oriented Development



Sustainability Focus





1. **Adapting Existing Buildings** (What is the CO₂ cost of building new?)
2. **Establishing Cooling Corridors** (How does this plan combat high-heat in Baltimore's future?)
3. **Ensuring Solar Access for All** (What is the right density and where?)



Site Analysis – Ground Plane Activation

GROUND PLANE ACTIVATION

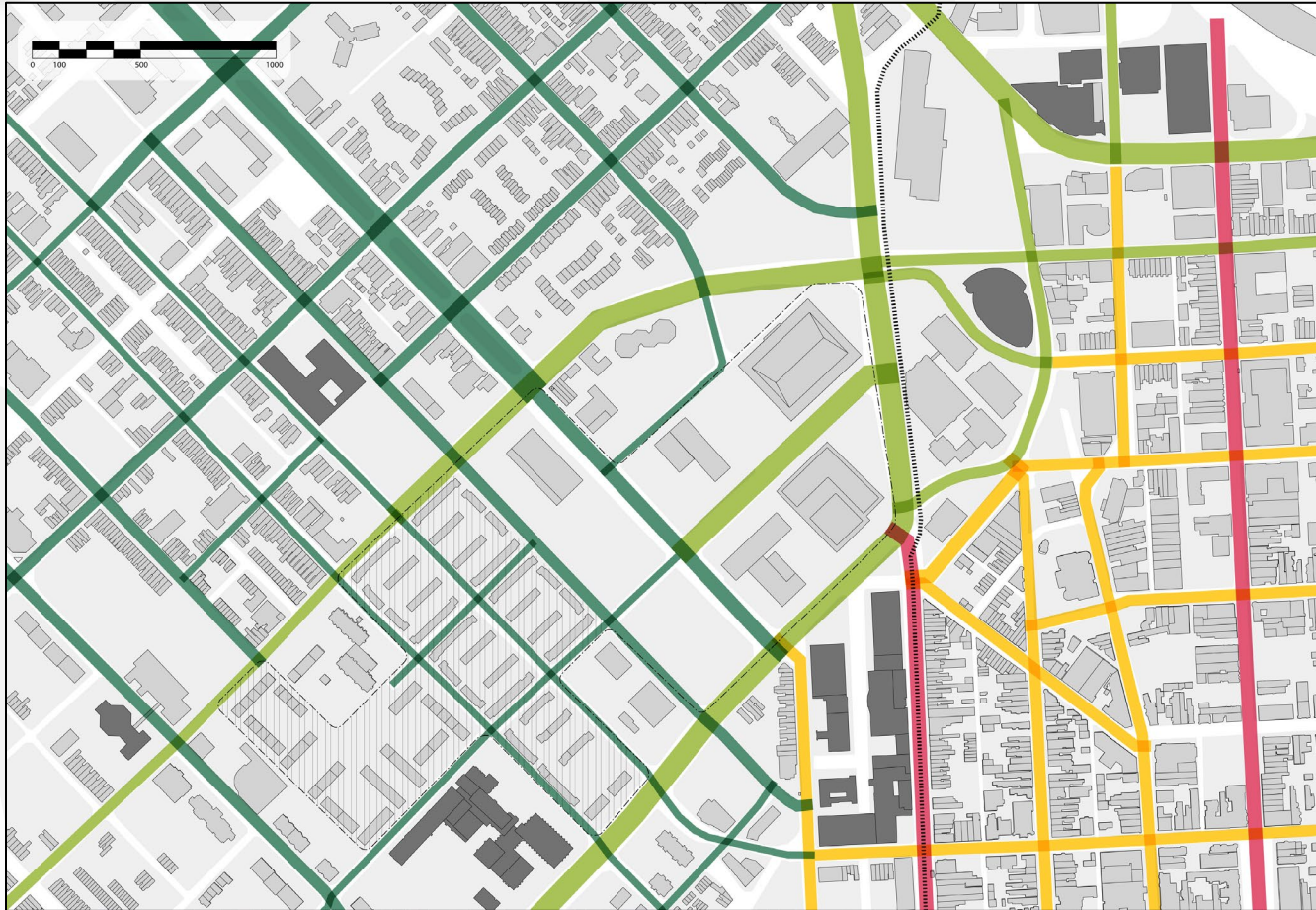
SITE CIRCULATION

-  BUS LANE
-  BIKE LANE
-  MAIN PEDESTRIAN ROUTE
-  LOADING
-  UNDERGROUND PARKING ACCESS AND EXIT

The State Center site is easily accessed by pedestrians, and activated by circulation from Metro and lightrail-but little else. Loading occurs off of MLK, parking ingress and egress is off of Preston and MLK, and often located underground. All of these are good approaches to planning, but the site lacks program and scale in open space that would otherwise make it feel vibrant and successful. Part of the masterplan approach will need to be a solution to this shortcoming.



Site Analysis – Street Character








- Residential Neighborhood
- Vehicular Corridor Streets
- Downtown Condition
- Commercial Corridor

Proposed Density

DESIGN DRIVERS: DENSITY

CHANGE IN SCALE THROUGH THE SITE

-  MASS TRANSIT STOPS
-  PRESTON MAIN STREET
-  EUTAW PARKWAY
-  LOW RESIDENTIAL DENSITY
-  HIGHEST DENSITY



Site Analysis - Barriers



Satellite View of West Preston Street today

Market Study - Housing

	OVERVIEW	ACHIEVABLE PRICING (1Q 2024 \$)	AVG. UNIT SIZE	TYPICAL PROJECT SCALE	SHORT-TERM DEMAND (BY 2030)	LONG-TERM DEMAND AT SITE (BY 2040)	STATE CENTER OPPORTUNITY
RENTAL HOUSING					250 Units	1,500 Units	
Conventional Rental Apartments	Appeals to all demand pools, particularly younger professionals (singles/couples), who represent core market audience. Priced competitively to attract renters to this location given large pipeline.	\$2.45 / SF \$1,840 / Month	750 SF	250 Units	150 Units	900 Units	MODERATE / STRONG
Post-Grad / Student Targeted	Site offers strong access to demand drivers, such as education and healthcare centers. Particularly underserved audience in neighborhoods surrounding the site today.	\$2.60 / SF \$1,690 / Month	650 SF	200 Units	100 Units	600 Units	STRONG
Active Adult / Senior Housing	Very few renters in this segment and limited projected growth.	\$2.70 / SF \$2,970 / Month	1,100 SF	80 Units	Limited	Opportunity may emerge in later phases	WEAK
FOR-SALE-HOUSING					80 Units	460 Units	
Townhomes	Opportunity to establish site with lower-density housing and build a critical mass. Demand concentrated at middle price points.	\$235 / SF \$376,000 / Unit	1,600 SF	80 Units	80 Units	460 Units	STRONG
Condominiums	Condominium buyers attracted to more established locations. Affordability of single-family product limits demand pool.	\$245 / SF \$294,000 / Unit	1,200 SF	100 Units	Limited	Opportunity may emerge later of for less dense product types	WEAK

Market Study - Retail

	OVERVIEW	TARGET CUSTOMER	UNMET SHORT TERM DEMAND	LONG-TERM DEMAND AT SITE (BY 2040)	STATE CENTER OPPORTUNITY
RETAIL			109,000 SF	122,000 SF	
Grocery & Drug	Major grocer with regional presence but currently in locations that are only drivable from Bolton Hill, Mt. Vernon, and other site-adjacent neighborhoods.	<ul style="list-style-type: none"> Households in immediate surrounding neighborhoods. On-site households and employees as site builds out. 	44,000 SF	48,000 SF	STRONG
Restaurants	Variety of fast-casual chains and family restaurants, as well as bars and cafes. Space-permitting, potential for vendors to co-locate in food hall setting.	<ul style="list-style-type: none"> Neighborhood and on-site households and employees. Transit can attract spending from broader market. 	29,000 SF	32,000 SF	STRONG
Hard & Soft Goods	Mix of national brands, credit tenants, and local businesses.	<ul style="list-style-type: none"> Neighborhood and on-site households and employees. May be able to leverage accessibility via car. 	6,000 SF	8,000 SF	MODERATE / WEAK
Entertainment / Fitness	Gym, small movie theatre, and/or mix of boutique entertainment. May be an opportunity to attract a more unique entertainment anchor tenant in later phases.	<ul style="list-style-type: none"> Neighborhood and on-site households and employees. Transit can attract spending from broader market. 	15,000 SF	17,000 SF	MODERATE / STRONG
Services	Household services, such as banking, nail salons, barbershops, spas, etc.	<ul style="list-style-type: none"> Households in immediate surrounding neighborhoods. On-site households and employees as site builds out. 	15,000 SF	17,000 SF	MODERATE / STRONG

Market Study – Office/Other

	OVERVIEW	TARGET CUSTOMER	UNMET SHORT TERM DEMAND	LONG-TERM DEMAND AT SITE (BY 2040)	STATE CENTER OPPORTUNITY
OFFICE			55,000 SF	265,000 SF	
Conventional Corporate Office	Multitenant and corporate office (e.g. professional services, financial activities), likely marketed as build-to-suit opportunity in near term	<ul style="list-style-type: none"> Target anchor in financial activities or other sector with established presence in Downtown Baltimore 	Limited	110,000 SF	MODERATE / WEAK
Medical Office	Office occupied by medical providers, often supplying ancillary space for nearby hospital systems	<ul style="list-style-type: none"> Nearby hospital systems and other institutional partners 	20,000 SF	55,000 SF	MODERATE
Life Science / Wet Lab Space	Space dedicated to lab functions of biotech companies, often accomplished via partnership between biotech users and educational institutions	<ul style="list-style-type: none"> Life science user with connection to local institutions Regional player(s) prioritizing transit access and affordability 	35,000 SF	100,000 SF	MODERATE / STRONG
OTHER					
Hospitality	Smaller scale, likely three-star flag that is currently uncalled for or less represented in local market; or independent, more boutique hotel	<ul style="list-style-type: none"> Visitors of local arts / entertainment Tourists seeking a more affordable option with transit 	0 Rooms	125 Rooms	WEAK
Institutional (Education and Medical)	Opportunistic play, attracting local institutional user with ambitious expansion plans to occupy ground-up development on site and potentially anchor other, more market-driven development on-site	<ul style="list-style-type: none"> Local institutional user (UB, UMB, JHU, UMMS) Scale and location of site presents opportunity (but no clear gap to be filled today) 	Limited initial interest from stakeholders, but opportunity could emerge.	Demand depends on long-term space needs and institutional planning	MODERATE

Market Study – Transit Impact

A 40-60% increase in rail commuters from Baltimore City to DC would likely result in additional demand for 50-100 units at the site —likely insufficient to justify planning for more residential, but enough to differentiate State Center from other mixed-use nodes and therefore mitigate competitive risk on the supply side.

ESTIMATE OF ADD'L HOUSING DEMAND FROM RIDERSHIP INCREASE

1-Mile Radius of Penn Station

		Percent Change in Rail Commuters Baltimore City to DC vs. 2019									
		10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
1- Mile of Penn Station Capture	10%	+9	+17	+26	+34	+43	+51	+60	+69	+77	+86
	20%	+17	+34	+51	+69	+86	+103	+120	+137	+154	+172
	30%	+26	+51	+77	+103	+129	+154	+180	+206	+232	+257
	40%	+34	+69	+103	+137	+172	+206	+240	+275	+309	+343
	50%	+43	+86	+129	+172	+215	+257	+300	+343	+386	+429
	60%	+51	+103	+154	+206	+257	+309	+360	+412	+463	+515



ESTIMATE OF ADD'L HOUSING DEMAND FROM RIDERSHIP INCREASE

Subject Site (50% Capture of 1-Mile Radius of Penn Station)

		Percent Change in Rail Commuters Baltimore City to DC vs. 2019									
		10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
1- Mile of Penn Station Capture	10%	+4	9+	+13	+17	+21	+26	+30	+34	+39	+43
	20%	+9	+17	+26	+34	+43	+51	+60	+69	+77	+86
	30%	+13	+26	+39	+51	+64	+77	+90	+103	+116	+129
	40%	+17	+34	+51	+69	+86	+103	+120	+137	+154	+172
	50%	+21	+43	+64	+86	+107	+129	+150	+172	+193	+215
	60%	+26	+51	+77	+103	+129	+154	+180	+206	+232	+257

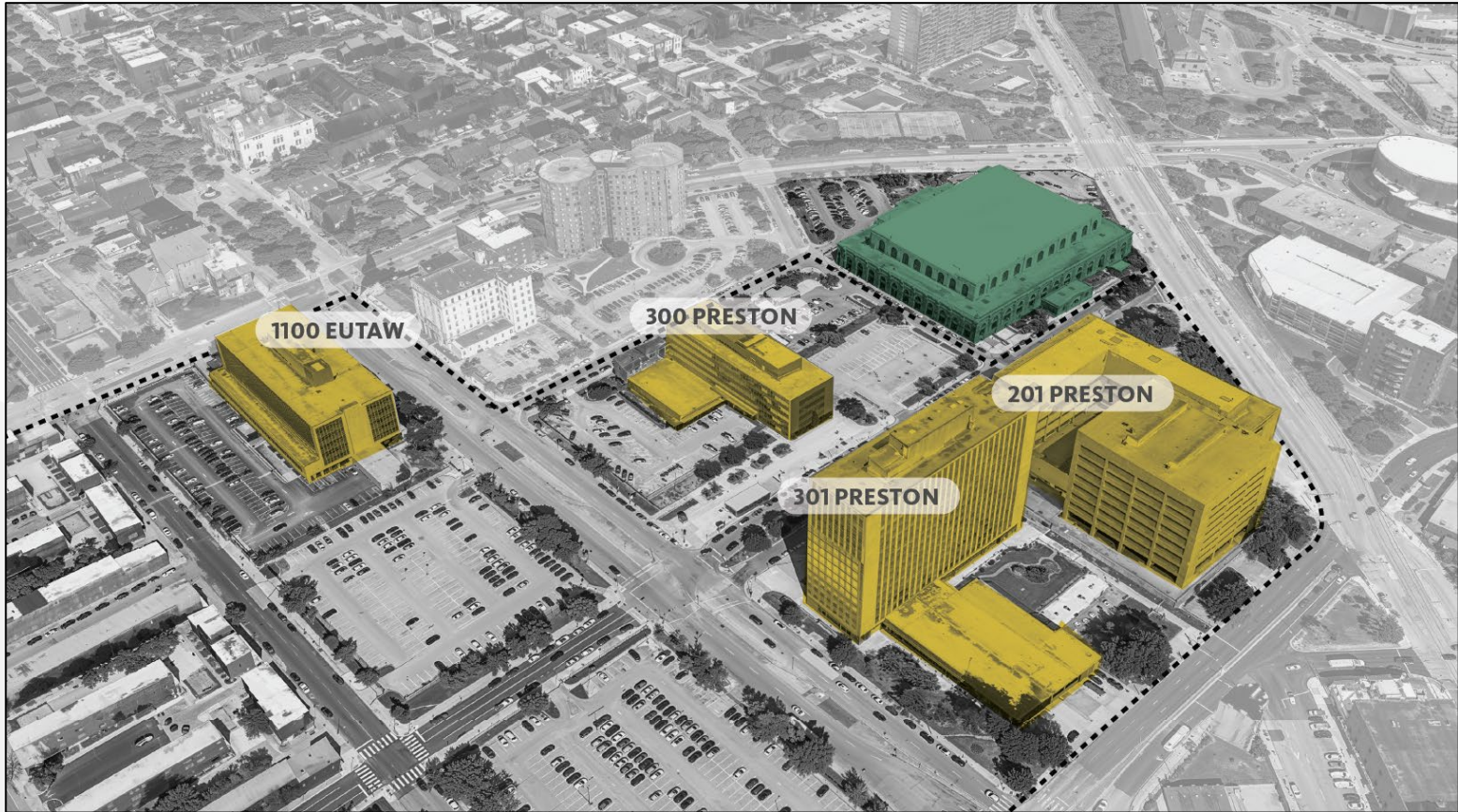
Anticipated Retail and Housing Development in Area

- Proposed New Grocery Store at Reservoir Square
- Significant Investment at Pennsylvania Avenue Market
- Mixed-Use Development at 50 W. Oliver
- Affordable Housing with Limited Retail at 1512 Eutaw

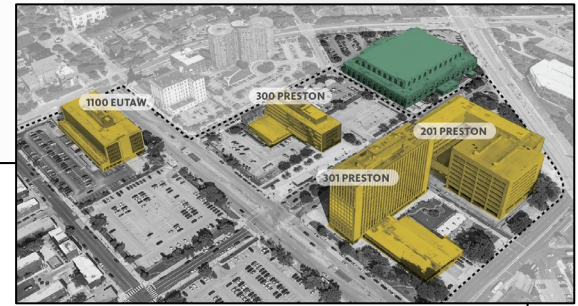


Rendering of 50 W. Oliver shared at 8/2023 UDAAP meeting

Existing Buildings



Existing Buildings



EXISTING BUILDING ANALYSIS

1100 N EUTAW



76% Compatibility	1	1	5,395,800
	# Unique Developments	# Cities	Min. GHG Savings (kgCO2e)
100%	160	7,454,500	
Yearly Rate	Estimated Total # of units	Max. GHG Savings (kgCO2e)	
		15,794	
		170,000	
		ft ²	
		Convertible Area	

Ranked Compatibility by Project



301 W PRESTON ST



79% Compatibility	1	1	18,285,414
	# Unique Developments	# Cities	Min. GHG Savings (kgCO2e)
100%	559	25,261,985	
Yearly Rate	Estimated Total # of units	Max. GHG Savings (kgCO2e)	
		53,521	
		976,180	
		ft ²	
		Convertible Area	

Ranked Compatibility by Project



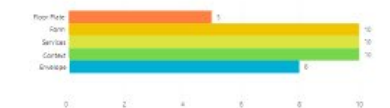
Min. CO2 Savings: 18,285,414 KgCO2e
Max. CO2 Savings: 25,261,985 KgCO2e

201 W PRESTON ST



81% Compatibility	1	1	9,723,612
	# Unique Developments	# Cities	Min. GHG Savings (kgCO2e)
100%	288	13,433,535	
Yearly Rate	Estimated Total # of units	Max. GHG Savings (kgCO2e)	
		28,461	
		306,352	
		ft ²	
		Convertible Area	

Ranked Compatibility by Project



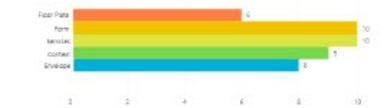
Min. CO2 Savings: 9,723,612 KgCO2e
Max. CO2 Savings: 13,433,535 KgCO2e

300 W PRESTON ST



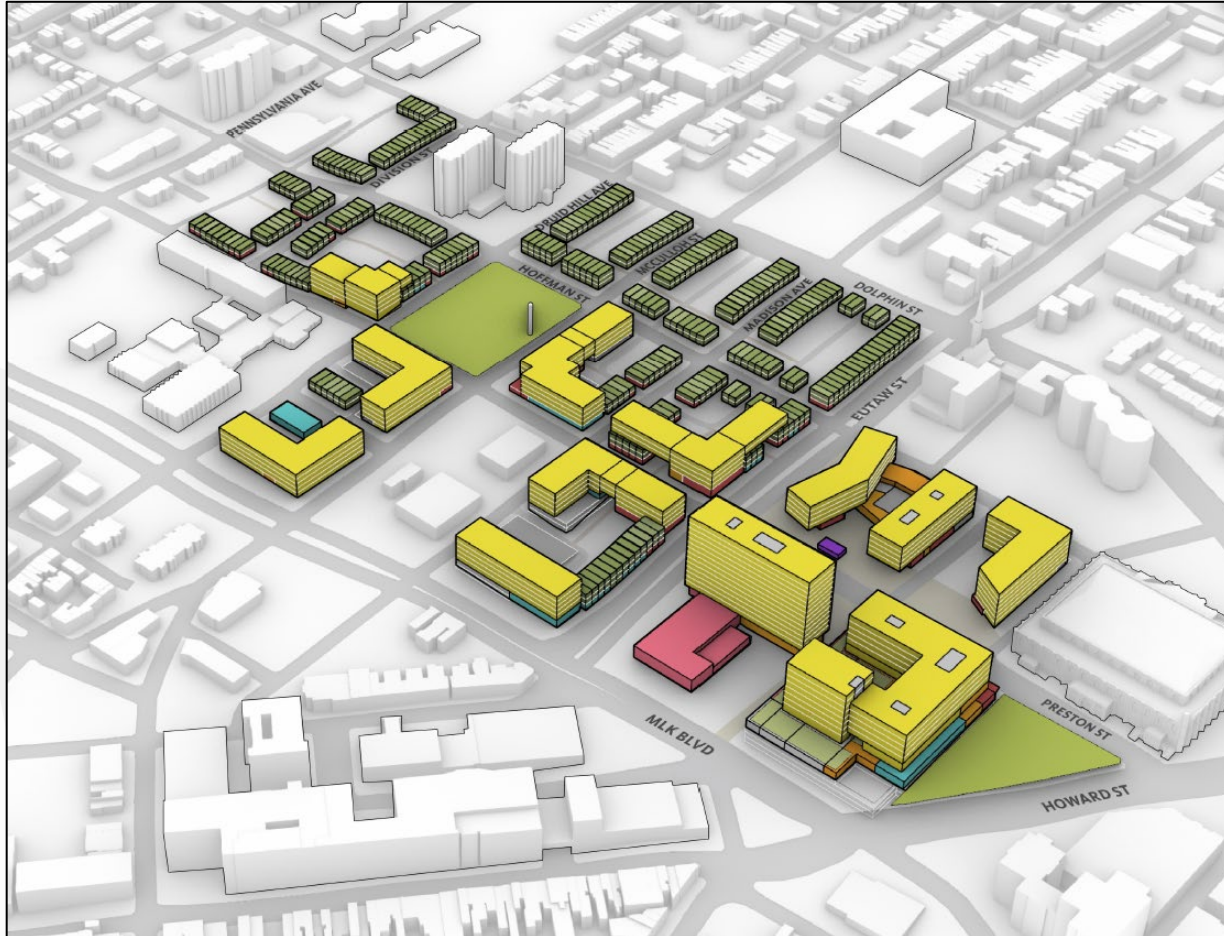
83% Compatibility	1	1	7,617,600
	# Unique Developments	# Cities	Min. GHG Savings (kgCO2e)
100%	226	10,524,000	
Yearly Rate	Estimated Total # of units	Max. GHG Savings (kgCO2e)	
		22,297	
		240,000	
		ft ²	
		Convertible Area	

Ranked Compatibility by Project



Min. CO2 Savings: 7,617,600 KgCO2e
Max. CO2 Savings: 10,524,000 KgCO2e

Adapt Scenario



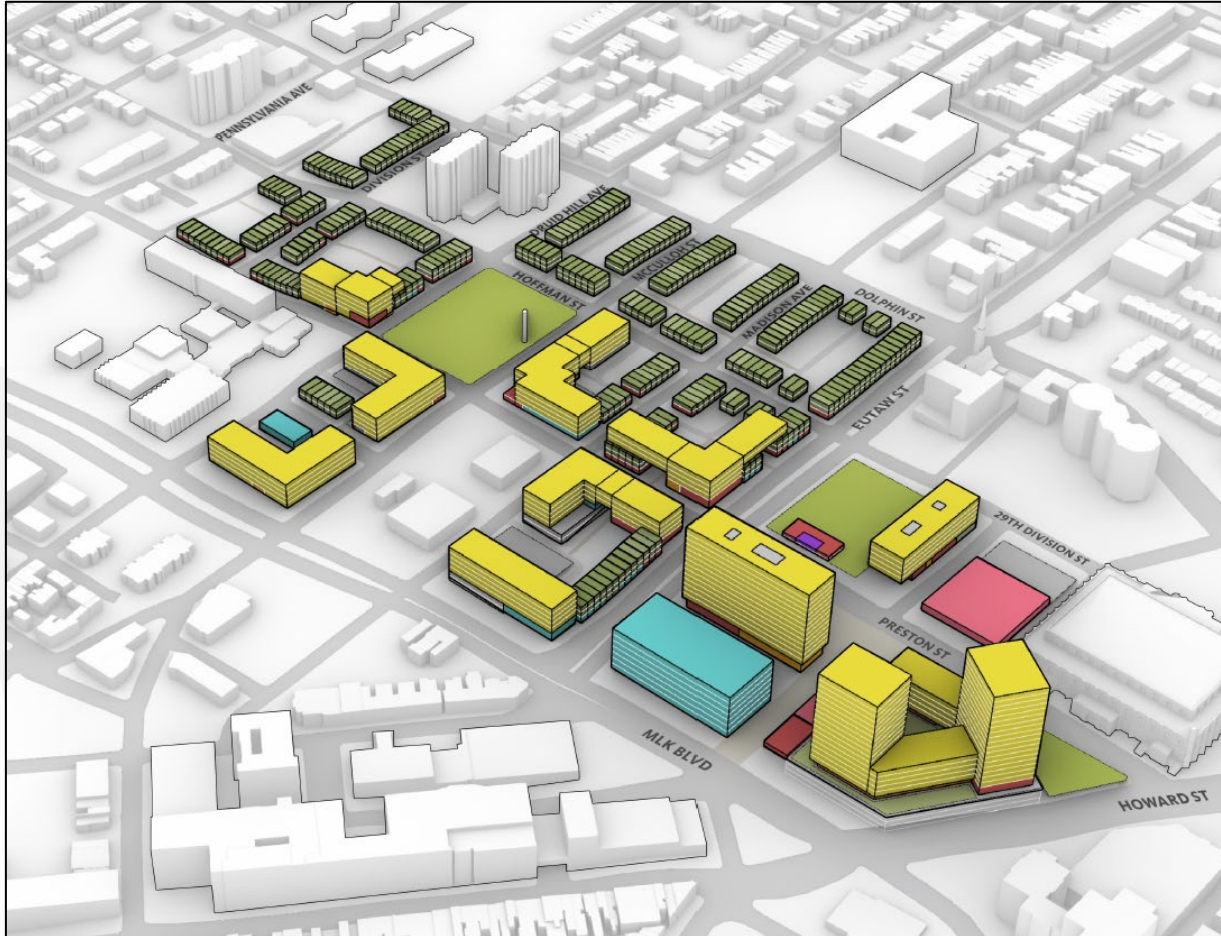
Program - Full Site	GSF	Units
Residential (Apartment)	1,600,000	2,000
Typical (825 GSF / unit)		900
Post-Grad (750 GSF / unit)		600
McCulloh (825 GSF / unit)		500
Residential Amenity	33,700	
Residential Lobby	37,600	
Townhomes	527,000	278
Small (900 GSF / unit)		14
Typical (1800 GSF / unit)		118
Large (2,500-2,700 GSF / unit)		46
McCulloh (1,800 GSF / unit)		100
Retail	92,700	
Grocery	41,800	
Office	58,900	
Loading / BOH / CUP	28,100	
Parking	441,500	1,031
Existing Garage		638
New Garage		179
Surface Parking		214
Park		
Metro Station		

TOTAL: 2,861,000

Program - State Center	GSF	Units
Residential (Apartment)	1,180,000	1,465
Typical (825 GSF / unit)		880
Post-Grad (750 GSF / unit)		585
Residential Amenity	33,700	
Residential Lobby	30,600	
Townhomes	173,700	84
Small (900 GSF / unit)		2
Typical (1800 GSF / unit)		53
Large (2,500-2,700 GSF / unit)		29
Retail	65,600	
Grocery	41,800	
Office	38,400	
Loading / BOH / CUP	28,100	
Parking	394,200	886
Existing Garage		638
New Garage		180
Surface Parking		68
Park		
Metro Station		

TOTAL: 1,986,100

Blend Scenario



Program - Full Site	GSF	Units
Residential (Apartment)	1,600,000	2,000
Typical (825 GSF / unit)		900
Post-Grad (750 GSF / unit)		600
McCulloh (825 GSF / unit)		500
Residential Amenity	14,700	
Residential Lobby	28,900	
Townhomes	527,000	278
Small (900 GSF / unit)		14
Typical (1,800 GSF / unit)		118
Large (2,500-2,700 GSF / unit)		46
McCulloh (1,800 GSF / unit)		100
Retail	90,500	
Grocery	46,400	
Office	278,400	
Loading / BOH	4,900	
Parking	409,700	965
New Garage		726
Surface Parking		239
Park		
Metro Station		
TOTAL:	3,000,500	

Program - State Center	GSF	Units
Residential (Apartment)	1,190,000	1,480
Typical (825 GSF / unit)		890
Post-Grad (750 GSF / unit)		590
Residential Amenity	14,700	
Residential Lobby	21,900	
Townhomes	173,700	84
Small (900 GSF / unit)		2
Typical (1,800 GSF / unit)		53
Large (2,500-2,700 GSF / unit)		29
Retail	62,400	
Grocery	41,800	
Office	258,000	
Loading / BOH	4,900	
Parking	362,500	820
New Garage		726
Surface Parking		94
Park		
Metro Station		
TOTAL:	2,129,900	

Re-Imagine - City Field Scenario



Program - Full Site	GSF	Units
Residential (Apartment)	1,600,000	2,000
Typical (825 GSF / unit)		900
Post-Grad (750 GSF / unit)		600
McCulloh (825 GSF / unit)		500
Residential Amenity	14,700	
Residential Lobby	25,800	
Townhomes	527,000	278
Small (900 GSF / unit)		14
Typical (1,800 GSF / unit)		118
Large (2,500-2,700 GSF / unit)		46
McCulloh (1,800 GSF / unit)		100
Retail	87,400	
Grocery	33,500	
Office	56,200	
Parking	505,300	1,195
New Garage		1,004
Surface Parking		191
Park		
Soccer Field		
Metro Station		

TOTAL:	1,849,900	
---------------	------------------	--

Program - State Center	GSF	Units
Residential (Apartment)	1,180,000	1,475
Typical (825 GSF / unit)		885
Post-Grad (750 GSF / unit)		590
Residential Amenity	14,700	
Residential Lobby	18,800	
Townhomes	173,700	84
Small (900 GSF / unit)		2
Typical (1,800 GSF / unit)		53
Large (2,500-2,700 GSF / unit)		29
Retail	59,300	
Grocery	33,500	
Office	35,700	
Parking	458,200	1,050
New Garage		1,004
Surface Parking		46
Park		
Soccer Field		
Metro Station		

TOTAL:	1,973,900	
---------------	------------------	--

Streets and Alleys

A - Preston Festival Street

Preston as an enhancer of public transit
Complete Street Designation: Downtown Mixed Use

B - Preston Main Street

Preston as the center of a neighborhood
Complete Street Designation: Urban Village Main

C - Eutaw Place Linear Park

Eutaw as a green cooling corridor
Complete Street Designation: Boulevard

D - MLK and Dolphin Multimodal Transit Roads

Preston as an enhancer of public transit
Complete Street Designation: Parkway

E - Neighborhood Streets

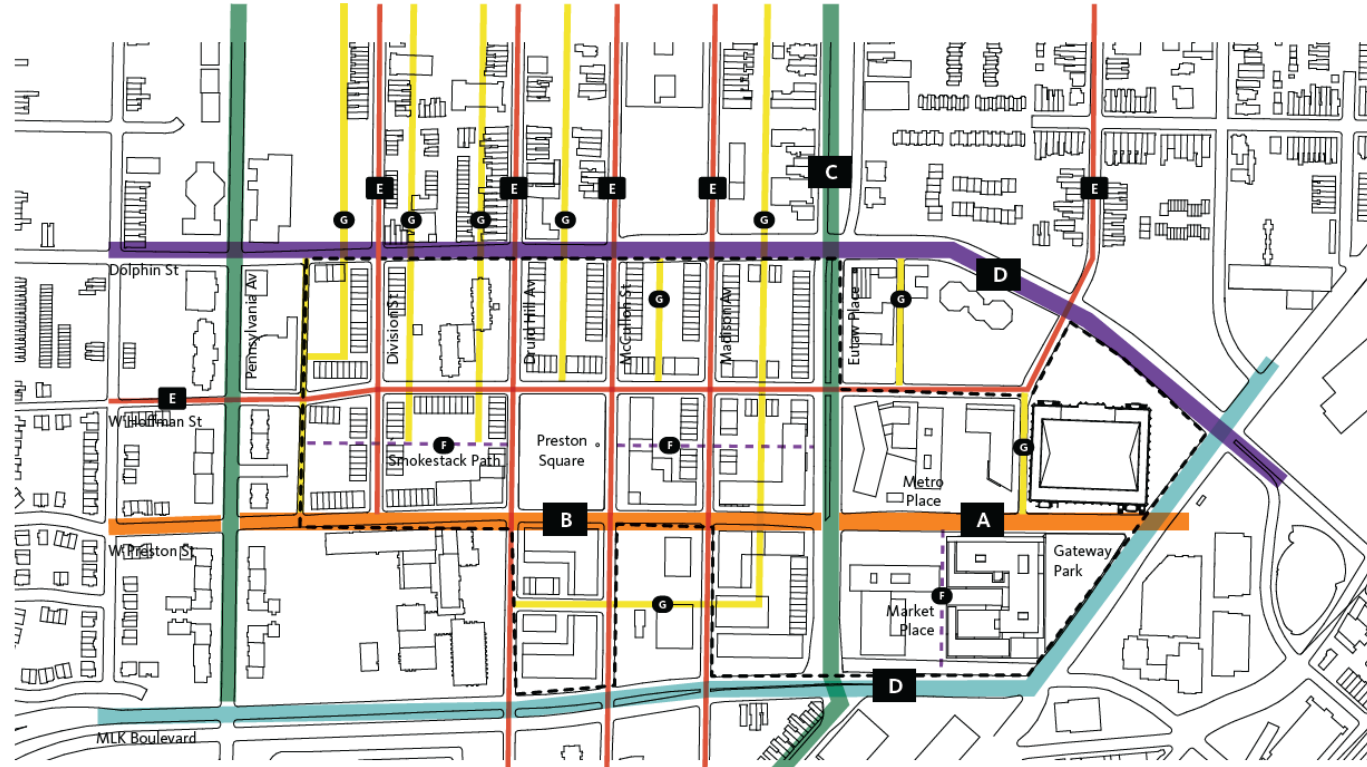
Front doors, community and connections
Complete Street Designation: Urban Village Neighborhood

F - Walking Alleys

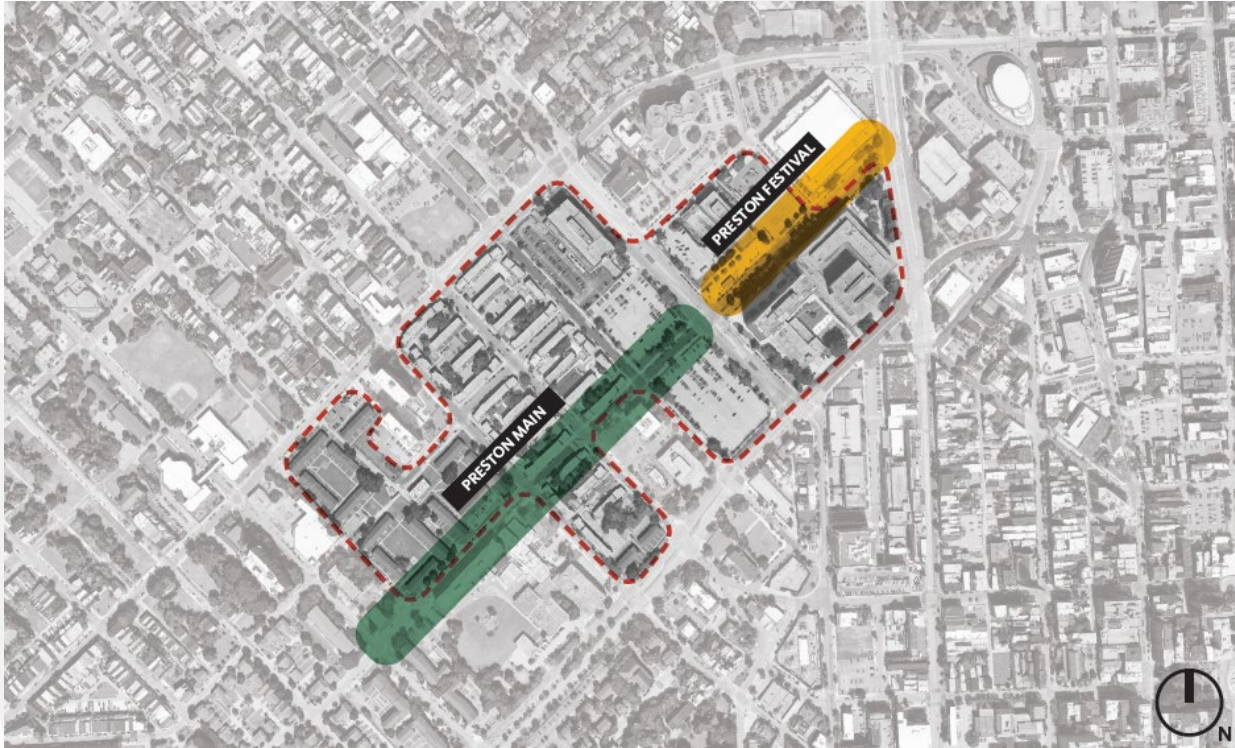
Special connectors for pedestrian experiences
Complete Street Designation: N/A

G - Service Alleys

Back alleys for trash and recycling pick-up
Complete Street Designation: N/A



Preston Street – Existing Conditions



301 W Preston Front Plaza

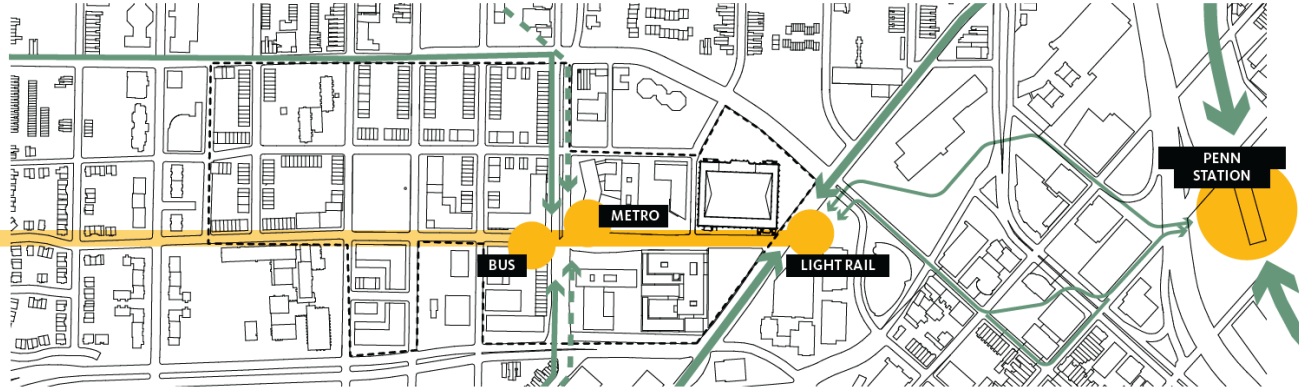


300 W Preston Front Plaza



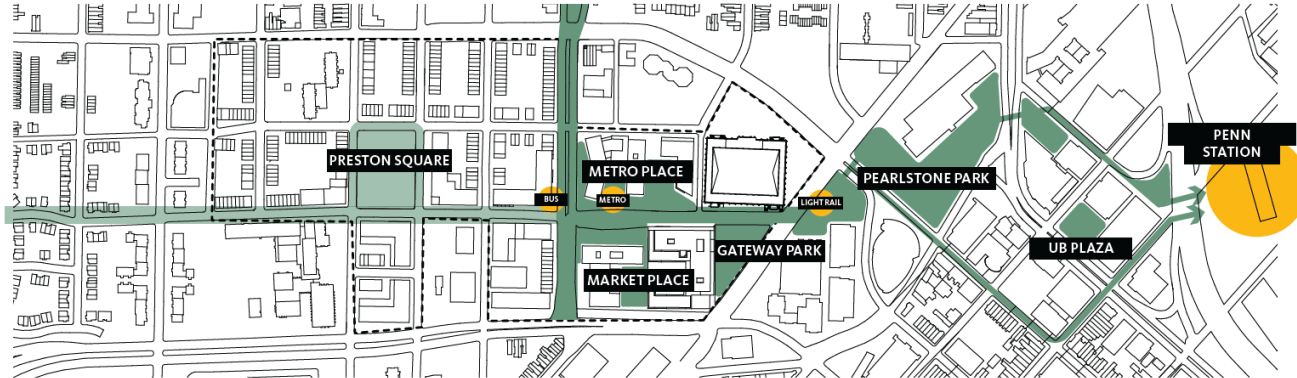
201 W Preston Garage Entrance

Preston Street – Design Principles



MASS TRANSIT CONNECTOR

Preston as an enhancer of public transit

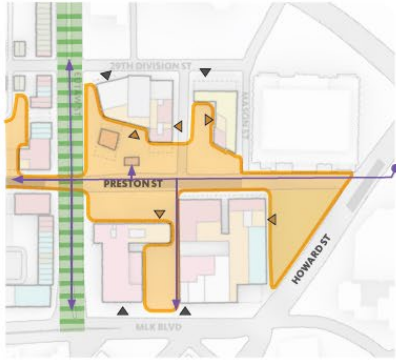


AN ARCHIPELAGO OF OPEN SPACES

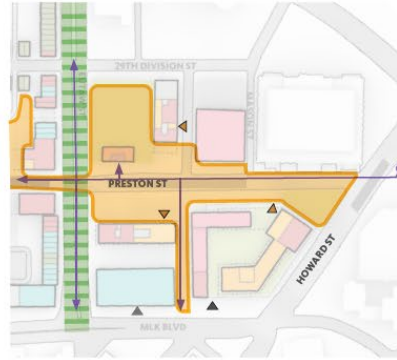
Preston as an enhancer of public space

Preston Street Comparison

Design Option 1: Adapt



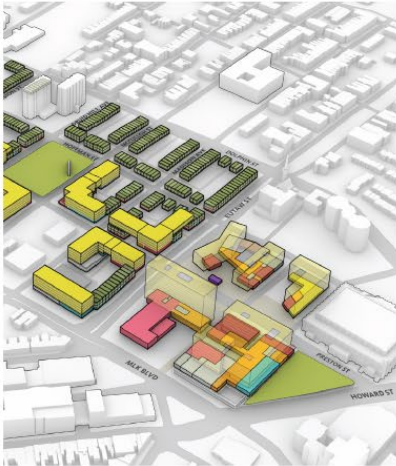
Design Option 2: Blend



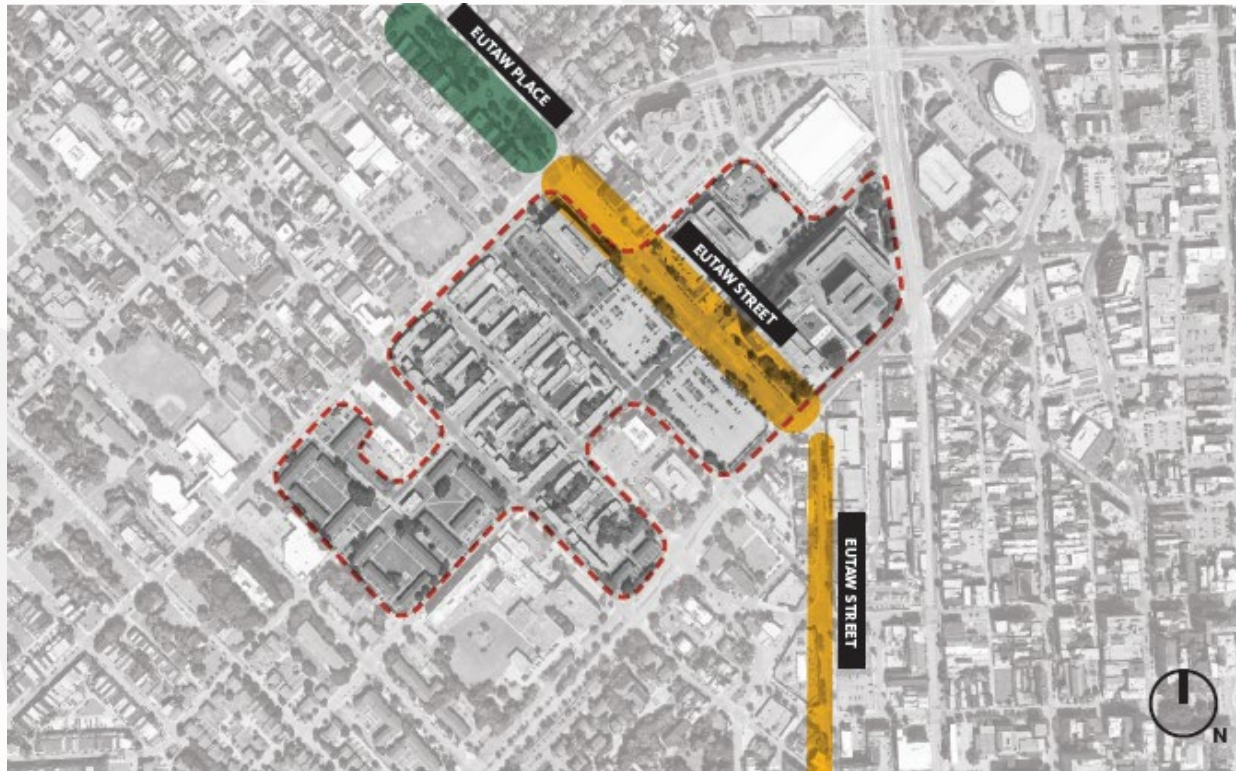
Design Option 3: Reimagine



Design Option 4: City Field



Eutaw Street – Existing Conditions



301 W Preston Front Plaza

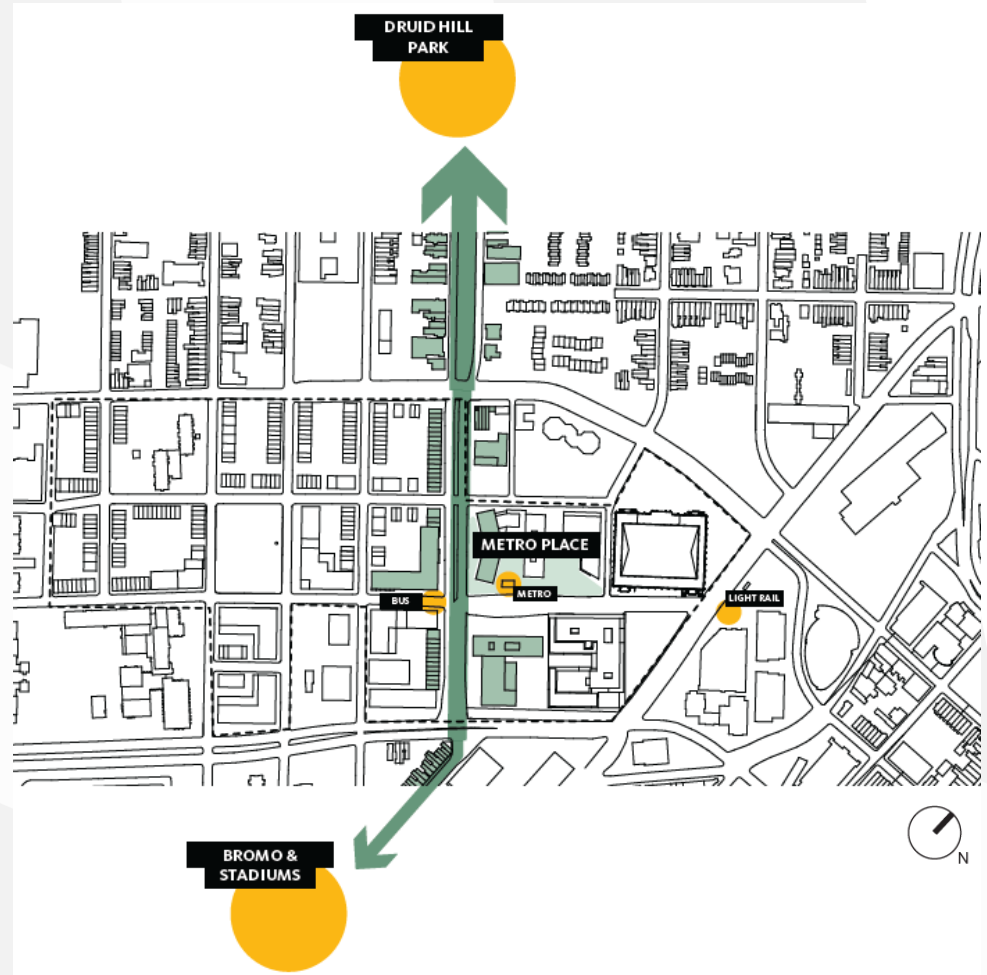


300 W Preston Front Plaza



201 W Preston Garage ENTrance

Eutaw Street – Design Principles



Eutaw Street Comparison

Design Option 1: Adapt



Design Option 2: Blend



Design Option 3: Reimagine



Design Option 4: City Field



What Next?

- The Department of Planning will continue meeting with community stakeholders as needed to present the study findings and gather feedback.
- Later this summer the final report will be shared with the public.
- The last agency is scheduled to vacate State Center at the end of 2025/early 2026.
- The city and state must agree to terms of any transfer of ownership of the State Center site.
- Baltimore City's goal is to limit the time the site will be vacant, and therefore hope to issue the RFP prior to the last State agency leaving the site.
- The City will conduct a public RFP (Request For Proposal) process to select a developer. This study will be incorporated into the RFP.
- During the RFP process there will be consistent community engagement.

THANK YOU!

Please contact Planning staff with any questions.

Caitlin Audette, Design and Land Use Planner
caitlin.audette@baltimorecity.gov

Tarek Bolden, West District Community Planner
tarek.bolden@baltimorecity.gov



Brandon M. Scott
Mayor