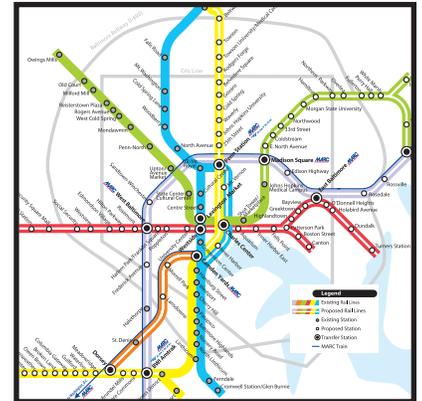
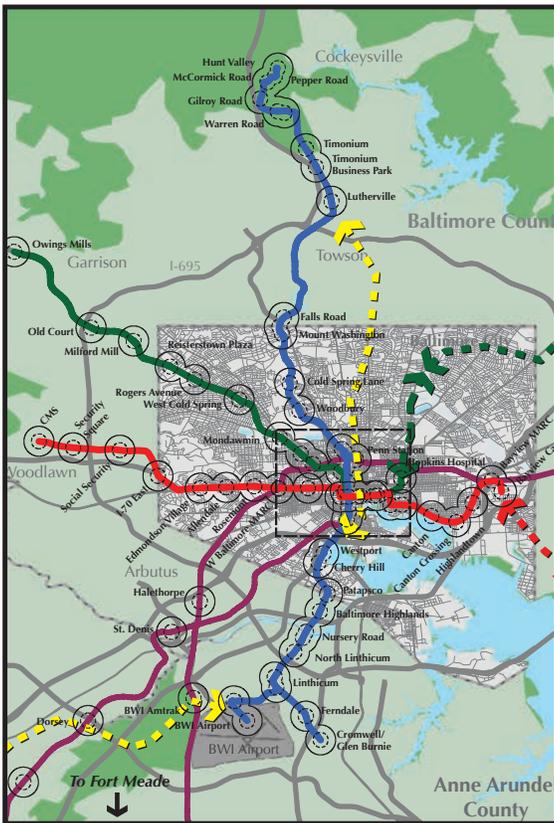


# Central Maryland TOD Strategy:

## A Regional Action Plan For Transit-Centered Communities



July 2009



# About This Strategy

The Central Maryland TOD Strategy effort has been led by the Central Maryland Transportation Alliance and the Center for Transit-Oriented Development with the guidance of a Steering Committee composed of:

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This report has been developed through a year-long process of identifying challenges and opportunities for transit-oriented development in Central Maryland through a mix of qualitative and quantitative analysis and does not necessarily represent official policy positions of any members of the Steering Committee, and should not be read as such.

Technical assistance for this study has been provided by the Center for Transit-Oriented Development. CTOD is the only national non-profit effort dedicated to providing best practices, research and tools to support market-based transit-oriented development. CTOD partners with both the public and private sectors to strategize about ways to encourage the development of high-performing TOD projects around transit stations and to build transit systems that maximize the development potential. CTOD is a joint venture of Reconnecting America, based in Oakland, California with offices in Washington, DC, Denver, and Los Angeles, together with the non-profit Center for Neighborhood Technology, an urban policy and GIS center based in Chicago and Strategic Economics, an urban economics firm based in Berkeley, California.

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Electronic versions of this document and additional data resources can be found at [www.cmtalliance.org](http://www.cmtalliance.org)

# About The Sponsors

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## **Central Maryland Transportation Alliance**

The Central Maryland Transportation Alliance (CMTA) is a new organization formed by a coalition of area business and nonprofit leaders dedicated to improving travel efficiency within Central Maryland. As advocates for the development and implementation of a comprehensive and innovative transportation plan, CMTA acts as a convener of diverse interests; advisor to city, county, state, and federal officials; and coordinator of advocacy efforts for short and long term strategies with the necessary state, federal, and private funding to implement transportation improvements. The vision of CMTA is to have a thriving metropolitan area which boasts an array of convenient transportation options, including a coordinated system of highways, and interconnected mass transit options to allow all citizens to move efficiently throughout the region.

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# Executive Summary: Regional Investments for Transit-Centered Communities

**Central Maryland once again finds itself at a turning point.** Between 1950 and 2000, Baltimore City lost nearly 300,000 residents, or 1/3 of its population, even as the Baltimore region grew by over 1 million people. This period included a shift in Baltimore's economy as manufacturing jobs declined, and many residents and employment opportunities relocated to the suburban parts of the region.

During this period of economic transition, **transportation investments in the region fueled the suburban migration.** Highway networks were designed to provide fast, easy access to downtown Baltimore and growing regional job centers such as Columbia Town Center and Towson. Existing regional rail transit lines were designed to provide regional mobility for commuters to and from Central Baltimore. **Regional land use patterns decentralized to take advantage of the high-speed mobility provided by the regional network.** This process increased economic and ethnic disparities, as those with means chose to relocate to more decentralized locations, while those without were left with fewer options. The self-reinforcing pattern can be seen in the blocks of vacant and abandoned housing in parts of Baltimore City and a shortage of retail options for current residents. The smaller tax base leads to poor school performance and cutbacks to city services even as tax rates in Baltimore City remain higher than surrounding counties and weaken the residential market.

**However, Central Maryland is poised for strong economic growth,** particularly in the health care, technology, and defense sectors. This growth could be threatened, though, if regional transportation and housing issues are not addressed in tandem. The potential for growth in Central Maryland mirrors national demographic and economics trends, and the same trends that fueled the suburban expansion in past decades now point to reinvestment in existing urban and suburban centers and transit accessible neighborhoods. The increase in the cost of driving means that the market

grows for neighborhoods with good access to jobs and services.

**The recent nationwide housing boom and movement back toward central cities had a positive impact in Central Maryland,** from new activity downtown to the revitalization of several close-in neighborhoods. Other large-scale forces, including the Base Realignment and Closure (BRAC) process that will bring thousands of new jobs and residents to the region, as well as continued transit investment guided by the Regional Rail Plan, set the stage for a new era in Central Maryland. At the same time, the economic downturn and foreclosure crisis of the past 18 months show the fragility of these gains, and the need for strategic action on a number of transportation and development issues simultaneously.

**The continuing and expanding prosperity of Central Maryland will rely on transit investments that continue to link jobs and housing while creating the types of neighborhoods in which people will want to live.** Transit-oriented development (TOD) is the term for these connections between the regional transit network and the places where people live, work, and play that give people real housing and transportation choices. TOD creates the opportunity to:

- Increase "location efficiency" so people can walk and bike and take transit;
- Boost transit ridership and minimize traffic to improve air quality and public health;
- Provide a rich mix of housing, shopping and transportation choices;
- Generate revenue for the public and private sectors and provide value for both new and existing residents; and
- Create community value and foster interaction through public amenities, such as parks and schools.

**TOD should not be thought of as a one-size fits all development solution, but rather a paradigm shift to focus on creating high-quality, strong communities connected by a multi-modal transportation network.** This report identifies key challenges and opportunities to move toward the transit-oriented development end of the spectrum, as well as identifying key locations, strategies, and tools for accomplishing this shift.

## TOD as a Tool for Change

The goals of TOD are broader than simply a better and more efficient transportation system and can be broken down into two primary goals: one regional and one local.

At the regional level, TOD can **facilitate and generate additional momentum for market-driven TOD investment that can be self-sustaining over time**. This goal relies on transportation networks and development patterns that support:

- **Access to economic opportunity** by linking residents with employment and service destinations and supporting synergistic growth of job centers;
- **Lower combined housing+ transportation costs** through the reduced need to own and drive cars to get to work and daily needs;
- **Reduced public infrastructure costs** by directing compact development to existing developed areas while preserving regional open space and farmland;
- **Improved public health** by creating walkable neighborhoods that encourage physical activity; and
- **Cleaner air and water** by reducing traffic congestion and air- and water-based pollution.

At the local level, TOD can **direct the velocity and trajectory of neighborhood change when necessary to provide neighborhood stability**. This goal relies on transportation and development investments that:

- **Support community-based projects** that maximize the benefits transit hubs can offer Baltimore's low- and moderate-income communities;
- **Build transportation and housing** that can make targeted neighborhoods more regionally competitive; and
- **Promote the integration of a variety of investments** to address issues such as weak real estate markets, vacant and abandoned housing, undeveloped and underutilized land, and the disconnects between low-income people and affordable

housing, employment and asset-building opportunities available in the region.

As TOD takes hold across the region, it is important to incorporate these Transit-Centered Community Development goals, so that all residents of Central Maryland have access to the benefits of TOD.

The regional and community goals for TOD are not mutually exclusive. They will help shape the recommendations about *where* investments in transit and TOD should be focused.

## How to Use This Report

**TOD depends on multiple stakeholders and any successful TOD effort will engage a range of actors.**

Each of these stakeholder groups will approach TOD with different tools at their disposal. This report contains sections that will be of primary interest to key stakeholders, including:

- **State, Regional, and Local Agencies, Non-Profit Advocates, and Philanthropic Foundations** should use Chapter 1 to understand key trends and regional issues and Chapter 2 to understand priority locations for TOD planning and investment, and Chapter 3 to understand the approaches and tools in implementing TOD in any particular location.
- **Market Developers** should use Chapter 2 to understand priority regional locations for TOD investments and Chapter 3 to understand the approach and tools in creating transit-centered communities.
- **Community Associations, Organizers, and Community-Based Developers, and the General Public** should begin with Chapter 3 to understand how TOD can be approached in their neighborhoods, but should also use Chapters 1 and 2 to understand how their communities fit into the regional context.
- **All Stakeholders** should use Chapter 4 to understand how the regional issues, priority locations, and local approaches can be implemented through a series of investments and actions.

## Transit and TOD in Central Maryland

### Transit-oriented development depends on a high-quality, robust public transportation system.

Transit access becomes more valuable and desirable as the transit network grows, and transit becomes more useful in connecting people with where they need to go on a daily basis. In addition to the transit system, walking and bicycling are important components in a successful multi-modal transportation system that provides people with true travel choice. In August 2002, an Advisory Committee composed of a broad cross-section of regional stakeholders recommended a Regional Rail System Plan to guide buildout of the system. The plan, which envisions a 40-year buildout, was the first comprehensive rail system planning effort in nearly 40 years, and includes the construction of several major investments:

- the east-west Red Line from the Security Square area in Baltimore County to Canton and Dundalk;
- the north-south Yellow Line linking with the existing Blue Line and connecting Towson, the Homewood Campus, and Mount Vernon Square, as well as connecting south and west to Columbia Town Center;
- an extension of the Green Line to Martin State Airport; and
- upgrades to the MARC system with infill stations and increased service (called the Purple and Orange lines).



Existing Blue Line Light Rail on Howard Street (Source: Center for Transit-Oriented Development)

**Baltimore already has successful examples of transit-oriented development.** Clipper Mill, Mt. Vernon Square, and some of the neighborhoods originally developed around the historic streetcar network are all examples in the region. Historic neighborhoods like Fells Point and recent redevelopments like the Inner Harbor also contain the basic framework that lead to successful TOD. Transit provided the framework for the traditional pattern of Central Maryland, too, when streetcar lines radiated outward from central Baltimore connecting to outer neighborhoods and the first suburbs.



Clipper Mill is an example of recent TOD in the region (Source: Center for Transit-Oriented Development)

But it is clear from examples within Baltimore and around the United States that merely placing transit in compact neighborhoods or fostering development around transit is not sufficient to generate the full range of TOD benefits. Rather, in order to affect change, a transit system must connect enough employment, entertainment, and community destinations that it offers a level of access that it can compete with automobile ownership and uses. Just as important, the destinations themselves must offer substantial opportunities such that expanding access to them creates real value to those living near other stations within the system.

**Reinvigorating TOD in Central Maryland will require a shift in mind set and collaborative planning efforts at multiple geographic scales and among multiple partners.** These collaborative efforts are already emerging, and need to be strengthened in order to build on the recent progress.



## Regional Conditions for Transit and TOD

Chapter 1 provides an assessment of the future possibilities, opportunities, and challenges for transit-oriented development through an assessment of the existing conditions in the region.

In understanding existing conditions in the region, there are a few key points that set the stage for how to look at opportunities into the future.

- TOD Housing Demand:** The regional demand for housing near transit will exist, but it will come from a diverse set of households. *TOD will need to serve multiple household types and incomes, and existing affordability needs to be preserved as the market develops.*

### 2030 TOD Demand

Household Type	2030 TOD		
	Demand	% of Total	National %
Singles and Non-Family Households	107,651	48%	33%
Married Couple Family Households	73,300	33%	56%
Other Family Households	44,057	20%	10%

Demand for transit-accessible locations comes from a variety of household types, and TOD plans should account for this demand (Sources: Center for Transit-Oriented Development, 2000 US Census, Baltimore Metropolitan Council)

- Regional Employment Clusters:** The Regional Rail Plan will serve many of the employment clusters in the region, but employment has been decentralizing in a way that is difficult to serve by transit. *TOD will need to include a mix of destinations to make transit access useful, and regional employment should be concentrated in transit-served locations.*
- Market Challenges:** Continued neighborhood disinvestment creates obstacles to economic prosperity. Vacancy, disinvestment and abandonment in areas served by transit make revitalization efforts difficult. *TOD will need to address community development approaches as well as real estate development ones.*

- Regional Transit Investment:** The Regional Rail Plan envisions a 40-year buildout of the transit network, when Central Maryland needs improved transit options today. *TOD can provide the framework and impetus for accelerated investment in the regional transit network.*

### Transit Ridership Trends

	Weekday Change Q107-Q408	
	Baltimore Region	National [1]
Blue Line (Light Rail)	57%	14%
Green Line (Heavy Rail)	20%	27%
MARC (System [2]) (Commuter Rail)	4%	21%

[1] National change also reflects new lines entering service

[2] MARC Penn and Camden line service averaged 23,500 daily riders in 2007.

Transit ridership in Central Maryland has increased substantially over the last two years, and has mirrored national gains in ridership in the same period. (Source: American Public Transportation Association)

- Planning and Regulatory Needs:** All stakeholders need to be prepared to be opportunistic to implement transit and TOD solutions. *TOD will be more successful if local plans and zoning and funding sources are oriented toward implementing a TOD approach in the priority regional locations.*

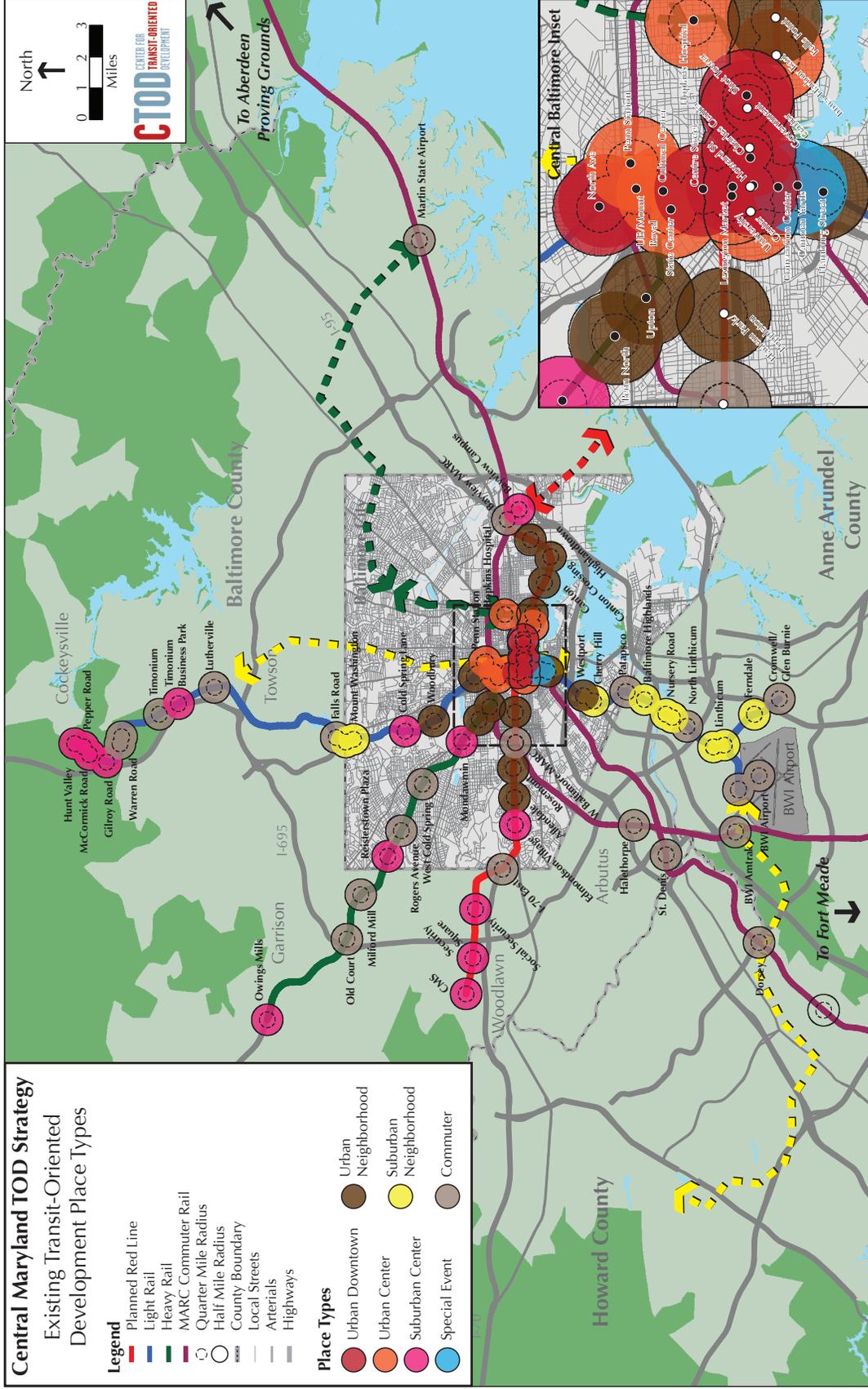
### TOD Opportunities

	Existing System		Red Line		Total	
	Acres [1]	Units	Acres [1]	Units	Acres [1]	Units
Baltimore City	1,556	21,530	106	16,874	1,662	38,405
Baltimore County	1,064	946	51	303	1,115	1,249
Anne Arundel County	382	1,102	0	0	382	1,102
Howard County	0	72	0	0	0	72
Total	3,002	23,650	157	17,177	3,159	40,828

[1] Note: Outside of Baltimore City, "Acres" refers to non-housing holding capacity. Within Baltimore City, "Acres" refers to housing holding capacity.

Holding capacities vary by station and by jurisdiction. Baltimore City has the majority of all development opportunity, but there will be some significant opportunities in outlying counties as well. (Sources: Baltimore City Department of Planning, Maryland Department of Planning)

- Partnerships and Process:** Regional stakeholders are open to creative solutions to open new opportunities for TOD: state and local agencies are developing new approaches to encouraging TOD and communities are embracing the opportunity TOD provides to help spur transit-centered community development. *TOD will depend on continuing existing partnerships and developing new ones.*



Existing transit-oriented development Place Types.

## Priority TOD Investment Locations

**Chapter 2 of the report provides a methodology for identifying critical locations for regional investment in TOD that can be updated and replicated into the future as conditions evolve.** “Investment” in this context is used broadly to refer to the commitment of resources, both financial and human, on planning or building development or infrastructure (physical or social). All stakeholders investing in TOD in any one location should also aim to achieve the long-term goal of fostering high-quality TOD throughout Central Maryland.

Investment in TOD or in neighborhood improvements around a transit station is generally a positive sign, and should be encouraged through supportive policies and programs. All TOD investments should also take a comprehensive view of programs and policies that can help realize the full range of TOD benefits. These comprehensive strategies will include investments in human capital, neighborhood services, and business development, and may well improve an area’s long-term prospects for TOD.

**Each stakeholder group involved in TOD brings its own goals and objectives to investment decisions.** Public, private, and non-profit actors may each weigh certain criteria more heavily than others, and may have existing commitments and investments to honor. In making investment decisions, each individual stakeholder or stakeholder group must evaluate the opportunity using their own criteria.

The transformative potential of TOD can be realized through investments that:

- Facilitate and generate momentum for market-driven TOD investment at the regional level
- Direct the velocity and trajectory of neighborhood change at the local level.

These two specific goals have a high degree of commonality among stakeholders and can be used to identify priority locations for TOD investment by multiple stakeholders. These goals often overlap, but there can be some divergence, and ensuring that priority investments are advancing at least one of these goals is critical in realizing the full potential of TOD investments.

The two goals are not mutually exclusive. For instance, where there is the potential for investments to lead to market momentum (Goal 1), there may also be the need to address issues like gentrification and displacement (Goal 2). However, there may also be cases where the goals are at odds with each other. For instance, some rapidly changing neighborhoods may not offer the potential to build long-term momentum for TOD. In these cases, where only one of the goals will be met by investment, the tradeoffs need to be weighed by multiple stakeholders in choosing to invest.

**Each of the two goals involves a different set of indicators when prioritizing station areas for investment.** The indicators under the first goal, to “facilitate and generate momentum for market-driven TOD investment” can be broadly categorized as *market opportunity*. Under the second goal, when considering which stations areas most in need of intervention “to direct neighborhood change,” indicators relating to *demographic change* are most important.

Assessing the priority of any location requires analysis of both sets of indicators. Because of the limited resources of regional stakeholders to take on new commitments for TOD, the top tier of priority locations—in addition to ongoing existing commitments for TOD implementation—may occupy much of the short- to mid-term investment capacity. For this reason, this study recommends focusing on the locations that received a Tier 1 rating in one goal and at least a Tier 2 rating in the other to focus implementation resources. There may be some additional locations with Tier 2 priorities for each goal that are important near-term locations.

**When identifying priority locations for investment, it is useful to think beyond individual station areas and see where there may be clusters of high priority locations.** In these situations, strategies and investments can be directed to a larger area, which can both generate momentum and address changes as appropriate. The chart and map on the following pages identify the current priority locations for TOD in the region based on available data. Full comparisons for all stations are included in the full report as Appendix B.

		Direct Trajectory of Neighborhood Change			
		Tier 1	Tier 2	Tier 3	Tier 4
Catalyze Momentum for Market-Driven TOD	Tier 1	<ul style="list-style-type: none"> <li>• N.A.</li> </ul>	<ul style="list-style-type: none"> <li>• U of B/Mount Royal</li> <li>• Centre Street</li> <li>• Lexington Market</li> <li>• University Center</li> <li>• Pratt Street/ Convention Center/ Howard Street</li> <li>• State Center/Cultural Center</li> <li>• Shot Tower/Market Place/Gov't Center</li> <li>• Harlem Park/Poppleton</li> </ul>	<ul style="list-style-type: none"> <li>• Pepper Road</li> <li>• McCormick Road</li> <li>• Charles Center Metro</li> <li>• Canton Crossing</li> </ul>	<ul style="list-style-type: none"> <li>• N.A.</li> </ul>
	Tier 2	<ul style="list-style-type: none"> <li>• Woodberry</li> <li>• Camden Yards</li> <li>• Westport</li> <li>• Mondawmin Metro</li> <li>• Penn North Metro</li> <li>• Allendale</li> <li>• West Baltimore MARC</li> <li>• Edmondson Village</li> <li>• Inner Harbor East</li> <li>• Fells Point</li> <li>• Canton</li> <li>• Highlandtown</li> </ul>	<ul style="list-style-type: none"> <li>• North Avenue</li> <li>• Owings Mills</li> <li>• Reisterstown Plaza</li> <li>• Rogers Avenue</li> <li>• Johns Hopkins Medical Center</li> <li>• Penn Station</li> <li>• Rosemont</li> </ul>	<ul style="list-style-type: none"> <li>• Hunt Valley</li> <li>• Warren Road</li> <li>• Ferndale</li> <li>• Cromwell/Glen Burnie</li> <li>• Upton Metro</li> <li>• Odenton</li> <li>• CMS</li> <li>• Security Square Mall</li> <li>• Social Security Administration</li> <li>• Bayview Campus</li> </ul>	<ul style="list-style-type: none"> <li>• N.A.</li> </ul>
	Tier 3	<ul style="list-style-type: none"> <li>• Hamburg Street</li> <li>• Patapsco</li> <li>• I-70 East</li> </ul>	<ul style="list-style-type: none"> <li>• Cold Spring Lane</li> <li>• Baltimore Highlands</li> <li>• BWI Business District</li> <li>• Old Court</li> <li>• Milford Mill</li> <li>• W. Cold Spring</li> <li>• Edgewood</li> </ul>	<ul style="list-style-type: none"> <li>• Gilroy Road</li> <li>• Timonium</li> <li>• Timonium Business Park</li> <li>• Lutherville</li> <li>• Nursery Road</li> <li>• North Linthicum</li> <li>• BWI Amtrak</li> <li>• Martin State Airport</li> <li>• Halethorpe</li> <li>• Dorsey</li> </ul>	<ul style="list-style-type: none"> <li>• St. Denis</li> <li>• Bayview MARC</li> </ul>
	Tier 4	<ul style="list-style-type: none"> <li>• Cherry Hill</li> </ul>	<ul style="list-style-type: none"> <li>• N.A.</li> </ul>	<ul style="list-style-type: none"> <li>• N.A.</li> </ul>	<ul style="list-style-type: none"> <li>• Falls Road</li> <li>• Mount Washington</li> <li>• BWI Airport</li> </ul>

= Critical TOD Priority Stations
 
 = Non-Priority TOD locations

= Regionally important TOD Stations



## Station Area Framework for Planning and Investment

Chapter 3 of the report provides a methodology for understanding how to approach planning and investment in any location, given real estate, development market, and demographic data.

The goal in developing this methodology was to create a framework that would help map out key planning and investment tools and strategies for the priority TOD and other locations throughout the region. Because each station and community is different, the methodology needs to account for real estate development opportunities, market activity, neighborhood demographics, and community development needs. The methodology is outlined in five steps:

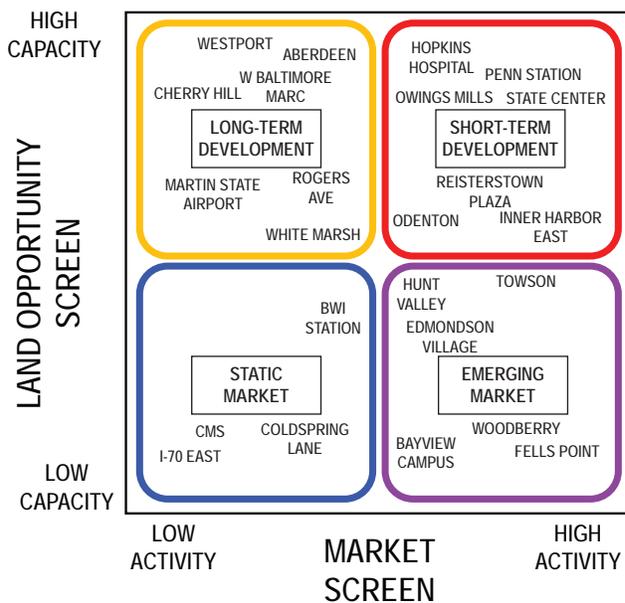
- What is the TOD opportunity?
- Who lives in the neighborhood?
- What are the approaches to TOD?
- What tools can be deployed to support the TOD Approach?
- Where are stakeholder resources needed?

Applying these steps to any station area yields a clear initial vision of how to accomplish TOD goals, and which stakeholders need to invest in an individual neighborhood. All of these tools and strategies need to be deployed through engagement with the local residents and businesses. The physical outcomes and implementation priorities of TOD may differ among stations, but this methodology will provide regional stakeholders with a clear path toward implementing high-quality TOD throughout the region.

There are two key sets of indicators in analyzing the TOD Opportunity:

- Land Opportunity: is there land available for development in the form of vacant, underutilized, or publicly held properties?
- Market Activity: is there already market activity in the form of construction permits for development activity, rising sales or rental prices, or high volumes of transactions?

These indicators exist on a continuum from low to high, and the level of activity and development opportunity can change over time. The four quadrants of low and high on each scale provide a framework for thinking about different types of TOD opportunities.



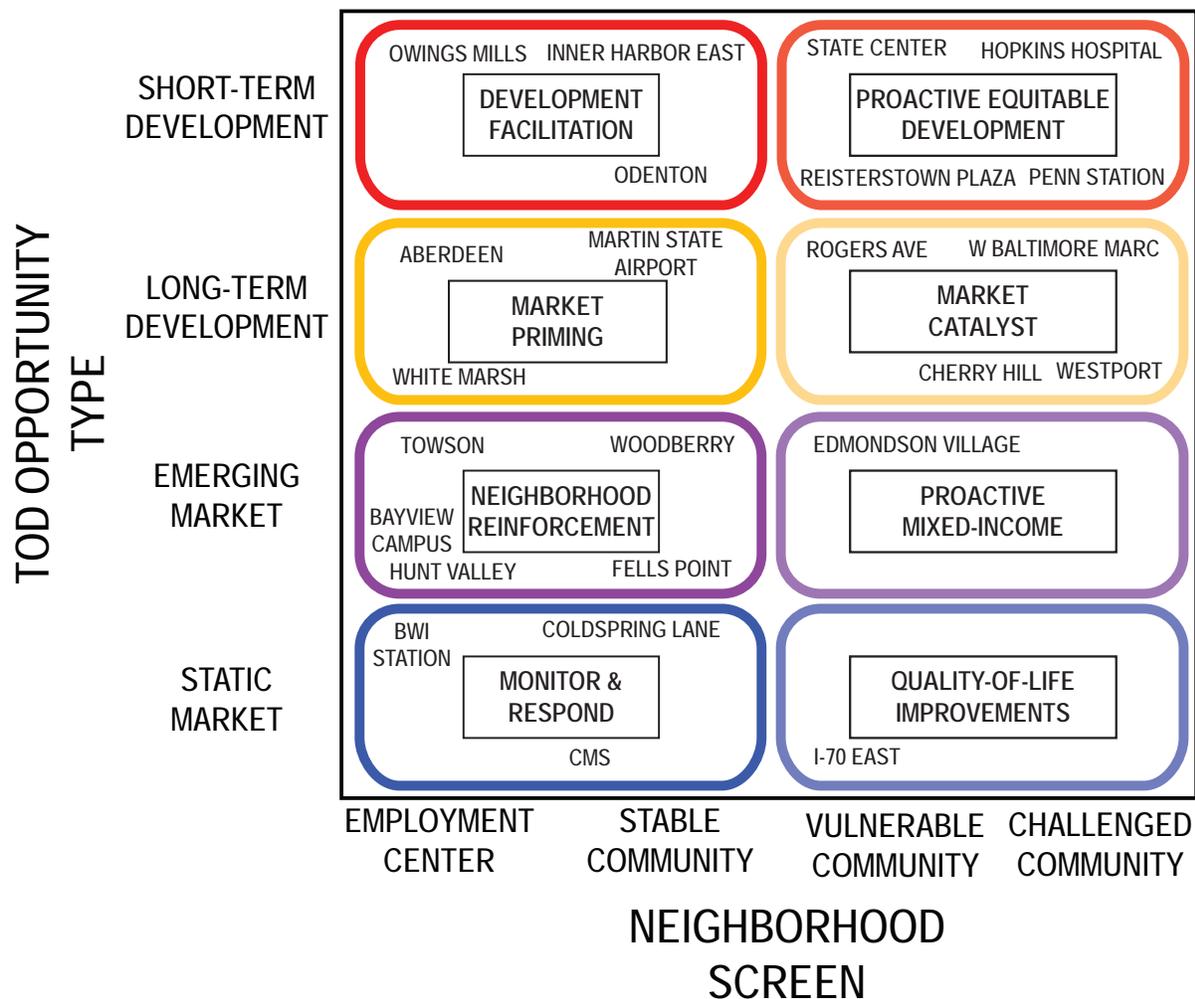
TOD Opportunity Types with example stations

The third set of indicators has to do with who is currently living in the neighborhood, and what this means in terms of investment strategies and the appropriate tools. In this case, a different set of indicators is needed that can help identify what some of the key needs and challenges will be moving forward with TOD implementation.

These indicators again existing along a continuum that can be broken down into four basic neighborhood types that is flexible and can change over time:

- Employment Centers
- Stable Neighborhoods
- Vulnerable Neighborhoods
- Challenged Neighborhoods

These categories do not identify the long-term TOD vision for any particular place—what is an Employment Center today may become a mixed-use neighborhood in the future—but does relate to the TOD Approach and the types of tools that would be deployed in any particular place.



TOD Approach Types with example stations.

There is commonality among the TOD Approaches, but there are also some key differences. Some will be more targeted to investment in new TOD construction, while others will be targeted to investment in preservation and community development outcomes. Some will rate equitable TOD as a top priority and reason for engagement, while others will be able to leverage equitable outcomes from TOD, while accomplishing other priorities.

Using this framework, we can identify an appropriate TOD Approach for existing and planned stations as a starting point for approaching TOD planning in individual locations. These broad approaches need to be implemented through policy and investment tools.

In an era of limited resources, making investment decisions necessitates a comprehensive approach. Given the multiple stakeholders engaged in transit-oriented development, communication and coordination across stakeholders is especially important.

The relative resource intensity and priority in a particular location will vary for each stakeholder engaged in TOD planning and implementation based on the TOD Approach.

## TOD Strategic Action Plan

The TOD Strategic Action Plan in Chapter 4 synthesizes the analysis and recommendations to guide TOD implementation in Central Maryland.

The Action Plan has five major strategies to achieve TOD goals. The brief synopsis here is expanded in depth in the full report.

### Strategy 1: Complete existing projects to demonstrate high-quality TOD in the region

There are already a multitude of existing and future TOD projects planned throughout Central Maryland. These projects should be completed in keeping with the core TOD principles (as outlined in Chapter 1) in order to demonstrate the feasibility and quality of TOD in the region. Specific actions to be completed include:

- Implement State Center TOD Plan.
- Complete the Metro Centre at Owings Mills.
- Complete the Uplands Housing Redevelopment and Edmondson Village Shopping Center Transformation.
- Finish implementation of EBDI project.
- Complete implementation of Inner Harbor East Master Plan.
- Implement Westport Plan.
- Implement Charles North Vision Plan.
- Implement West Baltimore MARC Plan.

### Strategy 2: Develop new corridor-level initiatives in key regional locations for TOD

Key stakeholders in all sectors should focus time and investments on new projects at the corridor-level that will promote a new vision of mixed income neighborhoods, transit activity centers, and making regional employment centers and targeted station areas more accessible and connected. Suggested projects that can accomplish this vision are:

- Complete planning for the Howard Street / Blue Line Corridor Streetscape and Development.

- Formulate a Red Line East Mixed-Income TOD Strategy.
- Engage in a Red Line / Security Boulevard TOD Opportunity Study.
- Develop a Vacant Property Strategy for the Red Line West / Edmondson Avenue corridor.
- Initiate a Green Line / Reisterstown Road Corridor TOD Strategy.

### Strategy 3: Modify local, regional, and state policies to support TOD

Local, regional and state stakeholders should focus efforts on improving and then deploying the planning and regulatory tools listed below. These tools provide investment funds that can be allocated towards TOD projects.

- Target State Economic and Community Development Incentives.
- Modify State/Local TIF District Formation to Support TOD.
- Renew and Adequately Fund State Historic Tax Credit.
- Implement Land Banking Strategy to Streamline and Reform Land Acquisition and Disposition in Baltimore City.
- Develop Incentives for High-Quality, Green Design of Transit-Centered Communities.
- Develop Regional Revenue and Financing Mechanisms to Accelerate the Implementation of the Regional Rail Plan.

### Strategy 4: Construct transit and multi-modal transportation systems to support TOD

Use federal money and other funding sources to implement the regional transit plan by continuing efforts toward building the Red Line and planning for other lines in concert with making existing transit stations more accessible. Specific projects to focus on are:

- Complete the Red Line.

- Focus transportation capital funding on priority station locations.
- Initiate Yellow Line Corridor Transit and TOD Planning.
- Implement MARC Growth & Investment Plan.
- Develop regional capital funding stream for multi-modal access improvements.
- Complete Buildout of Regional Rail Plan.

**Strategy 5: Foster cross-sector partnerships and build local capacity for TOD implementation**

TOD involves many different stakeholders, each with their own set of goals and priorities. However, not one stakeholder can accomplish TOD alone. It is important that representatives from the public and private sectors, community advocates, philanthropic organizations, and others collaborate to build a common goal or vision for TOD implementation. This can be done through coordination of policy reform efforts, joint investment in TOD, through community visioning and planning processes.

- Continue and expand TOD Strategy Steering/Implementation Committee to share strategies and implementation needs.
- Engage in community outreach and organizing to empower participation in existing and priority locations for TOD.
- Develop and deploy commuter incentives through public/private/non-profit partnerships.
- Explore public-private partnerships to advance transit-oriented development.
- Explore public-private partnerships to deliver infrastructure investments faster than otherwise possible.

**Implementing TOD in Central Maryland will be an ongoing process, and not all initiatives can move forward at the same time.** Being mindful of

the ongoing process of TOD implementation, and the challenges/barriers that could impede it, the Action Plan identifies implementation time frame for each activity as follows:

- Short-term strategies can be initiated in 1-3 years
- Mid-term strategies can be initiated in 3-5 years
- Long-term strategies will take 5 years and beyond to initiate.

Because TOD implementation will be an ongoing process, actions initiated within each time frame may well take much longer to fully implement.

**The TOD Strategic Action Plan will require coordinated effort from multiple stakeholders on both transit and development visioning, planning, and building projects.** To support coordination and implementation, this report provides a table that identifies each strategy, action, lead and support stakeholders, key steps, and the time frame for initiation that can serve as a guide for realizing a transit-centered vision for Central Maryland.

The map on the next page highlights the short-term planning and investment activities outlined in the TOD Strategic Action Plan.



## Introduction: Mapping a Transit-Oriented Future for the Region

Central Maryland has undergone radical changes in the last fifty years, and once again finds itself at a turning point. The metropolitan region has weathered difficult economic times. Growth in the region has been stagnant for several decades, and the population of Baltimore City has declined precipitously. Between 1950 and 2000, Baltimore City lost nearly 300,000 residents, or 1/3 of its population, even as the Baltimore region grew by over 1 million people<sup>1</sup>. This period included a shift in Baltimore's economy as manufacturing jobs declined, and many residents and employment opportunities relocated to the suburban parts of the region.

During this period of economic transition, transportation investments in the region fueled the suburban migration. Highway networks were designed to provide fast, easy access to downtown Baltimore and growing regional job centers such as Columbia Town Center and Towson. Existing regional rail transit lines were designed to provide regional mobility for commuters to and from Central Baltimore. The regional transit system now plays a different role than the historic streetcar network, which anchored communities with a range of mobility choices. Following these transportation investments, regional land use patterns decentralized to take advantage of the high-speed mobility provided by the regional network. This process increased economic and ethnic disparities, as those with means chose to relocate to more decentralized locations, while those without were left with fewer options. The self-reinforcing pattern can be seen in the blocks of vacant and abandoned housing in parts of Baltimore City and a shortage of retail options for current residents. The smaller tax base leads to poor school performance and cutbacks to city services even as tax rates in Baltimore City remain higher than surrounding counties and weaken the residential market.

However, Central Maryland is poised for strong economic growth, particularly in the health care, technology, and defense sectors. This growth could be threatened, though, if regional transportation and housing issues are not addressed in tandem. The potential for growth in Central Maryland mirrors national demographic and economics trends, and the same trends that fueled the suburban expansion in past decades now point to reinvestment in existing urban and suburban centers and transit-accessible neighborhoods. The demographic groups that have traditionally favored close-in, transit-accessible locations—primary among them the young and the elderly—are today growing fastest. The increase in the cost of driving means that suburban locations—for both jobs and housing—are less and less attractive, while the market grows for neighborhoods with good access to jobs and services.

The recent nationwide housing boom and movement back toward central cities had a positive impact in Central Maryland, from new activity



Figure 1: Regional growth has been slow, while Baltimore City's population has declined significantly since 1950, but is projected to level off. (Source: Baltimore City)

downtown to the revitalization of several close-in neighborhoods. Other large-scale forces, including the Base Realignment and Closure (BRAC) process that will bring thousands of new jobs and residents to the region, as well as continued transit investment guided by the Regional Rail Plan, set the stage for a new era in Central Maryland. At the same time, the economic downturn and foreclosure crisis of the past 18 months show the fragility of these gains, and the need for strategic action on a number of transportation and development issues simultaneously.

The continuing and expanding prosperity of Central Maryland will rely on careful and prudent transit investments that continue to link jobs and housing, and people with their destinations, while creating the types of neighborhoods in which people will want to live. Transit-oriented development (TOD) is the term for these connections between the regional transit network and the places where people live, work, and play that give people real housing and transportation choices. TOD creates the opportunity to:

- Increase “location efficiency” so people can walk and bike and take transit;
- Boost transit ridership and minimize traffic to improve air quality and public health;
- Provide a rich mix of housing, shopping and transportation choices;
- Generate revenue for the public and private sectors and provide value for both new and existing residents; and
- Create community value and foster interaction through public amenities, such as parks and schools.

TOD exists on a continuum moving from auto-oriented development—with a lack of travel options and separated, isolated land uses on end—to TOD on the other. TOD should not be thought of as a one-size fits all development solution, but rather a paradigm shift to focus on creating high-quality, strong communities connected by a multi-modal transportation network. This report identifies key challenges and opportunities to move toward the transit-oriented development end of the spectrum, as well as identifying key locations, strategies, and tools for accomplishing this shift.



Figure 2: TOD exists on a continuum with auto-oriented development.

## Contents of This Report

This report has been developed through a year-long process of both quantitative and qualitative analysis of the state of transit and TOD in Central Maryland. The outcome of this report is a series of recommendations on how and where to invest in transit and TOD throughout the region. These recommendations can be used by public agencies, private-sector developers, non-profit advocates and service providers, and individual citizens to determine how they fit into the transit-oriented future in the region. There are four chapters of the report:

- **The Introduction: Mapping a Transit Oriented Future for the Region** provides an overview of the study, as well as the goals, stakeholders, and scales of TOD.
- **Chapter 1: Regional Scan of Existing Conditions** provides a data-based analysis of existing transit and demographic conditions in the region, and some broad recommendations for how to accelerate the scope and scale of TOD in the region.
- **Chapter 2: Understanding Priority Areas for TOD** provides an analysis of where the key locations in the region will be to meet the goals of building market momentum and addressing rapid neighborhood change. This chapter identifies the critical areas that need investment, but is not intended to identify the *only* areas where TOD investment will be important.
- **Chapter 3: Station Area Framework for Planning and Investment** provides a methodology for understanding how to approach planning and investment in any location, given real estate, development market, and demographic data. This chapter also provides an assessment of the types of station areas and TOD strategies that will be important for each stakeholder group.
- **Chapter 4: TOD Action Plan** synthesizes the findings of Chapters 1-3 and provides a set of recommended transit and TOD planning and investment activities in the region.

## Transit-Oriented Development as a Tool for Change

The goals of TOD are broader than simply a better and more efficient transportation system and can be broken down into two primary goals: one regional and one local.

At the regional level, TOD can **facilitate and generate momentum for additional market-driven TOD investment that can be self-sustaining over time**. This goal relies on transportation networks and development patterns that support:

- **Access to economic opportunity** by linking residents with employment and service destinations and supporting synergistic growth of job centers;

- **Lower combined housing + transportation costs** through the reduced need to own and drive cars to get to work and daily needs;
- **Reduced public infrastructure costs** by directing compact development to existing developed areas while preserving regional open space and farmland;
- **Improved public health** by creating walkable neighborhoods that encourage physical activity; and
- **Cleaner air and water** by reducing traffic congestion and air- and water-based pollution.

At the local level, TOD can **direct the velocity and trajectory of neighborhood change when necessary to provide neighborhood stability**. This goal relies on transportation and development investments that<sup>2</sup>:

- **Support community-based projects** that maximize the benefits transit hubs can offer Baltimore's low- and moderate-income communities;
- **Build transportation and housing** that can make target neighborhoods more regionally competitive; and
- **Promote the integration of a variety of investments** to address issues such as weak real estate markets, vacant and abandoned housing, undeveloped and underutilized land, and the long-standing disconnects between low-income people and affordable housing, employment and asset-building opportunities available throughout Central Maryland.<sup>3</sup>

As TOD takes hold across the region, it is important to incorporate these Transit-Centered Community Development goals, so that all residents of Central Maryland have access to the benefits of TOD.

The regional and community goals for TOD are not mutually exclusive, and do not conflict with the broader goals and outcomes above. They will help shape the recommendations about *where* investments in transit and TOD should be focused.

### *The Benefits of Transit-Oriented Development*

In 2005, MDT, MTA, Baltimore City, and Baltimore County identified the benefits of TOD as transit investment and development that:

- Attracts additional resources and improvements to communities;
- Provides additional mobility choices;
- Increases public safety through more “eyes on the street”;
- Increases transit ridership;
- Reduces rates of vehicle miles traveled (VMT)--a primary contributor to greenhouse gas emissions;
- Increases household disposable income by supporting reduced car ownership and driving distances;
- Reduces air pollution and energy consumption rates;
- Helps conserve resource land and open space;
- Encourages economic development;
- Contributes to the creation of more affordable lifestyles through both housing and transportation costs; and
- Decreases local infrastructure costs.

### *TOD Principles*

At the same time that these benefits were being articulated, the same stakeholders developed a set of “Development-Oriented Transit Principles” to guide the planning of the Red Line. These principles can apply to future transit and TOD efforts in the region, and have served as a guide for this study as well. The principles are:

- Shape the Future
- Locate your Identity
- Transit Stations as Landmarks
- Connect Communities with Transit
- Be a Good Neighbor
- Complement Community Objectives
- Connect Places with Walking
- Pass the Test of Time
- Attract New Riders
- Create Partnerships

These principles refer not just to the design and implementation of transit projects, but also the planning and design of neighborhoods, corridors, and even the entire region.

## What is Transit in Central Maryland?

Transit-oriented development depends on a high-quality, robust public transportation system. Transit access becomes more valuable and desirable as the transit network grows, and transit becomes more useful in connecting people with where they need to go on a daily basis. In Central Maryland, the current transit network includes:

- the heavy rail Green Line from Owings Mills to Johns Hopkins Medical Center;
- the light rail Blue Line from Hunt Valley to BWI and Cromwell/Glen Burnie;
- the MARC Camden Line connecting Washington, DC to downtown/Camden Yards;
- the MARC Penn Line connecting both northeast and southwest from Penn Station; and
- MTA bus lines that serve a variety of destinations in the region.



Existing Blue Line Light Rail on Howard Street (Source: Center for Transit-Oriented Development)



In addition to this public transportation system, walking and bicycling are important components in a successful multi-modal transportation system that provides people with true travel choice. Efforts to support walking and biking as transportation options will also in turn support transit and TOD outcomes. Investments in streets and roads can be designed to benefit all users of the transportation system, from automobile users to transit users, pedestrians, and bicyclists. Transit funding should not be thought of as an isolated investment, but something that can support a range of travel options.

In August 2002, an Advisory Committee composed of a broad cross-section of regional stakeholders recommended a Regional Rail System Plan to guide buildout of the system. The plan, which envisions a 40-year buildout, was the first comprehensive rail system planning effort in nearly 40 years. and includes the construction of several major investments:

- the east-west Red Line from the Security Square area in Baltimore County to Canton and Dundalk;
- the north-south Yellow Line linking with the existing Blue Line and connecting Towson, the Homewood Campus, and Mount Vernon Square, as well as connecting south and west to Columbia Town Center;
- an extension of the Green Line to Martin State Airport; and
- upgrades to the MARC system with infill stations and increased service (called the Purple and Orange lines).

This study has taken the Regional Rail Plan as the basis for analysis of TOD opportunities in the region. Within this framework, this study has reassessed the priorities recommended in the plan from the perspective of transit investments that can also stimulate development response and move the region as quickly as possible toward realizing a transit-oriented future.

## What is TOD in Central Maryland?

Baltimore already has successful examples of transit-oriented development. Clipper Mill, Mt. Vernon Square, and some of the neighborhoods originally developed around the historic streetcar network are all examples in the region. Historic neighborhoods like Fells Point and recent redevelopments like the Inner Harbor also contain the basic framework that lead to successful TOD. Transit provided the framework for the traditional pattern of Central Maryland, too, when streetcar lines radiated outward from central Baltimore connecting to outer neighborhoods and the first suburbs.

But it is clear from examples within Baltimore and around the United States that merely placing transit in compact neighborhoods or fostering development around transit is not sufficient to generate the full range of TOD benefits. Rather, in order to affect change, a transit system must



Existing Green Line Heavy Rail at Rogers Avenue Station  
(Source: Center for Transit-Oriented Development)



Existing West Baltimore MARC Station with the Ice House potential TOD site  
(Source: Center for Transit-Oriented Development)



Clipper Mill is an example of recent TOD in the region  
(Source: Center for Transit-Oriented Development)



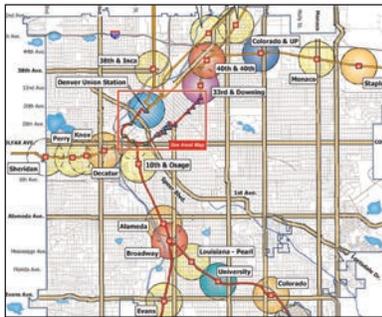
Development along Howard Street and elsewhere in central Baltimore was originally built to be oriented to transit and pedestrian activity  
(Source: James Willamar)

connect enough employment, entertainment, and community destinations that it offers a level of access that it can compete with automobile ownership and uses. Just as important, the destinations themselves must offer substantial opportunities such that expanding access to them creates real value to those living near other stations within the system.

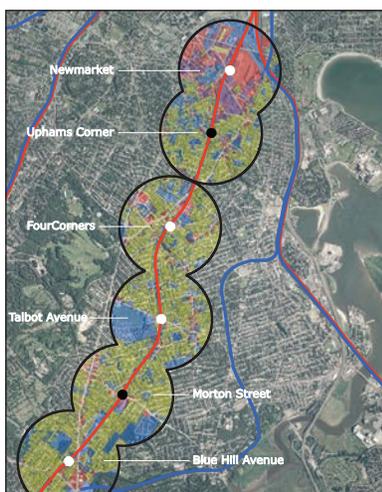
Reinvigorating TOD in Central Maryland will require a shift in mind set and collaborative planning efforts at multiple geographic scales and among multiple partners. These collaborative efforts are already emerging, and need to be strengthened in order to build on the recent progress.

### *Scales of TOD*

One key to building TOD in Central Maryland will be recognizing and supporting transit-oriented development at a range of scales:



The City and County of Denver developed a TOD Strategic Plan to guide development along existing and planned transit corridors (Source: City and County of Denver and Center for Transit-Oriented Development)



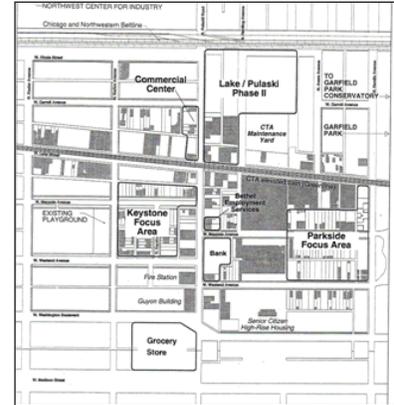
In the Fairmount Corridor, four CDCs are collaboratively planning for mixed-use, mixed-income TOD. (Source: Center for Transit-Oriented Development)

- City or Region Scale:** Multiple corridors in a city or region create a network of transit-oriented places and sites that integrate different functions and activity centers within easy access of transit. Planning at the regional scale can address problems such as need to connect job centers and the goal of providing disadvantaged communities to improved access to employment and retail opportunities. It is at this scale that overall mode shares and the health of a transit network can be most influenced. For example, the City and County of Denver, Colorado is thinking proactively about transit-oriented development opportunities around the 40 light rail stations that exist or will be built in the next 10 years. City and County staff are working to prioritize station-level planning processes, coordinate affordable housing and zoning policies, and engage with city residents about the opportunities presented by this major infrastructure investment initiative. The build-out of the regional FasTracks program, which will build five new rail lines in 15 years will transform the Denver region from an auto-oriented region into a region with improved mobility options that will shape regional growth for years to come.
- Corridor Scale:** The stations along a transit corridor support diverse and complementary transit-oriented neighborhoods. As connections between adjacent station areas are strengthened through transit, the amenities and opportunities in one area are made more accessible to others. Effective, integrated corridor-level planning can encourage the momentum of market activity between station areas, thus augmenting and diversifying development and other opportunities. For instance, in the Fairmount/Indigo Line Corridor, four community development corporations (CDCs) with contiguous boundaries have joined together to advocate for service upgrades and infill stations along an existing commuter rail corridor in Boston, Massachusetts. The CDCs are leading

the advocacy for affordable housing and equitable development along the corridor, focusing on both housing and employment solutions, as well as local transportation improvements beyond the rail upgrades.

- Station Area Scale:** Planning for TOD at the station area scale should aim to ensure that the 1/2-mile radius around a transit node contains a mix of uses and supports transit access and ridership. Planning at this scale should take into account the existing neighborhoods, since there are no one-size-fits-all solutions to TOD. Some neighborhoods may have good opportunities to grow neighborhood buying power through high-density, mixed-use development, while other neighborhoods may have more potential to take advantage of transit through street and roadway improvements. The Lake Pulaski Transit Village in Chicago, Illinois is an example of how incremental change over 25 years has supported the emergence of a district-wide transit village in a low-income neighborhood on Chicago's west side. Bethel New Life, a faith-based community development corporation has spearheaded the effort to revitalize the neighborhood. Affordable, energy-efficient housing in walking distance of the Pulaski/Lake El Station was the first stage of the village, followed by traffic calming and transit access efforts and a transit center adjacent to the station with a day care center, local-serving retail, an employment center, and a community technology center.
- Site scale:** Individual buildings and developments turn the principles of transit-oriented development into physical reality. The design of streets and buildings can have a large impact on the types of transportation choices people make. When buildings are designed to take advantage of walking and transit, with active ground-floor uses and high-quality materials, they encourage increased walking, biking, and transit, and contribute to neighborhood vitality. When streets are designed to safely balance the needs of all users, it becomes easier for people to take care of their daily needs using transit. Public spaces, too, can provide important community gathering places and centers for activity. The Fruitvale Transit Village, in Oakland, California, is centered on a linear public space, connecting from the BART station to the main commercial street in the neighborhood. This connection is used by residents and transit riders alike, and provides an important connection tying the development in with the neighborhood.

Buildings, neighborhoods, corridors, and regions that embrace transit-oriented development can reap the benefits of new community development partnerships and enhanced understanding among communities in addition to the physical development and infrastructure improvements. In order to fully realize these potential benefits, collaborative partnerships are required among the various stakeholders involved in transit and TOD decisions.



The Lake Pulaski Transit Village plan identifies key community needs and focus areas for development around an existing transit station. (Source: Bethel New Life, Inc.)



The Fruitvale Transit Village in Oakland, California is a good example of building and site design that takes advantage of transit access and creates high-quality public space. (Source: Metropolitan Transportation Commission)

### *TOD Stakeholders*

Transit-oriented development depends on a multitude of actors, from the public to the private and non-profit sectors, and engagement with the general public. Successful transit-oriented development can be defined as much by the planning process as by the tangible outcomes. There are a range of key stakeholders that will be engaged in any successful TOD planning effort, including:

- **State and Regional Agencies:** State departments of Transportation, Housing and Community Development, Economic Development, and Planning are all essential partners in transit and TOD planning in Maryland. The Baltimore Metropolitan Council can also be an essential partner, as many Metropolitan Planning Organizations (MPOs) are around the country. State and regional agencies bring both planning and capital resources to TOD implementation efforts.
- **Local Agencies:** Local agency staff is critical in making planning, and investment decisions for both land use and transportation. City and County planning, economic development, housing, and transportation staff are all stakeholders in TOD planning and investment. Local agencies bring both planning and capital resources, as well as regulatory and policy controls to TOD implementation efforts.
- **Market Developers:** A large responsibility for implementing transit-oriented development projects will rest on market developers of housing, office, retail, and other uses. These real estate professionals will have an important role not just in new construction, but also in the reinvestment in existing neighborhoods and structures. Market developers bring private capital and implementation resources to TOD efforts.
- **Community Associations:** Community associations are important stakeholders in every neighborhood-level TOD planning effort. These organizations provide important organizing capacity to develop TOD visions and make them a reality. Community associations bring organizing capacity to TOD implementation efforts and may also bring development implementation capacity.
- **Non-Profit Advocates, Organizers, and Community-Based Developers:** Because transit-oriented development is a tool for neighborhood revitalization and investment, job creation, and environmental protection, advocacy groups, regional, civic, and community based organizations such as CMTA have a critical stake in both planning and implementing TOD. Community engagement in planning for TOD depends on community-based organizations to bring their organizing resources to TOD visioning efforts, and many of these organizations also will be able to help implement TOD visions through development projects.

- **Philanthropic Foundations:** Central Maryland is lucky to be well-served by long-standing local and national foundation partners. These partners have an important stake in making TOD work in order to maximize the benefits of their mission-driven investments throughout the planning and implementation stages of TOD. National funders also have an important stake in creating models that can be replicated in other regions around the country. Philanthropic foundations bring resources for organizational development and support, and, in some cases, may bring additional capital resources for TOD implementation.
- **General Public:** The general public—residents, workers, employers, young and old, rich and poor—all have a stake in seeing transit and TOD investments made wisely. If done right, all of the benefits and outcomes detailed above will accrue to this most basic group of stakeholders. When engaged early and often in a meaningful way, the general public will have a vital role in shaping the TOD future of Central Maryland.

### *TOD Activities*

This study identifies the investment priorities, strategies, and activities that will move Central Maryland towards transit-oriented development at all scales and through all stakeholders. Through this, there are a set of activities which will be important throughout TOD planning and implementation activities:

- **Coordination among stakeholders:** No one stakeholder listed above can implement TOD on their own, and coordination among and within groups of stakeholders will be essential.
- **Community engagement and involvement:** Planning and investment in TOD needs to be something that happens *with* communities, rather than *to* communities. Early involvement and engagement throughout the process to understand local and regional visions is critical.
- **Planning and policy reform:** Local, regional, and state-level policies need to be shifted to take account of transit proximity and support the emergence of transit-oriented neighborhoods. Policies and programs from local zoning codes to state economic development incentives should be assessed for how they can support transit and TOD.
- **Infrastructure and development investment:** Capital investment for transportation and development, both public and private, should recognize the TOD opportunities and work to realize the potential of TOD.

All of these TOD activities will be discussed throughout this report and will play an important role in supporting the emergence of TOD in the region.

## Notes

- 1 City of Baltimore Comprehensive Master Plan 2007-2012. (2006).
- 2 These goals for Transit-Centered Community Development (TCCD) were developed through a community-based process led by the Baltimore Neighborhood Collaborative and engaging many public, private, non-profit, and community stakeholders.
- 3 Rachel F. Edds, AICP, and Chimere Lesane-Matthews. “West Baltimore and Transit-Centered Community Development: A Review of Community Plans and Exploration of Development Opportunities”, 2006.

# Chapter 1: Regional Conditions for Transit and Transit-Oriented Development

In assessing the future possibilities, opportunities, and challenges for transit-oriented development, it is important to understand the existing conditions in the region, and how the region has evolved to the point it is currently. In understanding existing conditions in the region, there are a few key points that set the stage for how to look at opportunities into the future.

- **TOD Housing Demand:** The regional demand for housing near transit will exist, but it will come from a diverse set of households. *TOD will need to serve multiple household types and incomes, and existing affordability needs to be preserved as the market develops.*
- **Regional Employment Clusters:** The Regional Rail Plan will serve many of the employment clusters in the region, but employment has been decentralizing in a way that is difficult to serve by transit. *TOD will need to include a mix of destinations to make transit access useful, and regional employment should be concentrated in transit-served locations.*
- **Market Challenges:** Continued neighborhood disinvestment creates obstacles to economic prosperity. Vacancy, disinvestment, and abandonment in areas served by transit make revitalization efforts difficult. *TOD will need to address community development approaches as well as real estate development ones.*
- **Regional Transit Investment:** The Regional Rail Plan envisions a 40-year buildout of the transit network, when Central Maryland needs improved transit options today. *TOD can provide the framework and impetus for accelerated investment in the regional transit network.*
- **Planning and Regulatory Needs:** All stakeholders need to be prepared to be opportunistic to implement transit and TOD solutions. *TOD will be more successful if local plans and zoning and funding sources are oriented toward implementing a TOD approach in the priority regional locations.*
- **Partnerships and Process:** Regional stakeholders are open to creative solutions to open new opportunities for TOD: state and local agencies are developing new approaches to encouraging TOD and communities are embracing the opportunity TOD provides to help spur transit-centered community development. *TOD will depend on continuing existing partnerships and developing new ones.*

In the remainder of this chapter, each of these key points is expanded in greater detail with both quantitative and qualitative analysis, along with recommendations for some broad policy and priority changes in the region.

## TOD Housing Demand

**Recommendation:** Prepare for the increasing demand for housing near transit from all incomes and household types by providing more of the amenities and investments in these areas. Amenities should be targeted toward the demographics most likely to choose to live near transit, including younger and older households.

### Demand for housing near transit exists and will continue to grow

Demographic and economic trends will continue to drive demand for housing near transit, which will create the potential for market momentum to revitalize currently disinvested neighborhoods. The Regional Rail Plan will link potential high ridership areas and regional employment areas. This study developed a regional estimate for housing demand near transit based on characteristics of households living near transit in the 2000 US Census and demographic trends. Based on demographic factors alone, the estimate predicts approximately 225,000 households will want to live near transit in the region by 2030, an increase of over 157,000 from 2000 levels.<sup>1</sup>

The estimate does not account for changing personal preferences due to increasing transportation costs, or desires for a more convenient lifestyle, and the changing perceptions of urban living that have led more households with children to remain in cities. This means the projection is likely a conservative one, but still predicts a demographic engine that will provide a built-in market for TOD that can be captured through new development close to transit. In fact, there is some reason to believe that the demand for housing near transit will exceed the demographic estimate. There has been strong demand in recent years for transit-accessible housing in Central Baltimore. Since it began its marketing campaign in 2002, Live Baltimore has documented net migration of around 2,000 people from the Washington, DC area to Baltimore with increases in each year of the campaign. Many of these relocatees will seek housing near MARC stations to continue to commute to DC-based jobs. The BRAC process will similarly increase regional demand for housing. While transit access may not be a primary driver of location decisions for BRAC relocatees, the MARC connections to both Fort Meade and Aberdeen do provide transit options that may influence some location decisions.

However, this market is not a monolithic one. There will be demand from both non-family and family households. In fact, the estimate predicts that 48 percent of the demand will come from singles or non-family households with no children. These households have traditionally favored denser, mixed-use neighborhoods that have good access to employment and entertainment centers. The other half of the demand, though, will come from family households, or those with children. These households have traditionally favored lower-density housing types, such as rowhouses or single-family detached housing. The split in demand means that development in transit-served areas will need to meet a range of housing needs, not cater to a single type of resident.

Household Type	2030 TOD		
	Demand	% of Total	National %
Singles and Non-Family Households	107,651	48%	33%
Married Couple Family Households	73,300	33%	56%
Other Family Households	44,057	20%	10%

Age of Householder	2030 TOD		
	Demand	% of Total	National %
15 to 34	50,867	23%	23%
35 to 64	100,081	44%	42%
65 and Older	74,059	33%	35%

Household Income	2030 TOD		
	Demand	% of Total	National %
Less Than \$20,000	74,058	33%	20%
\$20,000 - \$34,999	48,117	21%	16%
\$35,000 - \$49,999	32,681	15%	15%
\$50,000 - \$74,999	34,278	15%	19%
\$75,000 and Greater	35,873	16%	30%

Figure 3. Demand for transit-accessible locations comes from a variety of household types, and TOD plans should account for this demand (Sources: Center for Transit-Oriented Development, 2000 US Census, Baltimore Metropolitan Council)

The market is also diverse in income levels. Compared to the national market for TOD, current trends indicate the market in Central Maryland will come more from low- and moderate-income households making less than \$50,000 per year. Close to 70 percent of the demand will come from these households, as compared to 51 percent of the demand nationally. This reflects the need to plan for a mix of incomes around transit lines, but also the need to address the lack of demand from upper-income households for housing near transit in Baltimore. This may be partly due to a number of factors, including the demographic profile of who was living near transit in Baltimore in 2000, and the perceptions of quality of life factors, such as schools and public safety.

### Existing affordability needs to be preserved even as market develops

Despite the challenging economic conditions in the region, Baltimore, like most American cities, faces ongoing challenges in providing adequate affordable housing. Affordable housing that is located near transit has the potential to augment the housing benefits with transportation cost reductions, helping residents build wealth and move out of poverty. Currently, Central Maryland has over 13,000 units subsidized through the Federal Section 8 and Section 202 programs. 74 percent of these units are located within 1/2-mile of a rail station or a high-frequency bus line (greater than 15-minute headways). This is higher than the average of 58 percent found in a 20-city study currently being conducted by CTOD with the National Housing Trust. Additional transit-accessible affordable units have

**Recommendation:** Efforts to preserve existing affordable rental housing and prevent the displacement of low- and moderate-income homeowners is critical in supporting long-term mixed-income neighborhoods around transit. Targeting transit zones for both of these goals will ensure that all segments of the population will be able to benefit from transit access.

also been produced through the Low Income Housing Tax Credit Program and State bond programs.

While it is encouraging that there is this kind of linkage between affordable housing and transit, the study also shows the need to preserve this existing affordability, as over half of the units near transit have contracts that expire in the next five years. Once contracts expire, the units can revert to market rate, risking the displacement of thousands of residents.

The need to preserve and expand affordable housing opportunities near transit is also reflected in the current home foreclosure crisis in Maryland and nationwide. A 2008 study found that in the two years between January 2005 and December 2006, there were 6,438 foreclosures filed in Baltimore City, and these filings were disproportionately concentrated in predominantly African-American neighborhoods.<sup>2</sup> While the rate of foreclosure is lower than it was in 2000, there has been a rise since 2005, and this data predates the meltdown of the subprime market. Interestingly, the majority of foreclosures in the city have come on single-family rowhouses. While this is the predominant housing type in many parts of the city, it also suggests that the foreclosure issues continue to disproportionately impact low- and moderate-income homeowners who tend to live in these types of units.

	Total Units	% of Total	Elderly Units	Disabled Units	< Fair Market Rent Units	Units w/Expiring Contracts	Expiring Units as % of Total
Region	13,278						
1/2-Mile	9,873	74%	2,719	202	5,706	6,804	51%
1/4-Mile	8,361	63%	2,162	151	5,048	5,626	42%

Figure 4: Existing Federally subsidized units in Central Maryland (Sources: Center for Transit-Oriented Development, National Housing Trust)

## Regional Employment Clusters

**Recommendation:** Encourage regional concentration of employment around the transit network through policies and incentives to strengthen existing employment centers. These policies and incentives should be focused on potential high ridership sectors, such as information, biotech and professional sectors, but should also include a mix of employment opportunities for all sectors of the economy.

### Regional employment patterns are difficult to serve by transit

The continued decentralization of employment and spread of housing is difficult to serve with the current transit network or the planned expansion. Employment location and density are highly correlated with transit usage.<sup>3</sup> In Central Maryland, the highest density employment area is downtown Baltimore, but many relatively dense suburban employment centers have developed in recent decades. While the Regional Rail Plan will link many of the 21 employment clusters identified through this study, there is also the need to align the location of new housing with the transit network and these employment links, while at the same time reinforcing the clustering of employment uses in transit-supportive locations.

The current system captures under 20 percent of the regional jobs within 1/2-mile radius of stations, and with the Red Line this will increase only slightly, to about 22 percent. However, some of the sectors that have

been important for transit ridership in other regions are slightly more concentrated around transit stations.<sup>4</sup> Twenty-six percent of the region’s professional sector jobs and 30 percent of the information sector jobs are within 1/2-mile of an existing or planned transit station. Retail trade is one area that employment lags behind the regional average. This is consistent with the findings of the 2008 DrillDown analysis by Social Compact, which has found that nearly 700,000 square feet of additional grocery square footage could be supported within the Baltimore City and that there is the potential for additional retail of other types given the collective buying power of Baltimore City residents.<sup>5</sup>

Geography	Jobs	Jobs/Housing Balance	Employers	Jobs/ Employer	Professional Sector	Transportation, Warehousing, Utilities	Information Sector	Retail Trade	Public Admin.
Baltimore Region	1,188,455	1.13	62,957	18.9	10.4%	4.8%	3.1%	10.6%	6.5%
Existing Transit Zones	233,744	2.92	7,815	29.9	12.0%	5.7%	4.5%	5.7%	13.6%
Existing Transit Zones Regional Share	19.67%	N.A.	12.41%	N.A.	22.7%	23.4%	29.1%	10.5%	41.3%
Existing + Planned Transit Zones	259,243	2.11	9,140	28.4	12.6%	5.5%	4.2%	6.4%	12.2%
Existing + Planned Transit Zones Regional Share	21.81%	N.A.	14.52%	N.A.	26.2%	25.1%	30.0%	13.0%	41.3%

Figure 5: Regional Job Location and Key Ridership Sectors (Source: US Census 2004 LEHD, CTOD TOD Database)

System Size		Geography	Jobs
Region	(2030)		
Baltimore	Medium (Large)	Region	1,166,150
		Transit Zones	219,839
		TZ Share	18.9%
Philadelphia	Extensive (Extensive +)	Region	2,438,934
		Transit Zones	753,005
		TZ Share	30.9%
Washington	Large (Extensive)	Region	2,645,840
		Transit Zones	778,089
		TZ Share	29.4%
Denver	Small (Large)	Region	1,294,785
		Transit Zones	190,478
		TZ Share	14.7%
Portland	Large (Extensive)	Region	961,475
		Transit Zones	235,636
		TZ Share	24.5%
San Francisco	Extensive (Extensive +)	Region	3,215,695
		Transit Zones	1,022,367
		TZ Share	31.8%

Figure 6: Comparison of Employment location in Central Maryland with five other regions. System size determined by number of stations in system (Source: US Census 2004 LEHD, CTOD TOD Database)

**Recommendation:** *The Yellow Line, despite its complexity, will provide an important link in the network serving employment clusters in the region. Using employment connections as a means for prioritizing transit investments will help increase the utility of transit access in the region, and can help spur the market for both transit-oriented housing and jobs.*

### Use employment links to prioritize transit investments

In 2006, the employment clusters identified through this study near the planned buildout of the transit network contained approximately 309,000 jobs (or around 27 percent of the regional employment). Central Baltimore, including the Central Business District and the immediate surroundings, accounted for around nine percent of the regional employment total on its own. Providing access to this major employment cluster, with its diversity of employment types, is an important reason why the Red Line is such an important link the regional network.

Another critical link in the network will be the Yellow Line, especially the link connecting downtown Towson, an existing walkable, diversified employment center, the Johns Hopkins Homewood campus, and Central Baltimore. The clusters along this line account for four percent of the regional jobs, while the link south and west to Columbia Town Center would link another four percent, and could help catalyze the transformation of the area in to a more walkable, transit-supportive center.

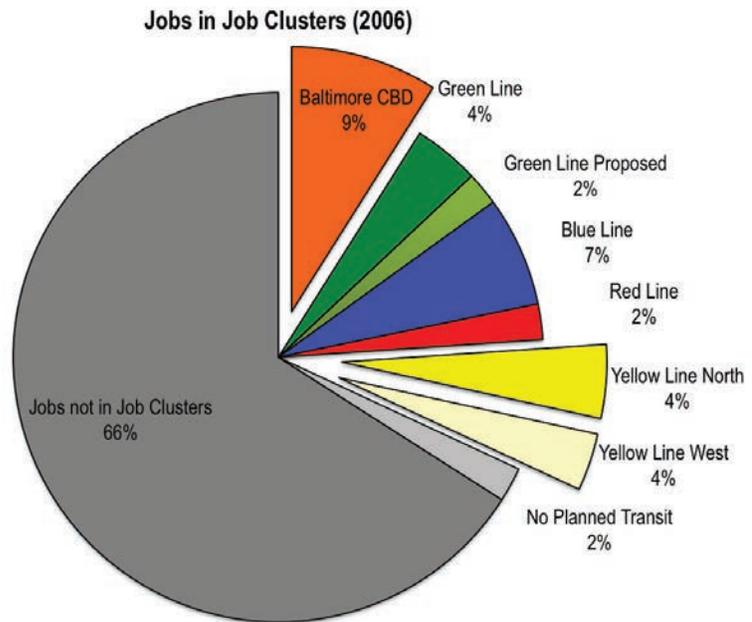


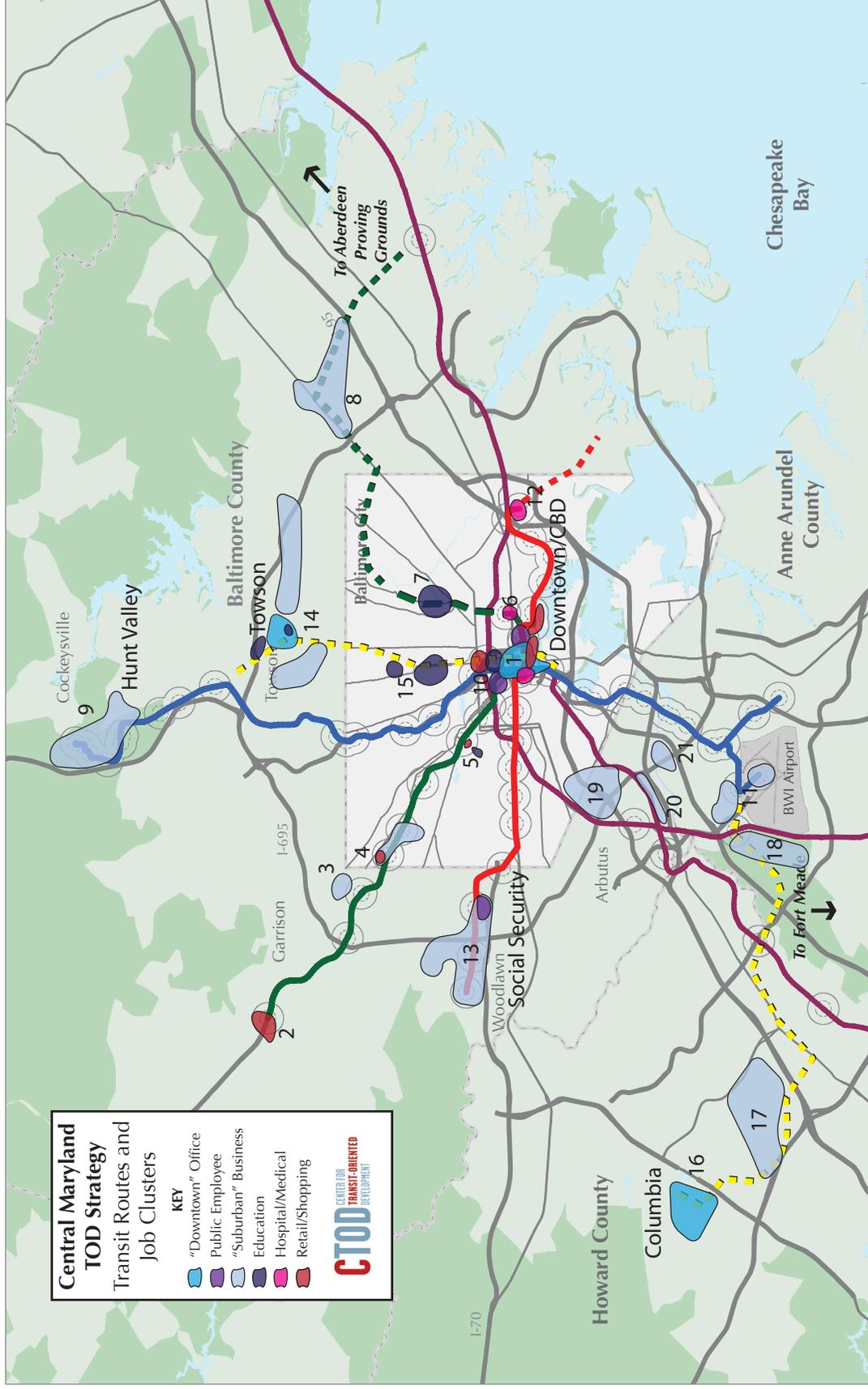
Figure 7: Potential transit-oriented job clusters are an important factor to consider in planning transit lines. Nearly 2/3 of regional jobs are not in employment clusters (but may still be near transit). (Source: US Census 2006 LEHD)

**Recommendation:** *Suburban single-use employment areas present an opportunity for TOD, but these areas may need infrastructure upgrades to support new levels of density and new types of uses.*

### Single-use employment areas provide an opportunity for new TOD

Many existing suburban employment centers are single-use areas without a balance of jobs and housing. Many single-use employment areas are clustered in the northern and southern suburbs around the existing transit network. This map also shows that there are roughly three zones in the region:

1. A core of high density housing and employment in Downtown Baltimore and immediately surrounding;



2. A band of moderate density housing areas without substantial employment; and
3. A suburban ring of employment zones located around regional highway network.

This is not an atypical pattern in American cities, and in other places focusing on TOD as a development strategy have seen much of the recent development activity treat each zone differently. In the central areas, the focus has been on high-intensity housing that complements the employment density and seeks to create an active 24-hour mixed-use neighborhood, appealing to younger residents. In the second zone, there has been a focus on infill housing and neighborhood serving retail serving more family households and older residents, while in the third zone, the focus has been on integrating residential uses and creating more mixed-use neighborhoods catering to a range of household types in existing employment centers.

Old malls and business parks are often some of the best opportunities for this kind of redevelopment because they are usually held in single or limited ownership and already have connections to regional transportation infrastructure. These locations can carry high costs for streets, sewers, and utilities, though.

## Market Challenges

### Continued neighborhood disinvestment creates obstacles to economic prosperity

Many neighborhoods around transit zones in the region are characterized by high rates of vacancy and abandonment and troubled by years of disinvestment in the real estate market. Compared with selected other regions from around the country, Baltimore has some of the highest rates of housing vacancy around transit stations. Baltimore also has a lower percentage of regional housing units near transit than some other systems around the country. Of the six cities compared here, only Denver has a lower percentage of housing units near transit, and the Denver region has embarked on an ambitious investment strategy that will radically transform the transit network in the course of around 15 years.

The concentration of vacancy and disinvestment is largely contained within Baltimore City in some of the inner neighborhoods ringing the downtown. Baltimore City developed a housing typology to assess the conditions of the housing market and help guide reinvestment strategies. The housing typology will be discussed in greater detail in Chapter 2, as a way to identify strategic regional locations for TOD investment. The data for existing and planned transit stations within the City of Baltimore also highlights the challenges associated with the existing housing conditions in some neighborhoods. Within 1/4-mile of these transit stations 20 percent of the housing is classified as “Distressed” and 15 percent as “Transitional”, the two categories that require the greatest investment of resources. Conversely,

**Recommendation:** *Efforts to build from market strength and expand the competitive and stable markets will likely have a beneficial influence on strengthening the market for development around transit. At the same time, the most distressed neighborhoods will need some targeted investments to catalyze revitalization.*



just 13 and 11 percent are classified as “Competitive” or “Emerging”, the two strongest market types.

The different transit lines show some of the different market characteristics. The Blue Line has the strongest market context, while the Green Line has the most distressed market conditions. The challenges associated with building the market for housing in areas with this kind of disinvestment in the existing housing stock should not be discounted.

Region	System Size (2030)	Total Housing			
		Geography	Units	% Occupied	% Vacant
Baltimore	Medium (Large)	Region	1,048,046	92.9%	7.1%
		Transit Zones	80,158	84.6%	15.4%
		TZ Share	7.65%	7.0%	16.7%
Philadelphia	Extensive (Extensive +)	Region	2,198,065	93.5%	6.5%
		Transit Zones	598,701	89.7%	10.3%
		TZ Share	27.24%	26.1%	43.4%
Washington	Large (Extensive)	Region	1,942,641	95.1%	4.9%
		Transit Zones	255,381	92.0%	8.0%
		TZ Share	13.15%	12.7%	21.7%
Denver	Small (Large)	Region	976,585	96.3%	3.7%
		Transit Zones	32,407	93.0%	7.0%
		TZ Share	3.32%	3.2%	6.2%
Portland	Large (Extensive)	Region	786,300	94.3%	5.7%
		Transit Zones	79,923	92.3%	7.7%
		TZ Share	10.16%	9.9%	13.8%
San Francisco	Extensive (Extensive +)	Region	2,369,249	96.8%	3.2%
		Transit Zones	466,411	95.5%	4.5%
		TZ Share	19.69%	19.4%	27.8%

Figure 8: Central Maryland has higher housing vacancies and lower levels of housing overall near transit than other regions around the country. System size determined by number of stations in system. (Source: 2000 US Census, CTOD TOD Database)

Station						Downtown	Outer City
	Competitive	Emerging	Stable	Transitional	Distressed	Multi-Family	Multi-Family
Blue Line Average	19%	14%	19%	15%	12%	16%	2%
Green Line Average	6%	2%	12%	22%	35%	21%	0%
Red Line Average	14%	13%	22%	10%	18%	20%	0%
Transit Zone Average	13%	11%	18%	15%	20%	19%	1%

Figure 9: Baltimore City's Housing Market Typology shows the differences in conditions along the two existing corridors and the Red Line (Source: Baltimore City Planning Department)

**TOD opportunities continue to be uneven within the region**

Income and racial segregation create islands of prosperity and strong real estate markets mixed with areas of disinvestment and there are regional challenges in terms of racial and economic equity around transit stations. Stations within Baltimore City are disproportionately low-income and non-white, while those in the surrounding communities are disproportionately white and higher income. In fact, whereas median income exceeds the regional median in only one station (Mount Washington) within Baltimore City, it does so in 18 of 28 stations outside of Baltimore City. Likewise, in Baltimore City, just four of 27 stations have a lower percentage of non-white residents than the regional average, while outside of Baltimore City, 21 of 28 stations do. Baltimore City's Inclusionary Zoning, which requires affordable units in all developments greater than 30 units that receive some City subsidies, is one method for ensuring some income diversity around transit.

Addressing these disparities to create more diverse and equitable development around all transit stations will be an important challenge moving forward. This does not mean that every station must reflect the regional averages, since neighborhoods are different and TOD should reinforce the existing communities, but for a regional TOD strategy to be successful, all must have the opportunity to benefit from regional development.

**Recommendation:** *Incorporate some housing equity guidelines with all new TOD projects to include an affordability component. In Portland, Oregon, recent TOD in the Pearl District has been required to reflect the regional income profile, rather than a strict inclusionary housing percentage. This may be a successful strategy for gradually integrating a mix of incomes into neighborhoods currently characterized by either very high or very low incomes, in addition to Baltimore City's existing Inclusionary Zoning requirements.*

### **There are areas of economic strength and success from which to build**

Many neighborhoods around existing transit have incomes higher than the regional median and market strength that can be tapped for additional development activity. Others have seen recent development that can serve as a model for future projects. Transit-oriented development in the region has been relatively episodic to date, with good examples of recent development near downtown, at Clipper Mill near the Woodberry Station, and around Mount Vernon Square. Other neighborhoods are developing and implementing ambitious plans for TOD: EBDI is under construction, and neighborhoods like Station North, West Baltimore, and State Center are formulating plans. Outside of Baltimore City, places like Owings Mills, Odenton, Linthicum, and Glen Burnie all have some level of plan for TOD. The Baltimore DrillDown analysis also found greater income and buying power than is typically understood, and this could support more market activity than previously considered.<sup>6</sup>

**Recommendation:** *Analyze and understand the market strengths of specific corridors and neighborhoods around transit and tailor development opportunities to build from these strengths with strategies that leverage multiple opportunities in close proximity to build market momentum for TOD.*

Where possible, these opportunities should also be leveraged in locations that can help generate spillover momentum in adjacent Transit Zones. Chapter 2 presents a detailed analysis of where this can happen in the region. Often, these areas of market strength will be linked, and developing strategies that span multiple Transit Zones can help to broaden the focus of TOD from individual developments to district-wide strategies that include real estate development, multi-modal transportation improvements, and investments in community amenities and public spaces.

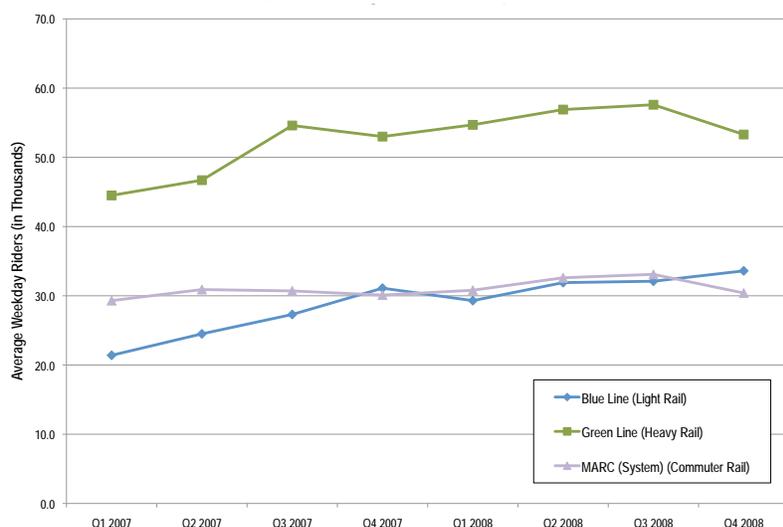


## Regional Transit Investment

### Regional transit buildout plans could take decades even as demand builds

The Regional Rail Plan adopted in 2002 calls for investments to be made over a 40-year time horizon, despite ongoing planning for investments in the Red Line and upgrading MARC service. The current funding process at the Federal, state, and local level continues to favor highways over transit investments. Federally, transportation funding for highways outweighs that for transit by a factor of 4 to 1, and the typical highway project takes less time and fewer planning resources to be built. Regionally, the Transportation Outlook 2035 sets out funding priorities for the region for the next 25+ years. Of the \$8.7 billion programmed for system expansion projects, just \$2.3 billion (or 26 percent) is programmed for transit projects, and only \$61 million is programmed for bicycle and pedestrian improvements.<sup>7</sup> Last year, the Baltimore Regional Transportation Board, charged with allocating transportation funds for the region allocated an additional \$340 million for transit. Despite this additional allocation, the 2035 plan only contains transit funding for the Red Line and MARC system improvements. However, MARC's ridership continues to exceed capacity, and ridership gains on the existing system over the past two years have been strong, and have mirrored national gains in transit ridership.<sup>8</sup>

**Recommendation:** Continue to find ways to accelerate funding for transit improvements to build out the Regional Rail Plan. Focus bicycle and pedestrian improvements on improving access to transit and supporting multi-modal neighborhoods near transit.



	Weekday Change Q107-Q408	
	Baltimore Region	National [1]
Blue Line (Light Rail)	57%	14%
Green Line (Heavy Rail)	20%	27%
MARC (System [2]) (Commuter Rail)	4%	21%

[1] National change also reflects new lines entering service

[2] MARC Penn and Camden line service averaged 23,500 daily riders in 2007.

Figures 10 & 11: Transit ridership in Central Maryland has increased substantially over the last two years, and has mirrored national gains in ridership in the same period. (Source: American Public Transportation Association)

Region	System Size (2030)	Geography	Total Commuters	% Transit/ Bike/Walk	% Transit	% Bike	% Walk
Baltimore	Medium (Large)	Region	1,223,867	9.3%	6.2%	0.2%	2.9%
		Transit Zones	65,570	29.0%	19.1%	0.3%	9.5%
Denver	Small (Large)	Region	1,259,815	7.7%	4.6%	0.7%	2.3%
		Transit Zones	36,345	17.6%	8.5%	1.2%	7.9%
Philadelphia	Extensive (Extensive +)	Region	2,491,979	13.5%	9.2%	0.3%	4.0%
		Transit Zones	552,037	31.2%	21.0%	0.8%	9.4%
Portland	Large (Extensive)	Region	951,489	10.1%	6.3%	0.8%	3.0%
		Transit Zones	82,446	25.0%	13.8%	1.7%	9.5%
San Francisco	Extensive (Extensive +)	Region	3,081,104	14.6%	10.2%	1.1%	3.2%
		Transit Zones	558,929	31.2%	21.3%	2.0%	8.0%
Washington	Large (Extensive)	Region	2,554,588	14.5%	11.2%	0.3%	3.0%
		Transit Zones	271,738	42.0%	30.6%	0.9%	10.5%

Figure 12: Regional commute mode splits for Baltimore and other selected regions show that residents in Transit Zones use alternate modes of transportation for commute trips in similar shares to commuters in other regions. System size determined by number of stations in system. (Source: 2000 US Census and CTOD TOD Database)

Not all transit-supportive investments need to be substantial infrastructure upgrades or new transit lines. Improvements to bicycle and pedestrian access and safety can have a substantial benefit for transit ridership and the creation of transit-supportive neighborhoods. While Baltimore currently has relatively strong transit ridership from people living near transit, the region lags behind others in rates of bicycling. Bicycle and pedestrian improvements are often relatively low cost for their benefit and can contribute greatly to moving neighborhoods and corridors toward the transit-oriented development end of the spectrum.

Because Baltimore has a medium-sized fixed-guideway\* transit network, the number of places that can be reached from a given station is somewhat limited. As such land near stations may carry less of a price premium than would be the case in regions with a more extensive network. In addition, as a region that has grown even as the population and share of employment in the central city has fallen, the “pull” of each of these stations has diminished, further diminishing their market appeal. While weaker market cities, such as Baltimore, are often able to draw transit ridership that is disproportionately great, relative to the size of their respective transit networks, these factors pose substantial barriers to the implementation of successful TOD in Baltimore. However, these processes also highlight the potential for change as the region continues to implement the Regional Rail Plan.

\* “Medium-sized” refers to a classification system developed by CTOD based on the number of stations in the system. “Fixed-guideway” refers to transit systems with fixed rail or dedicated bus lanes, as opposed to “fixed-route” which refers to regularly scheduled bus routes.

As a part of the Regional Rail Plan, 43 new miles of rail, including 68 more stations, will be constructed in Central Maryland. As planned, these stations will be placed in some of the city's densest neighborhoods, both in terms of residents and in terms of employment and regional draws. They will also serve many of the region's most important suburban jobs centers. Stations will be in a diverse range of residential neighborhoods, including some of the region's wealthiest, those that have experienced recent revitalization, and those with deep concentrations of poverty. By better connecting these varied neighborhoods and job centers, the range and number of people for whom transit will be viewed as a powerful amenity will be expanded dramatically. Further, as stations are constructed in areas with a high concentration of residential amenities, transit can serve as an "amenity extender," as residents of adjacent station areas are more intimately connected. As such, market activity can be both concentrated within station areas and expanded along corridors.

### **Continued transit investments will expand the opportunities for TOD**

The regional benefits of TOD are magnified as the transit network grows, and the continued investments, in the Red Line, MARC system, and other aspects of the Regional Rail Plan will add to the network benefits of the system. Current ridership demand is already increasing for the regional rail network, and this will likely continue as the region moves toward TOD and invests in more transit.

This regional ridership is supported by some areas of existing high transit ridership, especially within Baltimore City. In the core of the light rail line, over 20 percent of households commute to work by transit, and in the core of the heavy rail line, that figure jumps to over 30 percent for some stations. Coupled with walk and bike commute trips, some areas are already accommodating over 50 percent of their commute trips by non-auto modes. As more and more areas become accessible through the transit network, these rates will only climb. Most transit zones outside of Baltimore City have lower ridership, but there may be opportunities to build ridership from these areas with land use changes and as the regional transit network expands, making more destinations accessible.

Successful transit investments are often self-reinforcing and lead to increased demand. Planning for this success may be able to accelerate the implementation of the Regional Rail Plan, and may necessitate the incorporation of additional transit investments, such as a circulator-type route connecting multiple downtown destinations or an outer circumferential line identified as a potential long-term investment in the regional plan. These additional investments may also in turn create new TOD opportunities.

**Recommendation:** *The Red Line, with its east-west connections is essential in augmenting the transit network. Improvements to the MARC system will also help consolidate the recent ridership gains for both existing lines. The Yellow Line or Green Line extension will be important next steps in building the regional system, and planning for both should begin as soon as possible. In order to support the continued expansion of downtown housing and employment activity, a downtown circulator bus connecting key destinations with the regional transit routes will open in late summer 2009. Depending on demand in the future, this bus circulator could be upgraded to a streetcar system, as has been implemented in other cities around the country.*

## Planning and Regulatory Needs

**Recommendation:** *Seek ways to unify the individual URPs or create station area plans focused on stations, similar to the way plans have been developed for West Baltimore MARC and State Center. Remove implementation barriers by updating the zoning code and tailoring recommendations for transit zones.*

### Local planning tools lead to fragmented revitalization and dilution of resources

Revitalization efforts around transit are faced with regulatory hurdles as well as some of the market issues described above. Transit zones in Baltimore City are sliced by multiple Urban Renewal Plan (URP) areas, making implementation difficult. In the 1/4-mile radius around the 27 stations in Baltimore City in the existing transit system, there are an average of 87.5 acres per station within URPs. (Note: a 1/4-mile radius encompasses approximately 125 acres of land area). While this can be a powerful tool that enables the City to bring its full financial and implementation resources to bear, these 87.5 acres per station are contained in an average of 3.4 separate URPs that may have been developed in different eras and with different goals and outcomes. This fragmentation creates problems for the City in knowing how best to allocate scarce resources and can create confusion in the development community about what the priorities are for investment and revitalization.

In addition, the City's zoning code is outdated and currently undergoing a rewrite. This rewrite presents the opportunity to update regulations to encourage transit-supportive densities and mixes of uses, while also supporting the kind of revitalization that will be necessary to generate transit-oriented neighborhoods and corridors.

**Recommendation:** *Use Place Types as a way to begin a dialogue with neighborhoods that have or will have transit stations and ensure there are adequate tools in place to take advantage of TOD opportunities across the place spectrum.*

### TOD opportunities can be tailored to the qualities of a place

TOD is not a one-size fits all solution, and there are many outcomes that can form the building blocks of a transit-supportive region. The City of Baltimore has developed a TOD Typology together with the National Center for Smart Growth Education and Research at the University of Maryland-College Park to highlight these different existing place types within Baltimore City. This report has taken a similar approach to identifying the "Place Types" appropriate for outlying stations as well.

The TOD Typology has been used to as a way to categorize existing conditions, but it can also be used to identify the typical opportunities that may be present in a station area. Tailoring policies, development regulations, and even infrastructure investments to best take advantage of these opportunities will support near and long-term TOD opportunities.

Using Place Types can be a useful way to begin engagement with a community about how to reinforce existing assets and develop in a more transit-supportive pattern. Place types are not static, and can change over time to support changing community preferences. This typology provides a framework for thinking about TOD than a hard and fast rule that dictates specific outcomes.

TOD Place Type	Existing Use Mix	Existing Intensity	Typical TOD Opportunities
Urban Downtown	Mix of residential, employment, and regional destination retail	High	<ul style="list-style-type: none"> <li>• Infill mixed-use on surface parking lots;</li> <li>• Reuse of historic structures.</li> </ul>
Urban Center	Mix of residential, employment and community-serving retail	High	<ul style="list-style-type: none"> <li>• Infill housing or mixed-use on vacant or underutilized parcels;</li> <li>• New retail/mixed-use centers.</li> </ul>
Urban Neighborhood	Predominantly residential with local-serving retail	Moderate	<ul style="list-style-type: none"> <li>• Infill housing or mixed-use on vacant or underutilized parcels.</li> </ul>
Suburban Center	Mix of employment and community-serving retail, with some residential	Moderate	<ul style="list-style-type: none"> <li>• Mixed-use redevelopment of existing underutilized retail or employment uses.</li> </ul>
Suburban Neighborhood	Predominantly residential with some local-serving retail	Low	<ul style="list-style-type: none"> <li>• Infill housing or retail on previously undeveloped parcels.</li> </ul>
Commuter	Predominantly residential with some local-serving retail and substantial park-and-ride.	Low	<ul style="list-style-type: none"> <li>• Infill housing or mixed-use on park-and-ride lots.</li> <li>• Infill housing or retail on previously undeveloped parcels.</li> </ul>
Special Events	Predominantly entertainment or employment with some local or community-serving retail	Low/Moderate	<ul style="list-style-type: none"> <li>• Residential or mixed-use redevelopment of existing underutilized retail or employment uses and previously undeveloped parcels.</li> </ul>

Figure 13: Existing regional TOD Place Types based on analysis by Baltimore City and the University of Maryland.

**There is underutilized land near transit currently**

While the Place Types are based on existing conditions and do not necessarily signal where there is development opportunity, almost every station in the system has some capacity for investment and increased economic activity. While this is a key long-term opportunity, it also creates a challenge in terms of focusing public resources. A 2002 report by the Baltimore Regional Partnership found substantial development opportunities from planning efforts already underway. Surrounding the existing transit system there are already over 80,000 housing units, with the potential for nearly 10,000 more. In addition, there is the potential for nearly 19,000 jobs to be added to the existing 220,000 within 1/2-mile of transit stations. The planned Red Line could add thousands more new units and jobs.

**Recommendation:** *Develop planning and implementation tools and policies to encourage development on available opportunity sites. Build from models that have created successful development projects on these types of opportunity sites in the past.*



The City of Baltimore has taken a more detailed assessment of development opportunity and capacity within 1/4-mile of the current transit stations and planned Red Line stations, showing that there is the capacity for nearly 3,000 additional units around the Red Line stations within the city. Realizing these potential development opportunities will depend on having the right zoning in place and developing other implementation tools, such as a Land Bank and other tailored strategies for priming the development market and prioritizing TOD. The Maryland State Department of Planning has also assessed development opportunity and capacity at stations outside of Baltimore City. These opportunities show that there will continue to be development potential near transit in outlying counties as well.

	Existing System		Red Line		Total	
	Acres [1]	Units	Acres [1]	Units	Acres [1]	Units
Baltimore City	1,556	21,530	106	16,874	1,662	38,405
Baltimore County	1,064	946	51	303	1,115	1,249
Anne Arundel County	382	1,102	0	0	382	1,102
Howard County	0	72	0	0	0	72
<b>Total</b>	<b>3,002</b>	<b>23,650</b>	<b>157</b>	<b>17,177</b>	<b>3,159</b>	<b>40,828</b>

[1] Note: Outside of Baltimore City, "Acres" refers to non-housing holding capacity. Within Baltimore City, "Acres" refers to housing holding capacity.

Figure 14: Holding capacities vary by station and by jurisdiction. Baltimore City has the majority of all development opportunity, but there will be some significant opportunities in outlying counties as well. [Sources: Baltimore City Department of Planning, Maryland Department of Planning]

## Partnerships and Process

### Regional stakeholders are open to creative solutions to open new opportunities for TOD

In Central Maryland, state and local agencies are developing new approaches to encouraging TOD and communities are embracing the opportunity TOD provides to help spur transit-centered community development. The level of engagement with citizens and interagency cooperation and collaboration in the region is promising. Regions that have been successful in developing a transit-supportive region have used these collaborations to develop new policy tools that address specific needs. Some examples include:

- In the Twin Cities, Portland, and San Francisco, the Metropolitan Planning Organization (MPO) has taken a lead role in providing funding for TOD in the form of grants and development incentives to local jurisdictions that approve TOD projects.
- In Massachusetts and New Jersey, the state has taken a lead role in providing incentives for transit-oriented zoning and development incentives, much the same way that MDOT and MDP have in Maryland.

**Recommendation:** *The right solutions in Central Maryland will depend on continuing existing partnerships and developing new ones to implement TOD at all scales. The TOD Strategy Steering Committee, potentially expanded to include other stakeholders, should continue to meet, and public agencies should designate a TOD Coordinator to work across departments.*

- In the Twin Cities and Seattle, community groups, foundations, and cities have come together around new transit investments to create catalyst funds to help guide development.
- In the Bay Area and New York City, regional transportation and land use advocacy groups have taken a lead role in developing coalitions with environmental groups, and equity advocates to demand more transit funding and guide the vision for regional growth.

Right now, coordination among stakeholders happens on a project-by-project basis. The Steering Committee formed for the purposes of this Regional TOD Strategy has the potential to be a coordinating body that can continue to think strategically about TOD opportunities and align public, private, and non-profit resources. Within public sector stakeholders, it may also be important to designate a TOD Coordinator, empowered to work across departments to accelerate TOD implementation.

**Recommendation:** *As TOD planning and investment gains momentum, assess the funding and staffing levels of each stakeholder, and ensure the capacity of each stakeholder is sufficient to implement transit and TOD projects in a timely manner.*

#### **Limited stakeholder capacity may slow implementation**

While regional stakeholders have been actively pursuing innovative TOD implementation, there are realistic limits on their capacity. The current economic conditions place further constraints on all stakeholders, but public agencies in particular, and ongoing funding needs to be addressed. The following list, based on input from stakeholders, provides the current number of neighborhood planning or development projects each agency or non-profit entity can support with current staffing and funding limitations.

Understanding these limitations is important in assessing how fast the shift toward TOD can happen. If and when stakeholder capacity becomes a limiting factor on transit and TOD planning and investment, additional resources may need to supplement current staffing and funding levels.

Stakeholder	Role	Capacity	Typical Duration
Central Maryland Transportation Alliance	<ul style="list-style-type: none"> <li>• Convene Transportation Stakeholders</li> <li>• Advocate for Transportation Improvements;</li> <li>• Advocate for Policy Reform</li> </ul>	Regional	Ongoing
Baltimore Neighborhood Collaborative	<ul style="list-style-type: none"> <li>• Grantmaking for Neighborhood Revitalization, Advocacy, and Engagement</li> <li>• Aligning Public and Private Investment Priorities</li> </ul>	3-4 Station Areas	5 years
Citizens Planning and Housing Association	<ul style="list-style-type: none"> <li>• Technical Assistance and Community Benefit Agreements</li> <li>• Organizing and Leadership Development</li> </ul>	2-3 Station Areas	2-3 years
MDOT Office of Real Estate	<ul style="list-style-type: none"> <li>• Real Estate Transactions / Public-Private Partnerships</li> </ul>	6 Development Projects	varies
MDOT Office of Planning	<ul style="list-style-type: none"> <li>• Station Area Planning</li> <li>• Multi-Modal Transportation Improvements</li> </ul>	6 Station Areas	2-3 years
Maryland Transit Administration	<ul style="list-style-type: none"> <li>• Transit Planning and Construction</li> </ul>	1-2 Corridors	10 years
Baltimore City	<ul style="list-style-type: none"> <li>• Station Area Planning</li> <li>• Multi-Modal Transportation Improvements</li> <li>• Public-Private Partnerships</li> </ul>	7-8 Station Areas	varies
Baltimore County	<ul style="list-style-type: none"> <li>• Station Area Planning</li> <li>• Multi-Modal Transportation Improvements</li> <li>• Public-Private Partnerships</li> </ul>	1-3 Station Areas	varies

Figure 15: Current capacities and typical responsibilities of various transit and TOD stakeholders.

## Notes

- 1 Nationally, this estimate predicts a 2030 demand profile where 24 percent of households will want to live near transit—equal to approximately 15.2 million households—or an increase of approximately 9 million over 2000 levels. From Center for Transit-Oriented Development, “Preserving and Promoting Diverse Transit Oriented Neighborhoods”, September, 2006.
- 2 Baltimore Homeownership Preservation Coalition and The Reinvestment Fund. “Mortgage Foreclosure Filings in Maryland.” February 2008.
- 3 Cervero, Robert, et al. TCRP Report 102: Transit-Oriented Development in the United States: Experiences, Challenges, and Prospects. Washington, DC: Transportation Research Board, 2004.
- 4 See Belzer, Dena. “FTA New Starts Economic Development Criteria (Working Paper)”. Berkeley, CA: November 2006.
- 5 Social Compact. “Baltimore Neighborhood Market DrillDown: Catalyzing Business Investment in Inner-City Neighborhoods”. October 2008.
- 6 Social Compact. “Baltimore Neighborhood Market DrillDown: Catalyzing Business Investment in Inner-City Neighborhoods”. October 2008.
- 7 Baltimore Metropolitan Council. “Transportation Outlook 2035”. November 2007.
- 8 Maryland Transit Administration. “MARC Growth & Investment Plan”. September 2007

## Chapter 2: Priority TOD Investment Locations

While the last chapter was focused on the existing conditions of transit and TOD in the region and recommendations for addressing the full range of challenges and opportunities, this chapter outlines an approach to identifying the critical locations for regional investment in TOD by outlining a methodology that can be updated and replicated into the future as conditions evolve. “Investment” in this context is used broadly to refer to the commitment of resources, both financial and human, on planning or building development or infrastructure (physical or social). This chapter identifies investment locations that may be over and above the existing commitments of regional stakeholders. The priority locations identified here are not intended to supplant those existing commitments. Rather, they are intended to provide a common ground for investment decisions by multiple stakeholders moving forward, as well as a framework for how to respond to changing conditions over time. This chapter needs to be used in conjunction with Chapter 3 to identifying the more detailed approach to the *what* and *how* of investments in individual stations in the region.

### Understanding Priority Station Areas

All stakeholders investing in TOD in any one location should also aim to achieve the long-term goal of fostering high-quality TOD throughout Central Maryland. As described in the introduction to this report, TOD can have a range of beneficial outcomes and address a full complement of goals in creating strong and healthy neighborhoods in the region. However, the feasibility of high-quality TOD varies among current and future station areas. This chapter will outline the locations stakeholders should prioritize among both existing and planned station areas.

In particular, this chapter will address the following key questions:

- 1) What are the goals for investment in station areas?
- 2) What are the criteria to consider when identifying priority station areas for investment?
- 3) Which station areas should be prioritized for investment?

There are several steps in identifying priority station areas for investments, beginning with assessing the goals of investment, and continuing with an assessment of the existing conditions and changes over time.

## Goals for Identifying Priority TOD Locations

Investment in TOD or in neighborhood improvements around a transit station is generally a positive sign, and should be encouraged through supportive policies and programs. All TOD investments should also take a comprehensive view of programs and policies that can help realize the full range of TOD benefits. These comprehensive strategies will include investments in human capital, neighborhood services, and business development, and may well improve an area's long-term prospects for TOD. The next chapter of this report outlines a framework for approaching these types of investments in all locations in the region.

This chapter outlines a methodology for identifying priority TOD locations that explicitly reflects the potential for a “return” on investments. This return could come in the form of new private development/investment or in some modification of the character of private development/investment that is currently taking place to realize a full range of TOD benefits.

Each stakeholder group involved in TOD brings its own goals and objectives to investment decisions. Public, private, and non-profit actors may each weigh certain criteria more heavily than others, and may have existing commitments and investments to honor. In making investment decisions, each individual stakeholder or stakeholder group must evaluate the opportunity using their own criteria.

The introduction of this report outlined two broad goals for fostering long-term high-quality TOD throughout Central Maryland:

- 1) Facilitate and generate momentum for market-driven TOD investment at the regional level
- 2) Direct the velocity and trajectory of neighborhood change at the local level.

These two specific goals have a high degree of commonality among stakeholders and can be used to identify priority locations for TOD investment by multiple stakeholders. These goals often overlap, but there can be some divergence, and ensuring that priority investments are advancing at least one of these goals is critical in realizing the full potential of TOD investments.

### **Facilitate and generate momentum for market-driven TOD investment**

This goal has broad agreement because stakeholders recognize that unless there is market momentum for TOD in the region, the limited resources of public sector and non-profit organizations will not be sufficient to achieve the scale of investment necessary. To meet this goal, funding and investment should be targeted toward locations that have the potential to build momentum for continued development, rather than investments whose impacts would be limited to a single project.

Locations that best meet this goal will positively affect the TOD potential of nearby parcels or of the neighborhood as a whole, and eventually spur market activity in proximate station areas along the same transit line. Investments that meet this goal will attract other private investment to a neighborhood, thus advancing the development of transit-oriented communities in the near- and long-term.

Locations that meet this goal may not be locations where there is currently market activity, so funding and investments may need to be targeted to locations where poorly functioning real estate markets mean TOD might otherwise falter or happen very slowly.

### **Direct the velocity and trajectory of neighborhood change.**

This goal has broad agreement because stakeholders recognize the potential connections provided by transit and TOD can be powerful tools to catalyze positive change in neighborhoods surrounding existing and planned transit station. While Central Maryland is composed of many healthy, stable neighborhoods, there are also a great number of areas experiencing rapid economic and social change. In some areas, this change is coming in the form of new investment and new households in areas that had previously been suffering through an extended decline. In others, this change is the beginning, or a continuation, of disinvestment in the community.

In order to promote healthy, inclusive neighborhoods, investment by public or non-profit stakeholders with targeted equitable development outcomes may be most effective in directing neighborhood change. Investing in mechanisms for lower income residents to stay in their neighborhoods is important in neighborhoods where incomes and housing prices are escalating. Similarly, investing in incentives to retain and attract residents in neighborhoods that may be showing early stages of decline is a key to stabilizing neighborhoods. This goal is specifically intended to target existing residential neighborhoods, so areas with small residential populations may be a lower priority in the short-term. However, in the long-term, these areas may represent key opportunities for establishing comprehensive mixed-income transit-oriented communities.

Locations that meet this goal may also not have substantial real estate development activity, but will be experiencing some sort of market change, that may come as new residents move into a neighborhood or as old residents move away. Investment responses may once again run a full range from capital investment in new construction to human resource investment in social capital.

### **Balancing two goals for investment**

These two goals are not mutually exclusive. For instance, where there is the potential for investments to lead to market momentum (Goal 1), there may also be the need to address issues like gentrification and displacement

(Goal 2). However, there may also be cases where the goals are at odds with each other. For instance, some rapidly changing neighborhoods may not offer the potential to build long-term momentum for TOD. In these cases, where only one of the goals will be met by investment, the tradeoffs need to be weighed by multiple stakeholders in choosing to invest.

For all investments, regardless of whether they are addressing these two goals or other stakeholder priorities, the tools and strategies deployed in a particular place will need to respond to the local conditions. These are described in detail in Chapter 3, and can be used to help guide investment in TOD by all stakeholders at all locations.

## Indicators for Identifying Priority Station Areas for Investment

Each of the two goals involves a different set of indicators for consideration when prioritizing station areas for investment. The indicators under the first goal, to “facilitate and generate momentum for market-driven TOD investment” can be broadly categorized as *market opportunity*. Under the second goal, when considering which stations areas most in need of intervention “to direct neighborhood change,” indicators relating to *demographic change* are most important. These factors are discussed in greater detail below:

### *Market Opportunity*

In assessing whether there are market opportunities in a given station area likely to support investment in TOD, there are four key considerations:

- What is the current condition of the housing market?
- What is the land opportunity to support new development?
- What is the station area’s relationship to the region’s major employment (office, entertainment, or retail) centers?
- Is the transit and street infrastructure conducive to creating walkable TOD?

### **Real Estate Market Conditions**

While not the sole indicator of the potential to generate market momentum, the current condition of the housing market is an essential variable for determining the likelihood that a public investment will trigger new development and investment by the private sector. In neighborhoods where the housing market is already very strong, investment may not significantly alter the form of development, and as such may not add to momentum already underway. Likewise, in neighborhoods with the weakest real estate markets, development may not be feasible without an unsustainably high rate of subsidy, such that the potential for catalyzing additional investment is very low.

The Baltimore Housing Market Typology created as a part of the 2006 Comprehensive Plan effort identifies housing market types for neighborhoods within the city. Under this taxonomy, those areas classified as Stable or Transitional neighborhoods would be good candidates for TOD investment. These areas represent the middle of the spectrum of market conditions, and are neither too weak nor too strong for an investment to generate a significant market response. As such, those that are categorized as Competitive (very strong) or Distressed (very weak) may not generate as much of a market response. Given that this Housing Market Typology is produced by the City of Baltimore, it is not available for station areas in Anne Arundel, Howard, and Baltimore Counties. In these cases, a composite of the other indicators, listed above, can be employed.

### **Land Opportunity for New Development**

The availability of suitable vacant or underutilized parcels near a station plays a critical role in the potential for the transformation of a neighborhood into a transit-oriented community. Even a neighborhood that is primed for new development may not be able to attract private investment if a developer is required to go through the time-intensive, expensive, and potentially politically-difficult process of purchasing and assembling small parcels. In these cases, while public investment may be successful in leveraging a small number of projects, the potential for fostering additional transit-oriented development may be limited. Therefore, while rehabilitation of existing structures and small-scale development may play an important role in an overall neighborhood strategy, the availability of land for high density, large-scale development should be considered when prioritizing station areas for catalyzing TOD.

### **Relationship to Employment Centers**

If the housing market condition is a good indicator of *current* TOD investment potential, the relationship to employment centers can be thought of as an indicator of *prospective* TOD investment potential. This is because when transit connects a residential area to a major retail, employment, or entertainment cluster, these amenities will often influence market activity in the linked housing market. However, the magnitude of the impact depends chiefly on two major factors: 1) how closely does transit link the two areas, and 2) the character of the activity center. In cases where a major activity center is only a few stops down a transit line, the impact of the connection on the housing market can be profound. However, the more distant the two areas are from each other, and the greater the time-savings associated with driving, relative to transit, the less influence the transit connection will have. At a certain distance, there may be no market impact at all.

The character of the activity center also plays an important role in this factor. Dense, walkable, transit-oriented destinations can play a pivotal role in fostering dense, walkable, transit-oriented origins. Alternatively, if

the activity center is low-density and has a large amount of parking, the number of residents who would choose to access it by transit will be greatly diminished; this, in turn, reduces the market impact. For employment centers, the type, mix, and growth rate of jobs also plays a key role. Workers in certain jobs, including those in professional, technical, or financial services or in insurance, universities, government, or quasi-public agencies, tend to make use of transit at a much higher rate than those who work other industries. Areas immediately adjacent to dense, walkable employment clusters are also opportunities. These “Downtown Adjacent” areas have seen recent investment in TOD both in Central Maryland and across the country. Areas that are better linked to these transit-oriented activity centers should be prioritized for investment.

### **Transit and Street Infrastructure**

Transit infrastructure plays an important role in the potential for a location to spur market interest. When transit stations are integrated into walkable neighborhoods with interconnected street grids and pedestrian-friendly streets, they are already serving TOD outcomes, and are well positioned to capture further benefits. However, when transit infrastructure is an imposing barrier to pedestrian activity or where the surrounding streets do not serve the needs of pedestrians, it can be very difficult to generate momentum for TOD. Elevated transit stations in the middle of freeway medians are perhaps the prime example of this latter condition, where creating any TOD momentum is extremely challenging. This analysis considered all existing transit lines, as well as the planned Red Line and could be used to identify locations for station retrofits that might improve TOD market opportunities.

Because there are other considerations in constructing a transit line, such as the role in the regional transportation system and engineering and right-of-way considerations, it is not always possible to build transit systems to address this factor, but where possible, new investments in Central Maryland should consider the design of the system as an important factor in supporting TOD.

### **Factors for Potential Market Momentum**

The following table summarizes the factors, indicators and importance when considering the potential for generating TOD market momentum. To get a full perspective of how investments can help spur momentum for market-driven TOD, these factors need to be taken into consideration in parallel. High rankings on certain indicators may not signal an overall high priority for the location. Similarly, low rankings on an indicator can still result in a priority location for generating market momentum at the regional level. The composite of all factors looked at analytically, but there is also some element of qualitative assessment required.

Factor	Indicator	Importance	Priority Thresholds
Housing Market Condition	Baltimore Housing Market Typology	Helps determine the potential that an investment will have a positive impact on the ability to attract new investment in the short term; investments should be focused on “Stabilization” and “Reinvestment” Neighborhoods	<ul style="list-style-type: none"> <li>High: Emerging and Stable</li> <li>Mid: Transitional</li> <li>Low: Competitive</li> <li>None: Distressed</li> </ul>
Land Opportunity	Number and Size of Vacant and Underutilized Parcels	Helps determine the extent to which market interest in neighborhood investments can be translated into new development.	<ul style="list-style-type: none"> <li>High: &gt; 100 acres or 400 units</li> <li>Mid: 20-100 acres or 100-400 units</li> <li>Low: &lt; 20 acres or 100 units</li> </ul>
Proximity to Activity Centers	Type of Activity Center (Density, Dominant Activity, etc.)	The type of activity center will determine the frequency and timing of trips from residential neighborhoods. Dense daytime employment centers are the most likely to be accessed by public transit; thus, transit will have the greatest impact on land values in residential areas closely linked to these centers. This is true to a lesser extent of entertainment districts, which may have a lesser employment base, but still lend themselves to non-automobile-based trips. Those areas in which this impact is greatest will have the potential response to TOD investments.	<ul style="list-style-type: none"> <li>High: Downtown, Education, or Entertainment employment clusters</li> <li>Mid: Other employment clusters</li> <li>Low: Non-employment clusters</li> </ul>
Proximity to Activity Centers	Distance from Activity Center	The land value/TOD potential associated with activity centers (described above) diminishes with distance. After a certain distance in the transit network, these connections cease to have an appreciable impact.	<ul style="list-style-type: none"> <li>Mid: Adjacent to Downtown, Education, or Entertainment employment clusters</li> <li>High/Low: N.A.</li> </ul>
Proximity to Activity Centers	Employment Dynamics of Activity Center	The extent to which activity centers have a positive overall rate of jobs growth and/or include sectors/employers that are growing, plays an important role in whether households will move to improve their accessibility. This will influence the attractiveness of new TOD opportunities and, in turn, investment potential.	<ul style="list-style-type: none"> <li>Mid: High employment growth rate in cluster.</li> <li>High/Low: N.A.</li> </ul>
Transit Infrastructure	Accessibility of Transit Station and Connection to Neighborhood	Transit infrastructure can have a large impact on the potential market for TOD. Stations that are part of an interconnected street grid provide access from multiple directions and to many destinations. Elevated transit stations or stations with limited or poor pedestrian connectivity can dampen the catalytic potential of investments.	<ul style="list-style-type: none"> <li>High: At grade or sub-grade with highly walkable street pattern</li> <li>Mid: At grade or sub-grade with connected street pattern</li> <li>Low: At grade or grade separated with disconnected street pattern</li> <li>None: Grade separated with limited access or freeway median.</li> </ul>

Figure 1.6: Factors and indicators of the potential for catalyzing market momentum for TOD.

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### Example Stations

The following stations provide examples of each priority level for the market opportunity analysis:

- **State Center/Cultural Center (Tier 1):** The Housing Market Condition around the station is primarily Distressed or Competitive, resulting in a *Low* ranking. However, the station gets *High* ratings for Land Opportunity, Employment Center Proximity given the near downtown location, and Transit and Pedestrian infrastructure with below and at-grade stations and relatively connected street networks.
- **Owings Mills (Tier 2):** Because the Housing Market Value Analysis is not available for areas outside of Baltimore City, the station was not evaluated on this criterion. The Land Opportunity is *High*, while the existing Suburban Retail employment cluster gives a *Mid* priority rating. The freeway transit alignment and limited street connectivity give a *None* ranking.
- **Martin State Airport (Tier 3):** Because the Housing Market Value Analysis is not available for areas outside of Baltimore City, the station was not evaluated on this criterion. The station is ranked *Low* in Land Opportunity, Employment Center Proximity, and Transit Infrastructure, with an at-grade station, but constrained access due to the location of the station and the proximity to major roadways.
- **Mount Washington (Tier 4):** The station area gets *Low* priority rating for the Competitive housing market, Low amount of Land Opportunity, the distance from Employment Centers, and the constrained pedestrian access from surrounding areas.

### *Demographic Change*

A critical component of high-quality transit oriented development is diversity, not only of land uses, but also of households. Beyond advancing the goal of maximizing equity, economically diverse neighborhoods tend to be more stable and may help to support and foster a greater range of transportation and employment opportunities. While economic diversity can be achieved through interventions into the full range of neighborhood types, there is the greatest potential AND the greatest need in neighborhoods that are currently experiencing demographic change. Investments can be used to help preserve affordability in neighborhoods where incomes are increasing while income diversity is decreasing and they can also be used to stabilize neighborhoods, by attracting new residents into neighborhoods where incomes and populations are decreasing.

It is often difficult to identify the right quantitative indicators to assess neighborhood change. There needs to be enough reliability that they can indicate the true trajectory of change, and yet they need to be meaningful

enough to allow for thorough analysis. This study has focused on four primary factors, because each is available in great detail in the decennial US Census:

- Median Income,
- Income Diversity
- Family Structure, and
- Educational Attainment.

Because the 2000 Census is reaching the end of its useful life, this analysis has also supplemented the Baltimore DrillDown Analysis by Social Compact, with data from 2006, to provide as accurate a picture of change since 2000 as possible. Because the DrillDown data is only available for Baltimore City, when the 2010 US Census is available, it will provide the most comprehensive *regional* analysis of neighborhood change over the past 10 years. Until then, the DrillDown data is useful in assessing whether neighborhood trends have continued or reversed since 2000.

With regard to demographic change, station areas can be classified into one of seven neighborhood types. These include three wherein a neighborhood is *experiencing change* that supports market momentum or requires intervention and four that are *stable* and may not require short-term intervention.

### Changing Neighborhoods

- **Gentrifying:** In these neighborhoods, there are an increasing number of residents in higher income and educational attainment categories as there are fewer residents in lower income and educational attainment categories. While this is sometimes the result of existing households increasing their wealth and human capital over time, this may also be a result of displacement.
- **Disinvesting:** In these neighborhoods, there are an increasing number of residents in lower income and education categories as there are fewer residents in higher income and education categories. This may be a result of wealthier households moving out and/or the contraction of one or more major employers of residents.
- **Polarizing:** In these neighborhoods, there are an increasing number of residents at each end of the income and education spectrum, at the expense of middle class residents. Residents in neighborhoods with this profile are especially vulnerable to sudden upward shifts in housing costs or to rapid disinvestment.

These neighborhood types also include four *that are stable and may not require short-term intervention*. These station areas may be prioritized if it is likely to meet the goal of leveraging private investment in TOD, but should not be considered for reasons of demographic change:

### Stable Neighborhoods

- **Higher Income:** In these neighborhoods, the median income and educational attainment exceeds the city regional average and has not been shifting significantly
- **Middle Income:** In these neighborhoods, the median income and educational attainment is near the city regional average and has not been shifting significantly
- **Lower Income:** In these neighborhoods, the median income and educational attainment is below the city and/or regional average and has not shifted significantly
- **Stably Mixed-Income:** In these neighborhoods, the median income and educational attainment is not far from the regional average, but there is a high degree of variability.

In general, station areas that are demographically stable should only be prioritized if they are highly likely to meet the goal of leveraging private investment in TOD.

The following table summarizes the factors, indicators and importance when considering the potential need for intervention in rapidly changing neighborhoods.

Again, to get a full perspective of where investments can be used to address rapid neighborhood change, these factors need to be taken into consideration in parallel. High rankings on certain indicators may not signal an overall high priority for the location. Similarly, low rankings on an indicator can still result in a priority location for impacting this goal at the regional level. The composite of all factors looked at analytically, but there is some element of qualitative assessment that will be required to get a full picture of the place.

### Using DrillDown Analysis

The Baltimore DrillDown data can provide an additional layer of information on how neighborhoods have changed since 2000. Because this data is only available for Baltimore City, this report uses the DrillDown analysis to see whether previous trends have continued or been reversed, as a way to modify the 1990-2000 analysis of neighborhood change. The DrillDown analysis provides some pieces of information, such as income levels from Home Mortgage Disclosure Act (HMDA) statements that are not available through the US Census, that can provide additional information in understanding neighborhood change. As Baltimore Neighborhoods Indicators Alliance updates the DrillDown data for Baltimore City, this new information can again be used to deepen the understanding of neighborhood change.

Factor	Indicator	Importance	Priority Thresholds
Jobs/Housing Balance	Ratio of workers to residents within 1/2-mile of station	Places that are predominantly job locations are of less significance. Predominantly housing locations are places of higher importance in addressing this goal.	<ul style="list-style-type: none"> <li>• High: Housing (&gt;0.5 workers/residents)</li> <li>• Mid: Mixed (0.5-3.0 workers/residents)</li> <li>• Low: Jobs (&gt;3.0 workers/residents)</li> </ul>
Household Structure	Change in share of households that are not families	Change in the share of households that are in families can be indicative of neighborhood change. In gentrifying neighborhoods, young non-family households may be replacing families; in disinvesting neighborhoods, family households may be leaving for more desirable neighborhoods. While rapid decreases in this indicator show the potential for gentrification and displacement, rapid decreases show more neighborhood stability.	<ul style="list-style-type: none"> <li>• High: Rapid Increase (&gt; +10%)</li> <li>• Mid: Increase (+2.5% - +10%)</li> <li>• Low: No change (-2.5% - +2.5%) or decrease (-10% - -2.5%)</li> <li>• None: Rapid Decrease (&lt; -10%)</li> </ul>
Education	Change in % of households earning a bachelor's degree or higher	Whereas income reflects current buying power, education is a powerful indicator of potential buying power. Thus, even if incomes remain stable, a significant increase or decrease in educational attainment can be important indicator of neighborhood change.	<ul style="list-style-type: none"> <li>• High: Rapid Increase (&gt; +10%) or Rapid Decrease (&lt; -10%)</li> <li>• Mid: Increase (+2.5% - +10%)</li> <li>• Low: No change (-2.5% - +2.5%) or decrease (-10% - -2.5%)</li> </ul>
Median Income	Change in median household income	This reflects the overall change in the wealth of a neighborhood. While rapid changes in either direction are the most important indicator, decreases of median income can show signs of disinvestment, while modest increases show more signs of underlying stability, and may not signal gentrification.	<ul style="list-style-type: none"> <li>• High: Rapid increase (&gt; +15%) or decrease (&lt; -15%)</li> <li>• Mid: Decrease (-15% - -5%)</li> <li>• Low: Increase (+5% - +15%)</li> <li>• None: No change (-5% - +5%)</li> </ul>
Change in Income Distribution	Change in distribution of household incomes, including overall diversity and change within income categories	While median income provides a simple measure of the wealth of residents, the distribution of incomes provides greater insights into the dynamics of neighborhood change. Specifically, the change in the relative shares of households in the lower, middle, and higher income ranges can indicate whether a neighborhood is stable, gentrifying, disinvesting, or polarizing. When there is stability in income distribution, there is not a priority on addressing neighborhood change.	<ul style="list-style-type: none"> <li>• High: Gentrifying or Disinvesting (rapid increases or decreases in high and low incomes)</li> <li>• Mid: Polarizing (rapid decline in middle incomes)</li> <li>• Low: Stable Diverse or Middle-Income</li> <li>• None: Stable High-Income</li> </ul>

Figure 17. Factors and indicators of neighborhood change.

Factor	Indicator	Importance	Priority Thresholds
Neighborhood Trend	Composite of DrillDown Comparisons	Because the economic landscape in Central Maryland has shifted since the 2000 US Census, the DrillDown report indicators can be used to update the other neighborhood indicators and confirm or refute trends between 1990 and 2006. Rapid increases between 2000 and 2006 indicate gentrification, while decreases or small increases indicate disinvestment. Moderate increases indicate general stability. This analysis is used to flag potential changes in neighborhood trend since 2000.	<ul style="list-style-type: none"> <li>High: Confirmation of previous trend</li> <li>Mid: Stable or confirmation of previous trend</li> <li>Low: Stable or refutation of previous trend</li> <li>None: Continued stability</li> </ul>
Combined Indicators of Neighborhood Trend	Change in Home Values	<i>This reflects the change in a neighborhood real estate market from 2000-2006. This period captures a booming real estate market nationwide, but very large change in home value is a signal of gentrification and potential displacement. Small increases in home values can be a sign of economic distress because of the overall price appreciation during this period.</i>	<ul style="list-style-type: none"> <li>Very large increase = &gt; 200 %</li> <li>Large increase = 100-199%</li> <li>Moderate increase = 50-99%</li> <li>Small increase = 0-50%</li> <li>Decrease = &lt; 0%</li> </ul>
	Change in Median Income	<i>This reflects the overall change in the wealth of a neighborhood from 2000-2006. While rapid changes in either direction are the most important indicator, decreases of median income can show signs of disinvestment, while modest increases show more signs of underlying stability, and may not signal gentrification.</i>	<ul style="list-style-type: none"> <li>High: Rapid increase (&gt; +15%) or decrease (&lt; -15%)</li> <li>Mid: Decrease (-15% - -5%)</li> <li>Low: Increase (+5% - +15%)</li> <li>None: No change (-5% - +5%)</li> </ul>
	Change in Homebuyer Income	<i>This reflects the change in the income of new residents moving to a neighborhood. Rapid increases signal gentrification, while declines or small increases signal economic distress. Moderate increases indicate general stability.</i>	<ul style="list-style-type: none"> <li>Very large increase = &gt; 400 %</li> <li>Large increase = 200-399%</li> <li>Moderate increase = 100-199%</li> <li>Small increase = 50-99%</li> <li>Very small increase = 0-49%</li> </ul>

Figure 18: DrillDown indicators and analysis of 2000-2006 trends.

### Example Stations

The following stations provide examples of each priority level for the market opportunity analysis:

- **Fells Point (Tier 1):** The station has a *Mid* rating as a mixed housing/employment place and for the increasing number of Non-Family Households from 1990-2000. For all other indicators the area gets *High* ratings for rapid change and a gentrifying character. The DrillDown analysis confirms this gentrifying trend, and so gets a *High* rating.
- **Reisterstown Plaza (Tier 2):** The station has a *Mid* rating as a mixed housing/employment place, and for the increasing number of Non-Family Households from 1990-2000. It gets a *Low* rating for no change in Education levels, but shows evidence of Disinvestment and a Rapid Decrease in median income, resulting in a *High* rating. The DrillDown analysis shows a reversal of the Disinvestment trend, resulting in a *Low* rating, and actually shows some evidence of Gentrification.
- **North Linthicum (Tier 3):** The station has a *Mid* rating as a mixed housing/employment place and for the increasing number of Non-Family Households from 1990-2000. No change in Education and an increase in Median Income result in *Low* ratings, as does the Stable, but Diverse character of incomes. Because DrillDown analysis is only available for Baltimore City, it is not possible to see how the area may have changed since 2000.
- **Bayview MARC (Tier 4):** The station is primarily an employment location, resulting in a *Low* rating. While there has been an increase in Non-Family Households, resulting in a *Mid* rating, all other indicators have Low ratings, with no change in Education, an Increase in Median Income, and an overall Stable (Low Income) neighborhood. The DrillDown analysis confirms the Stability of the neighborhood.

## Priority Stations Areas for TOD Investment

Assessing the priority of any location requires analysis of both sets of indicators outlined above. Each station was assigned a relative priority for each goal using a “Tier” from one (as the highest priority) to four (as the lowest priority). A summary table showing ratings for each station area in the region is included as Appendix B\*. Because of the limited resources of regional stakeholders to take on new commitments for TOD, the top tier of priority locations—in addition to ongoing existing commitments for TOD implementation—may occupy much of the short- to mid-term investment capacity of regional TOD stakeholders.

For this reason, this study recommends focusing on the locations that received a Tier 1 rating in one goal and at least a Tier 2 rating in the other to focus implementation resources. There may be some additional locations with Tier 2 priorities for each goal that are important near-term locations. Locations that are Tier 1 on one goal and Tier 3 and Tier 4 locations are probably not ideal locations for investment at the current time. While stations rating a Tier 3 or below on one goal and Tier 4 on the other should not be considered priority locations for TOD investment.

When identifying priority locations for investment, it is useful to think beyond individual station areas and see where there may be clusters of high priority locations. In these situations, strategies and investments can be directed to a larger area, which can both generate momentum and address changes as appropriate. Within larger investment areas spanning multiple station areas, though, it may be important to focus in on individual catalyst sites or areas.

Map 6 also illustrates these locations geographically. As can be seen from this map, many of the priority areas are clustered in and around central Baltimore, with some additional priorities in outlying areas. There may be investments made at other stations, and these will still support the overall goal of supporting and expanding transit-oriented development in the region. For both the stations listed here and other transit-served locations in the region, decisions about *where* to invest are really only the first step in the process. The next steps, outlined in detail in the next chapter are about *what*, *how*, and *who*. These next steps are critical to the success of ultimate implementation efforts.

### Ongoing use of the analysis

As updated demographic or real estate information is available, this analysis can be applied again to arrive at updated priorities. In addition, the recent dramatic changes in the real estate and housing markets have made traditional data sources difficult to analyze for a long-term view. The analysis in this chapter should be reevaluated regularly as real estate and housing market conditions continue to evolve. Additionally, as new transit lines are planned and

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\* In Appendix B, green highlighting generally indicates higher priorities, red highlighting generally indicates lower priorities. The shading of each also indicates the level of priority. The summary field on the right side of each set of indicators identifies the iTieri for each.

implemented, the proposed stations can be analyzed using this framework. The proposed Yellow Line that would connect to both downtown Towson and Columbia Town Center would greatly improve the transit connections to regional employment centers, and might radically shift how stations are positioned relative to these centers, and thus where investments can be made to spur market momentum for TOD.

This analysis is not intended to articulate the only places where investment is needed in the region, but rather where investments can best support the two goals of spurring market-driven momentum for TOD and addressing rapid neighborhood change. Increased investment in TOD region-wide is important, and there may well be some important stations and existing commitments not listed here. Existing commitments are important, but, in an era of scarce public and private resources, getting the most out of each investment is more and more critical.

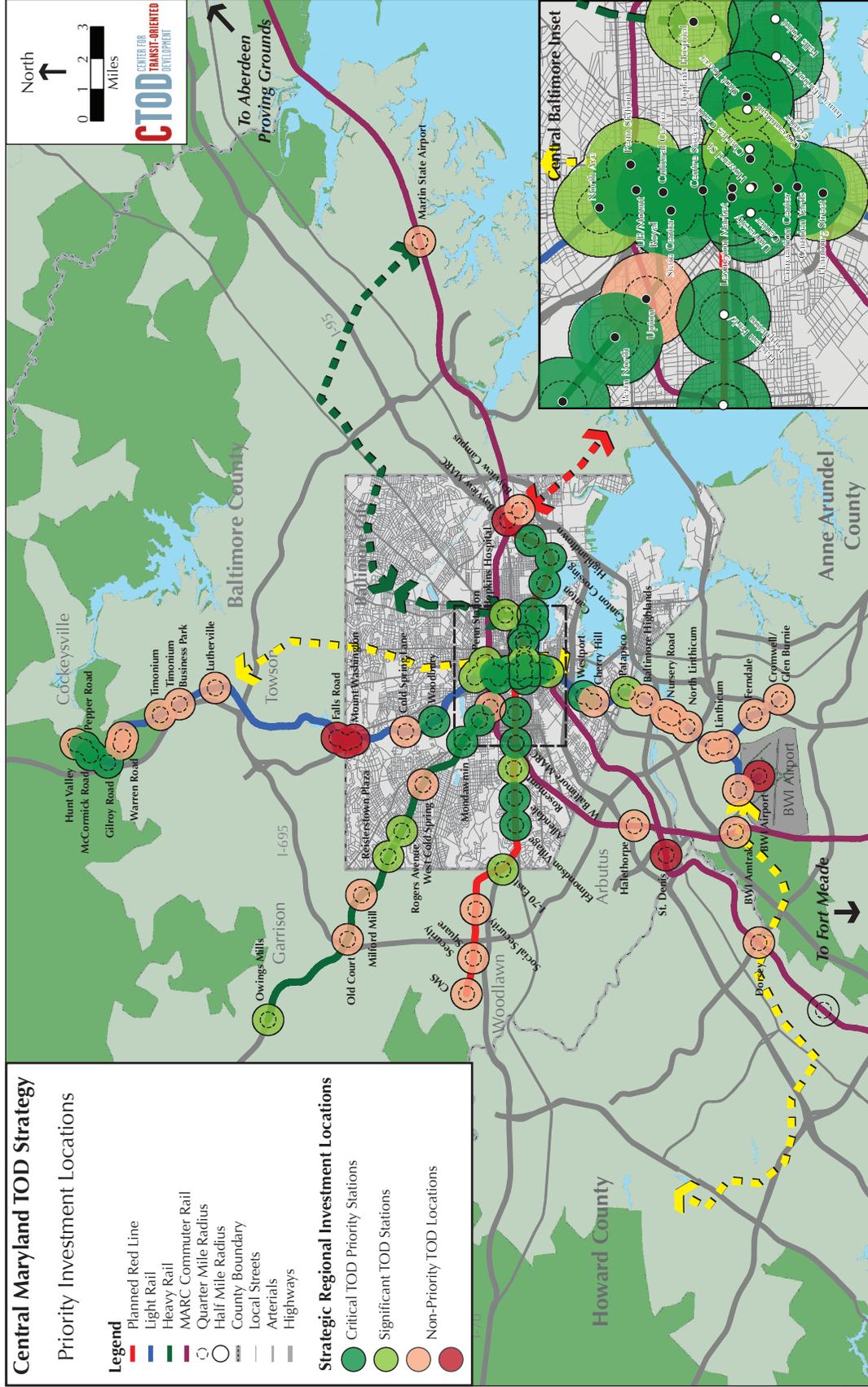
As stated above, the highest priorities for investment are those that meet *both* goals. In areas that only meet one, or in which the goals for investment may conflict, investment priorities will depend on the particular mission of stakeholders. Therefore, while this chapter has outlined an assessment of priority station areas based on the analysis of Market Dynamics and of Demographic Change, it is not intended as a final list of where investment will happen. The priority locations identified here do help form the basis for the recommendations in the Action Plan in Chapter 4.

		Direct Trajectory of Neighborhood Change			
		Tier 1	Tier 2	Tier 3	Tier 4
Catalyze Momentum for Market-Driven TOD	Tier 1	<ul style="list-style-type: none"> <li>• N.A.</li> </ul>	<ul style="list-style-type: none"> <li>• U of B/Mount Royal</li> <li>• Centre Street</li> <li>• Lexington Market</li> <li>• University Center</li> <li>• Pratt Street/ Convention Center/ Howard Street</li> <li>• State Center/Cultural Center</li> <li>• Shot Tower/Market Place/Gov't Center</li> <li>• Harlem Park/Poppleton</li> </ul>	<ul style="list-style-type: none"> <li>• Pepper Road</li> <li>• McCormick Road</li> <li>• Charles Center Metro</li> <li>• Canton Crossing</li> </ul>	<ul style="list-style-type: none"> <li>• N.A.</li> </ul>
	Tier 2	<ul style="list-style-type: none"> <li>• Woodberry</li> <li>• Camden Yards</li> <li>• Westport</li> <li>• Mondawmin Metro</li> <li>• Penn North Metro</li> <li>• Allendale</li> <li>• West Baltimore MARC</li> <li>• Edmondson Village</li> <li>• Inner Harbor East</li> <li>• Fells Point</li> <li>• Canton</li> <li>• Highlandtown</li> </ul>	<ul style="list-style-type: none"> <li>• North Avenue</li> <li>• Owings Mills</li> <li>• Reisterstown Plaza</li> <li>• Rogers Avenue</li> <li>• Johns Hopkins Medical Center</li> <li>• Penn Station</li> <li>• Rosemont</li> </ul>	<ul style="list-style-type: none"> <li>• Hunt Valley</li> <li>• Warren Road</li> <li>• Ferndale</li> <li>• Cromwell/Glen Burnie</li> <li>• Upton Metro</li> <li>• Odenton</li> <li>• CMS</li> <li>• Security Square Mall</li> <li>• Social Security Administration</li> <li>• Bayview Campus</li> </ul>	<ul style="list-style-type: none"> <li>• N.A.</li> </ul>
	Tier 3	<ul style="list-style-type: none"> <li>• Hamburg Street</li> <li>• Patapsco</li> <li>• I-70 East</li> </ul>	<ul style="list-style-type: none"> <li>• Cold Spring Lane</li> <li>• Baltimore Highlands</li> <li>• BWI Business District</li> <li>• Old Court</li> <li>• Milford Mill</li> <li>• W. Cold Spring</li> <li>• Edgewood</li> </ul>	<ul style="list-style-type: none"> <li>• Gilroy Road</li> <li>• Timonium</li> <li>• Timonium Business Park</li> <li>• Lutherville</li> <li>• Nursery Road</li> <li>• North Linthicum</li> <li>• BWI Amtrak</li> <li>• Martin State Airport</li> <li>• Halethorpe</li> <li>• Dorsey</li> </ul>	<ul style="list-style-type: none"> <li>• St. Denis</li> <li>• Bayview MARC</li> </ul>
	Tier 4	<ul style="list-style-type: none"> <li>• Cherry Hill</li> </ul>	<ul style="list-style-type: none"> <li>• N.A.</li> </ul>	<ul style="list-style-type: none"> <li>• N.A.</li> </ul>	<ul style="list-style-type: none"> <li>• Falls Road</li> <li>• Mount Washington</li> <li>• BWI Airport</li> </ul>

<span style="display: inline-block; width: 20px; height: 10px; background-color: #90EE90; border: 1px solid black;"></span> = Critical TOD Priority Stations	<span style="display: inline-block; width: 20px; height: 10px; background-color: #FFDAB9; border: 1px solid black;"></span> <span style="display: inline-block; width: 20px; height: 10px; background-color: #FF8C00; border: 1px solid black;"></span> = Non-Priority TOD locations
<span style="display: inline-block; width: 20px; height: 10px; background-color: #C8E6C9; border: 1px solid black;"></span> = Regionally important TOD Stations	

Figure 19: Regional TOD Priority Locations



Map 6. Priority Regional Locations for TOD Investment.



## Chapter 3: Station Area Framework for Planning and Investment

This chapter provides a methodology for understanding how to approach planning and investment in any location, given real estate, development market, and demographic data. This chapter also provides an assessment of the types of station areas and TOD strategies that will be important for each stakeholder group. The goal in developing this methodology was to create a framework that would help map out key planning and investment tools and strategies for the Priority TOD Locations or any other location throughout the region. Because each station and community is different, the methodology needs to account for real estate development opportunities, market activity, neighborhood demographics, and community development needs. This methodology builds off of the Priority TOD Location methodology, but the analysis tends to be more of static data, rather than neighborhood trends. The methodology is outlined in five steps:

- What is the TOD opportunity?
- Who lives in the neighborhood?
- What are the approaches to TOD?
- What tools can be deployed to support the TOD Approach?
- Where are stakeholder resources needed?

Applying these steps to any station area can yield a clear initial vision of how to accomplish TOD goals, and which stakeholders need to invest in an individual neighborhood. All of these tools and strategies need to be deployed through engagement with the local residents and businesses. The physical outcomes and implementation priorities of TOD may differ among stations, but this methodology will provide regional stakeholders with a clear path toward implementing high-quality TOD throughout the region.

### What is the TOD Opportunity?

The TOD Opportunity is an assessment of the potential to see transit-oriented development within 1/2-mile of a given station. There are two key sets of indicators to assess the opportunities:

- **Land Opportunity:** is there land available for development in the form of vacant, underutilized, or publicly held properties?
- **Market Activity:** is there already market activity in the form of construction permits for development activity, rising sales or rental prices, or high volumes of transactions?

These indicators exist on a continuum from low to high, and the level

Analysis	Indicator	Importance
Land Opportunity	Underutilized Commercial and Industrial Land (Parcels with Improvement-to-Land-Value ratio less than 1)	<ul style="list-style-type: none"> <li>If the underlying land is worth more than the built improvements, there is more likely to be redevelopment pressure to more intensive use. However, industrial land may have other productive value in addition to improvement value.</li> </ul>
Land Opportunity	Holding Capacity	<ul style="list-style-type: none"> <li>Some areas have vacant or abandoned land available for development.</li> </ul>
Land Opportunity	Non-Programmed Public Lands	<ul style="list-style-type: none"> <li>Public land that is not already programmed for other uses (schools, parks, fire houses, police stations, etc.) may be developable through public disposition.</li> </ul>
Market Activity	Permit Activity	<ul style="list-style-type: none"> <li>Recent permit activity can determine if there is some underlying market interest.</li> </ul>
Market Activity	Residential and Commercial Sales	<ul style="list-style-type: none"> <li>An increase in sales volumes and/or prices indicates an increase in market interest.</li> </ul>
Market Activity	Neighborhood Median Income (Change over time, if possible)	<ul style="list-style-type: none"> <li>Higher income areas tend to have stronger markets for new development because residents or shoppers are able to pay premiums for new construction.</li> </ul>

Figure 20: TOD Opportunity indicators.

of activity and development opportunity can change over time. The four quadrants of low and high on each scale provide a framework for thinking about different types of TOD opportunities:

- **Short Term Development** opportunities have both available land and recent market activity. TOD opportunities into the future can build off of both of these conditions and take advantage of new construction to meet TOD goals.
- **Long-Term Development** opportunities have land available, but not yet market activity. TOD opportunities will also build off the available land through new construction, but there may need to be investments that serve to catalyze the real estate market.
- **Emerging Markets** have limited land available for new development, but market activity has been high. TOD opportunities may come primarily through targeted development investments or community development and multi-modal transportation improvements. Because of the limited land availability in these locations, affordability strategies will need to focus on preservation.

- **Static Markets** have both limited land availability and limited recent market activity. TOD opportunities are limited, and may need to focus on community development and multi-modal transportation improvements to support TOD.

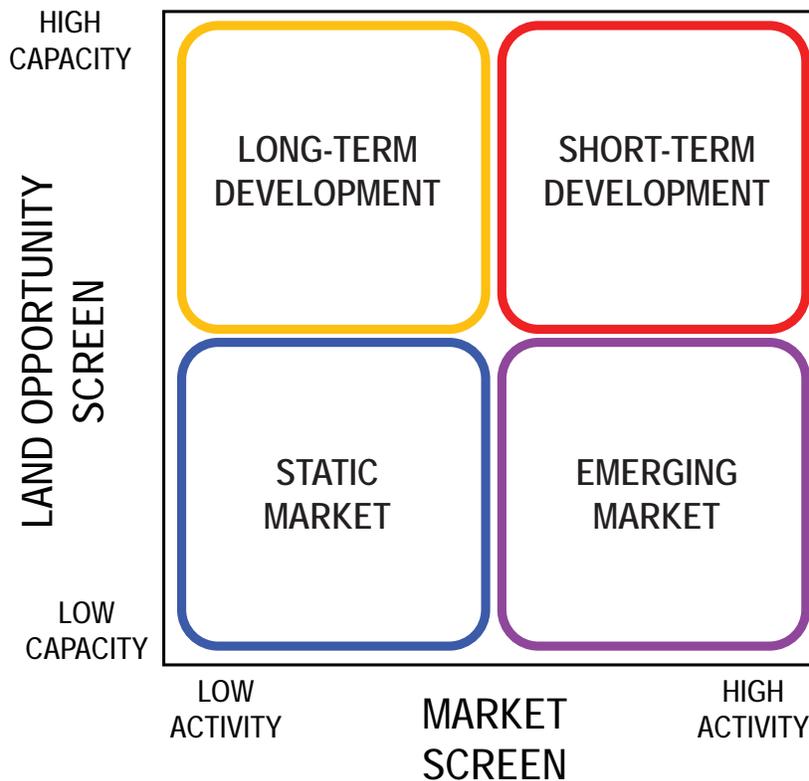


Figure 21: TOD Opportunity Matrix

Bringing together data from a number of existing sources, these indicators can be used to place stations in this framework. This does not tell us what the long-term future for any one place will be, but does give a sense for where and how to target planning and implementation resources and the priorities for different stakeholders. The analysis to initially place stations within this framework was conducted through this study and in collaboration with Baltimore City, Baltimore County, and Maryland State Department of Transportation staff. The data used to place the planned Red Line stations in this framework is included as Appendix C.

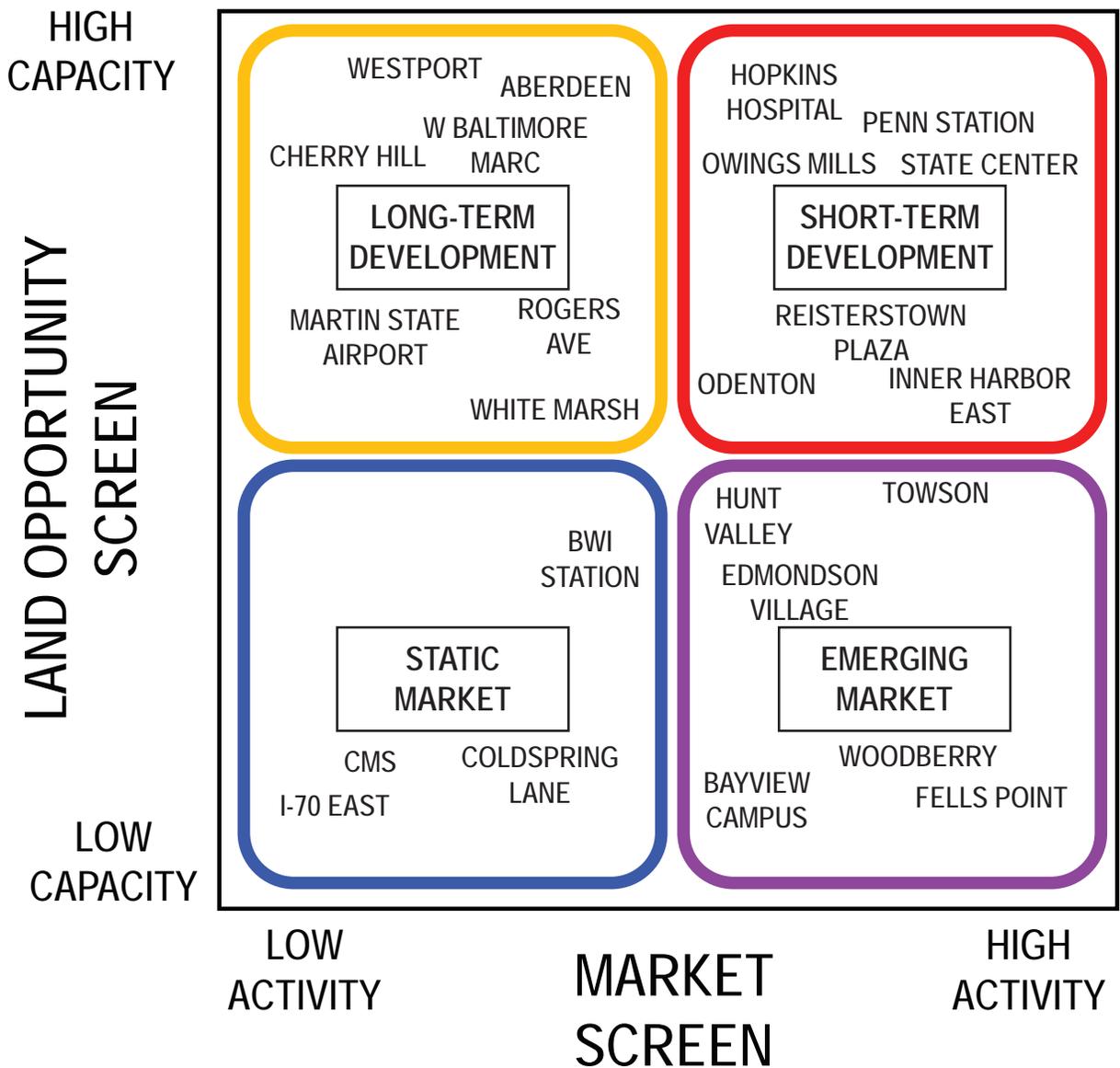


Figure 22: TOD Opportunity matrix with representative existing and planned station areas from Central Maryland.

### Who Lives in the Neighborhood?

As noted in Chapter 1, TOD in Central Maryland will require planning and investment beyond physical development. The third set of indicators has to do with who is currently living in the neighborhood, and what this means in terms of investment strategies and the appropriate tools. In this case, a different set of indicators is needed that can help identify what some of the key needs and challenges will be moving forward with TOD implementation.

Analysis	Indicator	Importance
Neighborhood	Neighborhood Median Income	<ul style="list-style-type: none"> <li>Household income in a neighborhood can identify potentially vulnerable populations or concentrations of poverty.</li> </ul>
Neighborhood	Income Diversity	<ul style="list-style-type: none"> <li>Income diversity is a measure of the relative spread of incomes in a neighborhood. High diversity indicates a high spread of income. Low diversity can indicate concentrations of either wealth or poverty. High diversity areas are the most vulnerable to neighborhood changes.</li> </ul>
Neighborhood	Market Value Analysis	<ul style="list-style-type: none"> <li>MVA indicates the relative strength of the housing market and can indicate areas of disinvestment or stable housing.</li> </ul>
Neighborhood	Jobs/Housing Balance	<ul style="list-style-type: none"> <li>High ratios of jobs to housing indicate centers of employment activity.</li> </ul>

Figure 23: TOD Neighborhood type indicators.

These indicators again exist along a continuum that can be broken down into four basic neighborhood types that is flexible and can change over time:

- Employment Centers** have few existing residents and a large portion of the existing land area devoted to employment uses (either retail or office). TOD strategies will need to engage with business groups and large employers, which usually have a high capacity to engage in land use and transportation planning. Employment Centers may offer good regional opportunities to introduce a mix of incomes through new construction of mixed-income housing.
- Stable Neighborhoods** are usually characterized by high incomes and stronger housing markets. These neighborhoods tend to have highly engaged residents and well-organized community groups or neighborhood associations that have a high capacity to engage in land use and transportation planning. Planning for affordability and mixed-income communities may not be a priority for the existing community, but Stable Neighborhoods may offer good regional opportunities to introduce a mix of incomes through a mix of preservation and new construction, even if this may not be a priority for existing neighborhood residents.
- Vulnerable Neighborhoods** are characterized by moderate-incomes, but often with some high- and low-incomes as well. These neighborhoods tend to have a high risk of displacement of existing residents, and maintaining the mix of incomes and addressing affordability concerns may be a priority in planning

efforts. These neighborhoods may have existing capacity to engage in land use and transportation planning, but may require some investment in capacity-building as well.

- **Challenged Neighborhoods** are characterized by a concentration of low-income residents and disinvestment within the neighborhood. These neighborhoods are often characterized by a lack of capacity to engage in land use and transportation planning, and both organization and capacity-building will be important components of a TOD strategy. Housing quality and affordability are often priority issues in these neighborhoods and there may be a need to address these issues both through new construction and preservation of existing housing.

These categories do not identify the long-term TOD vision for any particular place—what is an Employment Center today may become a mixed-use neighborhood in the future—but do relate to the approach to implementation that would be deployed in any particular place. The neighborhood types and the TOD Opportunity types can be used to identify the appropriate approaches and tools that can be deployed in any location.

The tools for Employment Centers and Stable Neighborhoods tend to be consistent, and aimed more at approaches that build off of the market strength of these neighborhood types and react to opportunities that may be initiated by the private sector. The approaches for Vulnerable Neighborhoods and Challenged Neighborhoods, on the other hand, are characterized more by proactive investments, tools aimed at catalyzing the market, and building community capacity.

## What are the Approaches to TOD?

There is commonality among the TOD Approaches, but there are also some key differences. Some will be more targeted to investment in new TOD construction. Others will be targeted to investment in preservation and community development outcomes. Some will rate equitable TOD as a top priority and reason for engagement, while others will be able to leverage equitable outcomes from TOD, while accomplishing other priorities.

The following is a snapshot of each TOD Approach:

- **Proactive Equitable Development** will focus on near term development opportunities, while engaging with existing communities around issues of neighborhood change, mixed-income development, and how the benefits of TOD can be equitably shared. To achieve these equitable outcomes, there may be substantial commitment of public resources. These locations do not require comprehensive planning efforts, but may require targeted planning for TOD opportunities or disposition of resources like public lands.

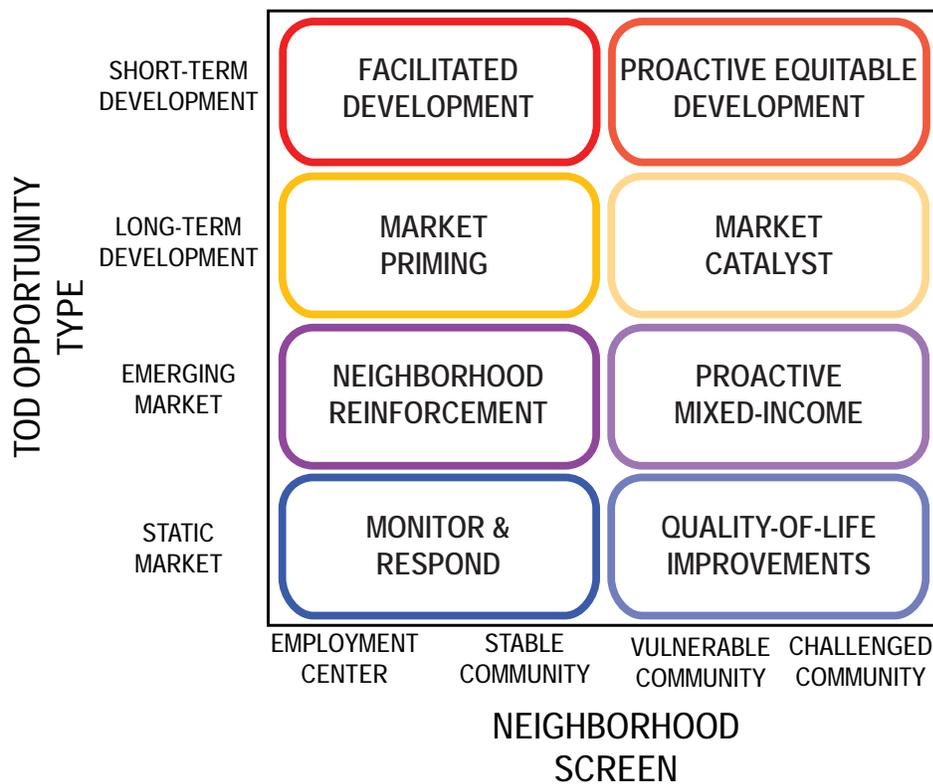


Figure 24: TOD Approach Matrix

- Facilitated Development** will focus on near term development opportunities that are already driven by the private market. TOD in these areas will likely be influenced less through public investments, but zoning and inclusionary housing requirements can shape the community outcomes of private investments. In employment areas, economic development incentives can be targeted to strengthen existing businesses. These locations do not require comprehensive planning efforts, but may require targeted planning for TOD opportunities.
- A **Market Catalyst** approach will focus on long-term development opportunities while proactively seeking to jumpstart the market for TOD. Housing trusts and land banks can build long-term investment and equitable outcomes. Investments in community capacity and organizing to prepare for deeper and more engaged station area planning will likely be necessary.
- Proactive Infrastructure Investment** will focus on the multi-modal and public infrastructure investments needed to unlock market opportunities. These investments may be necessary to intensify existing employment concentrations and add a mix of housing. Streetscape improvements may also be necessary

to build pedestrian and bicycle traffic in stable residential areas and support additional TOD investment. Long-range planning in collaboration with local residents and businesses will be important in supporting these infrastructure investments.

- **Proactive Mixed-Income** will target affordable housing preservation through long-term strategies including land banks and land trusts. Because there will be limited opportunities for new construction, these strategies will target investment in existing structures and in strengthening neighborhoods through community development and multi-modal transportation investments. Long-range planning and engagement focused on multi-modal transportation improvements and community development needs will ensure that tools and investments support equitable TOD outcomes for all members of the community.
- **Neighborhood Reinforcement** will utilize the market strength and lack of development opportunities in these station areas to produce targeted improvements in affordability. In these areas, targeted infrastructure and community investments can be used to leverage the preservation of a mix of incomes. Planning efforts will likely be targeted toward short-term and strategic site outcomes, rather than long-term land use and transportation visions.
- **Quality of Life Improvement** will address community development and investment needs when there is a lack of development opportunities or market activity and where there are vulnerable communities. Investments in schools, parks, and other neighborhood facilities can help support market activity, while also improving the quality of life for existing residents. Strategic neighborhood transportation and community amenity planning can help realize TOD benefits.
- **Monitor and Respond** will be more passive approaches to TOD where there is a lack of development opportunity or market activity, and where there are predominantly employment uses or stable communities. These locations have little potential or demand for TOD outcomes. However, if there is some private investment in these locations, there may be the need to provide some public planning or implementation support. This support should be weighed alongside other regional TOD needs.

Using this framework, we can identify an appropriate TOD Approach for existing and planned stations as a starting point for approaching TOD planning in individual locations. The analysis to initially place stations within this framework was conducted through this study and in collaboration with Baltimore City, Baltimore County, and Maryland State Department of Transportation staff. The data used to place the planned Red Line stations in this framework is included as Appendix C.

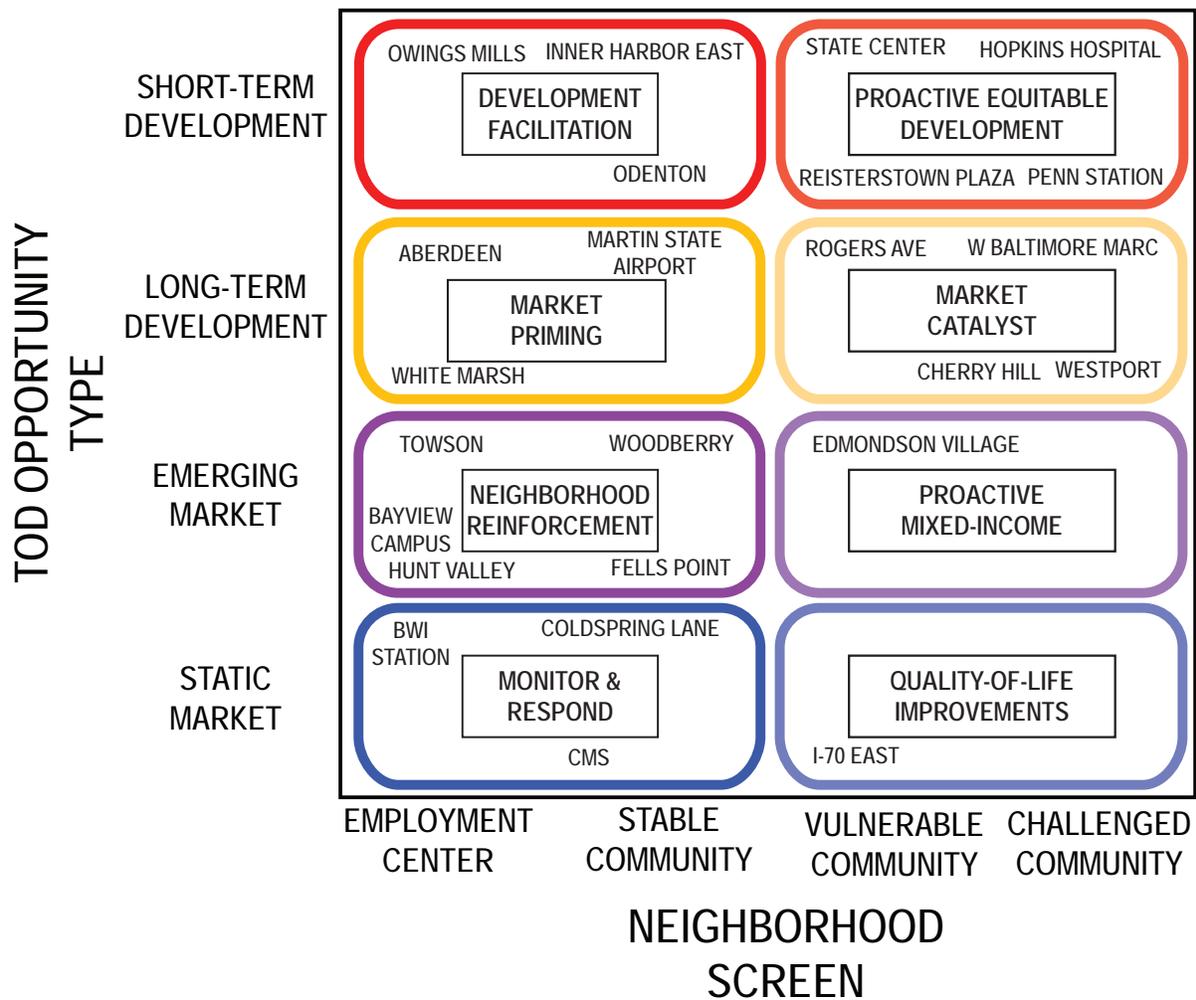


Figure 25: TOD Approach matrix with representative existing and planned station areas from Central Maryland.

### What Tools Can Be Deployed For Each TOD Approach?

These broad approaches need to be implemented through policy and investment tools. The following table outlines the TOD Strategies and some of the planning and development tools that can be deployed with each. Some tools currently exist, and some may need to be implemented at the state or local level. The key policy changes are also outlined in Chapter 4.

TOD Approach	TOD Opportunity Type	Neighborhood Type	Key Planning/Design Tools	Key Regulatory/Development Tools
Overall Regional Strategy	All	All	<ul style="list-style-type: none"> <li>Engage in TOD planning at the regional level to identify appropriate incentives or requirements that address key barriers to transit-supportive development.</li> <li>Engage with community residents in neighborhood-based planning processes to craft local responses and approaches.</li> </ul>	<ul style="list-style-type: none"> <li>Deploy regional-level capital funding sources for infrastructure and development uses that advance TOD goals, including pedestrian, bicycle, and transit-friendly streetscape improvements, increased affordability and market-transforming development projects.</li> <li>Target Federal, state, and local economic development funding and incentives to locations with high-quality transit access to encourage clustering of employment and limiting job dispersal.</li> <li>Use Commuter Choice Incentives to encourage people to live near and use transit.</li> <li>Use marketing and improved information to encourage non-work transit trips for cultural, sports, entertainment, or shopping destinations that can be reached by transit.</li> <li>Renew the state Historic Tax Credit to support reinvestment in areas served by transit. This program could also provide additional incentives to invest near transit.</li> </ul>
Proactive Equitable Development	Short-Term Development	Vulnerable/Challenged	<ul style="list-style-type: none"> <li>Conduct a targeted feasibility analysis of strategic sites for equitable TOD.</li> <li>Draft a public land disposition strategy to help facilitate short-term development objectives.</li> <li>Develop a priority list of pedestrian and multi-modal access improvements.</li> </ul>	<ul style="list-style-type: none"> <li>Use Tax Increment Financing (TIF) to finance local investments and infrastructure improvements to support development potential and affordability.</li> <li>Use City or County Capital Improvement Program (CIP) to fund multi-modal access, infrastructure and/or planning projects.</li> <li>Streamline permitting and approval processes to capitalize on development opportunity</li> <li>Utilize inclusionary zoning to help maintain income diversity.</li> <li>Utilize State capital funds and Medco bonds for land acquisition and infrastructure improvements.</li> </ul>
Development Facilitation	Short-Term Development	Stable/Employment	<ul style="list-style-type: none"> <li>Draft a public land disposition strategy to help facilitate short-term development objectives.</li> <li>Develop a priority list of pedestrian and multi-modal access improvements.</li> </ul>	<ul style="list-style-type: none"> <li>Tailor Zoning/Development Controls around transit, i.e. reducing parking requirements, integrating housing into employment areas, and requiring active ground floors.</li> <li>Utilize inclusionary zoning to help create income diversity.</li> <li>Use Economic Development incentives to target job creation in existing or planned transit zones.</li> </ul>

Figure 26: TOD Approaches and Tools

TOD Approach	TOD Opportunity Type	Neighborhood Type	Key Planning/Design Tools	Key Regulatory/Development Tools
Market Catalyst	Long-Term Development	Vulnerable/ Challenged	<ul style="list-style-type: none"> <li>Engage in a community visioning or Station Area Planning process to determine long-term transportation and land use goals and strategies and short-term investments.</li> <li>Identify transformative development projects (projects that have the potential to demonstrate a market for TOD, but may not provide immediate market return) and opportunities for investment by key stakeholders.</li> <li>Build community capacity through leadership training for CDCs and faith-based organizations to identify long-term implementation roles and responsibilities.</li> </ul>	<ul style="list-style-type: none"> <li>Develop a strategy for public acquisition and disposition of land—potentially including a Land Bank Authority—to control land development costs near transit stations and catalyze TOD that stimulates the development market in target neighborhoods.</li> <li>Use a Land Acquisition Fund or Urban Renewal Plans (URPs) to expand the affordable housing supply near transit and preserve existing affordable units.</li> <li>Tailor Zoning/Development Controls around transit, i.e. reducing parking requirements, integrating housing into employment areas, and requiring active ground floors.</li> <li>Site public investments in schools, parks, and other neighborhood amenities to catalyze development and take advantage of long-term potential.</li> </ul>
Market Priming	Long-Term Development	Stable/ Employment	<ul style="list-style-type: none"> <li>Engage in a community visioning or Station Area Planning process to determine long-term transportation and land use goals and strategies and short-term investments.</li> </ul>	<ul style="list-style-type: none"> <li>Use City or County Capital Improvement Program (CIP) to fund multi-modal access, infrastructure and/or planning projects.</li> <li>Use Tax Increment Financing (TIF) to finance local investments and infrastructure improvements to support development potential and affordability.</li> <li>Site public investments in schools, parks, and other neighborhood amenities to catalyze development and take advantage of long-term potential.</li> </ul>
Proactive Mixed-Income	Emerging Market	Vulnerable/ Challenged	<ul style="list-style-type: none"> <li>Build community capacity through leadership training for CDCs and faith-based organizations to set neighborhood vision, roles, and responsibilities.</li> <li>Identify affordable housing preservation opportunities, such as expiring Federal contracts or distressed public housing projects that can be rehabilitated.</li> </ul>	<ul style="list-style-type: none"> <li>Use Community Land Trusts to create long-term affordable housing preservation and infill development opportunities.</li> <li>Use an Acquisition &amp; Rehabilitation Fund to preserve existing affordable units and expand the affordable housing supply.</li> <li>Focus Housing Trust Funds on transit-accessible areas to pair reduced housing costs with reduced transportation costs.</li> <li>Deploy Homeownership Programs to help current residents stay in proximity to transit or new households move in.</li> </ul>

Figure 26 (continued): TOD Approaches and Tools

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TOD Approach	TOD Opportunity Type	Neighborhood Type	Key Planning/Design Tools	Key Regulatory/Development Tools
Neighborhood Reinforcement	Emerging Market	Stable/ Employment	<ul style="list-style-type: none"> <li>Conducted a targeted feasibility analysis of strategic sites for equitable TOD.</li> </ul>	<ul style="list-style-type: none"> <li>Use <b>Community Land Trusts</b> to create long-term affordable housing preservation and infill development opportunities.</li> <li>Use an <b>Acquisition &amp; Rehabilitation Fund</b> to preserve existing affordable units and expand the affordable housing supply.</li> <li>Focus <b>Housing Trust Funds</b> on transit-accessible areas to pair reduced housing costs with reduced transportation costs.</li> <li>Deploy <b>Homeownership Programs</b> to help current residents stay in proximity to transit or new households move in.</li> </ul>
Quality of Life Improvements	Inactive Market	Vulnerable/ Challenged	<ul style="list-style-type: none"> <li>Engage in a <b>Neighborhood Strategic Planning</b> process that focuses on key improvements to safety, schools, and streets.</li> <li>Identify <b>priority multi-modal improvements</b> that improve access to existing or planned transit station locations.</li> <li>Address long-term barriers to development using the <b>Comprehensive Planning</b> process</li> </ul>	<ul style="list-style-type: none"> <li>Make targeted investments in <b>public amenities</b> such as schools, parks, and other neighborhood amenities to improve and maintain community stability.</li> <li>Invest in outreach by <b>education and social service institutions</b> to enhance resident access to services and opportunities via transit, such as through discounted fare cards, or improved information about transit connections in the neighborhood.</li> </ul>
Monitor and Respond	Inactive Market	Stable/ Employment	<ul style="list-style-type: none"> <li>Little or no activity needed.</li> </ul>	<ul style="list-style-type: none"> <li>Little or no activity needed.</li> </ul>

Figure 26 (continued): TOD Approaches and Tools

## Where Are Stakeholder Resources Needed?

In an era of limited resources, making investment decisions necessitates a comprehensive approach. Given the multiple stakeholders engaged in transit-oriented development, communication and coordination across stakeholders is especially important. Primary stakeholders in TOD planning and implementation include:

- **Public Sector Planning Resources** responsible for short- and long-term land use and transportation planning at the city, county, or state level;
- **Public Sector Capital Resources** responsible for capital improvements, including street construction, housing and mixed-use development, site assembly, and infrastructure investment in transit and other public services at the city, county, or state level;
- **Philanthropic Investment** through grants and Program Related Investments;
- **Private Sector Investment** through real estate development projects and/or investment in upgrading existing structures;
- **Community Associations** through participation in planning processes and community improvements; and
- **Community Organizing and Advocacy** through outreach and engagement with residents, coalition-building, and political action around development or transportation investments.

The relative resource intensity for each of the primary stakeholder groups engaged in TOD planning and implementation will vary based on the TOD Approach in a particular location. The following table outlines resource demands from each stakeholder for each TOD Approach. Dark grey boxes indicate a high level of staff and financial resources needed for implementation, light grey boxes indicate a moderate level of resources, and white boxes indicate a low level of resources needed.

The table also identifies priority TOD Approaches for each stakeholder, outlined as follows:

- **Public Sector Planning Resources** prioritize those areas with short- or long-term development opportunities;
- **Public Sector Capital Resources** likewise prioritize those areas with short-or long-term development opportunities;
- **Philanthropic Investments** prioritize those areas with vulnerable and challenged communities;
- **Private Sector Investments** prioritize areas with existing market activity;
- **Community Associations** prioritize areas with short-term development opportunities and areas with a need for careful management and quality of life improvements; and
- **Community Organizing and Advocacy** prioritize areas where there will be an opportunity to influence short-term projects or inject additional equitable considerations into long-term development opportunities or emerging markets.

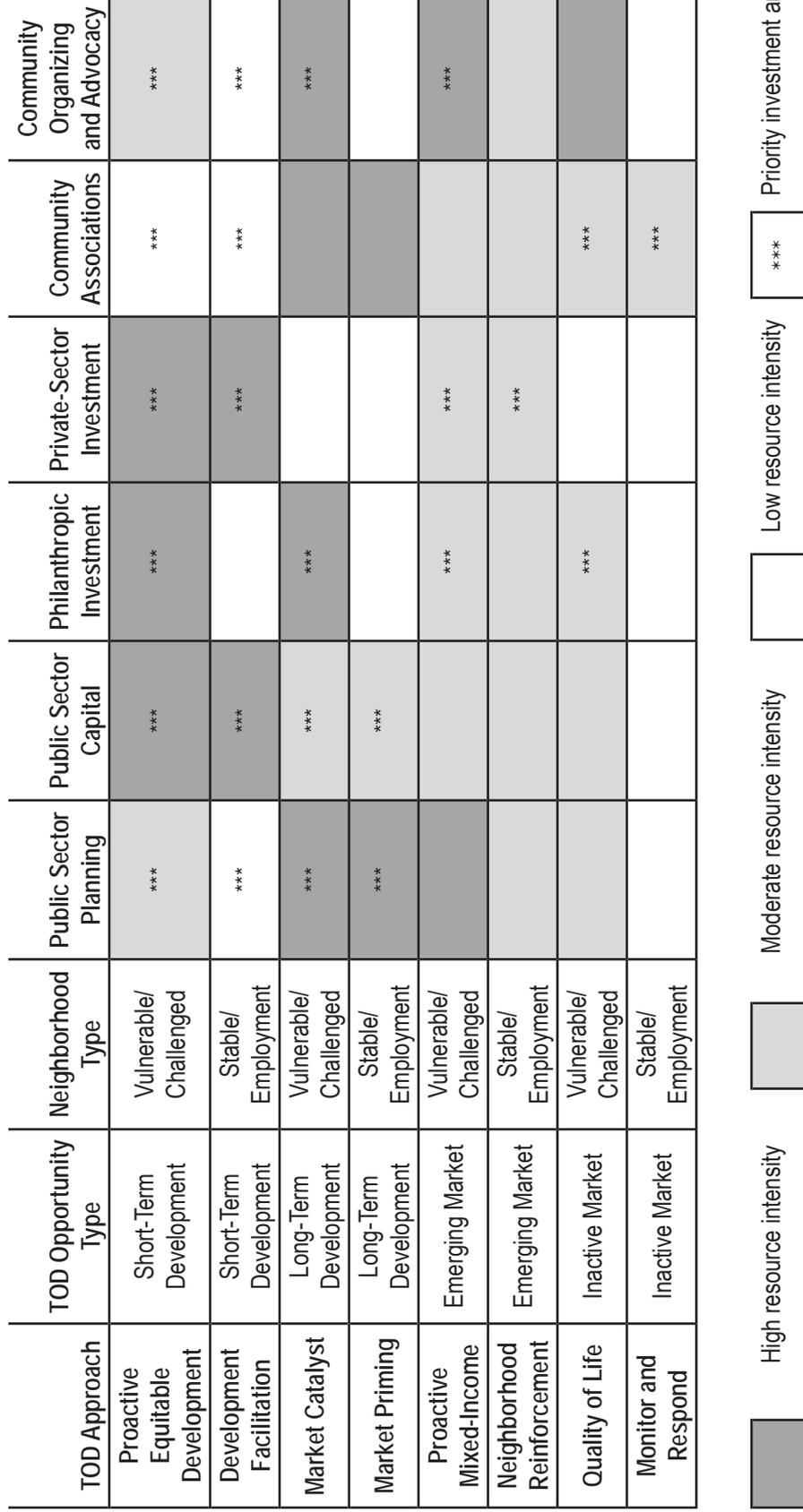


Figure 27: Stakeholder resource intensity and priority by TOD Strategy

The levels of resource intensity for each TOD Approach do not always correspond with the priority of various stakeholder groups, but it is also instructive to see where there is overlap of stakeholder priorities, and where there is not. *Proactive Equitable Development* has a high alignment of stakeholder priorities, but some variation in resource intensity. *Development Facilitation* similarly has high priority among most stakeholders, but does not require substantial investments of resources from public sector planning stakeholders or community advocates. *Monitor & Respond* has an across-the-board low resource intensity that fits with the potential for beneficial outcomes of investment in these areas.

This assessment also identifies TOD Approaches where some stakeholders will need to be out in front of others in making investments. For example, A *Market Catalyst* approach has a broad alignment of investment priorities, whereas *Market Priming* will be stronger priorities for the public sector than for other stakeholders. Some stakeholders may have the resources to invest across all TOD Approaches, whereas others will need to focus their resources on just a few.



## Chapter 4: TOD Strategic Action Plan

The previous chapters have outlined a number of recommendations and methodologies for advancing TOD in Central Maryland. The TOD Strategic Action Plan synthesizes the analysis and recommendations to guide TOD implementation in Central Maryland. Chapter 1 focused on the existing conditions and overall challenges and opportunities facing Central Maryland as a whole. Chapter 2 incorporated the general concepts of Chapter 1 into a methodology for identifying priority station areas. Chapter 3 laid out an approach to TOD investment, tools, and resource needs to implement TOD at any location within Central Maryland.

The TOD Strategic Action Plan provides a clear set of next steps and actions, including:

- Five broad TOD Strategies including both existing and new planning and investment initiatives;
- Criteria for investment in existing or new TOD initiatives that have some commonality among the various stakeholders;
- Key regional policy reforms, infrastructure investments, planning/development activities; and
- Time frame with steps beyond near-term implementation and both lead and support stakeholders.

### Five Strategies for TOD Implementation

This Action Plan has five major strategies to achieve TOD goals:

- Complete existing projects to demonstrate high-quality transit-centered communities in the region.
- Make new investments in key regional locations for TOD to build momentum for market-driven TOD and address neighborhood change, while demonstrating a cross-sector, multi-disciplinary approach to TOD implementation.
- Modify local, regional, and state policies to support TOD as the standard development practice.
- Construct transit and multi-modal transportation systems to build the market and expand the geographic reach of transit and TOD.
- Foster cross-sector partnerships and build local capacity for TOD implementation among all stakeholders.

## Criteria for TOD Investment

Despite all of the analysis in this report, there are still hard decisions to be made about where resources should be allocated. Each stakeholder is operating under its individual set of criteria, and will have to make its own allocation of scarce resources. In order to facilitate these decisions, this report has outlined a series of recommendations on regional needs and opportunities, priority locations, and TOD implementation approaches. The following list of criteria is a basic list of where there is commonality among the stakeholders involved in TOD that can be used to identify the individual actions and investments for TOD implementation.

Investment Criteria	Key Question(s)	TOD Strategy Considerations
Existing Investments	<ul style="list-style-type: none"> <li>Are existing investments or commitments in place?</li> </ul>	<ul style="list-style-type: none"> <li>New investments—in the form of capital improvements (street, school, or park upgrades) or financing commitments (TIF districts or private/philanthropic investments)—that build off of existing commitments can bring about long-term neighborhood improvements</li> </ul>
Economic Development Outcomes	<ul style="list-style-type: none"> <li>Does this investment add jobs to the economy or build the tax base of the City/County?</li> </ul>	<ul style="list-style-type: none"> <li>Funding could be used to target commercial development and job creation in existing or planned transit zones.</li> </ul>
Triple Bottom Line Outcomes	<ul style="list-style-type: none"> <li>Does this investment have equitable and environmental benefits in addition to economic ones?</li> </ul>	<ul style="list-style-type: none"> <li>Investments of some stakeholders may be focused on equitable development target areas.</li> </ul>
Neighborhood Institution Capacity	<ul style="list-style-type: none"> <li>Are there community institutions that can lead community processes or development activities?</li> </ul>	<ul style="list-style-type: none"> <li>Where this does not exist, there may need to be preparatory investments in community capacity building through CDCs, faith-based organizations, and other neighborhood institutions.</li> </ul>
Anchor Institution Capacity	<ul style="list-style-type: none"> <li>Are there existing anchor institutions (universities, hospitals, or other large-scale institutional uses) that can assist in planning or development activities?</li> </ul>	<ul style="list-style-type: none"> <li>In places without private market interest, anchor institutional partnerships can advance implementation efforts.</li> </ul>
Target Population	<ul style="list-style-type: none"> <li>Is there a specific population that should be targeted for support or investment based on the impact of past investments?</li> </ul>	<ul style="list-style-type: none"> <li>Neighborhoods that have seen negative impacts of past urban freeway construction, environmental justice, or redlining can be targeted for current equitable development investments.</li> </ul>
Strategic Regional Location	<ul style="list-style-type: none"> <li>Based on the regional and corridor analysis, where is the best place to focus resources given transit investments and the potential to catalyze TOD?</li> </ul>	<ul style="list-style-type: none"> <li>Investments targeted to overcoming barriers identified in the regional and corridor-level analysis can have wider impact than the individual station area and can feed into overall momentum for TOD.</li> </ul>

Figure 28: Criteria for TOD investment and considerations for TOD strategies.

## TOD Strategy Implementation Actions

The following is a detailed overview of the specific investments that can best advance TOD in Central Maryland.

### Strategy 1: Complete existing projects to demonstrate high-quality transit-centered communities in the region

There are already a multitude of existing and future TOD projects planned throughout Central Maryland. These projects should be completed in keeping with the core TOD principles (as outlined in the introduction) in order to demonstrate the feasibility and quality of TOD in the region. Specific actions to be completed include:

- **Implement State Center TOD Plan.** The State Center project envisions a mixed-use center to replace the existing state office complex with 1,400 new housing units (including 400 affordable and workforce units), new retail, a supermarket, and private office space. The proposed developer agreement also includes a \$500 million MBE opportunity. This project has the potential to be a model for how diverse nearby communities can participate in TOD planning and implementation. McCormack Baron Salazar, Preston Street Partners and Linden Associates are partnering with the State to implement the plan.
- **Complete the Metro Centre at Owings Mills.** The Owings Mills project envisions a mixed-use center that will improve connectivity between the mall, residents, and the transit station. Legal and market challenges have slowed the implementation schedule.
- **Complete the Uplands Housing Redevelopment and Edmondson Village Shopping Center Transformation.** Baltimore Housing, Uplands Visionaries, LLC, and Southwest LLC are leading the redevelopment of this former distressed public housing project as a mixed-income housing development near the future Edmondson Village Red Line Station. The design of the project should take advantage of this future transit amenity. The Edmondson Village Shopping Center has the potential to be transformed into a vibrant community-serving retail hub through investment from the City and the private sector.
- **Finish implementation of EBDI project.** The East Baltimore Development, Inc. project is an 80-acre redevelopment site located on the east side of Baltimore city just north of Johns Hopkins Medical Center and the Green Line Metro stop of the same name. Through partnerships between Baltimore City, the private sector, and philanthropic partners, the project

will create a mixed-income community through rehabilitation, new construction and open space.

- **Complete implementation of Inner Harbor East Master Plan.** The Inner Harbor East Master Plan is well on the way to completion. The wide sidewalks, storefront retail and restaurants will make the area an attractive destination for entertainment and shopping trips. The type of transit trips generated by this type of development make access to other stops along the Red Line and elsewhere in the transit network more attractive. The concentration of residential and office spaces will also generate commuting transit trips and build future ridership. It is important to complete the investment in this neighborhood and prepare for the Red Line investment.
- **Implement Westport Plan and Community Visioning for Larger Station Area.** The Westport project will add retail and residential uses to a large waterfront brownfield site adjacent to the Westport Blue Line station. The project will transform a formerly abandoned site into a mixed-use center. Westport has also been designated a BRAC zone which could support further investment in the area. A proactive process to involve the community of Westport will be important to maximize the benefits of public and private investment in the area.
- **Implement Charles North Vision Plan.** The Charles North Vision Plan envisions new investment in a mixed-use, mixed-income entertainment district north of Penn Station. The transformative plans to build off of the existing arts uses could increase the benefits of access to this neighborhood via transit. It is important to implement pedestrian improvements to improve the connections between Penn Station and the existing and planned residences and businesses nearby.
- **Implement West Baltimore MARC Plan.** The West Baltimore community in partnership with Baltimore City and MDOT developed a plan to transform the West Baltimore MARC station area into a mixed-use and mixed income transit centered community. The plan relied on extensive outreach and organizing by community-based groups and citywide partners and has clear, implementation steps that can happen over the long term.

### **Strategy 2: Develop new corridor-level initiatives in key regional locations for TOD**

Key stakeholders in all sectors should focus time and investments on new projects that demonstrate cross-sector approaches to TOD implementation that expand beyond the individual site or neighborhood to demonstrate innovative approaches at the corridor-level that will promote a new vision of

mixed income neighborhoods, transit-oriented activity centers, and more connected regional employment centers. Actions that can accomplish this vision are:

- **Complete planning for the Howard Street / Blue Line Corridor Development and Streetscape.** MDOT has initiated planning for comprehensive transportation improvements to the Howard Street corridor. The plan will likely modify the existing light rail configuration on the street and improve the connectivity of the existing Blue Line and new Red Line. The planning and implementation process should utilize a *Proactive Equitable Development* approach to identify potential opportunities for new development and rehabilitation of existing structures.
- **Formulate a Red Line East Mixed-Income TOD Strategy.** The neighborhoods along the Red Line corridor between the Inner Harbor East and Highlandtown stations have experienced recent neighborhood change and are continuing to see investment and rising incomes. Historically, these neighborhoods have been the home to a range of incomes, household types, and neighborhood-serving businesses, and these community assets should be maintained into the future. However, without proactive planning, the desirability of the neighborhoods and location with respect to the regional transit network threatens to price current residents out of the housing market. Because these neighborhoods are largely built out, a Mixed-Income TOD Strategy will need to follow a *Neighborhood Reinforcement* approach.
- **Engage in a Red Line / Security Boulevard TOD Opportunity Study.** The west end of the Red Line in Baltimore County, between the planned I-70 and CMS stations could be transformed into a transit-oriented center through proactive planning and engagement with existing businesses and residents. The Security Boulevard corridor is currently primarily a commercial corridor and employment cluster with a mix of retail, office, and light-industrial uses. A comprehensive planning effort and deployment of a *Market Priming* approach has the potential to produce a vital destination at the west end of the Red Line.
- **Develop a Vacant Property Strategy for the Red Line West / Edmondson Avenue corridor.** The large amount of vacant and city-owned properties along the Red Line West / Edmondson Avenue corridor between the Harlem Park/Poppleton and the Edmondson Village stations is a barrier to reinvestment in the area. A proactive reform of Baltimore City's land acquisition and disposition process through a Land Bank Authority or other tool can turn this land into a resource that can fuel

revitalization efforts through the utilization of *Market Catalyst* and *Proactive Mixed-Income* approaches. Completing the Red Line will be a critical component of this strategy to catalyze the market for TOD in the corridor.

- **Initiate a Green Line / Reisterstown Road Corridor TOD Strategy.** The Green Line between Penn North Metro and Reisterstown Plaza stations is a priority area for addressing the trajectory of neighborhood change, and has priority regional locations for TOD as well. However, the configuration of the elevated heavy rail corridor along the busy Wabash roadway and freight rail corridor makes transit-oriented communities centered on the Green Line stations difficult. The existing transit park-and-ride lots, inhospitable pedestrian access conditions from surrounding areas, and the existing maintenance facility near the Rogers Avenue station may also create barriers to TOD implementation. A transportation and land use planning effort in this corridor should start with a focus on the Reisterstown Road corridor and should use a *Market Catalyst* approach to focus on creating walkable neighborhoods, while also identifying Green Line station upgrades, improved pedestrian access, streetscape improvements, and development opportunities. Early engagement and organizing of residents and businesses will be important to generate momentum for TOD in the corridor.

### **Strategy 3: Modify local, regional, and state policies to support TOD**

Local, regional and state stakeholders should focus efforts on improving and then deploying the planning and regulatory tools listed below. These tools provide investment funds that can be allocated towards TOD projects.

- **Target State Economic and Community Development Incentives.** Economic Development Incentives can be created and used to target commercial development and job creation in existing or planned transit zones. In Central Maryland, this is important to reinforce existing regional job centers and connect them via transit. The Maryland Department of Housing and Community Development's Community Legacy program or Maryland Department of Economic Development incentive programs are examples of programs to target.
- **Modify State/Local TIF District Formation to Support Equitable TOD.** Historically, Tax Increment Financing districts have been formed for purposes of alleviating blight or stimulating economic development. Pennsylvania's Transit Revitalization Investment Districts (TRID) program can be a model for a state-level definition of value capture districts to support infrastructure and development projects that support transit and equitable TOD.

- **Renew and Adequately Fund State Historic Tax Credit.** The historic tax credits program has been important to support investment in TOD and historic preservation projects. This program and others that support reinvestment in existing communities are essential for implementing TOD on a broad scale.
- **Implement Land Banking Strategy to Streamline and Reform Land Acquisition and Disposition in Baltimore City.** There is a large inventory of vacant and city owned properties near the existing and proposed station areas. A proactive Land Bank Authority or other vacant property strategy can turn this land into a resource that can fuel revitalization efforts.
- **Develop Incentives for High-Quality, Green Design of Transit-Centered Communities.** While there are long-term benefits, there can be higher up front costs to high-quality design and materials and green design. Establishing state or regional incentives for meeting standards such as those established by the LEED rating systems administered by the US Green Building Council can make these additional initial costs feasible. Arlington, Virginia and Portland, Oregon have incentive programs that encourage green, high-quality TOD design.
- **Develop Regional Revenue and Financing Mechanisms to Accelerate the Implementation of the Regional Rail Plan.** The uncertainty and slow pace of financing for transit upgrades hampers the market for TOD. Regional transit financing tools, such as the FasTracks program in Denver, can accelerate the implementation of transit and TOD and build market momentum. These initiatives often face substantial political barriers, so a coordinated and effective regional outreach and messaging campaign is essential.

#### **Strategy 4: Construct transit and multi-modal transportation systems to support TOD**

Use federal money and other funding sources to implement the regional transit plan by continuing efforts toward building the Red Line and planning for other lines in concert with making existing transit stations more accessible. Specific projects to focus on are:

- **Complete Red Line.** The completion of the Red Line is imperative to further the implementation of the overall Regional Rail system and connectivity of transit in Central Maryland.
- **Focus transportation capital funding on priority station locations.** Multi-modal improvements that improve access to

and from transit stations are essential to supporting transit and TOD in Central Maryland. Targeting local Capital Improvement Programs (CIPs) and state Transportation Enhancement Program funds to make improvements to streets around transit stations using Crime Prevention Through Environmental Design (CPTED) principles will also signal the importance of these areas from a development perspective. The recent capital improvements to North Charles Street between Mount Vernon Square and Penn Station are an example of how these improvements can be targeted to transit zones.

- **Initiate Yellow Line Corridor Transit and TOD Planning.** As the Red Line is being implemented, planning for additional transit should continue. The potential Yellow Line connection from Towson to downtown Baltimore will improve regional connections to employment destinations and build the market for TOD region-wide. Transit can also help fuel the future growth of downtown Towson, by providing workers with alternative travel options and easing traffic challenges. For these reasons, planning and implementation of the Yellow Line is the next critical piece in implementing the Regional Rail plan to support TOD in Central Maryland.
- **Implement MARC Growth & Investment Plan.** The implementation of the plan is an important step in building out the Regional Rail Plan transit network. The new stations and connections with the Red, Yellow and Green transit lines will further the implementation of the overall Regional Rail system. The double tracking and rolling stock upgrades will improve regional connections to employment clusters at Aberdeen Proving Ground, BWI, Ft. Meade, and Washington, D.C.
- **Develop regional capital funding streams for multi-modal access improvements.** Regions around the country have developed regional programs to support multi-modal improvements to create more livable, walkable neighborhoods. The programs have often been led by the Metropolitan Planning Organization (MPO) and have used a variety of funding sources, including regional tolls, state transportation funds, and Federal transportation funds—often through the CMAQ program. The San Francisco Bay Area, the Portland, Oregon region, and the Minneapolis-St. Paul region have the most advanced programs, but there are 10 or so programs nationally that could be models. Providing the funding regionally encourages local jurisdictions to make the necessary improvements to support increased transit use and TOD.
- **Complete Buildout of Regional Rail Plan.** The completion of the Yellow Line is the next critical piece in the completion of the overall Regional Rail system and connectivity of transit in Central Maryland. Completing this line and the rest of the envisioned rail network will be critical in supporting TOD throughout Central

Maryland. As the transit network grows, access to transit will be more valuable and will build the market for TOD by linking residents with the destinations where they work, live, and play. This will build regional competitiveness and encourage economic growth and prosperity.

### **Strategy 5: Foster cross-sector partnerships and build local capacity for TOD implementation**

TOD involves many different stakeholders, each with their own set of goals and priorities. However, not one stakeholder can accomplish TOD alone. It is important that representatives from the public and private sectors, community advocates, philanthropic organizations, and others collaborate to build a common goal or vision for TOD implementation. This can be done through coordination of policy reform efforts, joint investment in TOD, through community visioning and planning processes.

- **Continue and expand TOD Strategy Steering and Implementation Committee to share strategies and implementation needs.** The information sharing and collaboration through the work on this study has clearly shown the value of regional collaboration around TOD. However, continued dialogue between all of the stakeholders will be necessary as the existing commitments to TOD are implemented and new ones are initiated. Tracking indicators and measures of progress such as those outlined in Appendix D can form an important element of ongoing coordination.
- **Engage in community outreach and organizing to empower participation in existing and priority locations for TOD.** This type of “action” helps involve the community in planning where to guide and invest their resources on projects that are focused on TOD. Community engagement through the West Baltimore MARC Station Plan is a good example of how public, philanthropic, and non-profit organizing and advocacy resources were combined to produce a plan everyone could rally behind.
- **Develop and deploy commuter incentives through public/private/non-profit partnerships.** Programs such as Live-Where-You-Work that provide financial incentives for home purchases near employment can encourage people to live closer to their jobs but can also be expanded to include housing near transit as well. This would encourage more investment along the existing and proposed corridors of the Regional Rail Plan.
- **Explore public-private partnerships to advance transit-oriented development.** Cooperation and partnerships among public and private stakeholders provide for better planning and funding of TOD projects. Streamlining partnership processes through an active Joint Development program or other

standardized agreements can speed TOD implementation.

- **Explore public-private partnerships to deliver infrastructure investments faster than otherwise possible.** Funding that is not readily available in the public sector could be supplemented by funding from the private or philanthropic sectors. Implementing transit, and multi-modal transportation investments has been the sole purview of the public sector in recent decades, but some regions are exploring public/private/non-profit partnerships around these projects. Major investments in regional transit lines will likely continue to be primarily done by the public sector, but there can be collaboration on local transit improvements or upgrades to existing stations.

### *TOD Strategic Action Plan*

#### *Acronyms*

BMC:	Baltimore Metropolitan Council
BNC:	Baltimore Neighborhood Collaborative
CDCs:	Community Development Corporations
CMTA:	Central Maryland Transportation Alliance
CPHA:	Citizens' Planning and Housing Association
DED:	Maryland Department of Economic Development
DHCD:	Maryland Department of Housing and Community Development
MDOT:	Maryland Department of Transportation
MDP:	Maryland Department of Planning
MTA:	Maryland Transit Administration
SHA:	Maryland State Highway Administration

## Implementation Time Frames

Implementing TOD in Central Maryland will be an ongoing process, and not all initiatives can move forward at the same time. Being mindful of the ongoing process of TOD implementation, and the challenges/barriers that could impede it, the Action Plan identifies the implementation time frame for each activity as follows:

- Short-term strategies can be initiated in 1-3 years
- Mid-term strategies can be initiated in 3-5 years
- Long-term strategies will take 5 years and beyond to initiate.

Because TOD implementation will be an ongoing process, actions initiated within each time frame may well take much longer to fully implement.

## TOD Strategic Action Plan Implementation

The TOD Strategic Action Plan will require coordinated effort from multiple stakeholders on both transit and development visioning, planning, and building projects. To support coordination and implementation, the following pages provide a table that identifies each strategy, action, lead and support stakeholders, key steps, and the time frame for initiation. This Implementation Matrix can serve as a guide for realizing a transit-centered vision for Central Maryland.

Maps 7 and 8 illustrate the short- and mid-term investments geographically, showing how transit and development projects will support TOD throughout the Central Maryland region.

The TOD Action Plan Implementation Matrix and Maps can serve as a guide moving forward to achieve a transit-oriented future for the region.

**Strategy 1: Complete existing projects to demonstrate high-quality transit-centered communities in the region**

Action	Lead Stakeholders	Support Stakeholders	Key Steps	Time Frame
Implement State Center Development Plan	<ul style="list-style-type: none"> <li>MDOT Office of Real Estate</li> <li>Private Sector</li> </ul>	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>CPHA</li> </ul>	<ul style="list-style-type: none"> <li>Execution of Master Development Agreement</li> </ul>	Short Term
Complete the Metro Centre at Owings Mills	<ul style="list-style-type: none"> <li>MDOT Office of Real Estate</li> <li>Private Sector</li> </ul>	<ul style="list-style-type: none"> <li>Baltimore County</li> </ul>	<ul style="list-style-type: none"> <li>TOD legislation to fund capital improvements</li> </ul>	Short Term
Complete Uplands Housing Redevelopment and Edmondson Village Shopping Center Transformation	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>Maryland DHCD</li> <li>Uplands Visionaries, LLC</li> <li>Southwest CDC</li> </ul>	<ul style="list-style-type: none"> <li>US Department of Housing &amp; Urban Development</li> </ul>	<ul style="list-style-type: none"> <li>Strengthen connections from Uplands project to planned Edmondson Village station</li> <li>Develop strategy and plans for transformation of shopping center</li> </ul>	Short Term
Finish implementation of EBDI project	<ul style="list-style-type: none"> <li>East Baltimore Development, Inc</li> <li>Baltimore City</li> <li>Johns Hopkins University</li> <li>Annie E. Casey Foundation</li> </ul>	<ul style="list-style-type: none"> <li>State of Maryland</li> <li>Private sector</li> </ul>	<ul style="list-style-type: none"> <li>Finish build out of existing master plan</li> <li>Identify connections to new future Green Line and/or MARC station</li> </ul>	Short Term
Complete implementation of Inner Harbor East Master Plan	<ul style="list-style-type: none"> <li>Private sector</li> </ul>	<ul style="list-style-type: none"> <li>Baltimore City</li> </ul>	<ul style="list-style-type: none"> <li>Finish build out of mixed-use urban center</li> <li>Implementation of the Red Line</li> </ul>	Short Term
Implement Westport Waterfront Master Plan and community visioning for larger station area	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>Private Sector</li> </ul>	<ul style="list-style-type: none"> <li>MDOT Office of Planning</li> </ul>	<ul style="list-style-type: none"> <li>Brownfield Remediation</li> <li>Community engagement and outreach</li> </ul>	Mid Term
Implement Charles North Vision Plan	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>Private Sector</li> </ul>	<ul style="list-style-type: none"> <li>MTA Office of Planning</li> </ul>	<ul style="list-style-type: none"> <li>Improve pedestrian and transit connections between Charles North, Penn Station, and Central Baltimore</li> <li>Identify funding resources and assemble property</li> </ul>	Mid Term
Implement West Baltimore MARC community plan	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>Private Sector</li> </ul>	<ul style="list-style-type: none"> <li>MTA and MDOT Office of Planning</li> <li>CPHA</li> </ul>	<ul style="list-style-type: none"> <li>Improve MARC station pedestrian access</li> <li>Identify funding resources and assemble property</li> <li>Continue to build local capacity</li> </ul>	Long Term

Figure 29: TOD Action Plan implementation matrix.

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**Strategy 2: Develop new corridor-level initiatives in key regional locations for TOD**

Action	Lead Stakeholders	Support Stakeholders	Key Steps	Time Frame
Complete planning effort for the Howard Street / Blue Line Corridor Streetscape and Development	<ul style="list-style-type: none"> <li>MDOT Office of Planning</li> <li>Private Sector</li> </ul>	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>MTA Office of Planning and Capital Programming</li> </ul>	<ul style="list-style-type: none"> <li>Develop targeted land use and transportation implementation plan</li> <li>Strengthen transit connectivity to Red Line</li> </ul>	Short Term
Formulate a Red Line East Mixed-Income TOD Strategy	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>CDCs</li> </ul>	<ul style="list-style-type: none"> <li>CPHA</li> </ul>	<ul style="list-style-type: none"> <li>Engage in community outreach on key challenges and vision.</li> <li>Identify funding needs and opportunities and key agency resources</li> <li>Identify key agency players</li> <li>Solicit community buy in</li> </ul>	Short Term
Engage in a Red Line / Security Boulevard TOD Opportunity Study	<ul style="list-style-type: none"> <li>Baltimore County</li> </ul>	<ul style="list-style-type: none"> <li>MTA Office of Planning</li> <li>MDOT Office of Planning</li> </ul>	<ul style="list-style-type: none"> <li>Identify key agency players</li> <li>Engage in a community visioning/planning process</li> </ul>	Short Term
Develop a Vacant Property Strategy along the Red Line West / Edmondson Avenue corridor	<ul style="list-style-type: none"> <li>Baltimore City</li> </ul>	<ul style="list-style-type: none"> <li>Private Sector</li> <li>CPHA</li> </ul>	<ul style="list-style-type: none"> <li>Identify key agency players</li> <li>Identify funding resources</li> </ul>	Mid Term
Initiate a Green Line / Reisterstown Road Corridor TOD Strategy	<ul style="list-style-type: none"> <li>Baltimore City</li> </ul>	<ul style="list-style-type: none"> <li>MTA Office of Planning</li> <li>MDOT Office of Planning</li> <li>SHA</li> <li>CPHA</li> </ul>	<ul style="list-style-type: none"> <li>Identify key agency players</li> <li>Build community capacity and engage in a community visioning/planning process</li> <li>Identify key land use and transportation opportunities</li> </ul>	Mid Term

Figure 29 (continued): TOD Action Plan implementation matrix.

**Strategy 3: Modify local, regional, and state policies to support TOD**

Action	Lead Stakeholders	Support Stakeholders	Key Steps	Time Frame
Target State Economic and Community Development Incentives to TOD	<ul style="list-style-type: none"> <li>MDP</li> <li>DHCD</li> <li>DED</li> </ul>	<ul style="list-style-type: none"> <li>MDOT Office of Real Estate</li> <li>Greater Baltimore Committee</li> </ul>	<ul style="list-style-type: none"> <li>Develop TOD economic development policy and legislation</li> <li>Target state community development programs—such as Community Legacy program—to TOD</li> </ul>	Short Term
Modify State/Local TIF District Formation to Support Equitable TOD	<ul style="list-style-type: none"> <li>MDP</li> <li>DHCD</li> </ul>	<ul style="list-style-type: none"> <li>CPHA</li> <li>Advocacy organizations</li> </ul>	<ul style="list-style-type: none"> <li>Develop TOD TIF Policy and legislation</li> </ul>	Short Term
Renew and Adequately Fund State Historic Tax Credit	<ul style="list-style-type: none"> <li>Maryland Historical Trust</li> </ul>	<ul style="list-style-type: none"> <li>CPHA</li> <li>Advocacy organizations</li> </ul>	<ul style="list-style-type: none"> <li>Secure legislative approval</li> <li>Identify funding resources to adequately fund program</li> </ul>	Short Term
Implement Land Banking Strategy to Streamline and Reform Land Acquisition and Disposition in Baltimore City	<ul style="list-style-type: none"> <li>Baltimore City</li> </ul>	<ul style="list-style-type: none"> <li>CPHA</li> <li>DHCD</li> </ul>	<ul style="list-style-type: none"> <li>Develop transparent and accountable methods for streamlining property disposition</li> <li>Develop outreach and implementation strategy</li> </ul>	Short Term
Develop Incentives for High-Quality, Green Design of Transit-Centered Communities	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>Baltimore County</li> <li>Metropolitan Baltimore Council</li> </ul>	<ul style="list-style-type: none"> <li>CMTA</li> <li>CPHA</li> <li>DHCD</li> <li>MDP</li> </ul>	<ul style="list-style-type: none"> <li>Identify key criteria and incentives for program</li> <li>Identify funding source and initiate pilot funding cycle</li> </ul>	Mid Term
Develop Regional Revenue and Financing Mechanisms to Accelerate the Implementation of the Regional Rail Plan.	<ul style="list-style-type: none"> <li>CMTA</li> <li>CPHA</li> <li>Advocacy Organizations</li> </ul>	<ul style="list-style-type: none"> <li>MDOT</li> <li>MTA</li> <li>Baltimore Metropolitan Council</li> </ul>	<ul style="list-style-type: none"> <li>Identify funding / financing strategy and initiate campaign</li> <li>Secure approval</li> </ul>	Mid Term

Figure 29 (continued): TOD Action Plan implementation matrix.

**Strategy 4: Construct transit and multi-modal transportation systems to support TOD**

Action	Lead Stakeholders	Support Stakeholders	Key Steps	Time Frame
Complete Red Line Planning and Engineering	<ul style="list-style-type: none"> <li>MTA</li> </ul>	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>MDOT Office of Planning</li> <li>Baltimore County</li> <li>Advocacy Organizations</li> <li>CMTA</li> <li>CPHA</li> </ul>	<ul style="list-style-type: none"> <li>Select Locally Preferred Alternative</li> <li>Initiate Preliminary Engineering</li> <li>Secure Full Funding Grant Agreement</li> </ul>	Short Term
Focus local and state transportation capital funding on priority station locations	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>Baltimore County</li> </ul>	<ul style="list-style-type: none"> <li>MTA Office of Planning and Capital Programming</li> <li>CPHA</li> </ul>	<ul style="list-style-type: none"> <li>Target local Capital Improvement Program (CIP) funds towards priority station locations</li> <li>Target State Transportation Enhancement Program funds to priority station locations</li> </ul>	Short Term
Initiate Yellow Line corridor transit and TOD Planning	<ul style="list-style-type: none"> <li>MTA Office of Planning</li> <li>MDOT Office of Planning</li> </ul>	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>Baltimore County</li> <li>CMTA</li> <li>CPHA</li> </ul>	<ul style="list-style-type: none"> <li>Engage in a community visioning/planning process</li> <li>Create station area plans</li> </ul>	Short Term
Implement MARC Growth & Investment Plan	<ul style="list-style-type: none"> <li>MTA</li> </ul>	<ul style="list-style-type: none"> <li>Baltimore City</li> </ul>	<ul style="list-style-type: none"> <li>Complete planned 2010 improvements and investments to schedules and rolling stock</li> <li>Complete long-term infill stations, station upgrades, and track work</li> </ul>	Mid Term
Develop regional capital funding stream for multi-modal access improvements	<ul style="list-style-type: none"> <li>Baltimore Metropolitan Council</li> </ul>	<ul style="list-style-type: none"> <li>MDOT Office of Real Estate Transportation Revenue and Expenses</li> <li>CMTA</li> </ul>	<ul style="list-style-type: none"> <li>Develop program concept and identify funding resources</li> <li>Target funding towards station upgrades</li> </ul>	Mid Term
Complete Red Line	<ul style="list-style-type: none"> <li>MTA</li> </ul>	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>MDOT Office of Planning</li> <li>Baltimore County</li> <li>Advocacy Organizations</li> <li>CMTA</li> <li>CPHA</li> </ul>	<ul style="list-style-type: none"> <li>Construct Red Line and begin operation</li> </ul>	Mid Term
Complete buildout of Regional Rail Plan	<ul style="list-style-type: none"> <li>MTA</li> </ul>	<ul style="list-style-type: none"> <li>MDOT Office of Planning</li> <li>Baltimore County</li> <li>Baltimore City</li> </ul>	<ul style="list-style-type: none"> <li>Yellow Line</li> <li>Green Line Extension</li> <li>MARC Expansion</li> </ul>	Long Term

Figure 29 (continued): TOD Action Plan implementation matrix.

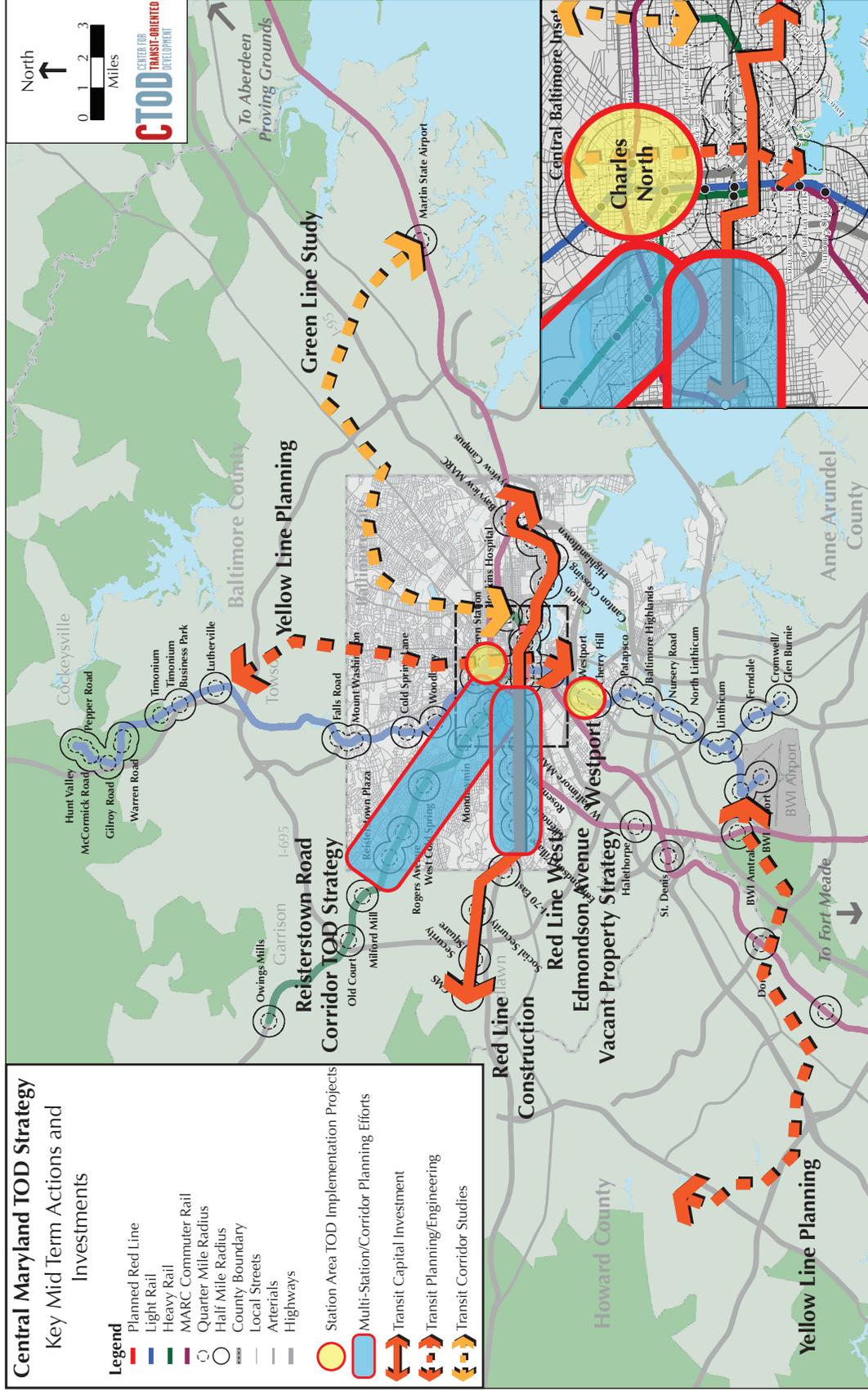
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**Strategy 5: Foster cross-sector partnerships and build local capacity for TOD implementation**

Action	Lead	Support	Key Steps	Time Frame
Continue TOD Strategy Steering/Implementation Committee to share strategies and implementation needs	<ul style="list-style-type: none"> <li>CMTA</li> </ul>	<ul style="list-style-type: none"> <li>TOD Steering Committee Members</li> </ul>	<ul style="list-style-type: none"> <li>Creation of ongoing Implementation Committee from members of the TOD Steering Committee and other stakeholders</li> <li>Repeat and update analysis and prioritize as new data becomes available from US Census or BNIA</li> </ul>	Short Term
Engage in community outreach and organizing to empower participation in existing and priority locations for TOD	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>Baltimore Neighborhood Collaborative</li> <li>Citizens Planning and Housing Association</li> </ul>	<ul style="list-style-type: none"> <li>Neighborhood Associations</li> <li>CDCs</li> <li>Faith-Based Groups</li> </ul>	<ul style="list-style-type: none"> <li>Identify target community-based partners</li> <li>Develop TOD leadership training</li> <li>Develop regional peer-to-peer network of community leaders</li> </ul>	Short Term
Develop and deploy commuter incentives through public/private/non-profit partnerships	<ul style="list-style-type: none"> <li>Baltimore Metropolitan Council</li> <li>Greater Baltimore Committee</li> <li>CMTA</li> <li>Live Baltimore</li> </ul>	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>Baltimore County</li> </ul>	<ul style="list-style-type: none"> <li>Develop program concept and engage public and private sector</li> </ul>	Short Term
Explore public-private partnerships to advance transit-Oriented development	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>Baltimore County</li> <li>MTA Office of Planning</li> <li>MDOT Office of Planning</li> </ul>	<ul style="list-style-type: none"> <li>Private Sector</li> </ul>	<ul style="list-style-type: none"> <li>Identify potential partnership opportunities</li> <li>Develop processes for public/private TOD partnerships to streamline implementation</li> </ul>	Long Term
Explore public-private partnerships to deliver infrastructure investments faster than otherwise possible	<ul style="list-style-type: none"> <li>Baltimore City</li> <li>MTA Office of Planning</li> <li>MDOT Office of Planning</li> </ul>	<ul style="list-style-type: none"> <li>Private Sector</li> </ul>	<ul style="list-style-type: none"> <li>Identify potential improvements and partners</li> <li>Engage in an interagency visioning process to prioritize investments</li> </ul>	Mid Term

Figure 29 (continued): TOD Action Plan implementation matrix.





Map 8: Mid Term Implementation Actions



# Appendix A: Regional Employment Clusters

Cluster	Cluster Type	Total Jobs			Change 2002-2006	% of Regional Jobs	
		2002	2004	2006		2002	2006
Baltimore Region (5 County)	All	1,116,882	1,081,193	1,052,616	6.1%	-	-
Baltimore City and County	All	639,049	624,280	625,459	2.2%	57.2%	59.4%
All Transit Clusters	All	354,918	349,679	355,265	-0.1%	31.8%	33.8%
<b>Central Baltimore</b>							
1. Baltimore CBD	Downtown Office/Medical/Education/Retail	100,038	98,090	98,726	1.3%	7.9%	8.5%
<b>Green Line, Existing</b>							
2. JHU Hospital	Education/Medical	20,685	19,958	22,632	-8.6%	1.9%	2.2%
3. Reisterstown/Rogers Avenue	Retail/Suburban Business	6,322	5,899	6,093	3.8%	0.6%	0.6%
4. Owings Mills	Retail	12,123	12,179	10,598	14.4%	1.1%	1.0%
5. Old Court	Suburban Business	4,759	4,090	4,509	5.5%	0.4%	0.4%
6. Mondawmin		1,304	1,665	1,574	-17.2%	0.1%	0.1%
Mondawmin Mall	Retail	687	912	871	-21.1%	0.1%	0.1%
Coppin State	Education	617	753	703	-12.2%	0.1%	0.1%
<b>Green Line, Proposed</b>							
7. White Marsh	Retail/Suburban Business	20,400	18,989	18,421	10.7%	1.8%	1.8%
8. Morgan State	Education	2,333	2,428	2,121	10.0%	0.2%	0.2%
<b>Blue Line</b>							
9. Hunt Valley/Cockeysville	Retail/Suburban Business	28,119	25,623	27,396	2.6%	2.5%	2.6%
10. Mt. Vernon/U of B./MICA	Education/Retail	23,712	23,914	27,033	-12.3%	2.1%	2.6%
11. Airport		23,190	22,211	23,247	-0.2%	2.1%	2.2%
BWI Business Park	Suburban Business	14,870	14,736	14,114	5.4%	1.3%	1.3%
BWI	Airport	8,320	7,475	9,133	-8.9%	0.7%	0.9%
<b>Red Line</b>							
12. Bayview	Medical	1,686	1,538	1,927	-12.5%	0.2%	0.2%
13. Fells Point/Canton	Retail/Office/Entertainment	8,502	7,330	7,116	19.5%	0.8%	0.7%
14. Social Security/CMS/Sec. Sq. Mall	Public Employee/Retail/Suburban Business	14,124	13,524	12,752	10.8%	1.3%	1.2%
<b>Yellow Line, North</b>							
15. Towson		34,627	35,152	33,328	3.9%	3.1%	3.2%
Towson University	Education	11,333	11,300	10,227	10.8%	1.0%	1.0%
Goucher College	Education	2,579	3,198	3,405	-24.3%	0.2%	0.3%
East Towson Business Parks	Suburban Business	6,023	5,989	6,074	-0.8%	0.5%	0.6%
Downtown Towson	Downtown Office/Retail	14,692	14,665	13,622	7.9%	1.3%	1.3%
16. North Baltimore		15,535	17,255	17,636	-11.9%	1.4%	1.7%
Loyola/College of Notre Dame	Education	1,835	1,715	1,870	-1.9%	0.2%	0.2%
Johns Hopkins	Education	13,700	15,540	15,766	-13.1%	1.2%	1.5%
<b>Yellow Line, West</b>							
17. Columbia	Downtown Office/Retail	8,540	9,700	12,083	-29.3%	0.8%	1.1%
18. Savage	Suburban Business	22,378	20,927	21,223	5.4%	2.0%	2.0%
19. Hanover	Suburban Business	8,227	10,745	8,777	-6.3%	0.7%	0.8%
<b>No Planned Transit</b>							
20. Arbutus/Lansdowne	Suburban Business	18,152	18,183	18,000	0.8%	1.6%	1.7%
21. Lansdowne	Suburban Business	1,731	1,600	1,571	10.2%	0.2%	0.1%
22. Pumphrey	Suburban Business	3,751	3,519	2,541	47.6%	0.3%	0.2%

Regional Job Clusters and Change in Employment 2002-2006 (Source: US Census Longitudinal Employment Housing Dynamics)

## Appendix B: Regional Priority Location Analysis

Station Area	Market Opportunity					Composite Assessment
	Housing Market Typology	Land Opportunity	Existing Activity Centers	Transit Infrastructure		
Blue Line (Light Rail)						
Hunt Valley	N/A	Moderate	Suburban Office	AI Grade/Good Access		2
Pepper Road	N/A	High	Suburban Office	AI Grade/Good Access		1
McCormick Road	N/A	High	Suburban Office	AI Grade/Good Access		1
Gilroy Road	N/A	Low	Suburban Office	AI Grade/Good Access		3
Warren Road	N/A	Moderate	Suburban Office	Constrained Access		2
Timonium	N/A	High	Suburban Office	Constrained Access		3
Timonium Business Park	N/A	Moderate		Constrained Access		3
Lutherville	N/A	Low		AI Grade/Good Access		3
Falls Road	N/A	Low		Limited Access/Freeway		4
Mount Washington	Competitive	Low		Constrained Access		4
Cold Spring Lane	Stable/Transitional	Moderate		Limited Access/Freeway		3
Woodberry	Transitional/Stable	Moderate	DT Adjacent	AI Grade/OK Access		2
North Avenue	Transitional	High	DT Adjacent	Limited Access/Freeway		3
U of B/ Mount Royal	Stable/Competitive	High	Education	AI Grade/Good Access		1
Cultural Center	Stable/Competitive	High	Downtown	AI Grade/Good Access		1
Centre Street	Stable/Emerging	High	Downtown	AI Grade/Good Access		1
Lexington Market	DT MF	High	Downtown	AI Grade/Good Access		1
University Center	DT MF	High	Downtown	AI Grade/Good Access		1
Pratt Street/Westside/Convention Center	DT MF	High	Downtown	AI Grade/Good Access		1
Camden Yards	Emerging/Competitive	High	Entertainment	AI Grade/OK Access		2
Hamburg Street	Transitional/Emerging	Low	Entertainment	AI Grade/Constrained Access		3
Wesport	Distressed	Moderate	DT Adjacent	AI Grade/OK Access		2
Cherry Hill	Distressed	Low		AI Grade/Constrained Access		4
Palapsco	Transitional	Low		AI Grade/Constrained Access		3
Baltimore Highlands	N/A	Moderate		AI Grade/OK Access		3
Nursery Road	N/A	Moderate		AI Grade/OK Access		3
North Linthicum	N/A	Moderate		AI Grade/OK Access		3
Linthicum	N/A	Low		AI Grade/Good Access		3
Ferndale	N/A	Moderate		AI Grade/OK Access		3
Cromwell Station/Glen Burnie	N/A	Moderate		AI Grade/Good Access		3
BWI Business District	N/A	Moderate	Suburban Office	AI Grade/Constrained Access		2
BWI Airport	N/A	N/A		Limited Access		4

Analysis of regional opportunity dynamics indicators. Bright green = high priority, light green = moderate priority, light red = low priority, red = no priority.

(Sources: Baltimore City, Maryland PropertyView).

Central Maryland Transit-Oriented Development Strategy / Appendix B: Regional Priority Location Analysis

Station Area	Market Opportunity					Composite Assessment
	Housing Market Typology	Land Opportunity	Existing Activity Centers	Transit Infrastructure		
<b>Green Line (Heavy Rail)</b>						
Owings Mills	N/A	High	Suburban Retail	Elevated/In Freeway	2	
Old Court	N/A	Low	Suburban Office	Elevated/In Freeway	3	
Milford Mill	N/A	Moderate		Elevated/Constrained Access	3	
Reisterstown Plaza	Stable/Transitional	Moderate	Suburban Retail	Elevated/Constrained Access	2	
Rogers Avenue	Transitional	Moderate	Suburban Retail	Elevated/Constrained Access	2	
W. Cold Spring	Distressed/Transitional	Moderate		Elevated/Constrained Access	3	
Wondamin Metro	Transitional	Moderate	Education/Retail	Sub-Grade/Good Access	2	
Penn North Metro	Distressed	High	DT Adjacent	Sub-Grade/Good Access	2	
Upton Metro	Distressed	High	DT Adjacent	Sub-Grade/Good Access	2	
State Center	Distressed/Competitive	High	Downtown	Sub-Grade/Good Access	1	
Lexington Market	DT MF	High	Downtown	Sub-Grade/Good Access	1	
Charles Center Metro	DT MF	High	Downtown	Sub-Grade/Good Access	1	
Shot Tower/Market Place	DT MF	High	Downtown	Sub-Grade/Good Access	1	
Johns Hopkins Hospital	Distressed	Moderate	Urban Medical	Sub-Grade/Good Access	2	
<b>MARC -- Penn Line</b>						
Odenton	N/A	Moderate		At Grade/Good Access	2	
BWI Amtrak	N/A	Moderate		At Grade/Constrained Access	3	
Halethorpe	N/A	Low		Sub-Grade/Constrained Access	3	
W. Baltimore MARC	Distressed	Moderate	DT Adjacent	Elevated/Good Access	2	
Penn Station	Stable	High	DT Adjacent	Sub-Grade/Constrained Access	2	
Marlin State Airport	N/A	Low		At Grade/Constrained Access	3	
Edgewood	N/A	Low		At Grade/Good Access	3	
<b>MARC -- Camden Line</b>						
Dorsey	N/A	Low		At Grade/Limited Access	3	
St. Denis	N/A	Low		At Grade/Constrained Access	3	
<b>Red Line</b>						
CMS	N/A	High	Suburban Office	At Grade/OK Access	2	
Security Square Mall	N/A	High	Suburban Retail	At Grade/OK Access	2	
Social Security Administration	N/A	Moderate	Suburban Office	At Grade/OK Access	2	
I-70 East	Emerging	Low		At Grade/Constrained Access	3	
Edmondson Village	Stable	Low		At Grade/Good Access	2	
Allendale	Transitional	Moderate		At Grade/Good Access	2	
Rosemont	Distressed	High		At Grade/Good Access	2	
West Baltimore MARC	Distressed	Moderate	DT Adjacent	At Grade/Good Access	2	
Harlem Park/Poppleton	Distressed	High	DT Adjacent	In Trench/OK Access	2	
University Center	DT MF	High	Education	At Grade/Good Access	1	
Howard Street	DT MF	High	Downtown	Sub Grade(?) / Good Access	1	
Charles Center	DT MF	High	Downtown	Sub Grade(?) / Good Access	1	
Government Center	DT MF	High	Downtown	Sub Grade(?) / Good Access	1	
Inner Harbor East	Competitive	High	Downtown	Sub Grade(?) / Good Access	2	
Fells Point	Competitive	Moderate	Entertainment	At Grade/Good Access	2	
Canton	Competitive	Low	Entertainment	At Grade/Good Access	2	
Canton Crossing	Stable	Moderate	DT Adjacent	At Grade/Good Access	1	
Highlandtown	Emerging/Stable	Low	DT Adjacent	At Grade/OK Access	2	
Bayview MARC	Distressed/Non-residential	Moderate		Limited Access	3	
Bayview Campus	Stable	Low	Suburban Medical	Constrained Access	2	

Analysis of regional opportunity dynamics indicators: bright green - high priority, light green - moderate priority, light red - low priority, red - no priority.

Sources: Baltimore City, Maryland PropertyView.

Station Area	Neighborhood Change (1990-2000)							Income Distribution Composite
	Jobs/Housing Balance	Household Type (% Non-Family)	Education (w/BA)	Median Income	% <80% AMI	Income Distribution % 80-120% AMI	% >120% AMI	
Blue Line (Light Rail)								
Hunt Valley	Jobs	Decrease	Increase	Rapid Decrease	Decrease	Rapid Increase	Polarizing	
Pepper Road	Jobs	Decrease	Increase	Rapid Decrease	Decrease	Rapid Increase	Polarizing	
McCormick Road	Jobs	Decrease	Increase	Rapid Decrease	Decrease	Rapid Increase	Polarizing	
Gilroy Road	Jobs	Decrease	Increase	Rapid Decrease	Decrease	Rapid Increase	Polarizing	
Warren Road	Jobs	Decrease	Increase	Rapid Decrease	Decrease	Rapid Increase	Polarizing	
Timonium	Mixed	Increase	Increase	No Change	No Change	No Change	Stable (Middle Income)	
Timonium Business Park	Jobs	Increase	Rapid Increase	No Change	Increase	No Change	Stable (Middle Income)	
Lutherville	Jobs	Increase	Rapid Increase	Increase	Increase	No Change	Stable (Diverse)	
Falls Road	Mixed	No Change	Increase	No Change	Rapid Increase	Rapid Change (both)	Stable (High Income)	
Mount Washington	Mixed	Increase	Increase	No Change	Increase	No Change	Stable (High Income)	
Cold Spring Lane	Mixed	Increase	No Change	Decrease	Increase	Decrease	Disinvesting	
Woodberry	Mixed	Rapid Increase	Increase	Rapid Change (both)	Increase	No Change	Disinvesting	
North Avenue	Mixed	Increase	Increase	No Change	Increase	No Change	Stable (Low Income)	
U of B/ Mount Royal	Mixed	Increase	Increase	Increase	Increase	No Change	Stable (Low Income)	
Cultural Center	Mixed	Increase	Increase	Increase	No Change	No Change	Stable (Low Income)	
Centre Street	Jobs	Increase	Increase	Rapid Change (both)	Increase	Rapid Change (both)	Polarizing	
Lexington Market	Jobs	Increase	No Change	Rapid Change (both)	Increase	Rapid Change (both)	Gentrifying/Disinvesting	
University Center	Jobs	Increase	No Change	Rapid Decrease	Rapid Increase	Rapid Change (both)	Gentrifying/Disinvesting	
Pratt Street/Westside/Convention Center	Jobs	Increase	No Change	Rapid Change (both)	Decrease	No Change	Gentrifying/Disinvesting	
Camden Yards	Jobs	Increase	Rapid Increase	Rapid Change (both)	No Change	Rapid Increase	Gentrifying/Disinvesting	
Hamburg Street	Mixed	Rapid Increase	Increase	Rapid Change (both)	Rapid Change (both)	Rapid Change (both)	Gentrifying/Disinvesting	
Westport	Mixed	Increase	Decrease	Decrease	Increase	Rapid Decrease	Disinvesting	
Cherry Hill	Mixed	Increase	Decrease	Rapid Decrease	Increase	Rapid Decrease	Disinvesting	
Palapasco	Housing	Increase	Increase	Rapid Increase	No Change	Increase	Gentrifying	
Baltimore Highlands	Housing	Increase	Increase	Increase	No Change	Increase	Gentrifying	
Nursery Road	Mixed	Increase	No Change	Increase	Increase	Decrease	Stable (Diverse)	
North Linthicum	Mixed	Increase	No Change	Increase	No Change	Decrease	Stable (Diverse)	
Linthicum	Mixed	Increase	Increase	No Change	No Change	Decrease	Stable (Diverse)	
Ferndale	Mixed	Increase	Increase	Decrease	Increase	Decrease	Disinvesting	
Cromwell Station/Glen Burnie	Jobs	Increase	Increase	Decrease	Increase	Decrease	Disinvesting	
BWI Business District	Jobs	Increase	Increase	Increase	No Change	No Change	Stable (Middle Income)	
BWI Airport	Jobs	Increase	Increase	Increase	No Change	No Change	Stable (Middle Income)	

Analysis of regional neighborhood change indicators (1990-2000). Bright green = high priority, light green = moderate priority, light red = low priority, red = no priority (Sources: C100 National Transit-Oriented Development Database, US Census, Social Compact Drilldown Analysis, Baltimore City).

Central Maryland Transit-Oriented Development Strategy / Appendix B: Regional Priority Location Analysis

Station Area	Neighborhood Change (1990-2000)							Income Distribution Composite
	Jobs/Housing Balance	Household Type (% Non-Family)	Education (w/BA)	Median Income	% <80% AMI	Income Distribution % 80-120% AMI	% >120% AMI	
Green Line (Heavy Rail)								
Owings Mills	Jobs	Increase	Rapid Increase	Increase	Increase	Increase	Decrease	Disinvesting
Old Court	Mixed	Increase	No Change	No Change	Increase	Increase	Rapid Decrease	Disinvesting
Milford Mill	Mixed	Increase	Increase	No Change	Increase	Increase	Rapid Decrease	Disinvesting
Reisterstown Plaza	Mixed	Increase	No Change	Rapid Decrease	Rapid Increase	Rapid Increase	Decrease	Disinvesting
Rogers Avenue	Mixed	Increase	No Change	Rapid Decrease	Rapid Increase	Increase	No Change	Disinvesting
W. Cold Spring	Housing	Increase	No Change	Rapid Decrease	Increase	Increase	Decrease	Disinvesting
Mondawmin Metro	Mixed	Increase	No Change	Rapid Decrease	Increase	Increase	Decrease	Disinvesting
Penn North Metro	Housing	Rapid Increase	No Change	Rapid Increase	Increase	Increase	Decrease	Disinvesting
Upton Metro	Housing	Increase	No Change	Rapid Increase	Increase	Increase	No Change	Stable (Low Income)
State Center	Mixed	Increase	Increase	Rapid Change (both)	Increase	Increase	No Change	Stable (Low Income)
Lexington Market	Jobs	Increase	No Change	Rapid Change (both)	Rapid Change (both)	No Change	No Change	Stable (Low Income)
Charles Center Metro	Jobs	No Change	No Change	Rapid Decrease	Rapid Increase	Rapid Increase	Rapid Change (both)	Gentrifying/Disinvesting
Shot Tower/Market Place	Jobs	Rapid Increase	Increase	Rapid Change (both)	Rapid Change (both)	Rapid Change (both)	Increase	Disinvesting
Johns Hopkins Hospital	Mixed	Rapid Decrease	No Change	Rapid Increase	Increase	Increase	Rapid Change (both)	Gentrifying/Disinvesting
MARC - Penn Line								
Odenton	Mixed	No Change	Rapid Increase	Increase	Rapid Decrease	Rapid Decrease	Increase	Polarizing
BWI Amtrak	Jobs	Rapid Change (both)	Increase	Rapid Increase	Rapid Decrease	Rapid Decrease	Decrease	Gentrifying
Halethorpe	Mixed	Rapid Increase	Increase	No Change	Increase	Increase	No Change	Stable (Diverse)
W. Baltimore MARC	Housing	Increase	Increase	Decrease	Increase	Increase	Decrease	Stable (Low Income)
Penn Station	Mixed	Increase	No Change	Decrease	No Change	No Change	Increase	Stable (Low Income)
Martin State Airport	Jobs	Increase	No Change	Rapid Change (both)	No Change	No Change	Increase	Stable (Low Income)
Edgewood	Housing	No Change	Increase	Increase	Decrease	Rapid Change (both)	Increase	Stable (Diverse)
MARC - Camden Line								
Dorsey	Jobs	Decrease	Increase	Increase	Increase	Increase	Decrease	Polarizing
St. Denis	Mixed	Increase	Increase	No Change	Increase	Increase	Decrease	Stable (High Income)
Red Line								
CMS	Mixed	No Change	Decrease	Decrease	Decrease	Rapid Increase	Decrease	Disinvesting
Security Square Mall	Mixed	No Change	Decrease	Decrease	Decrease	Rapid Increase	Decrease	Disinvesting
Social Security Administration	Jobs	Decrease	Rapid Decrease	No Change	Increase	Increase	Decrease	Disinvesting
I-70 East	Housing	Rapid Increase	No Change	Rapid Decrease	Rapid Decrease	Rapid Increase	Rapid Decrease	Disinvesting
Edmondson Village	Housing	Rapid Increase	No Change	Rapid Decrease	Rapid Decrease	Rapid Increase	Decrease	Disinvesting
Allendale	Housing	Rapid Increase	No Change	Rapid Decrease	Rapid Decrease	Rapid Increase	Decrease	Disinvesting
Rosemont	Housing	Increase	Increase	No Change	Increase	Increase	Decrease	Disinvesting
West Baltimore MARC	Housing	Increase	Increase	Decrease	Decrease	No Change	Decrease	Stable (Low Income)
Harlem Park/Poppleton	Housing	Increase	No Change	Rapid Increase	Rapid Increase	Decrease	Rapid Increase	Gentrifying
University Center	Jobs	Rapid Increase	No Change	Rapid Change (both)	Rapid Change (both)	Increase	Rapid Change (both)	Gentrifying/Disinvesting
Howard Street	Jobs	Increase	No Change	Rapid Decrease	Rapid Increase	Rapid Increase	Rapid Change (both)	Gentrifying/Disinvesting
Charles Center	Jobs	No Change	No Change	Rapid Decrease	Rapid Increase	Rapid Increase	Rapid Change (both)	Disinvesting
Government Center	Jobs	Rapid Increase	Increase	Rapid Change (both)	Rapid Change (both)	Increase	Rapid Change (both)	Gentrifying/Disinvesting
Inner Harbor East	Jobs	Rapid Increase	Rapid Increase	Rapid Change (both)	Rapid Change (both)	Increase	Rapid Increase	Gentrifying/Disinvesting
Fells Point	Mixed	Increase	Rapid Increase	Rapid Change (both)	Rapid Decrease	Rapid Increase	Rapid Increase	Gentrifying
Canton	Housing	Rapid Increase	Rapid Increase	Rapid Increase	Rapid Increase	Decrease	Increase	Gentrifying
Canton Crossing	Mixed	Rapid Increase	No Change	No Change	Increase	Decrease	Decrease	Stable (Low Income)
Highlandtown	Mixed	Rapid Increase	Increase	Rapid Decrease	Increase	Decrease	No Change	Disinvesting
Bayview MARC	Jobs	Increase	No Change	Increase	No Change	Rapid Increase	Decrease	Stable (Low Income)
Bayview Campus	Jobs	Increase	No Change	No Change	Increase	No Change	Decrease	Disinvesting

Analysis of regional neighborhood change indicators (1990-2000). Bright green = high priority, light green = moderate priority, light red = low priority, red = no priority.

Sources: CTOD National Transit-Oriented Development Database, US Census, Social Compact Urban/Down Analysis, Baltimore City.

Station Area	Neighborhood Change (2000-2006)		Composite Drill/Down Update	Composite Assessment
	Change in Home Values	Change in Incomes, Overall Median to Homebuyer Median		
<b>Blue Line (Light Rail)</b>				
Hunt Valley	N/A	N/A	N/A	3
Pepper Road	N/A	N/A	N/A	3
McCormick Road	N/A	N/A	N/A	3
Gilroy Road	N/A	N/A	N/A	3
Warren Road	N/A	N/A	N/A	3
Timonium	N/A	N/A	N/A	3
Timonium Business Park	N/A	N/A	N/A	3
Lutherville	N/A	N/A	N/A	3
Falls Road	N/A	N/A	N/A	4
Mount Washington	Moderate Increase	Large Increase	Stable	4
Cold Spring Lane	Very Large Increase	Moderate Increase	Stable/Gentrifying	2
Woodberry	Very Large Increase	Moderate Increase	Stable/Gentrifying	1
North Avenue	Large Increase	Moderate Increase	Stable	2
U of B/ Mount Royal	Large Increase	Moderate Increase	Stable	2
Cultural Center	Large Increase	Small Increase	Stable	2
Centre Street	Very Large Increase	Moderate Increase	Stable/Gentrifying	2
Lexington Market	Large Increase	Small Increase	Stable/Disinvesting	2
University Center	Large Increase	Very Small Increase	Stable/Disinvesting	2
Pratt Street/Westside/Convention Center	Large Increase	Small Increase	Stable/Disinvesting	2
Camden Yards	Large Increase	Very Large Increase	Gentrifying	1
Hamburg Street	Very Large Increase	Leage Increase	Gentrifying	1
Westport	Moderate Increase	Small Increase	Disinvesting	1
Cherry Hill	Small Increase	Small Increase	Disinvesting	1
Palapasco	N/A	N/A	N/A	1
Baltimore Highlands	N/A	N/A	N/A	2
Nursery Road	N/A	N/A	N/A	3
North Linthicum	N/A	N/A	N/A	3
Linthicum	N/A	N/A	N/A	3
Ferndale	N/A	N/A	N/A	2
Cromwell Station/Glen Burnie	N/A	N/A	N/A	2
BWI Business District	N/A	N/A	N/A	3
BWI Airport	N/A	N/A	N/A	3

Analysis of regional neighborhood change indicators (2000-2006). Bright green = high priority, light green = moderate priority, light red = low priority, red = no priority. (Sources: C100 National Transit-Oriented Development Database, US Census, Social Compact Drill/Down Analysis, Baltimore City).

Central Maryland Transit-Oriented Development Strategy / Appendix B: Regional Priority Location Analysis

Station Area	Neighborhood Change (2000-2006)		Composite Drill/Down Update	Composite Assessment
	Change in Home Values	Change in Incomes, Overall Median to Homebuyer Median		
<b>Green Line (Heavy Rail)</b>				
Owings Mills	N/A	N/A	N/A	2
Old Court	N/A	N/A	N/A	2
Milford Mill	N/A	N/A	N/A	2
Reisterstown Plaza	Large Increase	Large Increase	Gentrifying	2
Rogers Avenue	Large Increase	Large Increase	Gentrifying	2
W. Cold Spring	Moderate Increase	Moderate Increase	Stable	2
Mondawmin Metro	Moderate Increase	Very Small Increase	Disinvesting	1
Penn North Metro	Moderate Increase	Small Increase	Disinvesting	1
Upton Metro	Moderate Increase	Small Increase	Disinvesting	3
State Center	Large Increase	Small Increase	Stable/Gentrifying	2
Lexington Market	Large Increase	Small Increase	Stable/Gentrifying	3
Charles Center Metro	Large Increase	Small Increase	Stable/Gentrifying	3
Shot Tower/Market Place	Large Increase	Small Increase	Stable/Gentrifying	3
Johns Hopkins Hospital	Moderate Increase	Very Small Increase	Stable	2
<b>MARC -- Penn Line</b>				
Odenton	N/A	N/A	N/A	3
BWI Amtrak	N/A	N/A	N/A	3
Halethorpe	N/A	N/A	N/A	3
W. Baltimore MARC	Small Increase	Very Small Increase	Disinvesting	1
Penn Station	Very Large Increase	Small Increase	Stable/Gentrifying	2
Marlin State Airport	N/A	N/A	N/A	3
Edgewood	N/A	N/A	N/A	2
<b>MARC -- Camden Line</b>				
Dorsey	N/A	N/A	N/A	3
St. Denis	N/A	N/A	N/A	4
<b>Red Line</b>				
CMS	N/A	N/A	N/A	3
Security Square Mall	N/A	N/A	N/A	3
Social Security Administration	N/A	N/A	N/A	3
I-70 East	Moderate Increase	Large Increase	Stable	1
Edmondson Village	Moderate Increase	Moderate Increase	Stable	1
Allendale	Small Increase	Moderate Increase	Disinvesting	1
Rosemont	Small Increase	Small Increase	Disinvesting	2
West Baltimore MARC	Small Increase	Very Small Increase	Disinvesting	1
Harlem Park/Poppleton	Decrease	Very Small Increase	Disinvesting	1
University Center	Large Increase	Very Small Increase	Stable	2
Howard Street	Large Increase	Small Increase	Stable	2
Charles Center	Large Increase	Small Increase	Stable	2
Government Center	Large Increase	Moderate Increase	Stable/Gentrifying	2
Inner Harbor East	Large Increase	Large Increase	Gentrifying	1
Fells Point	Large Increase	Large Increase	Gentrifying	1
Canton	Very Large Increase	Very Large Increase	Gentrifying	1
Canton Crossing	Large Increase	Moderate Increase	Stable	3
Highlandtown	Very Large Increase	Small Increase	Stable	1
Bayview MARC	Very Large Increase	Small Increase	Stable	4
Bayview Campus	Large Increase	Moderate Increase	Stable/Gentrifying	3

Analysis of regional neighborhood change indicators (2000-2006). Bright green = high priority, light green = moderate priority, light red = low priority, red = no priority.  
 Sources: CTOD National Transit-Oriented Development Database, US Census, Social Compact Drill/Down Analysis, Baltimore City.

# Appendix C: Red Line Corridor TOD Strategy Analysis

Geography	Jurisdiction	TOD Place Type	Origin/ Destination	Development Indicators			
				Underutilized Commercial + Industrial Land	Holding Capacity (New Potential Residential/HHs)	Public Land (non-park/non- services)	Capacity Screen
<b>Red Line</b>							
CMS	Baltimore County	Suburban Center	Mixed		226	N.A.	Low
Security Square Mall	Baltimore County	Suburban Center	Destination	74.76	23	N.A.	Mod-High
Social Security Administration	Baltimore County	Suburban Center	Destination		30	N.A.	Low
I-70 East	Baltimore City	Commuter	Origin		7	38.6	Low
Edmondson Village	Baltimore City	Suburban Center	Origin	52.17	47	49.0	Mod-Low
Allendale	Baltimore City	Urban Neighborhood	Origin		198	15.9	Low
Rosemont	Baltimore City	Urban Neighborhood	Origin		532	8.6	Mod-High
West Baltimore MARC	Baltimore City	Urban Center	Origin	56.08	301	15.0	Mod-High
Harlem Park/Poppleton	Baltimore City	Urban Neighborhood	Origin		1,351	35.3	High
University Center	Baltimore City	Urban Center	Mixed		3,475	11.6	High
Howard Street	Baltimore City	Urban Downtown	Mixed	154	4,272	21.0	High
Charles Center	Baltimore City	Urban Downtown	Mixed		4,421	19.0	High
Government Center	Baltimore City	Urban Downtown	Mixed		1,385	22.0	High
Inner Harbor East	Baltimore City	Urban Center	Mixed	107	462	17.7	Mod-High
Fells Point	Baltimore City	Urban Neighborhood	Origin		250	13.0	Low
Canton	Baltimore City	Urban Neighborhood	Origin		24	2.5	Low
Canton Crossing	Baltimore City	Urban Neighborhood	Origin	60.08	61	7.9	Mod-High
Highlandtown	Baltimore City	Urban Neighborhood	Origin		14	0.1	Low
Bayview MARC	Baltimore City	Commuter	Origin	20.84	68	20.3	None
Bayview Campus	Baltimore City	Suburban Center	Destination		6	5.3	Low

Geography	Market Activity Indicators							Neighborhood Indicators				
	Permit Activity	Residential Sales Value Increase (2000-2008)	Sales Activity (2008)	Housing Vacancies (2000)	Station Area Income	Housing Market Typology	Market Screen	Station Area Income	Station Area Income Diversity	% Black/ African America n	Housing Quality	Demographic Screen
<b>Red Line</b>												
CMS		67%	38	5%	\$ 41,269	N.A.	Low	\$ 41,269	Medium	68%	Moderate	Vulnerable
Security Square Mall		96%	16	6%	\$ 44,898	N.A.	Low	\$ 44,898	Low	52%	Moderate	Employment
Social Security Administration		229%	2	7%	\$ 44,036	N.A.	Low	\$ 44,036	Medium	59%	N.A.	Employment
I-70 East	10	96%	23	6%	\$ 40,514	Emerging/Stable	Low	\$ 40,514	Medium	72%	High	Vulnerable
Edmondson Village		143%	35	9%	\$ 33,652	Stable/Emerging	Mod-High	\$ 33,652	High	94%	High	Stable
Allendale		110%	83	8%	\$ 30,800	Transitional/Distressed	Low	\$ 30,800	High	98%	Low	Vulnerable
Rosemont	40	57%	77	15%	\$ 25,022	Distressed	Low	\$ 25,022	High	98%	Low	Vulnerable
West Baltimore MARC		79%	117	28%	\$ 24,329	Distressed/Transitional	Low	\$ 24,329	High	98%	Low	Vulnerable
Harlem Park/Poppleton		94%	137	48%	\$ 17,419	Distressed/Transitional	Low	\$ 17,419	Low	95%	Low	Challenged
University Center	365	131%	40	16%	\$ 25,062	DT MF	Mod-High	\$ 25,062	Medium	56%	Moderate	Challenged
Howard Street		113%	29	14%	\$ 29,519	DT MF	Mod-High	\$ 29,519	Low	42%	Moderate	Challenged
Charles Center		129%	33	14%	\$ 30,256	DT MF	Mod-High	\$ 30,256	Medium	37%	Moderate	Challenged
Government Center		381%	177	47%	\$ 20,358	DT MF	High	\$ 20,358	Medium	60%	Moderate	Challenged
Inner Harbor East	272	322%	199	33%	\$ 33,429	Competitive/Stable	High	\$ 33,429	Low	37%	High	Stable
Fells Point		294%	274	22%	\$ 36,513	Competitive	High	\$ 36,513	Medium	25%	High	Stable
Canton		101%	245	14%	\$ 40,820	Competitive	Mod-High	\$ 40,820	Medium	2%	High	Stable
Canton Crossing	137	112%	134	12%	\$ 41,503	Stable	Mod-High	\$ 41,503	Medium	3%	Moderate	Stable
Highlandtown		217%	138	13%	\$ 31,384	None	Mod-High	\$ 31,384	Medium	3%	Moderate	Vulnerable
Bayview MARC	44		0	10%	\$ 25,428	None	None	\$ 25,428	High	10%	N.A.	Employment
Bayview Campus		168%	43	8%	\$ 28,842	Stable	Low	\$ 28,842	High	8%	Moderate	Employment

Red Line corridor TOD Strategy Analysis. (Sources: Baltimore City, Maryland PropertyView, CTOD National Transit-Oriented Development Database).

## Appendix D: Performance Metrics for Monitoring Implementation

### Performance Metrics for Measuring the Outcomes of TOD Efforts

Indicator	Metrics	Source	
Housing and Development Indicators	Increased housing values in inner-city transit-centered neighborhoods	Sales data for transit zones compared to city and regional data	Baltimore City, Baltimore County, BNIA
	Continued presence of a mix of housing stock around transit, affordable and market, rental and homeownership	Transit zone data on unit typ, permit data for rehabilitation, subsidized developments.	Baltimore City, Baltimore County, US Census, MDP, DHCD
	Increased income diversity in transit-centered neighborhoods	Composite indicator of income diversity developed by BNIA.	BNIA
	Improved housing market stability in transit-centered neighborhoods	Improved HMVA for TOD areas.	BNIA
	Expanded homeownership in transit-centered neighborhoods.	Housing tenure	US Census and/or BNIA
	Increased regional awareness of transit as an asset	Q3 , Q14, and Q21 of the CMTA Culture of Transit telephone survey	CMTA
	Improved development capacity for local and state officials around TOD projects	Programs and policies that target capital funds; development incentives and other resources toward TOD projects.	MDOT, Baltimore County, Baltimore City, CMTA
	Increased residential and commercial development near Central Maryland transit stations	Permit data for building permits > \$50,000	Baltimore County, Baltimore City
	Improved transportation savings for residents living in proximity to transit	The Housing plus Transportation (H + T) Affordability Index	Center for Neighborhood Technology
	Transit and Transportation Indicators	Funds appropriated by state, federal, and local governments for public transit and transit-oriented development	Maryland Capital Transportation Program (CTP), Local Capital Improvement Programs (CIP)
Increases in ridership on the MARC line, light rail and bus lines serving Central Maryland, especially walk-access trips		APTA quarterly ridership reports (not broken out for Central Maryland); MTA	APTA, MTA
Poll results through regularly conducted consumer polls on transportation and transit issues		Improvement on "no transit near where I live" and "transit doesn't go where I need it to go" responses to Q13 of Culture of Transit telephone survey	CMTA
Reduction in road congestion per capita		"Annual hours of delay per traveler" from the Texas Transportation Institute's Annual Urban Mobility Report	Texas Transportation Institute
Reduction of carbon emissions in the region		Vehicle Miles Traveled, emissions modeling	Baltimore Metropolitan Council

