EARN

Market Analysis

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

The Port of Baltimore has been a seminal and definitive component of the City's economy for centuries, and will continue to play a key role in the City's future. The industry, waterfront and broader economy in which it operates, however, has changed considerably in recent decades. To build a strong and diverse economy that is responsive and resilient to global shifts, the City will be taking steps to protect and expand such existing businesses, and in turn building on these strengths to attract new economic vitality and job opportunities.

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

Bioscience

The Bioscience industry cluster includes not only research and development, but manufacturing in such fields as pharmaceuticals and medical supplies, analytical laboratory instrumentation and testing, and environmental, biotechnology and life sciences.

Business Services and Real Estate

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

Construction

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

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

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

Healthcare and Social Assistance

The Health Care and Social Assistance sector consists of establishments providing health care and social assistance for individuals. Trained professionals deliver

the services provided by establishments in this sector. Many of the industries in the sector are defined based on the educational degree held by the practitioners included in the industry.

Hospitality and Tourism

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

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

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

A. The Industry

Baltimore's economy has changed dramatically in recent decades. The City once could rely on a robust manufacturing sector as the major source of employment for residents. However, the global and national economies have greatly transformed since the 1970s, and the domestic manufacturing sector has declined considerably. To succeed in transitioning to the new and emergent economy, the City must continue to diversify and re-tool its economic engines. For Baltimore's economy to be truly successful, it must be viable both regionally and globally for businesses and firms to "buy Baltimore" and meet the employment needs of all types of City residents.

As contending waterfront uses gain in popularity, the challenge has also become one of ensuring that land use regulations preserve the viability of our important port infrastructure, and that steps are taken to strengthen this key element of the local economy.

Percentage of Jobs by Sector by Jurisdiction, 2004

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

Source: Maryland Department of Labor and Licensing Regulation, 2004

For both the existing port industries and the emergent growth sectors, the aim is first and foremost to help strengthen the existing businesses, while encouraging new business growth and entrepreneurship.

B. Customers

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

Employers

Employers fuel the City's growth and are key to helping the City build on its existing and emergent assets. These include not only the port and port-related industries that have been a mainstay of the economy for centuries, but also new industries that have demonstrated potential for growth in the area, including Bioscience, Business Services/Real Estate, Construction, CIDS, Healthcare/Social Assistance, and Hospitality and Tourism. When business entities look to locate or expand in an area, they consider numerous variables, including land costs, incentives, networks of supply and transportation (air, rail, and road), access to markets, and availability of an appropriate pool of employees. Research has demonstrated that cities have more success when they selectively strategize around clusters of industries, rather than try to meet all potential needs of all potential business investors. Because these business groups in turn support and sustain other business growth, this plan focuses on the Port and the six emergent growth sectors.

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

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

Entrepreneurs not only provide sources of employment, but they also support the six targeted growth sectors by providing professional business services and as a cornerstone for furthering research and advancing technologies in the Healthcare, Biotechnology and CIDS fields in particular. Many small businesses operate in cooperation with larger institutions, foundations and corporations. Their role, for example, could include refining patented drugs, procedures and technologies, and providing the basis from which these advancements come to the broader public. Entrepreneurship is important not only to the vitality of our ports and the advancement of growth sectors, but to the overall health, growth and diversification of the City's economy.

Employees

City's residents represent a critical source of human capital that businesses depend upon for the success of their ventures. This factor also figures largely in business leaders' decisions as to where they should locate. To promote the City as a place to establish new businesses and relocate or expand existing ones, it is important that the City retain and create an employment base with appropriate skill sets.

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

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

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

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

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

Baltimore's Labor Force

In 2005, Baltimore's labor force consisted of roughly 249,000 people aged 16 and older. Baltimore's labor force can be combined with external residents to include not only the 154,463 workers who reside and work in Baltimore City, but also 94,910 workers who reside in Baltimore City, but work outside the City; 187,535 workers who reside outside Baltimore City, but work in Baltimore City.

Because all employees, whether they live inside or outside the City, must commute to work (whether by car or other means), improving overall job access and transportation is a critical component of planning for this City's future. This will include planning for enhanced mass-transit options, as well as non-motorized options such as walking and bicycling.

C. Market Size and Trends

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

Source: US Census

While the economy of metropolitan Baltimore has grown greatly over the last few decades, the City's economic growth has not kept pace. Like many other struggling cities, Baltimore has been losing ground to its suburban competitors in terms of its share of regional job growth. The City must work to strengthen its position as the core of the region's economy. Part of the reason for this trend is the fact that as middle-class City residents fled to the suburbs, employers often moved to be closer to the workers. This has led to a situation where many City residents (and even the most mobile of them), are often forced to work outside city limits. In 2005, it was estimated that 154,463 workers were living and working in Baltimore City, while 94,910 City residents worked outside the City. Current projections also suggest that the Baltimore region may well increase its employment totals by 50% by 2030. If the City, however, does not capture a more proportionate share of this regional growth, it will be in the unenviable position of having most of its residents forced to commute outside of the City limits to earn an income.

The port has been an enduring source of strength in this job market, supplying roughly 15,700 direct jobs with an average wage of $59,000 in 2002. In addition, the Port supported an estimated 83,000 induced jobs in trades and services sustained by spending of the direct employees, and 8,900 indirect jobs sustained by the business purchases of direct employers in the Port. The total 33,000 direct, indirect and induced employees generated roughly $216 million in State and local taxes in 2002. Faced with increasing competition for other desired uses along the waterfront the City has been and must continue taking action to preserve and enhance this major driving force in our economy.

To further strengthen the City's economic role in the regional economy, the City has targeted six growth areas, in addition to our existing port-related services, in strengthening our overall economy. These "growth sectors" were identified on the basis of their a) wage potential, b) appropriateness for Baltimore's workforce, and c) relation to existing strengths and identified

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

Source: Maryland Department of Planning

growth potential in the broader state and national contexts. This focused strategy will supplement the existing strength that resides in our port infrastructure, to build a more viable future for the current and future citizens of Baltimore.

D. Location

Baltimore's location along the Eastern Seaboard in the Mid-Atlantic region is a tremendous asset to the City's economy. The advantages of Baltimore's location are heightened by the extensive transportation network that serves the City, including a water, road and rail transportation network in which the Port again plays an integral role. This infrastructure, combined with the location, make the area important for manufacturing, warehousing and distribution businesses across the Mid-Atlantic and East Coast states. Interstate 95, for example, which stretches from Canada to Miami, helps connect the City to most other major Cities of the East Coast, while we also have strong connections West, via Interstate 70. In addition, the City is served by a major international airport, an extensive freight rail network as well as Amtrak passenger rail service.

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

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

E. Competition

1. **National and International -** Baltimore's main competitors at the larger geographic scale are the other East Coast ports (Halifax, Boston, New York, Philadelphia, Norfolk, Savannah, Jacksonville, and Miami); the world's major medical and biotechnology centers, tourist destinations as well as other places that specialize in the industries in which Baltimore hopes to compete.

   The Port of Baltimore is a major player at the national and international level, and has been designated number one in the nation (in the early years of 2000) for roll on/roll off cargo. This includes a broad array of construction and farm machinery, as well as trucks and automobiles. Among North Atlantic Coast ports the Port also ranked second in the import of forest products, and third in overall import and export of automobiles.

2. **Regional -** At the regional level, Baltimore completes with many other metropolitan areas of similar size in the mid-Atlantic Region, stretching from Norfolk to New York City. Baltimore's relatively low cost for office space makes it competitive with most urban areas in the region. Downtown office

spaces in Washington, DC, Philadelphia, Boston, and New York typically sell for $600 to $700 per square foot. Similar quality downtown office space in Baltimore trades at $200 to $300 per square foot. Additionally, for prospective resident-employees, our relatively low cost of living and housing makes it competitive with most of the cities in the region, especially the ones that can offer similar mixes of urban amenities, educational training and locational advantages as those that are offered within the City.

3. **Local -** Within the Baltimore-Washington region, Baltimore's position has shrunk from being the major economic engine to being a node in a complex web of regional economic actors in which suburban edge cities are often able to attract major sources of employment away from traditional downtown settings. Regionally, these areas include Maryland counties of Baltimore County, Montgomery County, Anne Arundel County, Howard County, and Virginia jurisdictions of Arlington, Fairfax, and Alexandria. The high levels of population and employment growth in these areas has led to increased development cost, making the city competitive with these suburban employment centers. The City also often offers superior transportation options for employers and employees and access to urban amenities not available in suburban and outlying areas.

Conclusion

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

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Products and Services

Baltimore possesses unique and specific resources that define how people EARN in the City. The key factors - or "products" - that the City controls and contributes in this market are land and labor. The services offered include the unique financing tools offered by the City to acquire land and continuing education and job training for workers. By aligning how we make our products and services available to employers and employees, Baltimore will be better equipped to meet the challenges of the 21st Century and successfully compete in the global marketplace.

A. Products and Services Offered

Products

The core physical products pertaining to how Baltimore EARNs are land and labor. Baltimore has ample land that is - or could be made - developable for newer and more productive uses in the new economy. The land is relatively well served by existing infrastructure investments in roads, rail, transit, water and sewer lines, etc. This existing investment presents an enormous opportunity and potential cost savings for the development and lease of property, increasing the range of choices for Baltimore businesses to grow, and for more businesses to relocate to or expand into the City. The City's built environment includes a diverse mix of buildings and urban fabrics to sustain a broad range of economic niches, and is supported by a strong network of non-profit, educational, and institutional entities, as well as port, tourism, and recreational amenities. These assets are key strengths to build from in both retaining and attracting business in the City.

The City's workforce is also a key product that defines Baltimore for businesses, at not only the local, but regional, national and international level. Businesses seeking to locate or grow within the City will require a ready supply of skilled and educated workers, and a pool of candidates that can be trained or cross-trained into new fields. Baltimore residents, on the other hand, need the support and training required to enable them to fill these jobs, and to access jobs outside of the City as needed.

Services

Financing and assembling land for employers and training the City's workforce are key pieces of the overall EARN strategy. The interaction and capacity to leverage such key factors against other key assets and City products (land, infrastructure, etc.) must be carefully managed and marketed as a foundation for growing jobs, salaries, and profits in the City.

The City has considerable business development and property tax incentive tools at its disposal, from which to help recruit and build businesses, invest in residents and ensure growth. The One Maryland Fund is a State program comprised of a set of targeted tax incentives for business start-ups and expansion

that can provide tax credits of up to $500,000 for firms to furnish and equip new facilities. Tax Increment Financing (TIF) is a tool for financing public sector costs associated with private development without creating new demands on scarce tax revenues. The Enterprise Zone (EZ) Property Tax Credit is a ten-year program that waives 80% of the property tax on non-residential properties for the first five years. Payment in Lieu of Taxes (PILOT) is a strategy that can provide economic incentive for job growth and physical development. The Brownfields Property Tax Credit allows developers to waive up to 70% of the increase in tax assessment over five years for most brownfields projects, or ten years if the business is within an Enterprise Zone. Historic Preservation credits can be applied to renovation projects worth at least 25% of the property's full cash value. Income Tax Credits can be tailored to specific projects, each with its own set of requirements and restrictions. These are the types of financing services that Baltimore provides to help businesses **EARN**.

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

The Mayor's Office of Employment Development's (MOED) regional career and youth centers served over 18,000 jobseekers last year. Additionally, MOED's digital learning labs, GED classes, and the YouthWorks summer jobs program placed up to 5,500 youth 14-21 in 400 job sites across the city. Each of the City's strategically-located One-Stop Career Centers is staffed with professionals from MOED and partner agencies to provide direct and comprehensive services onsite for persons who are unemployed, underemployed or employed and for targeted populations such as veterans, ex-offenders, people with disabilities, senior citizens and youth.

B. Competitive Advantage

The key proprietary positions and market strengths that Baltimore City must leverage include its vital and historic port industries, its strong convenient connections to Washington D.C., its Central Business District, and its strategic location between northern and southern cities of the Eastern seaboard.

With more than 16,000,000 square feet of office space in 111 downtown buildings, over half of it Class A, Downtown Baltimore is the largest office market in the Baltimore metropolitan area, and one of the largest in the consolidated Baltimore-Washington region. The appeal and convenience of our central city and the amenities it offers should be leveraged to give the City competitive advantage over the smaller areas that contend with us in attracting businesses.

The existing institutional, infrastructural, and locational advantages of the City, as well as its current labor force characteristics, were taken into close consideration by the Baltimore Workforce Investment Board (BWIB) in strategizing for growth in the emergent economy. The Board considered such City-specific assets and opportunities, relative to national and

state-wide trends in job and wage growth, as a basis from which to identify six growth sectors as a focus for targeted intervention: Construction, Computer, Internet and Data and Software-Related Services, Hospitality and Tourism, Healthcare and Social Assistance, Business Services, and Bioscience. While City agencies continue to work for the retention and growth of all current City industries, they will also pursue a more targeted investment strategy by building infrastructure and amenities to support and attract firms in these specific industry clusters. By focusing our resources, the strategy will help expand City employment opportunities in general, while helping maximize the earning potential of City residents.

C. Customer Perceptions

Baltimore offers convenience and access to a broad range of workers, entrepreneurs and other customers in the regional market place. Domestically, Baltimore is in a prime location to access the large urban markets of the Northeast; with three of the five largest metropolitan areas in the United States within 200 miles of downtown. No other location in Central Maryland is more reachable than Downtown Baltimore, which is easily accessible by national and regional rail, metro subway, light rail, commuter and local buses, and private automobile. Potential customers also benefit from the size of downtown Baltimore, which has achieved the critical mass of businesses required to provide a wide array of amenities in a localized area. The proximity of numerous business support services will aid businesses in operating in the most efficient manner possible.

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

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

Downtown Baltimore still reigns as one of the Northeast's major urban centers and the premier business address in Central Maryland. The traditional significance of the downtown and the recent resurgence of Baltimore's residential and retail sectors leave the City well positioned to gain a unique place and new prominence in the national market.

D. Comparative Analysis

While many of the products and services offered by Baltimore are similar to those in other urban and suburban areas, Baltimore can leverage its unique combination of assets to bolster investment in the identified growth industry sectors. As an integral and central part of the broader interstate, railway and port networks of the East Coast, Baltimore's locational strength can be seen as a pivotal point connecting major cities of the North (Boston, New York, and Philadelphia) to cities of the South (D.C., Richmond, Atlanta). This key position could be strengthened, leveraged and marketed in connecting large markets around the nation, and the world.

One of Baltimore's greatest competitive advantages is its (generally) lower land values, development costs, and rents. The City's cost of development is significantly lower than that of many of its urban and suburban competitors. Lease rates of existing buildings are also generally lower: While downtown office spaces in cities like Washington, DC, Philadelphia, Boston, and New York sell for $600 to $700 per square foot on average, office space in downtown Baltimore trades at $200 to $300 per square foot. Compared to regional competitors like Philadelphia or New York, and local competitors like Washington, DC, Montgomery and Baltimore counties, Baltimore City has more vacant residential and industrial buildings appropriate for redevelopment, and can offer them at lower cost.

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

Baltimore is well-served by freight and passenger rail lines, making it competitive with regional competitors along the Northeast and Southeast corridors. Amtrak service provides strong connections for the area not only to DC and the North, but also (via transfers) to such points further West as Cleveland and Chicago. Amtrak's Acela Express line provides high-speed passenger service along the Northeast corridor, connecting Baltimore to business travelers from Washington to Boston. The MARC regional passenger lines not only connect Baltimore to Washington DC and its suburbs but also are part of a broader network connecting to Martinsburg WV and Frederick MD to the West. Freight lines include CSX and Conrail and serve Baltimore's numerous industrial zones.

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

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

Earn

Goals, Objectives, and Strategies

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

Goal 1: Strengthen Identified Growth Sectors

Goal 2: Improve Labor Force Participation Rate among City Residents

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

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

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EARN Goals, Objectives and Strategies

Goal 1: Strengthen Identified Growth Sectors

Objective 1: Retain and Attract Businesses in all Growth Sectors (See also LEARN, Goal 2, Objective 2)

- Create an industrial mixed-use zoning district
- Create a light industrial mixed-use zoning district
- Establish microenterprise loans for start up businesses specifically in the growth sectors
- Work with growth sector employers to identify training needs
- Preserve use of eminent domain for underutilized and/or contaminated parcels of commercial and industrial land

Objective 2: Retain and Attract Business in Bioscience

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

Objective 3: Retain and Attract Business in Business Support Services

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

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

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

Objective 5: Retain and Attract Business in Construction

- Create, tailor and market programs that assist and encourage construction entrepreneurs in acquiring low-cost bonding

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

- Create a mechanism to adopt health care facility master plans to provide institutions with predictability in the development review process
- Amend the zoning code to broaden the definition of Health Clinics to include non-residential substance abuse treatment centers

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

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

Objective 8: Retain and Attract Port-Related Services (See EARN Goal 1, Objective 1, Strategy 2 and EARN Goal 3, Objective 2, Strategy 3)

Goal 2: Improve Labor Force Participation Rate Among City Residents

Objective 1: Align Employers with Job Seekers and Training Resources

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

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

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

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

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

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

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

Goal 1: Strengthen Identified Growth Sectors

Objective 1: Retain and Attract Businesses in all Growth Sectors (See also LEARN, Goal 2, Objective 2)

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Create an industrial mixed-use zoning district		•	•	Decreased number of variances for mixed use and less URP's. Increased mixed-use in industrial areas	Planning, BMZA, Housing, Law, MCC	Years 2-4	General Funds	Increased tax base and density

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

Create a light industrial mixed-use zoning district		•	•	Decreased number of variances for mixed-use and less URP's. Increased mixed-use in commercial areas	Planning/BMZA/ Housing/Law/ MCC	Years 2-4	GO Bonds, General funds, state	Increased tax base and density

Businesses in this sector have demonstrated a preference for flex office space, which has the lowest vacancy rate in the City. Creation of a mixed-use commercial district would also allow for "green" light-industrial users to locate in commercial parks where their non-commercial uses will not negatively impact the other commercial uses in the immediate area. This particular zoning district would serve as an appropriate, non-residential buffer for the MIZOD (See Appendix I). City agencies should address this growing demand through the review/renovation of select existing buildings, and by amending the Zoning Code to provide for this kind of office product (See Chapter IX for Future Zoning Recommendations).

Establish microenterprise loans for start up businesses specifically in the growth sectors	•		•	Increased number of start up businesses	BDC, Finance	Year 2	GO Bonds, State Grants, General Funds	Increased jobs and businesses in growth sectors

Remove barriers to start up companies by providing microenterprise loans to entrepreneurs in the growth sectors. Loan applications will be processed through the City's Small Business Resource Center.

Work with growth sector employers to identify training needs	•	•	•	Recommendations on how City can support internal and external organizations to most effectively utilize training resources	BWIB, MOED, BDC, Planning, Housing	Years 1-6	General Funds, Grants, Leveraged MOED budget	Stronger training programs, better equipped workforce, improved workforce, increased tax base, reduced dependency on social subsidies

Focusing training resources on preparation for employment in the six identified growth sectors as well as port-related industries will assist in providing a workforce that is qualified and enticing to growth sector businesses looking to expand or relocate.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Preserve use of eminent domain for underutilized and/or contaminated parcels of commercial and industrial land	•	•	•	Return of underutilized and/or contaminated parcels to productive use	Planning, BDC, Housing, Law, MCC	Years 1-6	GO Bonds, Federal Grants	Increase in property taxes and revenue

Underutilized and/or contaminated commercial and industrial parcels are a legacy of Baltimore's past. Often these parcels are in areas where they are now incompatible uses or are vacant properties. Eminent domain is often the only tool to take these properties and return them to the market for development. Prior to the use of eminent domain, a site specific plan will be developed that is consistent with any Area Master Plan (See LIVE, Goal 1, Objective 4, Strategy 1) and the City's Comprehensive Plan.

Objective 2: Retain and Attract Business in Bioscience.

Create a Bioscience Development District		•	•	Amended zoning code	Planning, BMZA, Housing, Law, MCC	Years 2-4	General Funds	More jobs, predictability of development

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

Create incubator space around biotechnology areas	•		•	Increased square footage available for bio start-up businesses	MOED, BDC, Planning	Years 2-6	GO Bonds, General Funds, Federal Grants	Provides for start-up space near existing Biotech activities.

While the Baltimore Development Corporation operates some incubator space for small businesses, many of the small business clients within the biotech field already have patents and/or research that is being supported through partnerships with major institutions and corporations but need a start-up space that is fully equipped with laboratory, and other specific needs, in close proximity to other biotech activities.

Objective 3: Retain and Attract Business in Business Support Services

Identify and rezone nodes in the city that can support high-density, mixed-use commercial properties.	•	•	•	Increased renovation of office space in targeted nodes.	BDC, Housing, Planning, MCC	Years 2-4	General Funds, MVR, GO Bonds	More supply of new quality office space and mixed-uses that meets demand and curtails vacancy.

The Department of Planning will work closely with Housing and BDC to identify key sites/opportunities for targeted mixed-use nodes. By providing increased density and the option for form-based designs, the renovation and adaptive reuse of office space will be directed to the targeted nodes.

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

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

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

Develop a master plan for the City's current and future CIDS infrastructure.	•		•	Development of the plan. Increased CIDS-related employment.	Planning, BDC, DPW, Mayor's Office, DOT, Fiber Optic Installation Firms	Years 2-5	General Funds, MVR, GO Bonds, Federal DOT, Homeland Security	New CIDS businesses locate and expand into the City.

The City has a unique position in that the entire underground conduit system is controlled by a franchise agreement program. This allows the City to require projects that add conduit or capacity underground to include space for the City's use, at the cost of the project developer. This can then be used to market Baltimore as a "Connected City" with "High Tech Zones." However, the system is not comprehensive, is near capacity, and is expensive to improve. A master plan should be developed to positively identify the system capacities, occupancy, and specific needs. The City of Baltimore will then increase its opportunity to retain and attract CIDS businesses by offering quality infrastructure through increased bandwidth and telecommunication capabilities (fiber optics, wireless connectivity). Areas of the city where new underground systems are being built need to include similar infrastructure for CIDS support, and should be included as a policy for new construction projects.

Provide Wireless Technology Zones in public areas throughout the City.	•		•	Increased number of wireless locations	Planning, BDC, MOIT, Cable & Communications	Years 2-5	GO Bonds, General Funds, Federal DOT	Increased tax base and incentives

While the City of Baltimore is enhancing a lot of its CIDS efforts on homeland security with video and surveillance cameras, the City should also capitalize on this initiative by marketing safe areas that can be used as wireless office spaces, cafés, parks, neighborhoods, schools, libraries, and commercial areas. Baltimore currently ranks 24th as the most-wired City. Development of wireless technology zones has great potential for significant public spaces at key locations such as along the I-95 corridor, MARC train stations, Montgomery Park, the Inner Harbor, Patterson Park, the Middle Branch, and the Howard Street corridor.

Objective 5: Retain and Attract Business in Construction.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Create, tailor and market programs that assist and encourage construction entrepreneurs in acquiring low-cost bonding	•		•	Increased number of new construction businesses	BDC, Finance, SBRC, DBED, MOED	Years 2-6	General Funds, GO Bonds	More workers living close to jobs, More businesses to provide workers and residents goods and services, Increased property taxes, Increased income taxes

Bonding and finding employees are two of the biggest hurdles for new construction companies. The City should provide resources to companies that make an effort to employ City residents and ex-offenders.

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

Create a mechanism to adopt health care facility master plans to provide institutions with predictability in the development review process		•	•	Increased number of approved master plans, improved speed of development review, predictability in the development review process	Hospital and Health Care Facilities, Planning, Planning Commission	Years 2-3	Hospitals, General Fund	Improved relations between neighborhoods and Hospital institutions in terms of facility expansion.

All health care institutions are encouraged to develop master plans for long-term growth. The City will develop a process to adopt master plans to provide institutions greater predictability during the development review process. By having the City participate in the development of facility master plans and formally adopt the plans, the City will be better prepared to support the recommendations in the plan, ranging from streetscape improvements to land acquisition. The intent is to ensure a better correlation between the City's Master Plan and the development/expansion of hospital campuses throughout Baltimore. A typical master plan should include a ten year physical plan as well as an economic impact statement, design guidelines, pedestrian safety standards, transportation/alternative commuting strategies, LEED-based environmental design objectives, etc. The master plan should also include strategies to reduce single occupancy vehicle trips to campus by discouraging parking, encouraging transit and carpooling, and providing on or near hospital residential opportunities for staff and family of long-term patients.

Amend the zoning code to broaden the definition of Health Clinics to include non-residential substance abuse treatment centers		•	•	Compliance with ADA	Planning, BMZA, MCC	Year 1	General Fund	Facilities will be able to locate with reduced time and expenses required, encouraging the growth of this portion of the healthcare sector.

This change will bring our Zoning Code into compliance with the Americans with Disabilities Act (ADA), which will reduce liability for the City due to legal challenges.

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

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Create a Strategic Convention Center Area Master Plan.		•	•	Adoption of plan	Planning, Transportation, BDC, MTA, BACVA, Convention Center	Year 3	General Funds	Expanded Job, Profit and Revenue Potential for the City

The Department of Planning will work closely with City agencies to review and improve pedestrian amenities, transit access, and to pursue business/rehabilitation opportunities to create greater synergies between new facilities and the adjacent area. Job and business opportunities in the Tourism sector are generally available for: hotel workers, food industry workers (producing, selling, serving), waiters and waitresses, bartenders, cooks, security guards, musicians and singers, actors and performers (including re-enactors of historic events), tour guides and escorts, amusement and recreation attendants, landscaping and groundskeepers, janitors, cleaners and maintenance workers, producers and tour organizers, recreation workers, producers, general and operations managers, recreation workers, travel agents, reservation & transportation ticket agents, meeting planners, and spa- and health club operators. The plan should also address the City's need for a modern, larger seating capacity, multi-use arena for concerts, circuses, present and potential sport professional franchise teams, college playoffs.

Install environmental and aesthetic improvements around tourist areas	•			Increased number and quality of lights, Increased pedestrian activity in tourist areas	Planning, BACVA, BDC, Downtown Partnership, Transportation	Years 2-4	General Funds, GO Bonds, Hotel Tax	Increased Hotel Tax Revenues. Improved perception of City of Baltimore by visitors

This will be an integral part of the City's pedestrian plan (See LIVE, Goal 3, Objective 1, Strategy 1). By improving the lighting and aesthetic environment around the City's tourist areas, we can successfully combat perceived safety issues. Hospitable areas will attract more visitors to the City, encourage exploration of City attractions and surroundings, and foster longer stays.

Objective 8: Retain and Attract Port-Related Industries (See EARN Goal 1, Objective 1, Strategy 2 and EARN Goal 3, Objective 2, Strategy 3)

Goal 2: Improve Labor Force Participation Rate Among City Residents

Objective 1: Align Employers with Job Seekers and Training Resources

Create a Strategic Plan for MOED that links employers to job seekers			•	Increased workforce participation rate.	MOED, BWIB, BDC, Housing, BCPSS, BCCC, Planning, and other training programs.	Years 2-3	General Funds	Higher per capita income in the city, fewer recipients of social assistance

By creating a strategic plan for MOED services, the city will be able to better manage all City-funded workforce development programs, increase and improve workforce development training opportunities, particularly apprenticeship programs, for targeted sectors. By making Baltimore City attractive to these businesses, the City can capture its share of the predicted employment growth in the greater Baltimore region.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Monitor and enforce First Source Hiring program.			•	Increased rate of use of Baltimore residents in the local workforce.	All city agencies	Years 1-6	General funds, also tie to contract money for indiv. projects	Involves more City residents in the local workforce. Reduction in City funding exported from City, more successful businesses and higher tax base

Monitoring First Source Hiring by contractors for City-funded development will help ensure that City dollars employ City residents. By enacting legislation or issuing an executive order for a reporting mechanism that links the program payout to compliance, the City can ensure that City dollars contribute to the local economy and improve the lives of employable Baltimoreans. Currently, the program is operated on a voluntary compliance basis, and there is no way of enforcing local labor use pledges once money is awarded. By incorporating a better method of review and ensuring compliance, the investments for the use of local labor will go to those companies and projects that actually use local labor – not just those that make a promise to do so. Funding for MOED will need to be increased to meet this new requirement.

Expand outreach to encourage use of One-Stop Employment Centers			•	Increased number of residents using One-Stop Centers	BWIB/MOED	Years 2-5	General Funds, Foundation support	Increased labor force participation rate, decreased unemployment rate, increased tax base, reduced dependency on social subsidies.

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

Target MOED resources to under- and un-employed populations to better connect job seekers and employers.			•	Increased number of ex-offenders utilizing MOED resources, increased placement rate for ex-offenders in program	BWIB/MOED	Years 1-6	General, Foundation grants	Reduced recidivism, reduced crime, safer communities, increased property values.

Targeting MOED programs to specific populations will help reduce barriers for connecting job seekers with potential employers. For example, MOED's Ex-Offender initiative seeks to break down those barriers and help ex-offenders gain long-term employment. Employment studies have shown that this is a key element in reducing recidivism. The City should embark on a potential study of incentives including insurance guarantees and tax credits to encourage private employers to employ ex-offenders.

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Prioritize drug treatment program access for job seekers working with MOED programs.			•	Increase the quality of worker by minimizing the chance for relapse, and therefore loss of investment.	Health, BSAS, MOED	Years 2-4		Ensures that programs are coordinated and that the likelihood of success for participating individuals is increased.

Intervention with drug treatment programs is not necessarily sufficient on its own to get addicts to become productive members of the workforce. By coordinating drug treatment programs with job training programs, it is much more likely that a positive change in lifestyle will become permanent and increase the cumulative effect of this investment in the quality of Baltimore workforce members.

Give preference for City-subsidized contracts to contractors with active apprenticeship programs			•	Increased number of apprenticeship programs, increasingly skilled workforce	All city agencies	Years 1-6	No direct cost	Wider range of training opportunities, Higher number of City residents qualified to work "good jobs"

Giving preference to contractors with active apprenticeship programs will help support the expansion and utilization of apprenticeship programs, encourage the use of training opportunities, and, in the long run, provide more City residents with opportunities to work professional jobs that pay much more than minimum wage.

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

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

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

Expand the number of participants in the Commuter Choice program throughout the Baltimore Region			•	Increased number of employees and employers who participate in the Commuter Choice Program	Baltimore Metropolitan Council, Maryland Transit Administration, Transportation	Years 1-6	General Funds	Cost savings to employers and employees, less congestion

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

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Support efforts to implement the Baltimore Regional Rail Plan and its Red and Green Line priority segments	•		•	Increased number of Passenger Rail Lines in the region, Increase in "transit mode share" (share of all trips made via public transportation) for people who either live or work in the City, Increased number of households and jobs 1/3-mile from existing and future rapid transit stops in City	MTA, BMC, MDOT, Transportation, Housing, Planning	Years 1-6	General Funds	Cost savings to employers and employees, less congestion

The Baltimore Region Rail System Plan as developed in 2002 is moving forward with portions of the Red and Green Lines as top priorities (See Appendix O). To realize these projects, City agencies will work with surrounding businesses and communities to explore and plan for the most appropriate economic development and related infrastructure (e.g. street improvements, traffic signals, safe pedestrian pathways) along these priority lines. The City will also collaborate with surrounding communities and businesses, other local jurisdictions, and the Maryland Transit Administration (MTA) to provide advice on preferred alignments, station locations, technologies, and system features. Those recommendations will be geared toward helping the City realize its transit-oriented development strategy and neighborhood revitalization goals and also toward making the project competitive for federal transportation funds. In addition, the City will work with City, State, and federal elected officials to develop viable funding strategies for construction of new transit lines and related economic development.

Implement Transportation Demand Management (TDM) strategies with large employers and institutions			•	Reduced or managed traffic, increased car- and vanpooling, increased bus ridership, adoption of a traffic reduction ordinance, creation of transportation management associations	BDC, BMC Transportation, MTA, Planning	Years 2-4	General Funds	Cost savings to all city residents and developers through more efficient use of road and parking resources.

A full Transportation Demand Management (TDM) Program will include an aggressive publicity campaign, partnerships with large employers and alternatives to single-occupancy vehicles, including promoting employer-subsidized transit passes. Alternative parking requirements will be encouraged to help reduce the demand for single automobile use. Other TDM strategies, such as a traffic reduction ordinance to minimize single occupancy vehicles will be studied. In addition, alternative parking policies at parking facilities will be promoted to help reduce the demand for single automobile uses, including preferential parking for carpool vehicles.

Implement Bicycle Master Plan	•	•		Increased number of bike lanes and bike racks at employment centers.	Planning, Transportation, DPW, Private Partners.	Years 1-3	MVR, Federal Grants, General Funds	Improved Air Quality, Cost savings to City, employers and employees in terms of auto use, parking infrastructure, etc. Land use efficiencies that can translate into enhanced property values.

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

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Increase number of water taxi stops near employment locations	•		•	Increased number of water taxis, Increased number of water taxi passengers	Planning, Transportation, Maryland Transit Administration, BDC, Water Taxi Service, National Historic Seaport of Baltimore	Years 1-6	MVR, Federal grants, General Funds	Land and time efficiencies and cost savings related to parking.

The water taxi and the harbor present a unique alternate transportation opportunity which could be expanded to accommodate commuter traffic. In addition, the water taxi could be expanded into the Middle Branch to accommodate new development. The City will seek available federal funds for expanded water-bourne passenger services, which will lead to less dependence on vehicles and will, therefore, reduce vehicle trips.

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

Restore and increase on-street parking in mixed-use and business districts	•		•	Increased on-street, high-turnover parking, Increased storefront occupancy	Transportation/ Planning, Parking Authority	Years 1-6	GO Bonds, General Funds, MVR	Greater accessibility to neighborhood businesses and retail

Expanding use of the new short-term, high-turnover meter parking technologies in mixed-use and neighborhood business centers will give merchants more customer traffic and improve their trade. In appropriate areas curb lanes, now used for through-traffic, can be restored to on-street parking and increase angled parking conversions where appropriate. This also creates an important psychological barrier between pedestrians and moving vehicles, increasing pedestrians' sense of safety while shopping or walking in the area.

Create Transit-Oriented Development zoning and incentive programs for transit nodes throughout the City (i.e. State Center, West Baltimore MARC)	•	•	•	Increased number of jobs within ½ mile radius of transit stations, Improved pedestrian access to stations	BDC, MDOT, Housing, Planning, BMZA, Law/, MCC, Transportation	Years 2-4	General Funds	Increased development and property values near transit stations

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

Strategy	Capital	Zoning	Policy/ Operations	Measurable Outcomes	Implementing Bodies/Agents	Timeline	Funding Source	Return on Investment
Integrate land use and transportation planning to ensure movement of freight into and throughout the City		•	•	Integrated land use and transportation plan	Planning, BDC, Transportation, MDOT, Port Authority	Years 2-4	General Funds	Stronger industrial and commercial activity, fewer land use and transportation conflicts

The City has a mature and functioning industry that is sustained by adequate port, rail, and truck access. By integrating land use and transportation planning, critical linkages in the transportation system will not be choked off by development.

Capture share of regional growth in defense-related industries due to BRAC	•		•	Increased defense-related industries, Increased rate of employment	BDC, MCC, Planning	Years 2-6	General Funds	Stronger overall economy, Greater employment base

The base realignment and closure (BRAC) recommendations took effect on November 9, 2005, and involve more than 800 installations. Maryland is one of very few states slated to experience a significant net gain, primarily at the Aberdeen Proving Ground (APG), Andrews Air Force Base (AFB), Fort Meade, and the Bethesda National Naval Medical Center (NNMC). The DOD has until September 15, 2007 to begin the indicated closings, which must be completed by September 15, 2011. The City is strategically located both proximate to the nation's capital, Washington DC, and among Maryland receiving areas with the implementation of BRAC. The City will capture office market and defense-related growth through strategic marketing and expansion of transit services to surround base installations.