



The occasion of the Spring 2018 Land Economics Weekend has been a cause for much enthusiasm at the Baltimore Chapter of Lambda Alpha International. It has offered us an opportunity to showcase our City and region, to be introspective, proud, and maybe even boastful at times. But most of all, the Land Economics Weekend has afforded us a way to demonstrate our hospitality to our guests from around North America, Europe, the Middle East and Asia while introducing you to our home and its many features.

The weekend is short, so we cannot show all that we would wish to show you. We are fortunate to live in an historic and vibrant City, region and economy which has provided us many assets, opportunities and qualities that we love. We welcome our LAI guests, and hope we can share with you our enthusiasm for Baltimore.

This Preview was crafted to provide you a first look at Baltimore. Enjoy your visit. After the LEW, we hope you will return to see and experience more than we can present to you this weekend.

*James S. Leanos, Rachel Edds, Ruth Louie,
Dan Pontious and Geoffrey Washington*



BALTIMORE: A PREVIEW

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Baltimore's Economy and its Changes

The story of Baltimore is in many ways the same story as the evolution of the American economy. Founded on July 30, 1729, by Lord Baltimore, Cecilius Calvert, the first Proprietary Governor of the Province of Maryland, Baltimore evolved from a port city into an industrial city. Many of its industries were stalwarts of the American economy from the 19th century through much of the 20th—steel, auto, industrial, rail and maritime shipping. As those industries waned, Baltimore faced the challenges of lost population and poverty within its borders, as well as a vigorous progression of reinvention and change.

The story of Baltimore is also the story of the City's struggle with the aftermath of the slaveholding roots of the American economy and of Baltimore's location at the nexus of North and South. While it ultimately developed many northern industries, Baltimore was located in the slaveholding State of Maryland. By the Civil War, Baltimore was home to the largest free African American population of any US City, but its schools were segregated until the 1954 *Brown v. Board of Education* ruling. As shown by the protests and riots of 2015, the 2017 consent decree with the US Department

of Justice, and the recent removal of five Confederate monuments (including four monuments in the City of Baltimore alone) in a State that never seceded, overcoming the legacy of Baltimore's history of slavery and segregation remains a challenge.

In light of that struggle, progress is often uneven, but many parts of Baltimore are now experiencing rebirth. It has seen increased investment in existing commercial spaces to transform and expand them and to build new structures and communities to serve the new economy, focused around IT, healthcare, education, finance, advanced manufacturing, transportation and logistics.

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The Harbor Point site in Central Baltimore, which once housed an Allied Signal Chromium plant, has been repurposed to be the home of Exelon and financial businesses like Morgan Stanley, adding to an already thriving area known as Harbor East. These new sites are among several employment centers of Baltimore's new economy.

Clusters of old commercial and industrial spaces are being converted into new maker spaces. In parts of the North Avenue corridor that saw an exodus of population and investment following Baltimore's 1968 riots, new employment centers for millennials and tech companies have emerged. Under Armour®, with its new, high-performance sportswear products has become more than just an employer. It is poised to remake a former focus of shipping activity, Locust Point and Port Covington, into Under

Armour®’s new home, with new residences and businesses located there to support new workers. Following a vigorous campaign by the faith-based Baltimoreans United in Leadership Development (BUILD) and others, Baltimore City’s \$660 million award of tax increment financing for the development is now accompanied by commitments to jobs for Baltimoreans struggling to find them and some affordable housing as well. New spaces are also being developed by Under Armour’s® founder Kevin Plank’s Sagamore Development in remaking nearby industrial sites like City Garage (the City’s former consolidated vehicle maintenance facility). Located in the former GE Apparatus site in South Baltimore is the recently-completed apartment community, Anthem House, developed by Bozzuto Group, Scott Plank’s War Horse Cities and Solstice Partners. What was once characteristic of old Baltimore and post-World War II America is being converted into the face of the new economy.

This is not to say that the population of the City is growing by leaps and bounds as a result of the new economic activity and residential development in the City but the City is improving as a place to live and work as a result. Before delving into the status of the residential changes and the new economic centers, more context of the City’s position in the economy of the region and the State of Maryland is necessary. Some basic facts:

BASIC BALTIMORE FACTS - 2016	
Population	614,664
<i>(Baltimore Regional Population)*</i>	<i>2,749,957</i>
Employment	337,533
<i>(Baltimore Regional Employment)*</i>	<i>1,194,844</i>
African American Population	63.3%
White Population	31.4%
Housing Units	297,596
Persons in Poverty	22.7%
Land Area in sq. miles	80.9

* The Baltimore Region = Baltimore City and Counties of Baltimore, Anne Arundel, Carroll, Harford, Howard, and the Kent Island portion of Queen Anne’s County.

Sources: US Census Bureau; Maryland Dept. of Labor, Licensing & Regulation, Office of Workforce Information & Performance

Residential Changes

Nothing shows the impact of Baltimore's economic and racial history more than its residential changes. The City and region's industrial success during and after World War II made it a destination for both white Appalachian workers and the Great Migration of African Americans from the south through 1950. With the



desegregation of Baltimore's schools following the 1954 *Brown v. Board of Education* decision, however, rapid racial change, blockbusting, and white flight to the suburbs began in earnest. By 1970, Baltimore's white population had plummeted by one-third. By 1980 Baltimore had lost fully half of its 1950 white population of 723,000. Only a continued influx of more than 200,000 African Americans slowed the City's overall population decline from its 1950 peak of 950,000. By 1980 the loss of many of the region's

20th century industrial jobs in steel, automobile manufacturing, and shipbuilding had started to take its toll, and the population slide continued, including an African American net outflow starting in the 1990s.

Some of Baltimore's older row house neighborhoods, built near the center of the City for nearby factory workers, felt the impact. As people moved out and incomes declined, maintenance and property values in row house neighborhoods sometimes suffered, leaving houses dilapidated or abandoned altogether. Most African American row house communities have still not recovered.

Some row house neighborhoods have experienced new investment since the 1980s. The historically white working-class waterfront communities of Canton, Fells Point, and Locust Point, are now booming and much more affluent. Over time, as industrial buildings in those locations became vacant, they too were converted to new residential and commercial uses that attracted new, wealthier residents to the City.

Some revitalization has been accompanied by racial change. A substantial part of the historic African American community of Sharp-Leadenhall was slated for condemnation by the City in the 1960s in order to construct I-95 through Baltimore. When local protests convinced the City to move the route, officials offered the houses they had taken in the northern portion of the community to "homesteaders" for \$1.

That “Dollar House” program ultimately transformed the area – near downtown and the waterfront – into the currently affluent, and predominantly white, Otterbein neighborhood.¹

Only through affordable housing programs and massive redevelopment using Federal funding were many of the older African American neighborhoods addressed. The locally infamous I-70 extension from downtown to the Baltimore Beltway (called locally the “highway to nowhere”) was also a catalyst for the transformation of some African American communities that fought the highway but lost the battle to retain the character of its community. However, a continued loss of employment centers in the City has left many of their lower income African American neighborhoods the unwilling victims of vacancy and abandonment. Lack of sufficient financial resources to maintain the condition of homes and pay housing costs saw the demise of many of the redeveloped communities in East and West Baltimore in the 90s. The economic downturn of 2007-2008 saw even greater numbers of vacant properties. City resources were unable to keep up with the rapid advance of these conditions.

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More recently, row house neighborhoods away from water amenities, but in central locations, are experiencing re-creation. The historically white working-class Hampden and Remington neighborhoods in north-central Baltimore, are being transformed. Remington’s change began with the conversion of a vacant warehouse into Miller’s Court, rental apartments for Baltimore teachers and office space for non-profits. Eventually some of those tenants purchased and moved into renovated nearby row houses. Seawall Development, which had created the teacher housing and nearby row house rehabs, next converted an abandoned car repair shop into a theater, a butcher shop and a restaurant. Now Seawall has completed the conversion of a former automobile showroom into R. House, a food hall and incubator space for aspiring restaurateurs, plus Remington Row, new construction of 100 market rate apartments with parking and street-level retail.

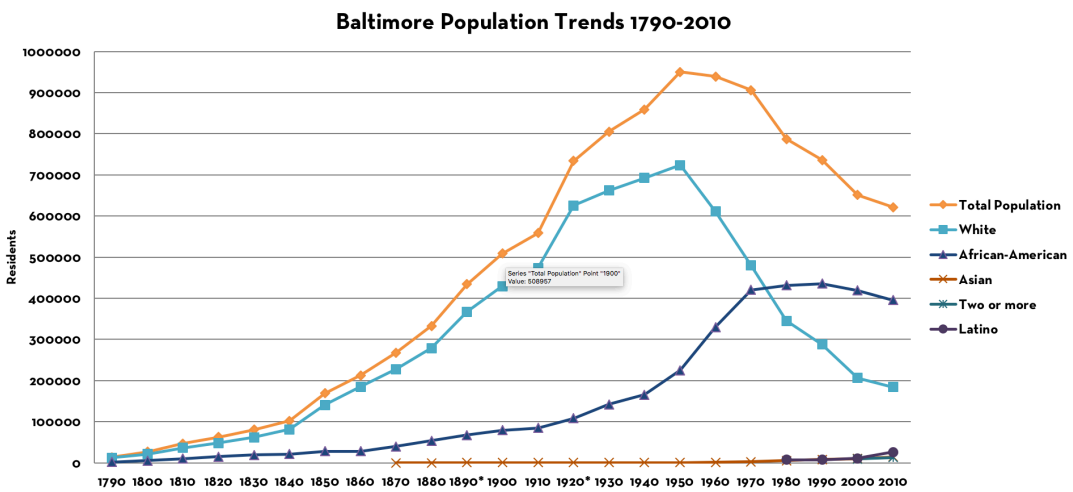
In largely African American Barclay, in central Baltimore, east of Remington, Telesis Corp., with City, State and Federal support, has turned hundreds of vacant houses and lots into new and rehabbed homes, both affordable and market-rate. In the Jones Falls Valley, also in central Baltimore, historic mill buildings are being converted into creative residential and commercial spaces and in the process resolving complex challenges of flood prevention, historic preservation, traffic access, environmental, and safety issues. On the east side, a concerted partnership between Baltimore City and BUILD in the low-income African American community of Oliver has resulted in block-by-block renovation and new development and an influx of new residents. Those new residents include staff at nearby Johns Hopkins Medical Institutions who receive substantial mortgage assistance from Hopkins to buy homes in nearby neighborhoods like Oliver.²

1 More information on pp.23-25 of Baltimore City’s 2016 South Baltimore Gateway Master Plan and p. 43 of the “History of Baltimore” section of Baltimore City’s 2006 Comprehensive Master Plan, “LIVE, EARN, PLAY, LEARN.”

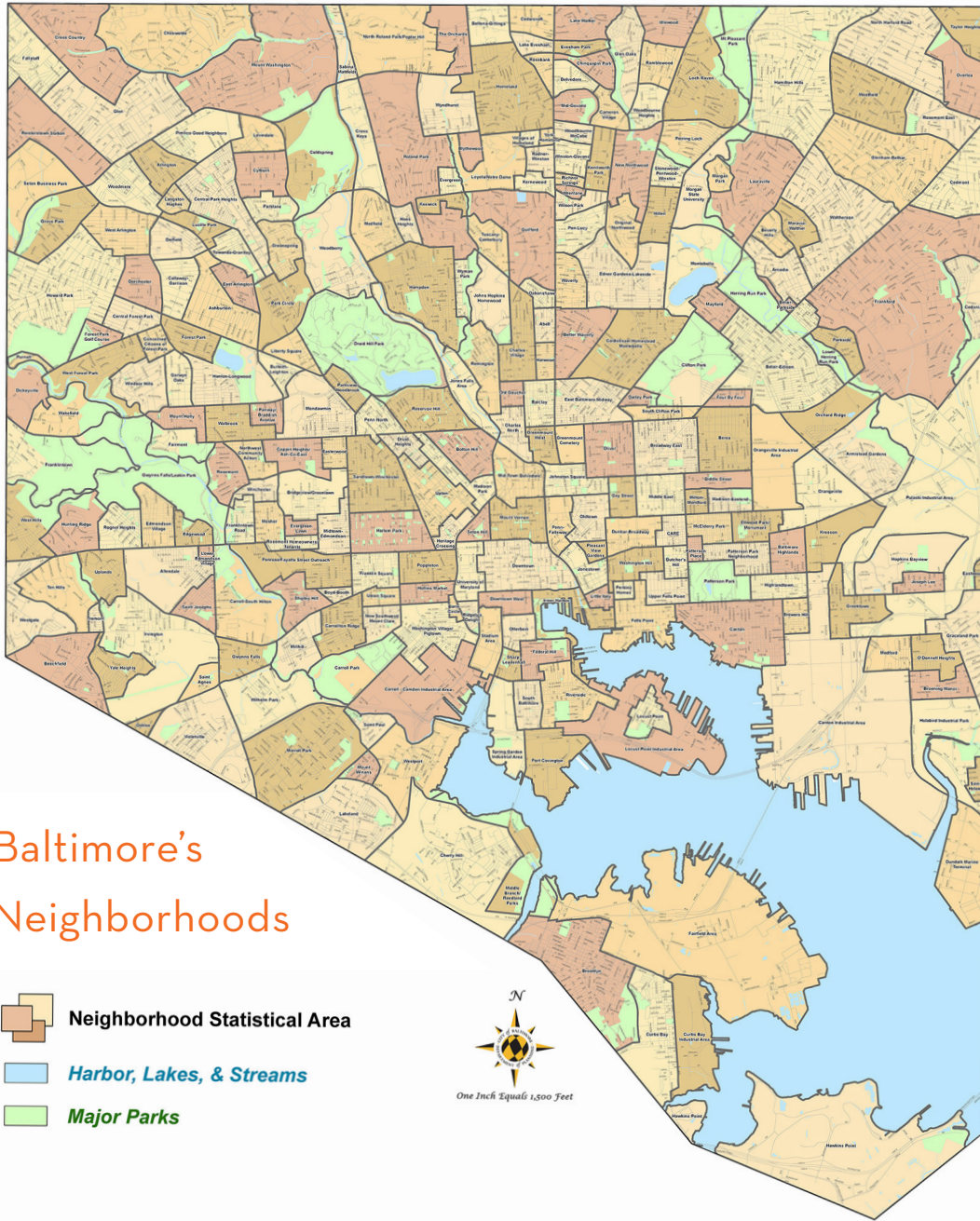
2 See pp. 82-83 of the Opportunity Collaborative’s 2014 [“Strong Communities, Strong Region: The Baltimore Regional Housing Plan and Fair Housing Equity Assessment.”](#)

The largest residential, institutional and commercial redevelopment in Baltimore is taking place in East Baltimore immediately north of the Johns Hopkins Medical Institutions. Here an 88-acre mixed-use, mixed-income neighborhood is being created to replace a once vibrant neighborhood that had become overwhelmed by poverty, abandonment, joblessness, and crime. The developer, East Baltimore Development, Inc. (EBDI), is a non-profit development corporation formed by Baltimore City, the State of Maryland, the Johns Hopkins University and Medical Institutions, community residents and other partner institutions. At completion, the development is expected to include approximately 1,700 mixed income rental and for-sale housing units, 1.2 million square feet of life science technology space, 100,000 sq. ft. of retail space, parks, a new public school and an Early Childhood Learning Center. Nearly 900 units are completed or under construction. Three life sciences buildings have been completed. The Henderson-Hopkins School and Early Learning Center are operating. The 5.5-acre Eager Park opened in the summer of 2017.


In 15 racially diverse or predominantly African American “middle” neighborhoods across the City – from Reservoir Hill and Garwyn Oaks in northwest to Hamilton in northeast and Highlandtown in southeast – the innovative non-profit Healthy Neighborhoods Initiative is helping to strengthen markets and social ties. These are generally not the most well-known communities, either for their desirability or for their difficulties – thus the “middle” designation. Through marketing, low-interest rehabilitation loans, and block projects, Healthy Neighborhoods helps local community associations strengthen homeowner demand for their communities, maintaining and boosting home values and drawing residents to Baltimore.³



3 Ibid, p. 78.



Baltimore's Neighborhoods

-  **Neighborhood Statistical Area**
-  **Harbor, Lakes, & Streams**
-  **Major Parks**



Catherine E. Pugh
Mayor
 Thomas J. Stosur
 Director of Planning

Neighborhood Statistical Area
 boundaries are created from
 2010 Census Block Geography.

2016

Eds and Meds

Our higher education facilities include Johns Hopkins University (the State's largest private employer with approximately 38,000 employees including Johns Hopkins Medicine, the undergraduate and graduate schools, the Carey Business School, the Applied Physics Lab, and the Peabody Institute), University of Maryland at Baltimore UMAB (including the Nursing, Pharmacy, Social Work, Dental and Law Schools), The University of Baltimore (including the Undergraduate, Graduate and Law Schools), Loyola University of Maryland, Notre Dame of Maryland University, The Maryland Institute College of Art MICA, Towson University, Goucher College, Stevenson University, Morgan

State University, Coppin State University, the University of Maryland Baltimore County UMBC, and McDaniel College. Also, in the Baltimore region, in Annapolis, we have the United States Naval Academy and Saint John's College. Each of the five counties surrounding Baltimore City, as well as the City of Baltimore, offers a dynamic community college, which grants Associates degrees and feeds many students into the universities throughout the State, with many of their



students focusing on Cyber Security and Science Technology Engineering and Math careers. Many of the Baltimore region's young professionals have remained in the Baltimore region after obtaining their degrees. This is especially evident in the most vibrant neighborhoods of Baltimore City. We recognize the need to foster more job opportunities for graduating seniors to retain them within the Baltimore region. Businesses, industries and other organizations are responding.

Baltimore is endowed with several of the best medical institutions in the USA—Johns Hopkins Medicine (composed of seven area Hospitals and Medical Centers and the Johns Hopkins School of Medicine) and the University of Maryland Medical Center/R. Adams Cowley Shock Trauma Center, as well as such leading regional hospitals as Sinai Hospital, Mercy Medical Center, and Medstar Union Memorial Hospital, and other facilities in surrounding counties such as the Greater Baltimore Medical Center. Johns Hopkins Medicine and the University of Maryland have developed extensive research communities in the form of the aforementioned East Baltimore Development Initiative, EBDI, near downtown on the east side, and the University of Maryland Bio Park in west-central Baltimore. Both institutions are teaching hospitals for many medical specialties. From these institutions has sprung a number of start-up biotechnology companies, as well as numerous service industries.

The Port

The Port of Baltimore and the Baltimore & Ohio Railroad (now part of CSX Corporation) were two of the greatest stimuli for growth in the 19th and 20th centuries. Norfolk-Southern Railroad also serves the Baltimore Region and its Marine terminals via the AMTRAK rail system. The Port of Baltimore has long offered a 100-mile advantage to reaching the Midwest because of its geographic location. This advantage has been challenged by other ports which boast more direct access to the Atlantic Ocean. In recognition of this, we have successfully deepened the Chesapeake Bay Shipping Channel to 50+ feet to accommodate Post-Panamax and New Panamax ships which will be served by our newest marine terminal at Seagirt on Baltimore Harbor. Baltimore continues to be one of the major coal exporting ports on the east coast. The Maryland Port Administration's MPA's Masonville and Dundalk Marine Terminals also combine to provide one of the most productive automobile import/export ports and roll-on/roll-off ports on the east coast.

In 2016 the Cruise Maryland Terminal in the Port of Baltimore's South Locust Point area saw more than 211,000 cruise ship passengers embark and disembark on more than 90 cruises representing a 68% growth over the 125,000 recorded in 2007, one year after its opening. Growth is expected to continue as a result of recently renewed contracts with Carnival and Royal Caribbean Lines to sail from the Terminal. The Cruise Maryland Terminal is now home to one each of the Carnival and Royal Caribbean ships and generates visits from other cruise lines for specialty cruises year-round. The Terminal ranks 6th on the East Coast, 11th in the US and 20th in the world for cruise passengers. The Port estimates the Terminal generates \$90 million in economic activity taking into consideration pre- and post-cruise local spending, hotels, dining and entertainment. The Terminal draws from an area within a four-hour drive of some of the most populated and affluent counties in the US. Since 2009 nearly every cruise from the Terminal has left at full capacity. Improvements underway at the Terminal include a new waiting area and VIP lounge, a PA system with monitors to aid passengers, and enclosure of the passenger breezeway.



BWI Thurgood Marshall Airport

Approximately 9 miles southwest of downtown Baltimore City in Anne Arundel County, on 3,200 acres along MD Route 295-The Baltimore-Washington Parkway lies the BWI Thurgood Marshall Airport, the busiest airport by passenger count in the Baltimore-Washington region. Downtown Washington, D.C. lies 32 miles southwest of BWI. Direct highway access is provided via I-195, which connects to the Baltimore Washington Parkway and I-95. Connected major highway access is provided by the Baltimore Beltway (I-695), the Washington Beltway (I-495), the Intercounty Connector (MD-200), and I-97 (the freeway between Baltimore and Annapolis).

When it was built by the Baltimore [City] Aviation Commission and dedicated by President Harry S. Truman as Friendship International Airport in 1950, it was viewed as the most advanced in the United States. For several years, prior to improvements of the other two Washington area airports, Friendship Airport served as the two cities' only jet airport. As its customer demand grew, capital needs exceeded Baltimore City's ability to



sustain the airport and in 1972, the Maryland Department of Transportation purchased the airport for \$36 million. In November, 1973, the Maryland Aviation Administration MAA, operator of the airport, renamed it Baltimore/Washington International Airport. Immediate expansion of the airport ensued and phase one of the modernization was completed for \$30 million. Subsequent improvements have far exceeded the MAA's original investments, such that today,

more than 3.2 million passengers use BWI annually, the terminals amount to 2.1 million square feet, and service currently averages 650 flights daily to domestic and international destinations. Rail connections have been built for AMTRAK, MARC and Baltimore Light Rail service. Very substantial office building, retail, residential and hotel development has occurred near BWI and Columbia, MD to accommodate many technology companies and government agencies in the area, the largest of which are Northrop-Grumman, National Security Agency NSA, and Fort George G. Meade (including the US Cyber Command). In order to support the many businesses and agencies in the BWI district, the BWI Business Partnership www.bwipartner.org was founded in 1985.

The annual economic impact of BWI Thurgood Marshall Airport, excluding the impact of Fort George G. Meade, NSA, the US Cyber Command and related contractors, is \$9.3 billion, making it a major contributor to Metropolitan Baltimore's and Central Maryland's economy.

Sports

Part of Baltimore's past was the large, abandoned Camden Yards rail yard, B&O Railroad Warehouse, and Camden Rail Station southwest of the City's center along Russell Street, the northern terminus of the Baltimore-Washington Parkway. Beginning with the completion of Oriole Park at Camden Yards in 1992, Baltimore succeeded in bringing sports fans into the center of the City. Oriole Park has provided a model of a new stadium which evokes the long history of baseball while providing an energetic gateway to the City's center. The Orioles are immensely popular in the Baltimore Region, Chesapeake Bay country, and in Central Pennsylvania. The Stadium's current capacity is 45,971 (reduced from 48,876 in 2011). Its record attendance on July 10, 2005 was 49,828, including standing room. The Stadium master plan was prepared by Baltimore-based international design firm RTKL. The stadium's design was completed by architectural firm Populous (then HOK Sport). Orioles' architectural consultant, Janet Marie Smith, successfully promoted the concept of a retro-style ball park. A unique feature of Oriole Park is the re-use of the former B&O warehouse which is contiguous. It contains offices, service and retail spaces, and the Camden Club. As of this writing, the warehouse has been hit only once - a homerun hit by Ken Griffey, Jr. during the Home Run Derby of the 1993 MLB All-Star Game. Eutaw Street, a pre-existing street through Camden Yards, has been repurposed as a dedicated promenade through



the stadium. It serves as a place to meet, eat, have a beer, and just enjoy the game. But watch out! Many home run balls (75 as of 2016) have landed on Eutaw Street during game-time, as noted by the bronze plaques installed to mark the spots.

Immediate to the south of Oriole Park is M&T Bank Stadium, home of the NFL's Baltimore Ravens football team. Commonly referred to as Ravens Stadium in the Baltimore region, the Stadium was completed and officially opened in 1998. After losing the Baltimore Colts to Indianapolis, fan passions forced business and governmental leadership to recognize the limitations of the former Memorial Stadium, and planning for the new football Stadium culminated with the start of construction in mid-1996. M&T Bank acquired the naming rights for the stadium in 2003, culminating a large public effort to name the Stadium in honor of Colt's quarterback great, Johnny Unitas. The Ravens owners and the Maryland Stadium Authority, however, respected public sentiment by building Unitas Plaza at the north entry to the stadium, adding bronze statues of Unitas and, later, long-time Raven Ray Lewis. A record crowd of 71,547 occurred on January 15, 2012 for the 2011 Divisional Playoff Game against the Houston Texans, which the Ravens took with a score of 20-13. All events at the stadium result in substantial dining and entertainment business for downtown Baltimore venues.

Casinos and Racetrack

Following a long, contentious and expensive political campaign during which casinos were represented as a means to enhance funding of public education throughout Maryland, casino gambling was approved by a Maryland Constitutional Referendum in 2008, initially limited to video lottery casino facilities. The first casino to open in the Baltimore region was Maryland Live in Hanover, Maryland's Arundel Mills Mall. The first phase opened in June, 2012 with 3,200 slot machines and electronic table games. The second phase opened in September, 2012, increasing the total to 4,750 machines. The project features a six-story 5,000 vehicle parking garage that is free to visitors of the Mall and Casino. In December, 2012, the casino opened on a 24-hour, 7-day basis. Horseshoe Casino, which opened in Baltimore in 2014, offers a 122,000 square foot gaming floor. Initial designs of the casino were prepared by Baltimore-based architects Ayers Saint Gross. Cleveland-based KA architects prepared revised renderings using their knowledge gained from the Horseshoe Casino Cleveland.



The State's share of casino revenues is earmarked for supplemental public education funding, although, in practice, they have only supplanted funds that are already required by law, freeing those funds to be used elsewhere.

Pimlico Race Course, since 1870, has offered Baltimoreans the pleasure of playing the horses long before casino gambling was on the scene in Maryland. Known as "Old Hill Top", Pimlico is the second oldest horse racing course in the USA, after

Saratoga in New York. Pimlico is one of the three Triple-Crown race tracks, hosting the Preakness Stakes, the second race of the sequence which begins with the Kentucky Derby and concludes with the Belmont Stakes. The track is a one-mile dirt oval, surrounding a seven-furlong turf oval. There are stables for over 100 horses and the course can handle attendance of over 120,000 people, including the infield. As horse racing has declined in popularity from the days that many would interrupt their spring workdays with a day at the races, it has become financially difficult to maintain the course at a level competitive with other leading race tracks. There have been discussions by its owner, the Stonach Group, regarding relocation of the Preakness Stakes to the Laurel Race Track, between Baltimore and Washington. Stonach also owns Laurel and implies that the company could better sustain the Laurel Track at a high level and re-use the land at Pimlico for other uses. Relocation of the Preakness has been fiercely opposed by Baltimore City interests.

Arts, Entertainment and Culture

A wide array of Arts and Entertainment attractions and districts in Metropolitan Baltimore include:



American Visionary Arts Museum
avam.org



Baltimore Museum of Art
artbma.org



Center Stage
centerstage.org



Charles Theatre
thecharles.com



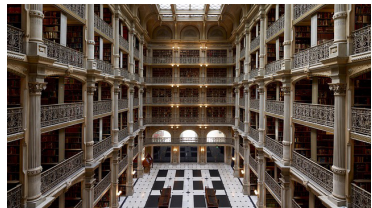
Enoch Pratt Free Library
prattlibrary.org



Everyman Theatre
everymantheatre.org



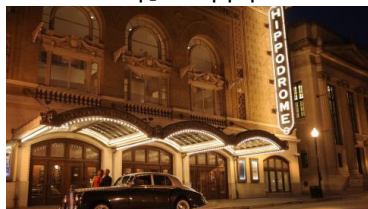
Frederick Douglass-Isaac Myers
Maritime Park [livingclassrooms.org/
ourp_fdimpp.php](http://livingclassrooms.org/ourp_fdimpp.php)



George Peabody Library and the
Peabody Institute | peabody.jhu.edu



Great Blacks in Wax Museum
greatblacksinwax.org



Hippodrome Theatre
france-merrickpac.com



Jewish Museum of Maryland
jewishmuseummd.org



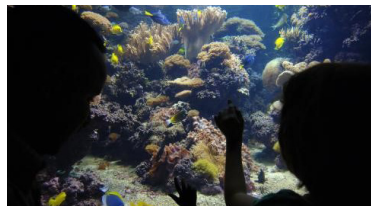
Joseph Meyerhoff Symphony Hall
and the Baltimore Symphony
Orchestra bsomusic.org



Maryland Zoo
marylandzoo.org



Modell Performing Arts Center
modell-lyric.com



National Aquarium (Baltimore)
aqua.org



Stavros Niarchos Foundation
Parkway Theatre mdfilmfest.com



Reginald F. Lewis African-American
Museum lewismuseum.org



Walters Art Museum
thewalters.org

The Environment

The Metropolitan area's environment is characterized by such quality of life issues as climate, clean air, clean water, personal mobility, and crime, to name several of the most impactful categories. Marylanders often have characterized their State as "the land of pleasant living", and Baltimoreans have called Baltimore "Charm City". A lauded feature of life here is being within easy reach of the Chesapeake Bay and Atlantic beaches to the east and the Appalachian Mountains to the west.

Maryland's and Baltimore's climate, called semi-tropical by climate scientists, is characterized by four distinct seasons. Summer, lasting from June through September, ranges from bright clear dry days to very hot and humid ones, with occasional thunder storms. Autumn, from October into mid-December, is one of the area's most beautiful seasons, with cool, dry days with moderate breezes transitioning to brisk colder and wetter days toward mid-December. Winter, from mid-December through mid-March, is moderately cold, with occasional snow and frequent rain. Spring, the other beautiful season from mid-March through May, is typically sunny, with breezes and frequent rain showers.

Our baseline air quality does not meet EPA's clean air standards because the prevailing winds from the west and southwest (e.g., The Tennessee and Ohio River Valleys). Improvements have occurred as a result of US Clean Air initiatives supervised by the US-EPA., as well as the Maryland Department of the Environment. Pollution caused by coal-fired generators, industrial emissions, diesel engines, automobile engines, heating, and incinerators has been notably reduced, especially with regards to pollution sources within the State. Still more work remains to be done by improving and expanding public transit, making it possible to reduce automobile dependency, and broadly expanding clean energy uses and emissions-reducing technologies.

The tourism benefit of the Inner Harbor can be measured by the 8,000 hotel rooms that supply Baltimore, as well as the 16,000 residents holding tourism related jobs there. A 2015 survey by OpinionWorks was commissioned by the Waterfront Partnership to measure public interest in the following:

- Inner Harbor Visitation
- Visitation of Individual Attractions
- Impact of Amenities
- Perceptions of Safety
- Attitudes about the Inner Harbor

The results of this survey have been incorporated in an effort entitled Harbor 2.0 to make the harbor inviting to the approximately 70% of respondents who visit the Inner Harbor and its amenities, who strongly support activities such as visits by Tall Ships and foreign navies, events such as July 4th and New Year's Eve fireworks shows, as well as Light City Baltimore and the Blue Angels air shows. Such amenity improvements, as well as more shade, outdoor cafes and parks, outdoor fitness equipment, and ice skating, make the cleaner harbor even more attractive. The Waterfront Partnership is "the proud steward of Baltimore's crown jewel, its Inner Harbor and Waterfront". The Partnership's leadership has informed and advised planning and zoning officials to insure the continual improvement, expansion and maintenance of the waterfront promenade, which in turn has added substantial value to waterfront neighborhood locations and projects now under development and planned for future development.

Planning and Zoning: Baltimore's New Zoning Code

On December 5, 2016 Baltimore City adopted a new comprehensive zoning code, the City's first since 1971. The new code was designed to implement the vision outline in the City's Comprehensive Master Plan (2006) and Sustainability Plan (2009). The new code, developed through a Planning Department, community and City Council process that spanned 8 years, replaces one whose land uses had become increasingly antiquated and whose separation of land uses is often no longer desirable. The new code, aimed at simplifying and making less arbitrary the development review and approval process, is expected to encourage growth and development, making it easier to reuse old industrial buildings and develop more walkable neighborhoods. Some of the changes in the new code include:

The new code replaces one whose land uses had become increasingly antiquated and whose separation of land uses is often no longer desirable.

- A new Industrial Mixed-Use District which allows for the conversion of multi-story industrial buildings into artist live-work spaces, offices, galleries, retail or limited residential alongside light industrial uses.
- Allowance for many sustainability measures such as community gardens, urban agriculture, bicycle parking, and walkability.
- Creation of Zoning Districts for Educational and Hospital Campuses, allowing Campus Master Plans and the flexibility they provide.

The New Zoning Code took effect in the summer of 2017, giving City agencies six months transition time for full implementation.

Transportation

The region's rail network is in need of modification and modernization to accommodate both freight and passenger rail service. AMTRAK is planning a new rail tunnel southwest of Penn Station, Baltimore's passenger rail station, to accommodate four tracks in a straighter alignment to provide for high speed rail and double stacking. CSX and the State of Maryland are deliberating about a way to enlarge the aging Howard Street Tunnel to accommodate double stacked container trains. These



changes will be beneficial to passenger travel as well as freight travel originating at the Port of Baltimore. Passenger travel could benefit from greater AMTRAK investment in its physical facilities like the historic Pennsylvania Station in Baltimore, so that it can also be classified as one of the country's great American train stations.

Baltimore is also served well by the Interstate highway system with I-95 serving the US northeast corridor coming in on the north and exiting close

to the Port in Southeast Baltimore with connections to the Baltimore Beltway (I-695), I-895 and the Jones Falls Expressway (I-83). I-70 begins at Baltimore's western beltway and connects the region with the US west and mid-west. These highway links are as crucial as the Port and rail system to the vibrancy of the Baltimore economy.

Public transportation, despite Baltimore's high residential density and high ridership levels, is an especially weak point in the Baltimore region. The inability or unwillingness of the State, City and the region's leadership to effectively envision, plan, fund, and execute a comprehensive transportation plan for the Baltimore region has resulted in the following:

- Public transit travel time to/from work, education or recreation destinations from residences can be long – on average only 30% of the region's jobs are accessible in a 90-minute transit commute, inhibiting job seekers and those seeking educational services from reaching their goals.
- Divisions between the City of Baltimore and suburban jurisdictions have created an Us vs. Them political environment in which the City has been unable to pay for needed transit infrastructure on its own, and suburbanites, never having experienced the benefit of public transit, cannot identify themselves as prospective public transit users living in higher density communities—the result is more induced demand-generating highway projects to accommodate sprawl and growth, thereby creating more highway congestion, longer travel times, and more demands for highway funding.

- Baltimore has never gotten traction on a comprehensive regional rail transit system. After abandoning its streetcar system like many other cities in the 1950s and 60s, the Baltimore region received State funding for only one Baltimore subway line from its DC Metro-era 1968 rapid transit plan. Inspired by San Diego's low-cost trolley success of the 1980s, Democratic Gov. William Donald Schaefer added an intersecting, but also largely north-south surface light rail line in 1992. One of Democratic Gov. Parris Glendening's smart growth initiatives in the early 2000s was to try to regroup, creating a 2002 Baltimore Regional Rail System Plan, building on the two existing rail lines. That plan's top priority, an east-west Red Line, after more than ten years of planning became in 2014 a shovel-ready light rail line with two tunneled sections projected to cost \$2.9 billion.
- In 2015, newly elected Republican Governor Larry Hogan, with his votes derived substantially from rural and suburban areas, cancelled the State's \$1.235 billion contribution to the \$2.9 billion Red Line and reallocated 100% of those State funds to rural and suburban road projects. (A federal civil rights complaint over that decision filed later that year was dismissed without explanation by the US Department of Justice in 2017). Furthermore, \$900 million in approved federal funding never reached Maryland as a result of the Governor's action.
- In answer to the outcries from Baltimore City and Baltimore County residents and politicians, MTA Maryland has implemented a redesigned, reorganized transit bus system "Baltimore Link". The stated major goal is to improve travel times to job centers throughout the region to increase job access and to decrease unemployment.
- Baltimore Link has promise; however, far more funds are needed to build this system, and to repair and maintain the roads and bridges in Baltimore City and the region on which the buses travel.
- The fractured political culture of the Baltimore region – dividing the suburbs from the City – and the State of Maryland make major change in public transportation outcomes unlikely; however, public awareness of this problem seems to be improving.
- A broad-based citizens group, Transit Choices (www.transitchoices.org) has been formed to work with MTA Maryland and Baltimore City to identify the low hanging fruit of public transportation to insure the best outcomes possible with limited resources. This is a major step forward for the Baltimore region as the dialogue and engagement with MTA has been quite positive.
- A free-to-the-riders downtown Bus Connector service operated by Transdev, and funded by a City parking tax, has been very successful, drawing high ridership.

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Public Markets and Marketplaces

Baltimore's Public Markets began in 1782 with the Lexington Market (the oldest market in the USA) and grew with five additional markets, the (Pennsylvania) Avenue Market, the Broadway Market, the Cross Street Market, the Hollins Market, and the Northeast Market. These markets originally offered the primary means of retail distribution of fresh foods, largely locally sourced, to the City's population. In the prime times of the public markets, city zoning and other regulations were used to restrict the entry of larger private grocers into the City. In time, particularly after World War II, small private super markets were built to meet demand for fresh food reflecting neighborhood demand and the public markets entered a period of decline. In the past 20 years, a number of these smaller lower-quality neighborhood supermarkets closed.

This situation began to change in the 1990s with the opening of two 62,000 square foot Safeway Stores in Charles Village and Canton, and later two similarly sized Giant Food Stores in Hampden/Roland Park and Waverly, and a SuperFresh store in Hampden.



Food deserts began to be understood and identified around the year 2000, and new efforts were successful to lure new markets in neighborhoods of all incomes, such as a Whole Foods market in Mount Washington, a ShopRite in the Howard Park neighborhood, and Shoppers and Harris Teeter in the Locust Point/South Baltimore area. Since then, a Mom's Organic Market has opened in Hampden/Roland Park at the site of the Giant Food store, Giant

has moved to the former site of the SuperFresh Store, a Harris Teeter has opened in Canton, and a Street's Market and Café has opened in Charles Center in Downtown Baltimore's fastest growing zip code, 21201. Food retailers are currently examining other locations around the City, and the long-existing trend of City residents to shop at supermarkets in the neighboring suburban jurisdictions seems to be ending.

In the intervening years, open air "farmers markets" began to spring up in Baltimore City, including in such neighborhoods as Waverly and beneath the Jones Falls Expressway downtown. These markets are typically open only on weekends and in the growing season, specializing in fresh produce grown in outlying areas around the Baltimore region. They are very popular and have a loyal following among residents of all socio-economic groupings who value their relationships with the farmers who occupy these markets. The six public markets still operate today. They continue to adjust to changing times and competition, and seek to remain viable in modern environments. Design and fundraising are now underway for a full reconstruction of the Lexington Market which will upgrade it to modern standards and create new adjacent open space and plazas.

Parks and Outdoor Recreation

Baltimore's City's Public Parks are plentiful and include golf courses and other amenities that are distributed and well-used by many residents and visitors throughout the region. A list of the City Parks is as follows:

Canton Waterfront Park	Gwynns Falls / Leakin Park
Carroll Park	Hanlon Park
Chinquapin Run Park	Herring Run Park
Clifton Park	Middle Branch Park
Cylburn Arboretum	Patterson Park
Druid Hill Park	Reedbird Park
Federal Hill	Riverside Park
Farring Baybrook Park	Roosevelt Park
Fort Armistead Park	Wyman Park

Each of these parks has groups of active users who offer various kinds of support. In addition, there are numbers of trails and walkways that are not known to be parks, per se, but which serve as active park systems by users. Included in this category are the Inner Harbor areas and the Waterfront Promenade that wraps around the waterfront, and which is under a continual expansion and improvement effort. The City operates the public water system's reservoirs (all of which are outside of the City) which serve residents of the City and many suburban areas, particularly in the warmer months when they are recreational destinations. While there is strong interest in these recreation and park facilities, identifying and obtaining funding to maintain them is a challenge. Many groups, including neighborhood groups, have programmed activities in the park system. A variety of private sponsors organize activities in cooperation with the Department of Recreation and Parks and other City agencies. Further, public corporations have been formed to maintain and operate the City-owned golf courses and ice rinks so as to be self-sustaining.



Druid Hill Park, home of the Maryland Zoo, an historic horticultural conservatory (Howard P Rawlings Conservatory), and the Druid Park Lake, was acquired and developed by the City of Baltimore in the mid-19th century. In fact, Druid Hill Park is the nation's third-oldest large urban park, behind only New York's Central Park and Philadelphia's Fairmount Park. You can learn more about Druid Hill Park at the website of Friends of Druid Hill Park: druidhillpark.org.

In addition to the City Parks named above, there exist a number of emerging recreational amenities that have served as parks without formal designation as such. There are a number of trails that follow stream valleys, such as the Jones Falls Trail and the Gwynns Falls Trail, that are increasingly popular among walkers, runners, and cyclists. Some

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of these trails combine with protected bicycle lanes along public roadways, to assure safety and encourage use by commuters as well as enthusiasts. The Inner Harbor and the Waterfront Promenade, mentioned earlier, have a particularly active user group, and, together with an expansion of water taxi services,

serves both commuters and recreational walkers. Many private owners of waterfront property have been required by development regulations and plans to maintain public access to the waterfront. To some extent, particularly in the area of the harbor's Middle Branch, pathways have been created which most certainly will be improved to become permanent amenities for nearby communities.

Preston Gardens, a long-underused strip park opposite Mercy Hospital in the Mount Vernon neighborhood, has been recently restored and improved via a public private partnership between Mercy Hospital and the City. Mount Vernon Place, a gem in the City which is the location of the annual spring Flower Mart, many years of fall Book Festivals, and the winter Monument Lighting festival, is now managed by a model public-private partnership, the Mt. Vernon Place Conservancy. The Conservancy raised funds for a Master Plan for restoring and rehabilitating the Place's historic grandeur, and has now completed the first project, restoration of the Washington Monument at the center of the park.

Among the most popular activities centered on the Inner Harbor and adjacent areas are:

- Fireworks on New Year's Eve and July 4th
- Flag Day at the Fort McHenry National Monument and Historic Shrine, home of the national anthem "the Star-Spangled Banner" and attendant fireworks displays
- Tall Ships and visiting Navy ship events
- Harbor Cruises and Water Taxis
- Light City Baltimore lightcity.org
- Air shows such as The Blue Angels
- The National Aquarium at Baltimore
- The Maryland Science Center
- Historic ships in Baltimore, such as the USS Constellation, the USS Torsk, the lightship Chesapeake, the USGC Cutter Taney, the Seven Foot Knoll Lighthouse, and the SS John W. Brown liberty ship
- Privately owned, transient recreational sail and power boats
- Private marinas located on the harbor
- Waterfront bars, restaurants and shops

Crime

Crime, “The Wire”, and the civil unrest following the death of Freddie Gray in police custody have been the focus of much media and public attention in recent years. These conditions cause many to hesitate before choosing to go to Baltimore City because of fears for safety or uncomfortable encounters with the poor or aggressive youth. Many believe that the substantial cause of crime in Baltimore City is related to (1) severe poverty, (2) low education attainment and access to opportunity, (3) the illegal drug trade, and (4) the availability of firearms as a result of insufficient federal government policies and court decisions related to firearm possession. Without question, the dangers posed by these four factors are probably beyond the ability of Baltimore City and its residents alone to cure. And, it is also true that crime has spread to suburban districts, and that the drugs are a recognized problem of national dimensions. Baltimore City, however, has confronted the issues of crime and unrest even more intensely since Freddie Gray’s death in the following ways:

- With some State financial assistance, much of the damage to neighborhood businesses resulting from the Freddie Gray riots has been repaired.
- The US Department of Justice and the City of Baltimore entered into a 227-page Consent Decree in January, 2017, which addresses the Justice Department’s identification of a years-long pattern of unconstitutional and discriminatory practices and persistent neighborhood complaints of abusive police actions. The Decree limits how and when police officers can engage individuals suspected of criminal activity and requires more training on de-escalation tactics, mental illness, handling protests, and civilian oversight. The Consent Decree has received Federal court approval and is binding.
- At the same time, there has been an intense effort to improve police – community relations via regular meetings with community groups and foot patrols, as well as more cooperation from individuals and community groups to find and arrest criminal perpetrators.
- There is an intense effort to provide more organized youth-related activities, some of which are supported by police organizations; City voters approved an earmarking of .03% of the City’s assessable property for youth programs above what is already being spent for education, after-school programs, libraries, and youth health services. The fund amounts to \$12 million in 2017.

The overarching problems requiring solutions are entrenched poverty; the Baltimore region’s stark racial segregation, which concentrates African American poverty; poor public school quality – linked to racial and economic segregation – that results in low education levels; lack of decent-paying jobs for people with lower education levels; poor job access; and barriers to employment among primarily African American men who have police records due to the War on Drugs. While it is a popular belief that millennials have greater racial understanding than older generations, it is clear that older generations must address the conditions that have resulted from their individual and collective performance in this area, and that younger generations must see benefits to their greater efforts towards inter-racial understanding.

An Expanded Region

Not long ago the Washington, DC and Baltimore regions were two distinct, separate places. Although each maintains its own character and personality, they have grown together to form a super-region in fact, if not in governance. This process was accelerated by the Base Realignment and Closure BRAC, process at Fort George G. Meade, the home of the National Security Agency and the US Cyber Command which began in 2005. Estimates for job growth through 2020 related to BRAC alone amount to 63,000 persons. If other job growth in the BRAC-affected areas of the region are added, more than 100,000 new residents moved into the Baltimore-Washington corridor. Ample new housing development occurring in this area of the Baltimore-Washington corridor supports this analysis. Workers in BRAC jobs commute from parts of the region as far south as Northern Virginia and Southern Maryland, as far east as Queen Anne County, Maryland (across the Chesapeake Bay Bridge), as far west as Montgomery and Howard Counties, and as far north as Baltimore and Carroll Counties. Part of the reason for this broad expanse of areas is a drive to affordability and superior school districts. Road improvements have been made, but are far behind the level of need created by BRAC and coincidental growth.

Concluding Remarks

There is much more to discuss about Baltimore than is possible to convey in the context of our LEW Overview. However, one clear conclusion can be reached—we have an historic and vibrant City, region and economy with many assets, opportunities and qualities that its visitors and permanent residents love. And, of course, we have much work to do to assure the future health of our region, especially in these challenging political and fiscal times and given our region’s history. There is much we don’t know and cannot predict, but among the things we do know is that we must face our region’s future with optimistic, informed, and energetic sobriety. We are mindful of our past, proud of the new energy of our region and its educational, cultural, financial and scientific resources, and our political perspectives (varied as they may be). We love to speak about and show off our City and region. We benefit mightily from Baltimore’s reputation as “Charm City”, its location in the USA’s Northeast Corridor on the Chesapeake Bay, in Maryland, “America in Miniature”, “the Land of Pleasant Living”. We respect and invite diversity, of ethnicity, of background, of thought, of business and professional endeavor, and we strive to be inclusive. While our social divisions and unequal opportunity were on international display in April, 2015, that wake-up call only makes us more determined to address those entrenched inequalities and to cause the opportunity of our region to be more widely shared. By far most of us are determined to stay and work in, on, and for our City and region, and not to move away to places that offer fewer opportunities for us to apply our energies and to experience the rewards of hope and accomplishment.

We welcome our fellow LAI guests, and hope that your days with us exceed your expectations.

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