• Baltimore County • Focus on Community •

ESSEX CBD REVITALIZATION STRATEGY

As Adopted by the Baltimore County Council on December 16, 1991

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COUNTY COUNCIL OF BALTIMORE COUNTY, MARYLAND

LEGISLATIVE SESSION 1991, LEGISLATIVE DAY NO. 23

RESOLUTION NO. 95-91

MR. VINCENT J. GARDINA, COUNCILMAN

BY THE COUNTY COUNCIL, DECEMBER 16, 1991

A Resolution to adopt the Revitalization Strategy, Essex Central Business District as part of the Baltimore County Master Plan 1989-2000.

WHEREAS, the Baltimore County Council adopted the Baltimore County Master Plan 1989-2000 on February 5, 1990; and

WHEREAS, the Master Plan recognized the work then underway for updating the 1978 Essex Revitalization Plan; and

WHEREAS, Baltimore County adopted the Essex Revitalization Plan in 1978; and

WHEREAS, in 1980 Baltimore County Staff prepared a Revitalization Plan, including an Action Plan, for Essex, and an update to the original Plan has now been prepared and submitted for consideration by the County; and

WHEREAS, by Resolution adopted July 19, 1990, the Baltimore County Planning Board adopted the Revitalization Strategy, Essex CBD, to constitute a part of and an amendment to the Master Plan; and

WHEREAS, the County Council held a public hearing on the recommended Revitalization Strategy, Essex CBD on November 26, 1991.

NOW,THEREFORE, BE IT RESOLVED BY THE COUNTY COUNCIL OF BALTIMORE COUNTY, MARYLAND, that the Revitalization Strategy, Essex CBD, a copy of which is attached hereto and made a part hereof, be and it is hereby adopted and incorporated into the Baltimore County Master Plan 1989-2000 to be a guide for the development of the Essex Central Business District, subject to such further modifications as deemed advisable by the County Council.

RESOLUTION
Adopting and Recommending
the
REVITALIZATION STRATEGY, ESSEX CBD

Dennis F. Rasmussen
County Executive

WHEREAS the Baltimore County Master Plan 1989-2000 recognized the work underway for up-dating the 1978 Essex Revitalization Plan; and

WHEREAS the Baltimore County Economic Development Commission, with assistance by RPR Economic Consultants, and in cooperation with the Essex Development Corporation and other business people and property-owners, has prepared a revitalization strategy for the central business district of Essex, which is a logical unit for planning within Baltimore County; and

WHEREAS the Draft Revitalization Strategy, Essex CBD, as submitted on May 17, 1990, was the subject of a public hearing by the Planning Board on June 21, 1990, at which time the Strategy was endorsed by the Essex Development Corporation and the Essex-Middle River Chamber of Commerce:

NOW, THEREFORE, BE IT RESOLVED, pursuant to Section 22-12 of the Baltimore County Code, 1978, that the Baltimore County Planning Board hereby adopts the Revitalization Strategy, Essex CBD, March 1990 to constitute a part of and an amendment to the Baltimore County Master Plan 1989-2000; and

BE IT FURTHER RESOLVED that the Revitalization Strategy, Essex CBD shall be transmitted to the Baltimore County Council for adoption in accordance with Section 523(a) of the Baltimore County Charter.

DULY ADOPTED by vote of the Planning Board this 19th day of July, 1990

Dave Fields

P. David Fields
Secretary to the Planning Board

RPR Economic Consultants

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703-749-4300
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April 20, 1990

Mr. Adam Wasserman
County Revitalization Coordinator
Baltimore County Economic Development Commission
Courthouse Mezzanine
Towson, Maryland 21204

Dear Adam:

We are quite pleased to transmit to you our report, Revitalization Strategy for the Essex CBD. While we are solely responsible for the study's findings and conclusions, we have thoroughly enjoyed the close association with you and Dan O'Donnell. We sincerely appreciate your assistance in pulling the study together in a such a way that assures it will be of the greatest possible use to the Essex community and to Baltimore County. Your probing of the issues and careful review of our research has helped us produce what is, we believe, a realistic and achievable strategy and plan to guide the community and the County in their commitment to revitalization of downtown Essex.

We are all well aware of the difficulties to be faced in downtown revitalization, and we know that changes will not come overnight. But we feel that we have identified potentials to support renewal of the downtown, and strategies to put those potentials to use. With the excellent beginning that has already been made in the CBD, and with the County's plans for an innovative small business incubator that could provide additional stimulus in the downtown, there is every reason to be optimistic about Essex's future as a business, commercial and governmental center.

We remain ready to assist you in any way we can in this or other economic planning activities. We extend to you our best wishes for continuing success in the downtown.

Sincerely,

Phil Hammer

Philip G. Hammer, Jr.
Executive Vice President

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EXECUTIVE SUMMARY

EXECUTIVE SUMMARY

This report presents an updated plan for revitalization of the commercial core in Essex, Maryland. The study also includes retail and non-retail uses in an extended target area adjacent to the CBD. This plan is oriented toward providing a broad, updated strategy that can guide the Essex Development Corporation (EDCO) and Baltimore County in their revitalization program for Essex. In particular, it recommends site- and area-specific public sector projects for consideration for the next phase of the County capital budgeting process, and it identifies other projects for private sector responsibility. These projects would complete the second phase of the commercial revitalization program now underway, and would recommend new uses or improvements for certain key sites to support the updated revitalization strategy. Study objectives are:

- First, to assess current commercial activity in the CBD and in its trading area to determine future market potentials that could support a revitalized CBD;
- Second, to evaluate revitalization activities to date undertaken as Phase I of the Essex Development Corporation (EDCO) revitalization program;
- Third, to update the conceptual framework underlying Phase I activities to reflect current conditions; and
- Fourth, to recommend the strategic next steps to be taken in Phase II to complete the revitalization of the extended Essex core area.

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Study Area Description

The Essex business core area for this study is the Central Business District as defined by the 400 and 500 blocks of Eastern Avenue, extending from Mace Avenue and Riverside Avenue on the west to Woodward Avenue on the east, plus selected adjacent properties, which extend south to Maryland Avenue. Also covered in this report is an extended study area consisting of the Eastern Avenue frontages west of Mace and Riverside avenues to the Back River bridge.

Almost without exception, the Essex central business district is an area of small shops, restaurants, professional offices and service establishments, plus several larger government agencies and facilities. Uses in the extended area to the west are more directly oriented to the automobile than is true in the CBD, and include many converted residences. The Essex business district within the study area is entirely zoned business, with commercial overlay districts.

Revitalization Planning History

The early 1980's has seen the execution of a first phase of a concerted program for the commercial revitalization of the Essex CBD. Three plans for the commercial revitalization of the core area were undertaken prior to the execution of the first phase: the Murphy-Williams study (1976), the American City Corporation study (1978), and the Revitalization Plan prepared by Baltimore County staff (1980). Problems identified in the 1976/1978 plans and rated as high priority for improvement included access and parking, and obsolescence in the retail core:

1. Access and Parking:

- o high volume of through traffic
- o deficiencies in the numbers of parking spaces available
- o very poor access to parking from thoroughfares
- o poor location of spaces in relation to shops

2. Retailing: Obsolescence

- o no clear retail function
- o inability to compete with surrounding shopping centers
- o large vacancies (64,000 square feet, or 25 percent)
- o poor appearance of area
- o poor condition of many structures
- o lack of large anchors to generate shopper traffic
- o lack of shoppers goods and specialty shops
- o store units that are too large for modern shops
- o lack of concentration of shops in easy walking distance
- o absence of high quality businesses; large number of marginal businesses attracted by low rents
- o high rate of business failure and turnover
- o changing demographic mix: older, moderate income

The 1980 Action Plan

In 1980 Baltimore County staff prepared a Revitalization Plan, including an Action Plan, for Essex that built upon many of the ideas and concepts of the 1976 and 1978 plans. The Action Plan recommended improvements for public and commercial facilities, and private rehabilitation.

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Public Facilities. The basis for the design of the Action Plan is the concept of the Village Green, which was conceived as two (public sector) anchors connected by landscaped streetway (Eastern Avenue). Baltimore County approved a $600,000 bond issue to carry out the first phase elements of the Action Plan, the major components of which are described below.

1. Reconstruction of Eastern Avenue. Improvements to the roadway and beautification of the streetscape between the anchors was seen as essential to creating an inviting environment for upgraded shops, improved traffic flow, and increased access to shopping and parking.

2. Creation of Public Sector Anchors. The two facilities envisioned as the anchors for the Village Center greenway were the Essex Heritage Society museum (the old fire and police station) at 514 Eastern Avenue, and a Government Center one block to the south at Eastern Avenue and Taylor Avenue.

3. Construction of Public Parking Facilities. Creation of additional parking in the CBD was considered crucial. Among the proposals of the Action Plan were the construction of a parking deck at the Government Center, a new lot on the Franklin Warehouse property, and the interconnection of lots to the rear of stores.

Commercial Facilities. Private sector commercial revitalization includes physical improvements and marketing improvements, including tenant mix and business operations and promotion. Projects recommended were:

1. An Extended Commercial Mall for the 400-500 blocks of Eastern Avenue, with renovated shops bolstered by additional pedestrian traffic from the two public sector "anchors." Development would center on the redeveloped major commercial structure at 509 Eastern Avenue, with use of the two-story center portion for a supermarket.

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2. Private Office Space and Business Services. The concept of the Action Plan was to focus office development west of the mid-400 block of Eastern Avenue, and on Eastern Avenue east of Margaret Avenue.

3. Entertainment Facilities. Proposed were a Twin Cinema, to be housed in the major commercial structure in the 500 block of Eastern Avenue or other appropriate site, and a complement of Ethnic Restaurants nearby.

Private Rehabilitation. The key to revitalization is to induce private property owners to make improvements to their own properties, such as:

1. Strengthen Residential Uses in the commercial area through the renovation of upper floor apartments.

2. Upgrade Facades along both sides of the 400 and 500 blocks of Eastern Avenue.

3. Create Private Government Support offices through redevelopment of 413-17 and 420 Eastern Avenue.

4. Construct Businesses Services Building to house service establishments not needed in the retail core.

The CBD Today

The Actions Plan's major proposals have been only partially achieved. This is not meant as criticism; the plan was extremely ambitious, but needs a more realistic reorientation today. Project status, and other problems and potentials identified in the CBD, are highlighted below:

- Public Facilities. Both public anchors have been completed. Major changes to the roadway could not be implemented, and landscaping has been more modest than planned. Certain priority areas have not yet received treatment. None of the parking projects has been implemented, although there has been change in policy toward metering, and public use of existing private lots has been negotiated.

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- Commercial Facilities. The large retail structure has not been redeveloped, nor have entertainment or ethnic foods complexes been created. Renovation of shops, and particularly of offices and services establishments, is occurring at a modest pace, although not necessarily in accordance with the plan.

- Private Rehabilitation. A considerable amount of facade and other renovation has been accomplished; perhaps two thirds of the structures have been affected. Lack of design controls and incentives has been a problem, and there is still no identifiable retail village image. The business services and government support offices concepts have not been implemented as recommended in the Action Plan.

- A Business Plan for marketing and promoting the CBD has not been developed to date, nor is there a business assistance program to help entrepreneurs improve their merchandising techniques and target their markets. If, in fact, retail is still viable for the CBD, incentives and assistance programs would be in order.

- There is a need for more parking in Essex, but the greatest deficiencies appear to be in parking close to shops, rather than in the overall number of spaces. Visitors to the multi-service government center and the career training center keep the nearby non-metered lots full, preempting spaces for shoppers. Metered Revenue Authority lots at CBD's peripheries are underutilized.

- Building Condition. A survey showed that almost 80 percent of the nearly 350,000 square feet of commercial retail and office space is in good or excellent condition; 14 percent is in fair condition, and only seven percent is rated poor. This is a substantial improvement over condition ratings for previous years and suggests considerable progress in reversing deterioration and in upgrading the area.

Commercial Market Potentials

While there have been substantial improvements to properties in the Essex CBD, there has not been an appreciable improvement in business conditions. In 1988 stores in the CBD sold $14.1 million in goods and services from 147,000 square feet of space, for a very modest $96 per square foot, on average. By comparison, the residents of the Essex trading area spend $426 million for such goods and services annually; Essex's capture of that potential is only 3.0 percent. Some specifics are that:

- While reported retail sales are modest, merchants indicate improvement recently. Data were collected soon after the completion of a major streetscape project; retail sales can be expected to drop off temporarily during and for a period after construction.

- The CBD has been shown to be quite weak in shoppers goods and supermarket retail activity, but to be located centrally in a trading area in which demand for shoppers goods is quite underserved, especially for apparel, furniture, and specialty items. Potential for additional food stores in Essex is much less, due to competition from supermarkets in surrounding centers.

- It is in the area of convenience goods -- notably, restaurants -- and personal services that Essex has had some economic growth. Even so, most local restaurants are mom and pop operations, and the CBD captures only a small proportion of demand in the trading area.

- The predominant personal service in Essex is beauty and barber shops, and there is a limit to the CBD's ability to absorb more of them. The demand analysis has identified a sizable potential for local-serving office-type services: banking and finance, insurance, real estate, medical, legal, and so forth.

Conclusions

It is the conclusion of this report that the retail Village Green concept that has been the basis for past revitalization efforts cannot be achieved and needs to be replaced with a more realistic alternative. Four factors lead to this conclusion:

1. The extensively landscaped village retail center concept is unrealistic and prohibitively expensive. Factors contributing to this conclusion include the inability to obtain State cooperation in limiting traffic volume and in creating landscaped medians and pedestrian crossings; the significant costs associated with the ambitious village center plan; the inability to sufficiently stimulate and provide design control over facade improvements to create a unified image for the CBD.

2. The new Diamond Point Plaza may seriously reduce the potentials for additional anchors in the CBD. The Essex CBD finds itself in the position of being sandwiched between two strip centers, each with supermarket and discount department store anchors -- too close to compete successfully with, yet too far away to benefit from their proximity in attracting shoppers.

3. Public facilities have not been successful as "twin anchors" to stimulate business in the CBD. The restricted hours and modest patronage of the museum are too limited to have much impact. Further, visitors to the government center are there primarily for social services; they tend to be of limited means and do not constitute a stable market for retail in the CBD.

4. An alternative use is planned for the major available retail space in the CBD. The proposed business incubator represents a de facto decision to pursue broad economic development objectives in Essex as well as commercial revitalization. This facility would be linked to the County careers center and would provide important business development assistance opportunities in the community.

Recommendations

A Revised Revitalization Strategy

The revitalization strategy that is proposed here is to build upon the opportunities that will arise due to the incubator without abandoning the goal of retail revitalization. Instead, the revitalization concept would be reoriented to emphasize shops and services that have natural affinity to incubator activities, as well as to improve conditions for retail, services and offices in general. In this strategy, focus would also shift to business development -- which has been neglected in revitalization activity thus far -- to bring it in balance with physical development activity.

The Planned Business Incubator. The incubator would provide physical facilities, and technical and business development assistance, to small start-up firms in the Essex area at below market rates. The County is considering the purchase of the long-vacant A&P store at 501 Eastern Avenue; the incubator would occupy the 21,300 square foot ground level section of the structure, which has upper level retail space fronting on Eastern Avenue. If arrangements to acquire the property at a reasonable cost are not possible, other sites noted in feasibility studies for the facility can be pursued.

The incubator-linked retail revitalization concept would be to create opportunities for incubator tenants to retail their products and to attract other related retail specialties which could benefit from, and lend support to, the activities here and in the CBD. Such activities could include:

1. Food products and preparation, possibly with ethnic orientation. Successful shops of this type exist in Essex. (Appropriate training programs are currently provided at another training center, but not at Essex.)

2. Industrial specialties, including those offered at the occupational training facility in Essex; examples include metalcraft and woodworking, and other industrial arts and crafts (e.g., County demonstration projects, links to historical industries through the museum, commercial graphic arts, fine arts, etc.).

3. A farmers market, with inside vendors or seasonal open-air stalls, should be competitive in Essex despite nearby supermarkets, given its image of low-cost/high-value fresh and specialty foods, and would provide a festive atmosphere sorely lacking in Essex. A study of the Baltimore city markets indicated they involve heavy subsidies which should be avoidable through alternative strategies for space leasing and maintenance.

Other Revitalization Activities. The revised strategy for the Essex CBD essentially abandons the highly landscaped retail village for a broader multi-service concept where it is hoped that a stronger bridge can be established between the commercial sector and public offices and facilities in Essex. The planned incubator is the key link among them. In addition:

- Current physical improvement programs in the CBD should not be slackened but rather intensified to complete improvements begun within the CBD and to expand revitalization activities to include the broader study area. These include streetscape, facades, roadways, parking, design control, signage, etc.

- Business development should join physical improvements as the next initiative for revitalization. Such business development assistance should include the marketing of the CBD and of vacant space in the CBD, technical assistance to businesses, and financial assistance for working capital as well as for improvements to real property.

Public Sector Responsibilities

As a community development organization, EDCO is the proper body to spearhead these expanded activities for Phase II of the revitalization program for Essex, just as it has led the way in revitalization activities to date. The support and assistance of Baltimore County will be critical, of course, and the County should have responsibility for implementing key revitalization projects in Essex. A summary of roles and responsibilities for EDCO and the County follows below, with a timetable for completion of major physical improvements. A complete site-by-site description is presented in Section IV of the report.

Parking and Traffic. There can be no relief to parking and traffic problems in Essex without the aggressive participation of Baltimore County. The County should not cease to intercede with the State Highway Department concerning traffic flow and control policy for Eastern Avenue. It is recommended that the price of on-street parking meters be increased to $0.20 per hour to discourage meter-feeding. At the same time, the meters should be removed from the Revenue Authority lot at 409 Eastern Avenue to encourage use of this long-term lot by employees. Also recommended are major improvements to alleys to increase access to employee parking behind stores. Finally, the County should consider whether it has a responsibility for providing more parking for the government multi-services center in a way that will lessen the present negative impact on the availability of parking for shoppers.

Business Development. EDCO should take the lead in initiating a business development program for the expanded revitalization area. There should be increased technical and financial assistance from Baltimore County. Activities should include:

1. EDCO activities and roles: advertising and lease-up of vacant space; area promotion and marketing; technical assistance; and involvement of local financial institutions in supporting revitalization projects.

2. Roles and responsibilities for Baltimore County: financial assistance for working capital as well as property improvements; technical assistance; stricter code enforcement.

Key EDC Capital Projects. Design and implementation of physical improvements projects will be primarily the responsibility of Baltimore County through the Economic Development Commission (EDC) with critical input from EDCO and cooperation from property owners. These projects and proposed timing for their implementation are summarized here:

	Recommended Action	Year
1.	Essex Business Incubator: Acquisition and establishment	FY'91
2.	Streetscape: Eastern Avenue from Margaret to Woodward, and on Taylor and Margaret Avenues from Eastern Avenue to Maryland Avenue	
	a. Streetscape design	FY'91
	b. Streetscape construction	FY'92
3.	Essex Village Green Park (523 Eastern)	
	a. Acquisition and design	FY'91
	b. Construction	FY'92
4.	Reconstruction of Alleys in the 400-500 blocks between Eastern Avenue and Dorsey	FY'91-2
5.	Streetscape: 0-300 blocks of Eastern Ave.	
	a. Streetscape design	FY'92
	b. Streetscape construction	FY'93

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Section I. AREA DESCRIPTION

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Section I. AREA DESCRIPTION

Introduction

This report presents an updated plan for the revitalization of the commercial core in Essex, Maryland, the linear two-block core area along Eastern Avenue (four discrete city blocks, plus adjacent strips), which is the Central Business District (CBD) of Essex. The study also includes retail and non-retail uses in an extended target area adjacent to the CBD. This plan is oriented toward providing a broad, updated strategy that can guide the Essex Development Corporation (EDCO) and Baltimore County in their revitalization program for Essex, plus recommendation of the specific steps that should be executed to successfully complete the commercial revitalization project now underway. In this context, new uses or improvements to certain key sites are suggested. The nature of this strategy is described below, under the heading of Study Objectives, followed by an outline of the report.

Study Objectives

Several planning studies and market analyses have been prepared for Essex since 1976; (these are described later in Section I) These studies have provided the basis for eight years of revitalization activity and projects in the Essex commercial core. These activities and projects have sought to improve the physical condition and functioning of public infrastructure, to upgrade the appearance and condition of public spaces and private buildings, and to increase the general activity level in the

CBD through expanded government offices and public facilities, in an effort to rejuvenate commercial activity the area.

At this point it is timely to re-evaluate the strategy that has guided revitalization planning in Essex, given the completion of many of the projects that have been recommended in the past, and given that certain changes that have occurred in the CBD and in the regional marketplace that may warrant revisions to that revitalization strategy. Consequently, the revitalization planning effort reported here has been undertaken to accomplish four objectives:

- First, to assess current commercial activity in the CBD and market conditions in the trading area served by businesses in Essex, and to determine future market potentials that should emerge within this trading area over the next five to ten years (the market study);
- Second, to determine the present status and degree of success of revitalization activities proposed for the CBD in previous revitalization plans, as Phase I of the Essex Development Corporation (EDCO) revitalization program;
- Third, to re-evaluate the conceptual framework underlying Phase I activities and to update these concepts for the role and function of the CBD to reflect current market conditions, completed projects, and planning realities; and
- Fourth, to recommend the strategic next steps to be taken in Phase II to complete the revitalization of the extended Essex core area according to these revised concepts for the role and function of the CBD. A future phase, Phase III, will extend the physical boundaries of the study area still further.

Study Outline

This report consists of two sections, the "Revitalization Strategy" and a "Technical Appendix". The Revitalization Strategy (this report)

consists of an introductory section describing the study objectives, the study area, and summaries of physical and business conditions in Essex, plus potentials for revitalization (Section I); previous planning and revitalization activities (Section II); a revised revitalization concept (Section III); and recommendations for an updated revitalization strategy for Essex (Section IV).

The "Technical Appendix" consists of a detailed inventory of building structural conditions, and commercial floor space, parking facilities, and an in-depth retail market analysis. The Revitalization Strategy report should serve the needs of policy-makers, while the Technical Appendix will be available for reference.

Essex Study Area

Planning for commercial revitalization of the Essex business core has been on-going since the mid-1970's, although it was not until after 1980 that targeted revitalization and improvement projects were initiated to implement the plans that had been prepared. While the boundaries of the core study area have changed slightly over the years, they remain focused on the concentrated business strip on Eastern Avenue in the heart of Essex. Most market studies in support of revitalization planning have also considered an extended commercial strip along Essex Avenue from the Back River bridge to the vicinity of the Middlesex Shopping Center. The discussion to follow identifies and describes in more detail the study area for this report, and it gives a brief history of planning activity for the commercial revitalization of the CBD.

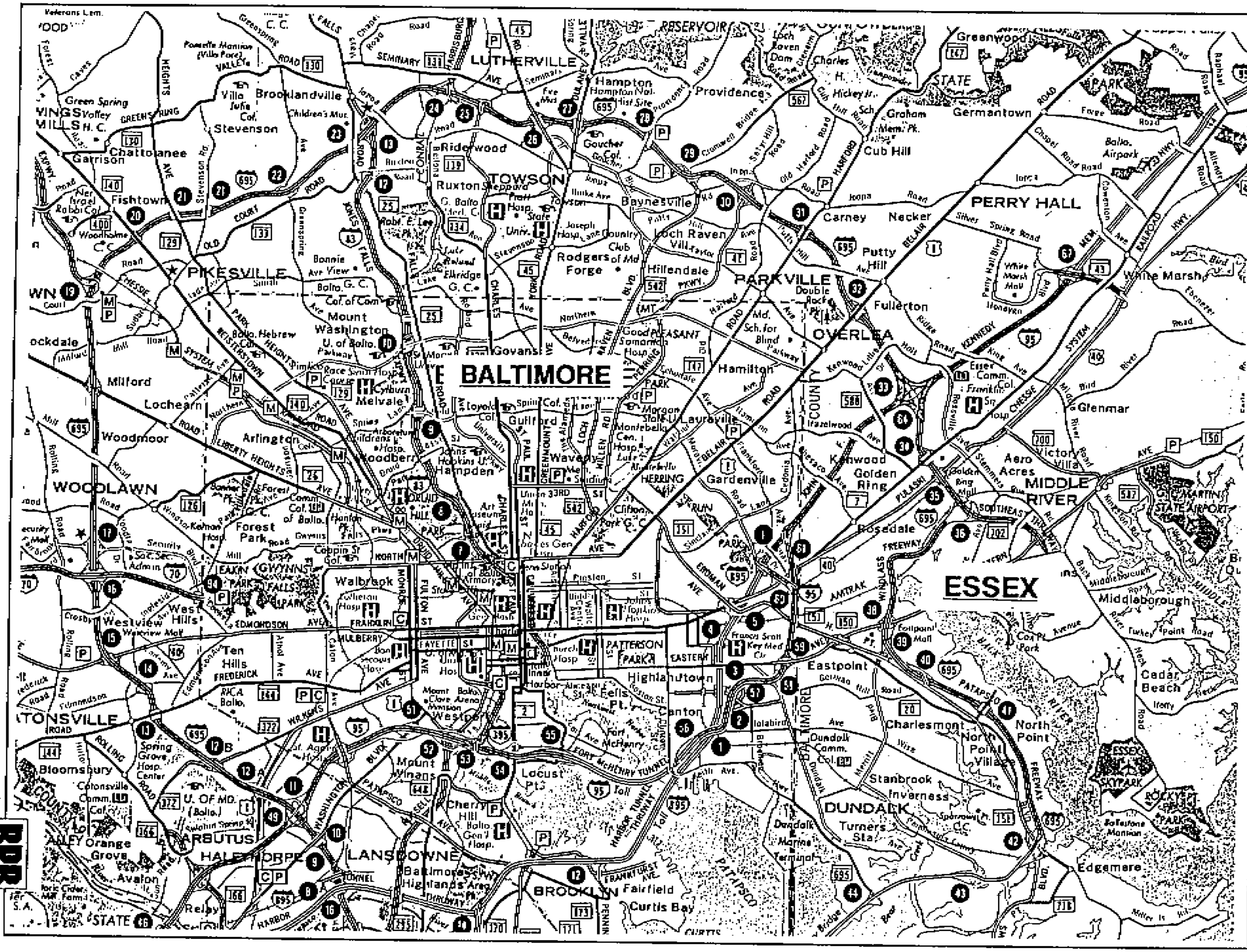
Regional Position

The community of Essex, Maryland is situated to the east of the City of Baltimore, in southeastern Baltimore County. The community is centered at the neck of the peninsula (Back River Neck) formed by the backwaters of the Back and Middle rivers and extending into the Chesapeake Bay. It is traversed from southwest to northeast by Eastern Avenue, which crosses both rivers and the peninsula; and from northwest to southeast by Back River Neck Road, which runs perpendicular to Eastern Avenue and extends the length of the peninsula (or neck). These two roads connect Essex and adjacent neighborhoods to the regional highway network, as follows (see Map A):

- Eastern Avenue provides access to the southeast to the Patapsco and Windlass freeways, which are portions of the Baltimore Beltway system (I-695). It also extends directly to downtown Baltimore to the west, linking with such major thoroughfares as North Point Boulevard and Pulaski Highway, and intersecting the Harbor Tunnel Throughway (I-895).

- Back River Neck Road intersects Eastern Avenue near the terminus of the Southeast Freeway, which links directly to Pulaski Highway (U.S. Route 40), Philadelphia Highway (Route 7), Interstate Route I-95, and the Beltway (I-695), and heads northwest toward Towson.

The character of Essex is decidedly that of a blue collar, working class community, with a modest maritime flavor due to the proximity to the rivers and the bay. Maritime industries are of little economic significance to the area, however, being limited primarily to pleasure craft repair and marina operation. It is the larger heavy industries that have traditionally given the area its character and livelihood, such as the Bethlehem Steel Sparrows Point plant and the Martin Marietta aircraft plant (now a state airport and industrial park).



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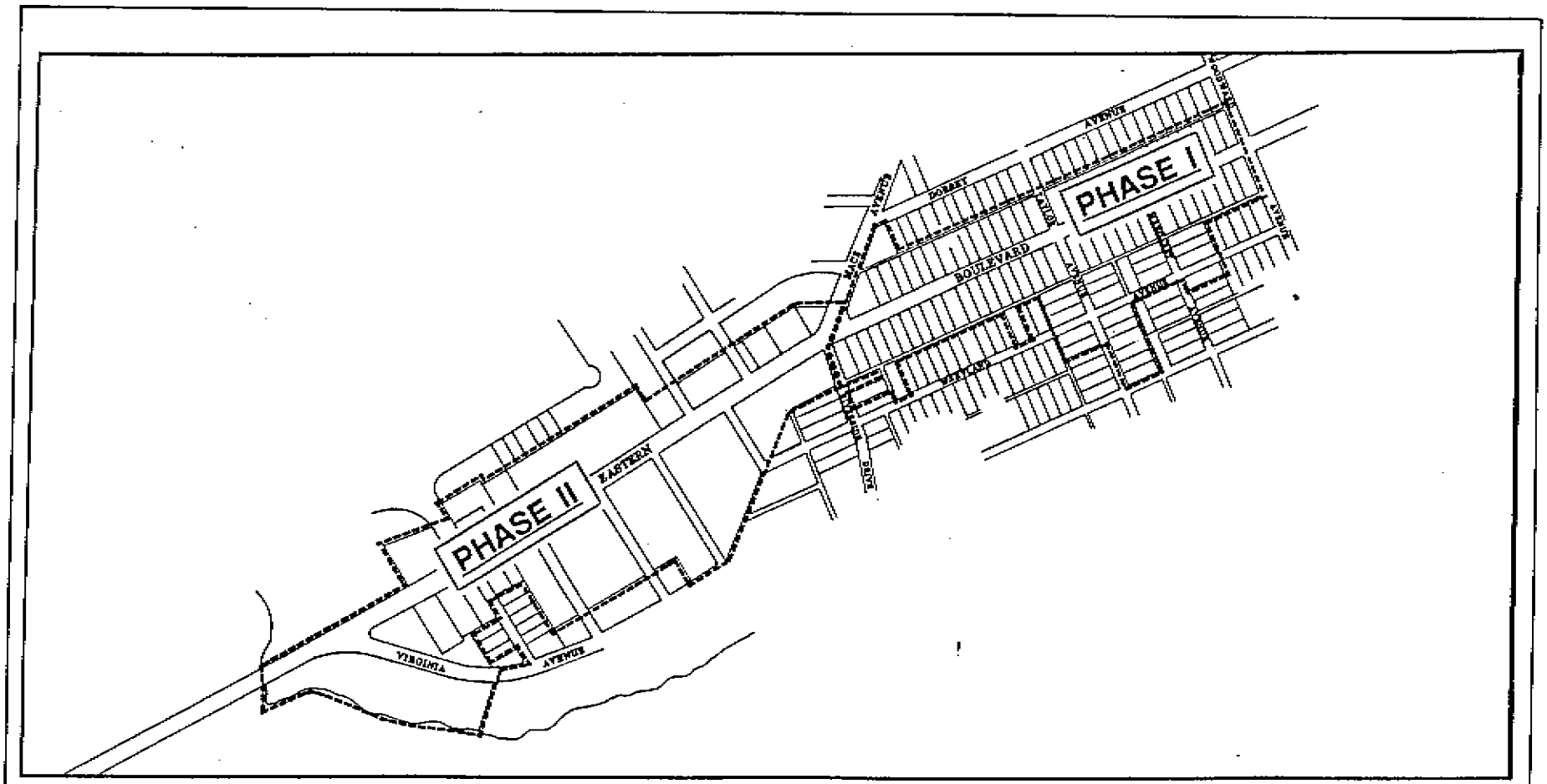
MAP A. Essex CBD Regional Position

Study Area Boundaries

The Essex business core area for this study is the Central Business District as defined by the 400 and 500 blocks of Eastern Avenue, plus selected adjacent properties. This area has served as the Phase I site for revitalization projects undertaken over the 1980's to implement the 1980 Revitalization Plan for Essex (see below). The primary study area, shown on Map B, extends from Mace Avenue and Riverside Avenue on the west to Woodward Avenue on the east.

On the north side of Eastern Avenue the study area includes only the first line of properties, extending to the rear alley. On the south side, however, the study area extends across the rear alley to include several properties fronting on Maryland Avenue. These extensions provide inclusion into the study area of those parking lots and commercial structures in the CBD that do not front on Eastern Avenue. Cross streets in the study area include Taylor Avenue and Margaret Avenue. The major assignment of this report is to evaluate the current status and remaining potentials for revitalization in this core area, and to recommend next steps to further the improvements to the area.

Also covered in this report is an extended study area consisting of the Eastern Avenue frontages west of Mace and Riverside avenues to the Back River bridge. This is a less intensely developed commercial strip that will become the locus of additional improvements for revitalization, if warranted and as recommended (Phase II). Future studies and revitalization activities are expected to take place to the east of the downtown, along Eastern Avenue from Woodward to the vicinity of Marlyn Avenue and the Middlesex Shopping Center (Phase III).



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MAP B. Essex Revitalization Study Area

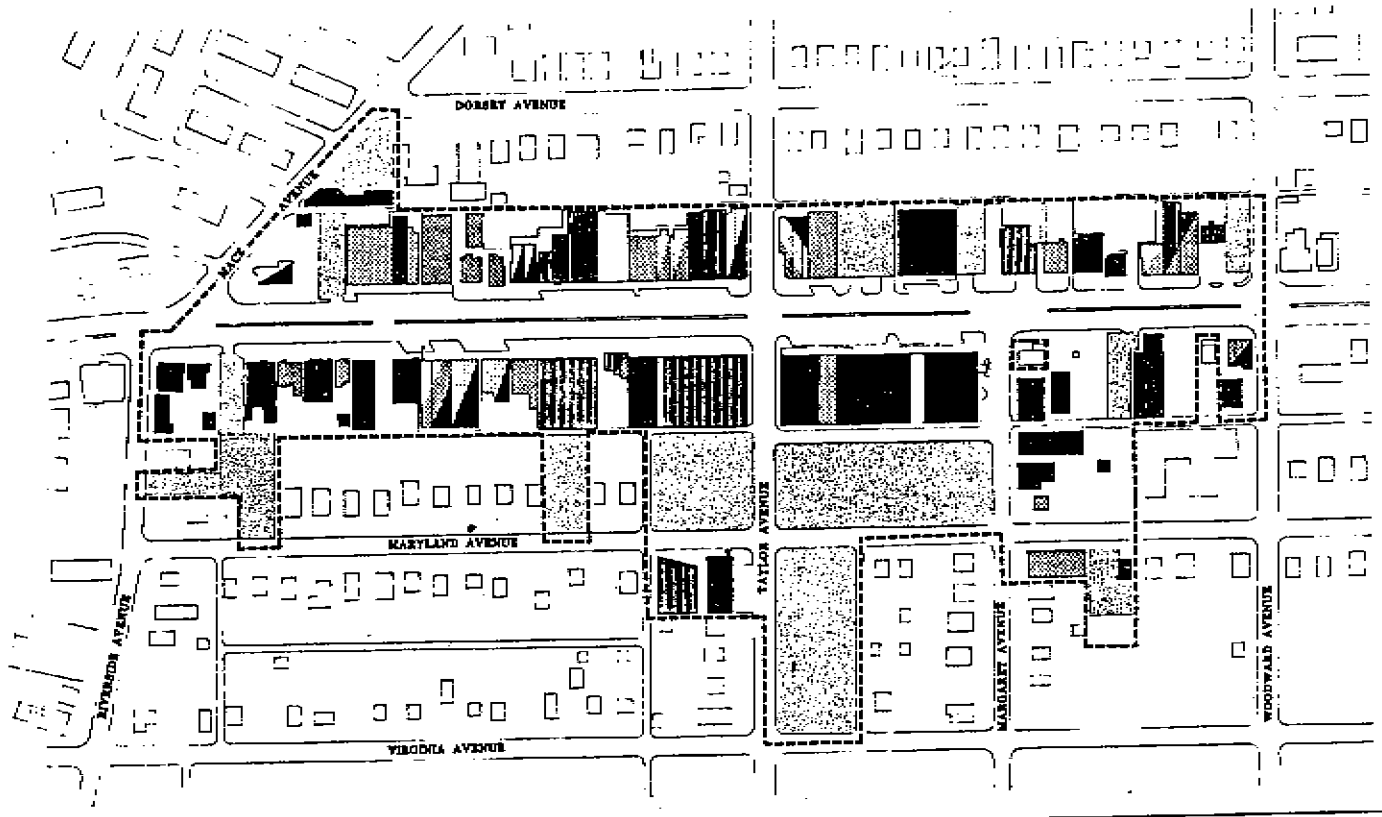
Land Use and Structures

The Essex CBD is an area of small shops, restaurants, professional offices and service establishments. Most occupy storefront space, but a good number are in converted residences. Structures are typically one or two stories. Larger establishments tend to be government offices or public facilities. There are some residential uses, including upper story apartments and one or two older detached dwellings. Uses in the extended area to the west are more directly oriented to the automobile -- with gas stations, repair shops, and drive-in convenience stores -- than in the CBD, where direct driveway access is limited. Stores in the extended area also includes many converted residences. The single institutional development in the extended area is a nursing home south of Eastern Avenue at Back River.

Land Use Pattern

Map C portrays land use in the Essex core on a building-by-building basis. Most of the commercial (retail) space tends to be on the south side of Eastern Avenue and is especially concentrated in the 500 block. Office space, on the other hand, tends to the north side of the street and to the west, in the 400 block. Many structures house both retail and office tenants. Large public facilities are located on the south side in the 400 block: the Baltimore County multi-service government center and U.S. Post Office, and the county occupational training center. Other public facilities are the cerebral palsy center at Taylor and Maryland, and the historical museum in the 500 block of Eastern Avenue.

Downtown Essex has a number of parking lots, as shown on Map C. There are two County Revenue Department lots and three larger private lots on Eastern Avenue. Two additional private lots that are free and available to the public face each other across Maryland Avenue at Taylor Avenue.



ESSEX COMMERCIAL REVITALIZATION

EXISTING LAND USE

ESSEX, MARYLAND

COMMERCIAL
OFFICE
RESIDENTIAL
INSTITUTIONAL
PARKING
VACANT

N

WILES
DAILEY
PRONSKE

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MAP C. Essex CBD Land Use

Floor Space Trends

Table 1 presents floor space in the Essex CBD by broad categories of space use for the years 1976, 1980 and 1989. The total inventory appears to have increased by about 3,500 square feet over this period, but this difference is most probably due simply to measurement error or scope of the survey. Uses of some structures may also have changed from or to uses not included in the different surveys (e.g., residential). The 1980 data are based on information on previous tenants of existing space, thus the total inventory is the same in both cases.

In general terms, retail uses have maintained a consistent base of about 120,000 to 130,000 square feet since 1976, although that base suffered from earlier losses, notably the closing of the only supermarket in the CBD (an A&P) prior to 1976. Consumer services have increased by almost 50 percent -- from 14,000 square feet in 1976 to 20,000 square feet today. Other uses have increased by almost 100 percent: from 74,000 square feet of office and other uses in 1976, to 156,000 square feet at present. Vacant space, on the other hand, has declined to one-third its 1976 level. Overall, occupied space increased by 42,000 square feet in the late-1970's, and by another 40,000 square feet in the 1980's.

These changes have meant shifts in the relative mix of business and other uses in the Essex CBD. In particular, the retail function has given way considerably to office, service and government functions, although it has almost maintained its gross square footage, as these figures illustrate (based on occupied space):

	Percent of Occupied Space		
	1976	1980	1989
Retail Trade	57.7%	52.3%	40.2%
Consumer Services	6.7	6.2	6.8
Other Uses	35.6	41.5	53.0
Total Occupied	100.0%	100.0%	100.0%

Shoppers goods stores include The Family Dollar Store and numerous specialty shops: antiques and used furniture, discount apparel, gun shop, thrift shop, etc. The CBD has lost most of its better furniture and clothing stores. Convenience goods, on the other hand, are on the rise, due almost entirely to an increase in the number of restaurants in the CBD. Personal services have expanded somewhat. The primary service being barber and beauty establishments.

Table 1. NON-RESIDENTIAL FLOOR SPACE INVENTORY BY TYPE OF SPACE 1/, ESSEX CBD, 1976 TO 1989

	1976	1980	1989
Retail Trade			
Shoppers Goods	66,045	74,075	37,550
Convenience Goods	42,120	43,850	53,450
Other Retail	12,300	14,625	27,150
(Subtotal)	(120,465)	(132,550)	(118,150)
Consumer Services			
Personal Services	13,925	12,840	16,950
Business Services	N/A	3,000	3,000
(Subtotal)	(13,925)	(15,840)	(19,950)
Other Uses			
Offices	49,035	57,050	83,965
Government	2/	2/	54,000
Other, Unknown	25,278	48,250	18,100
(Subtotal)	(74,313)	(105,300)	(156,065)
All Occupied	208,703	253,690	294,165
Vacant	130,325	88,875	48,400
Total	339,028	342,565 3/	342,565

1/ Excludes auto dealers and repair.
2/ Included in other uses.
3/ Inventory is limited to space still existing in 1989, as of December 30.

Source: RPR Economic Consultants Field Survey.

Zoning Districts in the CBD

The Essex business district within the study area is entirely zoned business, with commercial overlay districts. Map D shows the areal extent of the three business zones and two overlay districts that cover the CBD; the uses allowed in the respective business districts are:

- BL (Business, Local): Uses permitted include most types of convenience goods, shoppers goods and specialty retail establishments, plus personal services, banks and offices, and other stores, services and business establishments as one would expect in a commercial center. Included also are accessory uses or structures, such as garages and parking spaces, and signs. Special exceptions would allow pet boarding, service stations and repair garages, boat yards and marinas, car wash, community social/cultural/educational or recreational facilities and day care, drive-in restaurants, dry cleaning plants, motels and hotels, theatres, laboratories, apartments, and miscellaneous recreational facilities. In the event of a permitted fabricating or repair facility, the maximum number of employees engaging in such activities can be no more than five.

- BM (Business, Major): All uses permitted in a BL zone, plus a wide variety of such uses as recreational and entertainment facilities (many of which are permitted in BL zones only by special exception), repair facilities, smaller printing and dry cleaning plants, hotels and theatres, and warehouses. Employees in fabrication or processing, repair or dry cleaning cannot number over 25. Service stations, car wash establishments, drive-in restaurants, bus terminals laboratories, and some additional recreational facilities may be permitted by special exception.

- BR (Business, Roadside): All uses permitted in the BM zone (and hence also in the BL zone), plus such uses as larger printing firms, bottling plants, motel an motor court, pet boarding, greenhouse, and volunteer fire department. Uses such as building materials/farm supply and equipment/lumber/stone works, etc., tire retreading, kennel, and public utility storage yard are permitted when set 50 feet or more from residential

zones at the zone ends. By special exception, service stations, a wide range of transportation facilities, moving and storage, larger recreational, motor vehicle sales, and other uses can be permitted.

Specific regulations for these zones for setbacks, front, side and rear yards, special conditions, and building height will not be detailed here. Areas such as the Essex CBD that have predominantly older structures predating many of the ordinance specifications will evidence many non-conformances and variances. Without overlay districts, the floor area ratios for the zones are 3.0 for BL, 4.0 for BM, and 2.0 for BR. Off-street parking requirements for selected uses for the three business zones are as follows (generally in terms of building floor space):

- Nightclubs and restaurants: one per 50 square feet;
- Medical offices: one per 300 square feet;
- Other offices, institutions and non-retail commercial establishments of more than 5,000 square feet: one per 300 square feet of ground floor space, and one per 500 square feet of upper floor space;
- Retail establishments: one per 200 square feet; and
- Industrial and wholesale: one per three employees.

Provision for such off-street parking normally would be required at the time of application for a building permit to construct or enlarge a structure for which offstreet parking is required. The parking spaces provided would have to be either on the same lot or within 500 feet of the building they are intended to serve. Additional requirements govern provision of loading spaces for retail stores, industrial and warehouse facilities and similar facilities of 10,000 square feet of more, at the rate of one space for each 50,000 square feet in excess of 10,000 square feet.

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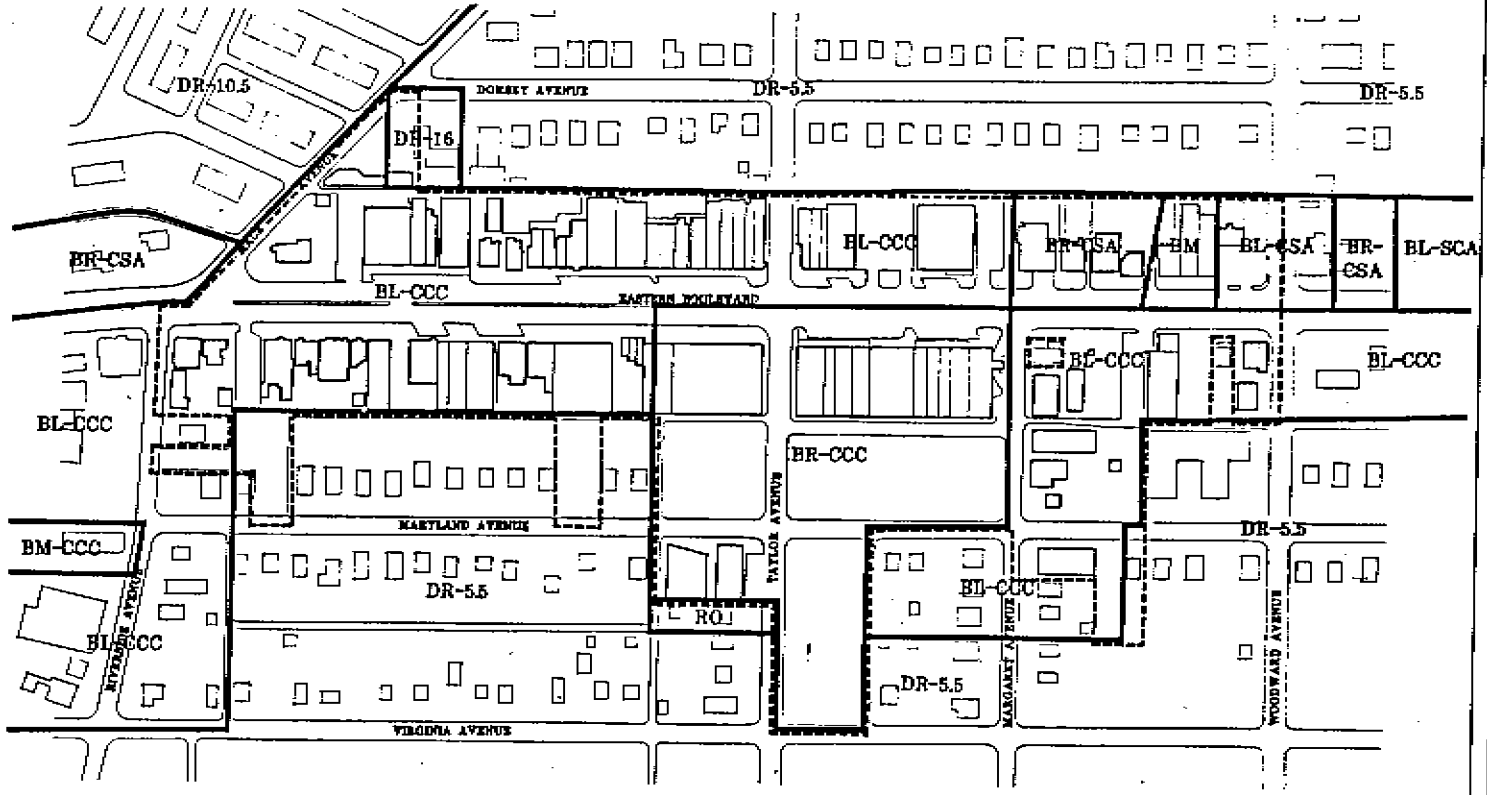

ESSEX COMMERCIAL REVITALIZATION

ESSEX, MARYLAND

ZONES:

DR- 5.5	(Density Residential, 5.5 Dwelling Units per Acre)
DR-10.5	(Density Residential, 10.5 Dwelling Units per Acre)
DR-16	(DENSITY Residential, 16.0 Dwelling Units per Acre)
RO	(Residential Office)
BL	(Business, Local)
BM	(Business, Major)
BR	(Business, Roadside)

DISTRICTS:

CCC	(Commercial, Community Core)
CSA	(Commercial, Supporting Area)

N

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MAP D. Essex CBD Zoning Districts

As Map D indicates, the BL zone predominates in the CBD, covering properties to the south of Eastern Avenue and east of Margaret Avenue, to the north of Eastern Avenue and west of the Margaret Avenue terminus (at 514 Eastern Avenue), and to the south of Eastern Avenue west of (and including) 435 Eastern Avenue. A BR zone includes all properties on the south side of Eastern Avenue from 437 Eastern Avenue to Margaret Avenue; this includes the government multi-purpose center and post office, the major retail structure in the 500 block, and parking lots and other structures to the rear across Maryland Avenue. The properties fronting on and north of Eastern Avenue from the terminus of Margaret Avenue eastward to the study area boundary at Woodward Avenue include all three business zones in succession: BR (514 to 522 Eastern Avenue), BM (526 to 530 Eastern Avenue), and BL (532 Eastern Avenue). It may be noted that these three groups of properties were all zoned BL in 1980, which covered all of the downtown at that time except for the above-described BR zone south of Eastern Avenue.

Properties in the CBD are covered by two overlay zoning districts which further qualify the uses permitted and the regulations that govern them. These are the CCC (Commercial, Community Core) and CSA (Commercial, Supporting Area) districts. Particulars of the CCC district are:

- Apartments are a permitted use, but only above the first story of a building. Side windows of apartments must be 25 feet from the property line, with 50 feet between apartment side windows facing each other in adjacent buildings.

- No limit is placed directly on the number of apartment units, but the maximum floor ratio for the site is placed at 4.0, and a minimum amenity open space ratio is set at 0.2. Minimum parking for apartments is 1.25 spaces per dwelling unit, but up to 50 percent of the apartment spaces can be applied to required parking for commercial and office parking at the site.

In 1980 the entire downtown Essex study area fell under the CCC overlay district. The rezoned northeastern portion of the study area, which now includes BR and BM as well as BL zones, now is covered by the CSA overlay district in place of CCC, which remains in place in the rest of the study area. The CSA overlay district allows automobile service stations as a use by-right, rather than by special exception. The purpose is to provide a transition for highway commercial to CCC (Commercial Community Core).

Land Use and Zoning in the Extended Area

The extended study area runs from Mace Avenue to the Back River Bridge and includes the 000 to 300 blocks of Eastern Avenue west of the CBD. This is a transitional area; the zoning is for business roadside, allowing for residential uses if they are contiguous to residential. There are many converted residences in this area, primarily housing offices and marginal shops on first floors and in basements. Office uses include several legal firms, insurance, real estate and construction, with retail such as gift shop and deli. Parking at these properties is often to the sides of the structures in widened driveways.

The overall mix of uses in the extended area gives evidence to the dominance of the automobile: there are several auto sales and auto repair establishments, an auto parts store, Jiffy Lube, gas stations, tire store, and highway-access retail (liquor store, 7-11). Miscellaneous uses include a bingo parlor, a nursing home, and a park and ride lot. There are several restaurants -- Ho Jo Chinese, Terrace Inn, Crabhouse -- some of which are rather unsightly and apparently not too active. The only real cluster of stores is at the Mazer Brothers facility (auto parts, plus furniture, printing, etc.). A largely vacant retail/office structure is located at Eastern Avenue and Riverside Avenue, just outside the CBD.

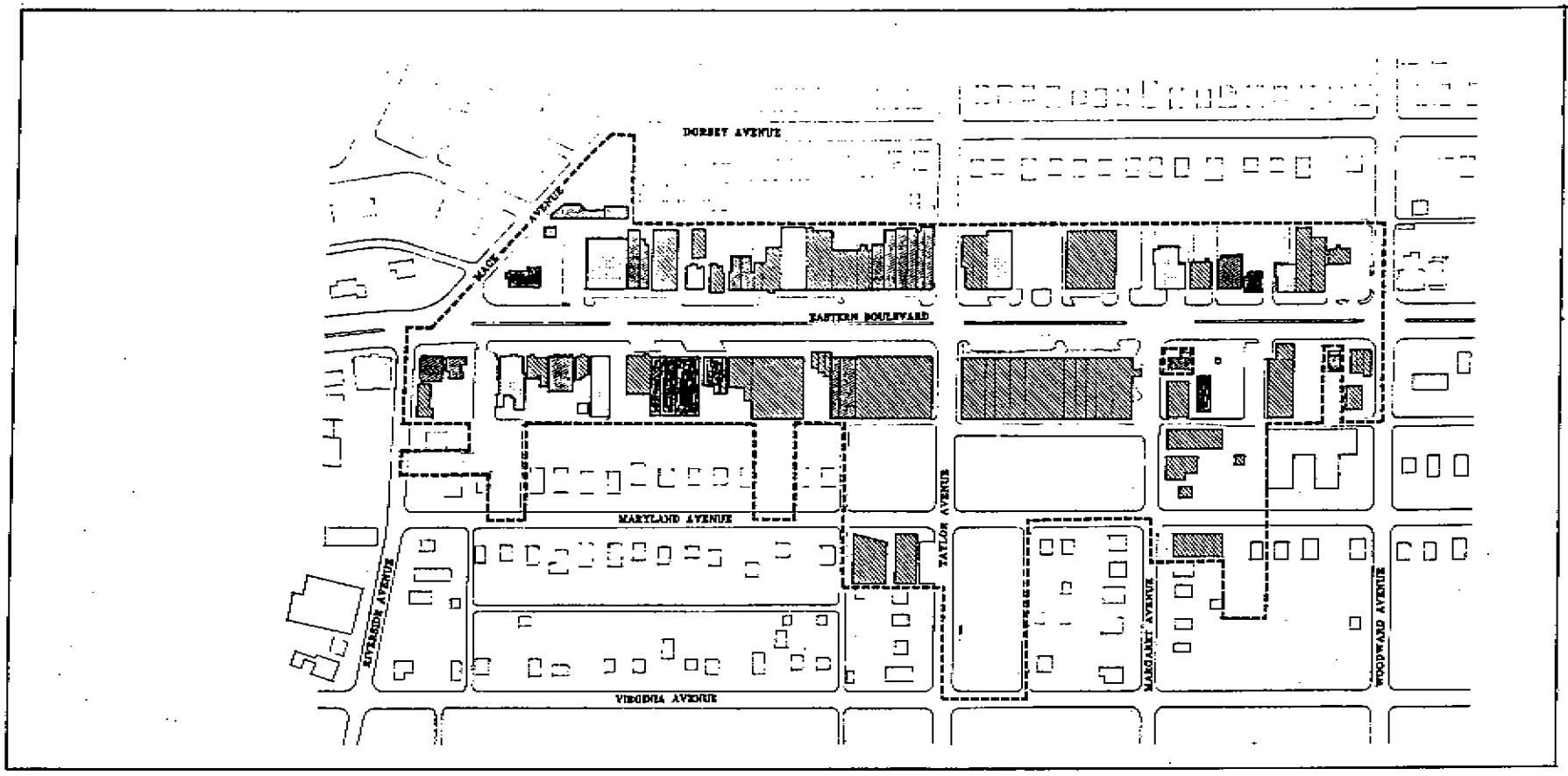
Building Condition

Visual inspection of structures in the Essex CBD was undertaken to determine the general physical condition of the buildings in the area. Structures were rated as being in excellent, good, fair or poor condition, based on obvious signs of deterioration or need for maintenance and repair. The ratings relate to structural conditions; they will reflect the impacts of facade renovation, but they will not reflect other aspects of street beautification or structure or lot functional or economic obsolescence. The results of the survey are shown on Map E. Among the findings are that:

- Over 80 percent of the 334,000 square feet of commercial retail and office space is rated to be in good or excellent condition; 12 percent is considered to be in fair condition, and only seven percent is rated poor. This is a substantial improvement over condition ratings for previous years and suggests considerable progress in reversing deterioration and in upgrading the area.

- Most of the floor space in poor condition -- over 80 percent of the total -- is found on the south side of the 400 block of Eastern Avenue. Affected properties include 423-427 Eastern Avenue. Other properties considered in poor condition are 400 Eastern Avenue (Guttenberger's Grocery, the oldest structure in the Essex CBD) and 522 Eastern Avenue.

- The south side of the 400 Eastern Avenue block also contains 45 percent of the space in only fair condition, so that almost 30 percent of the space in that block is rated in less than good condition. The north side of that block contains 41 percent of the fair quality space. By comparison, from 91 percent to 98 percent of the space in the blocks on the north and south sides of 500 Eastern Avenue are in good or excellent condition.



ESSEX COMMERCIAL REVITALIZATION

CONDITION OF STRUCTURES

ESSEX, MARYLAND

POOR
FAIR
GOOD
EXCELLENT

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MAP E. Essex CBD Building Conditions

Parking Facilities

Reconnaissance of the study area determined that there are approximately 870 parking spaces in the CBD. This number follows the study area boundaries rigidly, and therefore it excludes spaces just outside the area. On the other hand, the surveys of shoppers and merchants suggest that shoppers will not come to the CBD if they have to park too far from stores, so the spaces at the edge of the area are not as effective in terms of parking capacity to serve shoppers. Patrons of government services appear to park wherever they can, and there is some complaint from merchants that they crowd shoppers out of close-in parking. A summary of the parking inventory and analysis is presented below (the Technical Appendix documents the findings in detail):

- Of the total number of spaces, 250 or just less than 30 percent are on-street spaces, and 620 are off-street. Almost 70 percent of the spaces are to the south of Eastern Avenue. Metered spaces -- which constitute 160 or 18 percent of the spaces -- are fairly evenly divided between north and south of Eastern Avenue. Far more free and customer parking is available to the south.

- Metered spaces are concentrated along Eastern Avenue frontages. Of the total of over 260 metered spaces, 118 are in Revenue Authority lots located to the north in the 500 block, and to the south in the 400 block. Despite this apparent balance, the lots are away from the center of activity at Taylor and Eastern avenues, and they are not heavily used. On-street metered spaces are available on all Eastern Avenue block fronts in the CBD and on some side streets, although not necessarily in even proportions.

- Free parking, which totals 355 spaces in the CBD, consists of 107 on-street spaces and 248 off-street spaces. About 40 free spaces are on-street spaces near Eastern Avenue frontages (although most of these are on the side streets). The Chertkof lot behind the large retail structure in the 500 block is available to the public and has 132 spaces. Another 68 on-street spaces

and 116 off-street spaces are available south of Maryland Avenue in the 500 block; most are in another Chertkof lot open to the public. These spaces are quite far from many, if not most, of the stores in the downtown.

- Private restricted parking for customers and employees is available in small amounts in all blocks. Employee parking as identified here (103 spaces) is concentrated in back alleys and behind stores; as such it is cramped and not very accessible. The 151 spaces of customer parking includes 52 spaces at the (new) Post Office; the rest is widely scattered. Apparently, the post office lot is heavily used by other government patrons, as are the Chertkof lots nearby.

- Practical parking requirements in the CBD determine that from 1,000 to 1,300 spaces are needed to handle current parking needs. Historical counts of 800 to 900 spaces suggest that the existing parking space inventory within the study area consistently has met 70 percent to 80 percent of actual need. This compares to a supply of only 35 to 40 percent of the theoretical need for from 2,200 to 2,500 spaces, based on zoning requirements for parking according to land use. As the CBD is upgraded with more and better retailers, parking need may begin to approach this higher requirement.

Parking Management

Although there is a lack of parking overall in the Essex CBD, metered lots at 409 and 508 Eastern Avenue are underutilized. The lot at 409 Eastern Avenue is rarely more than 25 percent full during business hours, and the lot at 508 is rarely more than 50 percent full, even though the Eastern Avenue Health Center leases approximately one-quarter of the spaces in the lot. Although these off-street lots are not fully utilized, the on-street metered spaces are generally full. There are several reasons for this parking pattern. First, business district patrons generally try to park directly in front of their destinations. Therefore they avoid off-street lots. Second, in public meetings with EDCO, it has been reported that many employees feed the meters in front of their places of employment.

Third, the pricing of the meters is the same ($.10 per hour) for both on-street two-hour and off-street five- and 10-hour lots. These three factors suggest alternatives that could be pursued to help encourage more utilization of the long-term lots. These parking management alternatives are presented below.

- Alternative 1 - Pricing at Meters. One alternative would be to increase the price of on-street meters to $.20 per hour while continuing the cost of off-street metered lots at $.10 per hour. Twenty cents per hour is still relatively inexpensive for parking in downtown areas, yet this price increase would encourage employees to use long-term lots rather than feed the meters.

- Alternative 2 - Timing of Meters. The second alternative would be to decrease the on-street meters to one-hour maximum, rather than the present two-hour maximum. If employees have to feed the meters every hour, they may choose to utilize the all-day lots.

- Alternative 3 - Removal of Meters. A third alternative would be to remove the meters from the long-term lot at 409 Eastern Avenue as the lot is rarely used now. The Revenue Authority would not realize any significant loss of income and on-street spaces would be more available to area businesses.

- Alternative 4 - Combination of Measures. This alternative would combine selective rate changes, timing, and/or removal of meters.

The alternative recommended for Essex is the fourth alternative, which would raise the price of on-street meters to $.20 per hour and would remove the meters at the Revenue Authority lot at 409 Eastern Avenue. This increase in price for on-street meters will not significantly affect the desirability of the shopping area, yet, it will encourage greater utilization of long-term lots. It should be noted, however, that whatever parking management strategy is chosen for Essex, EDCO should take a lead

role in educating business owners to encourage employees not to take up valuable on-street parking spaces.

Essex CBD Alleys

The alleys between Eastern Avenue and Dorsey Avenue in the 400 and 500 blocks could provide access to additional off-street parking behind the commercial properties on Eastern Avenue. However, the deteriorated condition of the alleys prohibits many employees from using the potential spaces behind businesses. In earlier revitalization studies of the Essex CBD, improvements to the alleys were recommended. Although some resurfacing of alleys was recently accomplished, the improvements made were of a minimal nature and have not greatly affected the desirability of the parking areas behind properties on the northern side of Eastern Avenue. In order to provide additional employee parking opportunities, major improvements to the alleys should be pursued.

It is also important to note that the Baltimore County Department of Environmental Protection and Resource Management has targeted these alleys for improvement due to runoff pollution exacerbated by the poor condition of the alleys. As the stormwater management system outfall is in an Intensely Developed Critical Area, improvements to the alleys will help the County meet the County's Critical Areas goals to reduce pollution from Intensely Developed Areas.

Economic Activity

An exhaustive inventory and analysis were made of retail and service floor space and sales activity in the Essex CBD and in the Eastern Avenue Corridor from Back River to (and including) the Middlesex Shopping Center. This included field survey of floor space and surveys of merchants and

shoppers. The particulars of that inventory and analysis, including projections to 1995, are reported in the Technical Appendix to this study.

Shopper's Survey

Shoppers and other visitors to the Essex area were surveyed to determine their pattern of patronage of stores and services in the Eastern Avenue Corridor, and use of competing facilities. Knowledge of their places of residence permits the definition of the trading area that the Essex corridor serves; this trading area was used in the market analysis to identify the retail sales potential. Highlights of the survey are as follows (see the Technical Appendix for details):

- Trip Purpose. Tabulating the residence data for visitors to the CBD according to trip purpose reveals that the government center is a major attraction for the CBD, accounting for over 80 percent of the visits to the core. Those visitors coming the greatest distances tend to come for governmental purposes. About half of the visitors to the CBD for government purposes come from outside both the primary and the secondary trading areas, compared to only 15 percent of the shoppers.

- Trading Area. About 60 percent of the shoppers in the Eastern Avenue corridor come from the Essex and Middle River communities; these have been designated the "primary trading area". Roughly another 30 percent come from Windlass (to the east) and North Point (to the west); this is the "secondary trading area". The remaining 10 to 15 percent are "inflow shoppers" from beyond the trading area.

- Shoppers Goods Purchases. Almost 40 percent of the shoppers in the Essex CBD usually make their shoppers goods purchases at stores in the CBD, based on the responses of shoppers surveyed in the CBD. Another small proportion (10 percent) of the CBD shoppers make their regular purchases at the Middlesex Shopping Center. Thus, almost half of those who shop in the CBD make their regular shoppers goods purchases outside the Eastern Avenue Corridor.

- Food Store Purchases. The survey data indicate that most shoppers (45 percent to 55 percent, or roughly half) in the Eastern Avenue Corridor usually do their grocery shopping at the Basics supermarket in the Middlesex Center, while a somewhat lower percentage (about 20 percent to 30 percent) shop regularly at the Mars market in Riverdale. Altogether, about 80 percent to 90 percent of all primary area residents shopping in the corridor make their regular grocery purchases at stores within the primary trading area.

Merchants Survey

In addition to surveys of shoppers in the Eastern Avenue Corridor, a survey was undertaken of merchants in the Essex CBD. The purpose for surveying these merchants was two-fold. First, the survey sought to obtain the opinions of merchants on the business climate in the CBD, on the character and success of their enterprise, and on the problems in the CBD that impact business climate and success. The second purpose was to view first hand these places of business and to assess objectively the quality of the facilities and merchandising practices of the operators. Findings include these observations:

- Turnover Rate. The pattern of residency indicates a "core" group of retail stores and personal services that have remained in the Essex CBD at their current address since 1980, or just about one out of every four stores. The remaining three out of four have moved in since 1980 and have been at their current address for an average of 4.75 years.

- Adequacy of Space. Two-thirds respond that their space is adequate and one-third respond that it is not. Most (75 percent) of those responding no, the space is not adequate, indicated a desire for more space. Field observations suggest that space on the whole is not properly utilized in terms of display or storage.

- CBD Competitiveness. Three-fourths of the merchants surveyed believe that the Essex CBD is a good location for their business. Respondents indicated that the positive elements of the Essex commercial area are its convenience and location within the greater Essex area, and the loyal community atmosphere of the area.

- Marketing Organization and Practices. Only six (30 percent) of the businesses in the survey currently belong to EDCO or the Chamber of Commerce. Many are complimentary of the streetscape improvements to Eastern Avenue, but as yet they do not see this cosmetic improvement as the answer to the flagging retail market. There is no unified approach to marketing the CBD at present. There is considerable apathy among merchants concerning marketing and promotion.

- Undesirable features reported about Essex are its lack of traditional retail stores comparable to those found in the malls and shopping centers nearby, what are considered unresolved parking problems, the "run-down" appearance of several storefronts, the large amount of vacant space along Eastern Avenue, and its difficulties as a retail location. Nonetheless, of the businesses surveyed, only 15 percent indicated they have considered moving because of these issues.

Retail Sales In Essex

It is estimated from floor space inventories and merchant surveys that the 147,000 square feet of occupied retail and service floor space in the CBD in 1988 generated about $14.1 million in retail sales, for an average sales volume of $96 per square foot. This is almost precisely the same rate of sales generation that was evident in 1977 in constant dollars (an estimated $13.6 million in sales in 143,000 square feet of space). As noted above, merchants cited disruptions due to street improvements as a cause of lowered sales in this period. Detailed analysis of retail floor space and sales found that:

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- In the CBD shoppers goods stores account for $4.0 million in sales, convenience goods for $5.2 million, and other retail for $2.5 million, for a total of $11.8 million in retail sales. Services make up the remaining $2.3 million in sales in the CBD. The single type of establishment with the largest sales volume in the CBD is the eating and drinking category (restaurants), at $3.9 million.

- Another $11.5 million in sales are made at stores in the corridor outside the Essex CBD, excluding the Middlesex Shopping Center. As in the CBD eating and drinking places account for a major share of all sales, at $3.5 million. In the corridor, however, there is also a substantial concentration of auto parts and related stores, with $3.6 million in sales. These two types of firms account for 60 percent of the sales in the corridor outside the CBD. The Middlesex Shopping Center makes an estimated $19.7 million in sales per year, of which $9.9 million are for groceries and $5.9 are for shoppers goods, including department stores.

- The magnitude of expenditures made each year by trading area residents dwarfs the actual sales made by stores within the primary trading area, including the Essex CBD, with $426 million in expenditures annually. This is especially true of shoppers goods (purchases of $176 million) -- including department store products, apparel, furniture and miscellaneous specialty goods. As noted above, the shopping centers near Essex tend to be supermarket anchored, and the Essex Corridor's major retail strengths are in convenience goods and highway related activities. Clearly, most trading area residents make their major purchases at the larger malls, such as Golden Ring.

- The most significant finding of the analysis is that the Essex CBD and business corridor are currently meeting a very small proportion of the potential retail demand in the trading areas they serve. That proportion, or capture rate, is only 5.1 percent of demand -- 6.3 percent in the primary trading area, and 3.5 percent in the secondary trading area. The adjacent Middlesex Shopping Center supplies another 4.4 percent of sales capture, 6.5 percent and 1.5 percent for the submarkets, respectively. The highest capture for corridor businesses is for convenience goods stores

and services, at 11.0 percent. Capture for shoppers goods and food stores is about 2.0 percent.

Summary

This introductory section of the market study and revitalization plan update for the Essex CBD has provided a statement of the purpose and method of the study, and an overview of factors relating to the present state of commercial activity in the downtown -- factors such as traffic, building conditions and area appearance, parking, merchant and shipper preferences, and retail sales. Section II, to follow, will describe previous planning and revitalization activities for Essex, and Sections III and IV will recommend a revised revitalization concept and strategy for Essex.

Section II. REVITALIZATION PLANNING HISTORY

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Section II. REVITALIZATION PLANNING HISTORY

Introduction

The early-1980's has seen the execution of a first phase of a concerted program for the commercial revitalization of the Essex CBD. Today, the impending completion of that first phase is the occasion for undertaking this present study, to assess progress to date and to recommend the next steps to be taken. Three plans for the commercial revitalization of the core area were undertaken prior to the execution of the first phase: the Murphy-Williams study (1976), the American City Corporation study (1978), and the Revitalization Plan prepared by Baltimore County staff (1980).

The 1980 Revitalization Plan set the stage for recent revitalization efforts in Essex, and it is reviewed in detail below. Here, brief summaries of the Murphy-Williams and American City Corporation studies are presented; they provided important analytical and strategy input to the Revitalization Plan, and much statistical data from those two studies have been included in this study to establish trends in floor space condition and utilization. Basically, the Murphy-Williams study provided an in-depth analysis of problems in the core area, while the American City Corporation study focused on a market analysis to identify market potentials and recommend a revitalization strategy. That strategy was picked up, elaborated and modified, and developed into a revitalization program in the 1980 Revitalization Plan. Problems identified in the 1976/1978 plans and rated as high priority for improvement included access and parking, and obsolescence in the retail core:

1. Access and Parking:

- high volume of through traffic
- deficiencies in the numbers of spaces available
- very poor access to parking from thoroughfares
- poor location of spaces in relation to shops

2. Retailing: Obsolescence:

- while gross square footage is substantial, the core does not meet the criteria for a regional center (no department store), a community center (no junior department, discount or large variety store), or neighborhood center (no supermarket)
- cannot compete with surrounding shopping centers
- large vacancies (48,000 square feet, or 14 percent)
- poor appearance of area and poor condition of many structures, cannot command higher rents needed for better maintenance
- lack of large anchors to generate shopper traffic
- lack of shoppers goods and specialty shops
- store units that are too large for modern shops
- absence of high quality businesses; large number of marginal businesses attracted by low rents
- high rate of business failure and turnover
- changing demographic mix: older, moderate income

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A number of policy recommendations were advanced for CBD revitalization, and key projects were identified. Recommend policies and strategies, and identified opportunities for a strengthened core, are summarized below. Specific projects are elaborated in more detail in the discussion of the 1980 Revitalization Plan, to follow.

3. Goals and Strategies to Re-establish the Essex Town Center:

- o establish a role for the Town Center: balanced mix of retail (neighborhood shopping facilities), private office space, and public office space and facilities (government multi-purpose center)
- o retail opportunities: supermarket (25,000 square feet), shoppers goods stores (75,000 square feet); especially apparel; hardware/drug/variety complex; home furnishings, antiques center), and services
- o local-serving office opportunities: 50,000 to 70,000 square feet
- o cultural and entertainment opportunities: ethnic restaurants, theatre, County museum, restore Guttenberger's historic store
- o public facilities opportunities: government offices, retain post office
- o transportation policy: reverse current policy to maximize flow; increase access to shoppers: auto, transit, pedestrian
- o parking policy: more spaces, more free space, more curbside space, better security and lighting, more evenly distributed spaces
- o streetscape policy: facade improvement program, streetscape program (furniture, planters, walkways, festive effects/maritime theme, signage).

The 1980 Action Plan

In 1980 Baltimore County staff prepared a Revitalization Plan for Essex that built upon and extended many of the ideas and concepts that had been previously advanced in studies of the CBD by Murphy/Williams (1976) and the American City Corporation (1978). The 1980 Revitalization Plan included an Action Plan which set forth a physical concept and plan for revitalization of the CBD, and various other plan elements to guide the implementation of the Action Plan (Relocation Plan, Administration Plan, etc.). The Action Plan has served as a basis and guide for revitalization projects within the CBD for the past eight years.

It is now timely to review the status of the Action Plan recommendations to assess the success of those projects that have been implemented, to determine whether other projects proposed but not yet implemented are still valid and needed, and to reevaluate the timetable and priorities for implementation of such projects. The discussion to follow summarizes the recommendations of the 1980 Action Plan and reports on the status of their implementation.

Public Facilities

The basis for the design of the Action Plan is the concept of the Village Center, which was conceived as two (public sector) anchors connected by landscaped streetway (Eastern Avenue). Baltimore County approved a $600,000 bond issue to carry out the first phase elements of the Action Plan, which are described below.

1. Reconstruction of Eastern Avenue. Improvements to and beautification of the streetscape between the anchors was seen as essential to creating an inviting environment for upgraded shops, improved traffic flow, and increased access to shopping and parking. Among the specific recommendations were:

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- Widening (four feet each side).
- The addition of 10 foot parking lanes each direction.
- The addition of a 12 foot median strip, landscaped with trees.
- Grass and brick pedestrian crossings, with extended nosings.
- Left turn lanes at critical intersections.
- Move utility poles to alleys to allow additional lanes.
- Improve the pavement in alleys.
- Demolish the Franklin Warehouse, widen the alley.
- Landscape and brick the walks/textured concrete, greenery.

These recommendations proved to be quite ambitious, and compromises with the State Highway Department were necessary to achieve many of the objectives. For example, the median could not be widened or planted. A parking lane was added, but not to the full 10 foot width desired. One-third additional on-street parking (33 spaces) was accomplished by changing parallel parking to diagonal parking. New turning lanes could not be fit into the existing right-of-way, and the utility poles were not moved. The Franklin Warehouse was not demolished, but the alleys did receive a pave-over, and there is more employee parking there than previously.

The sidewalks were landscaped and upgraded to the greatest extent that is likely to be achieved, but the coverage did not include the full 400 and 500 blocks of Eastern Avenue. Instead, improvements stopped short of the half block between Margaret and Woodward. There are some significant uses in this stretch, and completion of the improvements should be considered. Creation of a pocket park at 521 Eastern Avenue is under consideration (the former Delia Motors lot). However, the $100,000 budget available to the Department of Recreation and Parks may not be sufficient for both acquisition and improvements.

2. Creation of Public Sector Anchors. The two facilities envisioned as the anchors for the Village Center greenway were the Essex Heritage Society museum (the old fire and police station) at 514 Eastern Avenue, and a Government Center one block to the west at Eastern Avenue and Taylor Avenue. The museum has been completed and is a viable weekend attraction. Since the facility is staffed entirely by volunteers and does not operate on weekdays, its impact is somewhat limited. The Government Center was conceived as a "State District Court -- Multi-Service Center" to be grouped around an open courtyard or plaza, with these components and characteristics:

- State District Court Functions -- 22,500 square feet
- Baltimore County Satellite Office -- 20,000 square feet
- Various other State, Federal functions
- A newly constructed Williamsburg-type building, or
- As an alternative, acquisition and rehabilitation of 431-433 Eastern Avenue (36,000 square feet)
- Acquisition of 435-7 and/or 427-9 for plaza and services
- An expanded Post Office as part of the Government Center complex or adjacent with pedestrian linkage

EDCO and the County were not successful in securing the location within the CBD of the State District Court or other state and federal offices, but a new Government Center was successfully established as a County multi-service complex, including the Post Office. The status of Action Plan proposals to date is:

- The Government Services Center complex at 439 Eastern Avenue was renovated in 1983, with approximately 18,000 square feet of space.

- It was not possible to create an open court area, however, as the owner chose to rehabilitate the properties for shops and offices rather than sell them to the County.

- Major County tenants include Social Services (15,000 square feet) and Permits (1,000 square feet), plus offices of EDCO and other agencies. The Motor Vehicle Administration is also a major tenant.

- The Post Office was relocated from its previous location at Maryland and Taylor Avenues, to expanded quarters in the lower (rear) portion of the Government Services Center, with access from Taylor and Maryland.

- In 1984-85 the vacant structures at 431-433 Eastern Avenue were rehabilitated for a County Occupational Training Center, with 36,000 square feet of space. The building is under long term lease. The structure at 435-437 remains in private ownership and in occupancy by the Salvation Army and a sub shop.

- The building vacated by the Post Office at Maryland and Taylor Avenues remains vacant; a dress factory had occupied the structure briefly, but failed. The Occupational Training Administration may consider it for an adult literacy center to support the training center, as the GED is required for admittance to the training program. The building next door houses the cerebral palsy daycare center and offices.

3. Construction of Public Parking Facilities. Creation of additional parking in the CBD was considered crucial to the successful revitalization of the area. Among the proposals of the Action Plan were the following projects:

   - A new lot on the Franklin Warehouse property

   - Construction of a parking deck at the Government Center

o Interconnection of lots to the rear of stores

The Franklin Warehouse project has not been pursued, nor has the construction of the parking deck. Since existing Revenue Authority lots are underutilized, it has been difficult to justify the construction of a new parking deck. It appears, however, that the problem with the Revenue Authority lots is their distance from the center of activity in the CBD; the deck would have been much more centrally located. The lot to the rear of 439 Eastern Avenue is ostensibly reserved for Post Office patrons, and an adjacent lot is for Post Office use only. The lot in the 500 block opposite the post office is usually well-occupied.

Connection of lots to the rear of stores by an expanded alleyway would require the petitioning of 60 percent of adjacent property owners. Owners of commercial properties supported the action, but the residents on the south side (Maryland Avenue) would not, as it would take away from backyards; thus, no action has been taken for lack of support.

4. Maintenance Program. The idea was to establish cooperative agreements with owners to maintain the landscaped frontages on Eastern Avenue. It was envisioned that the CETA program could continue to provide assistance in maintaining the public right-of-way (this federal program has been discontinued). In realty, the landscaping has been much more modest than proposed in the action plan, consisting primarily of the location of planters, and no formal agreement for maintenance has been entered into with property owners. EDCO has a small budget for a part-time maintenance person, and utilizes volunteers (teenager summer work programs, Baltimore Area Retarded Corps, etc.). Coordination of these activities for consistent maintenance has been difficult, however, and trash remains a problem in Essex.

5. Lighting. The Action Plan proposed two types of improved lighting for the CBD: (1) high twin mast luminaries in the Eastern Avenue median; and (2) pedestrian lamps on Eastern Avenue sidewalks, and along adjacent side streets. Since a widened median could not be constructed, the first of these proposals was not implemented. Lamps were installed on Eastern Avenue but not on adjacent streets.

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Commercial Facilities

Commercial revitalization includes physical improvements and marketing improvements, including improvement of tenant mix and business operations and promotion. Public physical improvements were discussed above, and private improvements will be discussed below. This discussion will focus on Action Plan concepts for layout and mix of commercial activities in the core area (the plan did not directly address promotion or business operations). With respect to retailing concepts and mix, it may be that changes in market factors, and in the types of public improvements that have actually been made (as opposed to proposed in the Action Plan), have rendered the original Action Plan concepts obsolete. Discussion in the next section will consider the need to replace those concepts with more realistic objectives. The retailing concepts and proposals of the Action Plan, and changes made in the CBD to date, are summarized in the paragraphs to follow.

1. An Extended Commercial Mall for the 400-500 block Eastern Avenue was to be the heart of a revitalized commercial core in the Essex CBD. It was believed that the two public sector "anchors" -- the Government Services Center and the Heritage Museum -- would help generate pedestrian traffic in the area and would define a street segment within which streetscape improvements and commercial activities would be concentrated. Three key proposals of the Action Plan were:

   - Redevelopment of the major commercial structure on the south side of the 500 block of Eastern Avenue. Among the guidelines recommended for this redevelopment were:

     * Retention of the two-story center portion of the structure was seen as critical for a supermarket;

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    * Other retail functions would be added as needed in the CBD: drug, variety, hardware, family shoes, womens apparel and/or fabric, liquor, laundry/cleaners, etc.

    * Existing merchants of appropriate types would be concentrated here through relocation from their current premises;

    * An arcade would be run through the length of the building to facilitate subdivision for smaller shops (the 120-foot depth of the structure is a problem for shop layout);

    * A pedestrian overpass would be constructed to link the commercial structure to the Government Center.

- Rehabilitation of the shops at 423-425 Eastern Avenue; and

- The creation of an antiques center in the CBD, based on the existence of several well-established enterprises.

The creation of this commercial mall has not taken place, and the recent completion of the Makro/Ames shopping center at a former junk yard on Diamond Point may have permanently altered the market conditions favoring a supermarket-centered retail center in downtown Essex. The scope of the downtown is changed; most of the space on Eastern Avenue is well-occupied (with notable exceptions), but the orientation is away from traditional retail toward offices, services, and convenience/low end retail.

The large commercial structure has not been renovated or re-tenanted. The Eastern Avenue frontage is well-occupied with a mix of shops, offices and services. The former A&P portion remains vacant. Current plans at EDCO favor a small business incubator in the vacant space. The concepts of an arcade through the building and a pedestrian overpass to the Government Center remain intriguing but may be prohibitively expensive.

An antique center concept was attempted but was not successful, as this is not a prime location for such a center. Most of the authentic antiques dealers have moved away; the remaining shops either deal primarily outside the area, or are better characterized as used merchandise and thrift stores. The structure at 423-425 Eastern Avenue remained in poor shape through 1988. It was recently damaged severely by fire. Currently, it is vacant but under renovation.

The public sector anchors are not likely to be able to generate the retail support that was envisioned in the Action Plan. Essex has over half of all the subsidized housing in Baltimore County, and most of the visitors to the multi-service government center are of modest income. Motor Vehicle Registration is the most frequented office after the various County offices, and the third most frequented is the Post Office. It was noted above that the museum is open only on the weekends. Students and trainees at the occupational center do make extensive use of the fast food establishments in the CBD, however. Based on a thorough analysis of retail potentials in Essex, this report will consider whether the retail mall concept is obsolete for the CBD, and whether a revised mixed-use concept is in order.

2. Private Office Space and Business Services. The concept of the Action Plan was to focus office development west of the mid-400 block of Eastern Avenue, and on Eastern Avenue east of Margaret Avenue. This would minimize dilution of the retail concentration planned for commercial mall in the 400 and 500 blocks. Care was to be taken not to displace retail, and to coordinate office development with relocation of shops to the mall area.

There has been much leasing activity for offices and services in the CBD, but not well-coordinated or necessarily in conformance with the Action Plan concept. The higher rents that can be obtained through office leases have encouraged landlords to convert to office use all along the Eastern Avenue frontage. This has had the effect of further breaking up what remains of the former retail concentration in the CBD.

3. Entertainment Facilities. The Action Plan envisioned an intensification of entertainment and related activities to be concentrated in the core area. Proposed were a Twin Cinema, to be housed in the major commercial structure in the 500 block of Eastern Avenue or other appropriate site, and a complement of ethnic restaurants nearby in the CBD. An attempt was made to market the cinema concept, but without success. The CBD does have a number of restaurants that offer Italian and Greek dishes, but these are primarily mom-and-pop family restaurants rather than ethnic specialty restaurants.

Private Rehabilitation

The key to revitalization is to induce private property owners to make improvements to their own properties. Action Plan proposals for revitalized commercial structures in the CBD would require joint public-private actions. Since the public sector would be making substantial investments in public buildings, infrastructure and streetscape, as described above, it was anticipated that those investments could "leverage" corresponding investments by the private sector in commercial facilities. Further, these improvements must include all structures, non-commercial as well as commercial, if the appearance and ambiance of the CBD is to achieve the objectives sought for a revitalized downtown.

No formal structure or agreements for such leveraging were created, however, and the response of the private sector has been somewhat spotty, often not in conformance with the plan. Key proposals of the Action Plan for specific structures were summarized above, noting the current status of those proposals. Broader objectives for private improvements in the CBD are described here, again noting the current status of these proposals.

1. Residential Uses. The Action Plan did not oppose the retention of some residential uses in the CBD, in the form of upper floor apartments or residences of proprietors. Indeed, those residences could add depth and ambience to the commercial area. Consequently, the renovation of those upper floor apartments was included as an objective of the plan.

2. Upgrade Facades. The "face" that the CBD presents to the community is its facade frontage and the streetscape that connects and integrates individual store fronts the length of the business district. Consequently, the improvement of facades along both sides of the 400 and 500 blocks of Eastern Avenue is high priority for a revitalized CBD.

3. Government Support Facilities. To take advantage of, and to provide support services for, the new Government Services Center, the Action Plan proposed the redevelopment of 413-417 and 420 Eastern Avenue as offices.

4. Business Services Building. The Action Plan proposed to set up a new business services center to house service establishments not needed in the high priority retail core -- and pre-empting prime retail space -- in order to free up buildings there. Space could be new construction or rehab, lease or condominium, and would accommodate relocated tenants. Examples include printing, kitchen, decorator, small suppliers, etc.

A considerable amount of facade and other renovations has been accomplished in the Essex CBD, although the business services and government support offices concepts have not been implemented as recommended in the Action Plan. Among the better residential property improvements are those to the structure at 532 Eastern Avenue, which created four new apartments targeted for senior citizens. Most second story apartments on the south side of the 400 block were burned out in the recent fire. The renovations underway at the property will convert the space to offices.

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Both sides of the 400 and 500 blocks of Eastern Avenue have had substantial improvements to facades, and to some interiors -- perhaps two-thirds of the structures have been affected. The problem has been lack of design controls, so that while the appearance of the retail corridor in the CBD has been greatly improved, there is still no sense of the identifiable retail village image envisioned in the Action Plan. An attempt was made to provide an integrated design for 423-425 Eastern Avenue, but the owner chose not to apply for renovation funds under the Baltimore County loan program and ignored the designs in making alterations to the property. The structures at 413-417 and 420 Eastern Avenue remain in poor condition; but as they remain occupied, the owner has seen little need to improve them.

In evaluating the results that have been accomplished in facade and other improvement to private structures, the original goals of the Action Plan should be tempered by emerging trends in the corridor. Failure to get State Highway Administration approval of widened medians, and the inability to implement other traffic controls, mean that traffic remains relatively heavy and travels at excessive speeds through the corridor. This perpetuates the barriers to shopping movements -- both of pedestrians in the CBD and shoppers' vehicles attempting to gain access to parking -- that helped create the decline in retail activity in the CBD in the first place. Consequently, the role of the CBD for retail is still in doubt, and the failure to create an appealing atmosphere of charming small shops through facade improvements is not too surprising.

It should also be noted that marketing practices in the CBD are primitive, at best. Window displays and merchandise layout are poor in most stores, and there has not been a successful attempt to market and promote the CBD, such as through joint advertising, special festive days or late hours, or other organized activity. These are ingredients to successful retailing that must go hand-in-hand with physical improvements to buildings and infrastructure. EDCO could play a key role in promoting

and marketing the revitalized CBD. This will become increasingly important as physical improvements are completed.

Timetable for Implementation and Future Needs

The Action Plan proposed a two-year timetable to complete a first phase of revitalization activity in the Essex CBD, to include streetscapes, the government complex, and a business services center. Future phases would address improvements to the large retail structure on the south side of the 500 block of Eastern Avenue, business development for improved retail tenant mix, and office development. The proposed timetable was as follows:

1. Streetscape Program

   - CETA program: continuing
   - ROW/streetscape improvements, widenings: 1/80 - 6/82
   - Private facade improvements: 1/80 - 1/82

2. Government Center Complex

   - Services Center building: 9/80 - 6/82
   - Parking structure (Revenue Authority): 9/80 - 6/82

3. Private Business Services Building

   - Building (re-) development: 1/81 - 6/82
   - Tenant relocation: 1/82 - 2/82

4. Future Phases

   - Major commercial structure (500 block south side)
     - Building reconstruction
     - Supermarket
     - Entertainment complex
     - Shops

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- Business development to enhance tenant mix
- Private office space to bracket the retail core

As noted above, the parking deck and business services building projects have not been implemented and are not anticipated for future phases. Otherwise, scheduling of projects is running three to five years behind the rather ambitious and unrealistic timetable of the Action Plan. The CETA program is no longer in existence to provide maintenance assistance for the streetfront. Financing has been an issue in terms of County and State shares. Ultimately, both have made substantial financial contributions to streetscape improvements, but the result has been a long delay in completing the improvements. Those improvements completed by 1986-1987, and in place today, are likely to be the extent to be undertaken for the sites treated. One exception is the "pocket park" proposed at the Delia Motors site.

Currently, improvements are planned at a number of private properties: Jender Printing (Concept Two), for example, and several other shops. The burned property at 423-425 Eastern Avenue is undergoing repairs and conversion of upper floors for office, as noted previously. Lease-up of offices in the CBD is proceeding well without a targeted program, although there is encroachment on areas originally planned as retail. New office space has not been developed, however. A notable gap in the revitalization program for the CBD is completion of improvements to the 500 block of Eastern Avenue above Margaret Avenue. This portion of the Phase I target area was not addressed, probably because of budget limitations. In Phase II of EDCO's program, the target area is to be extended to include Eastern Avenue westward to the Back River bridge; this extended area will be addressed in this report. A future phase (Phase III) will extend improvements east to Marlyn Avenue.

To date, there has not been the development of a business plan for marketing and promoting the CBD, nor a business assistance program to help entrepreneurs improve their merchandising techniques and target their markets. The current loan program is limited to loans for facade and interior improvements; other financial incentives are not available, nor any financial assistance for working capital. If, in fact, the retail strategy of the Action Plan is still viable for the CBD, some of these other incentives and assistance programs would be in order.

Summary

This section has described previous planning and revitalization activities for Essex. Sections III and IV, to follow, recommend a direction for the next phase of revitalization activity in the expanded downtown Essex study area. These recommendations will be based on identified market potentials, evaluation of progress in revitalization efforts to date, and current thinking by EDCO and County staff on priorities and proposals for upcoming projects.

Section III. RECOMMENDATIONS FOR ESSEX

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Section III. A REVISED REVITALIZATION CONCEPT

Introduction

The previous two sections have provided a comprehensive review of problems and potentials facing the community and public officials in revitalizing the downtown business core in Essex. This section reaches conclusions concerning the opportunities afforded by those potentials. Based on these conclusions, it suggests a revised revitalization strategy for the downtown that reflects accomplishments to date, changes that have occurred in the marketplace, and new public sector initiatives in Essex. The next and final section, Section IV, identifies activities and improvements that are still needed in the CBD and in the extended revitalization study area. And lastly, it recommends certain broad policies to guide continuing efforts to upgrade and rejuvenate the downtown.

Summary of Findings

The most significant conclusion reached in the research on existing conditions in the Essex CBD is that, while there have been substantial improvements to property, there has not been a corresponding improvement in business conditions. The retail development strategy that initiated revitalization efforts in Essex is in need of revamping. Completion of physical improvements should remain a priority, but the main focus of revitalization should turn more specifically to business development.

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The following points should serve to capsulize the data and analyses of the previous sections and the Technical Appendix. Concerning potentials in Essex:

- The CBD has been shown to be quite weak in shoppers goods and supermarket retail activity, but to be located centrally in a trading area in which demand for shoppers goods is quite underserved. This is especially true for goods such as apparel, furniture, and specialty items.

- Potential for additional food stores in Essex is somewhat less, despite the plea from current shoppers and downtown merchants for a supermarket. The supermarkets in surrounding centers meet a good portion of existing and projected demand. Food product specialties might offer possibilities, however.

- It is in the area of convenience goods -- notably, restaurants -- and personal services that Essex has had some activity. Even so, most local restaurants are mom and pop operations, and the CBD captures only a small portion of demand in the trading area. The fare at most restaurants is modest, as local patrons are price sensitive; however, ethnic specialties have been identified as options.

- The predominant personal service in Essex is beauty and barber shops. While the number is small relative to trading area demand, there is a limit to the CBD's ability to absorb more of them. The demand analysis has identified a sizable potential for local-serving office-type services: banking and finance, insurance, real estate, medical, legal, and so forth.

Problems remain to be addressed in Essex, among them the following:

- There has not been a substantial improvement in the retail mix in Essex since the 1976 plan. The market study and survey of merchants and shoppers indicate a small but loyal local following for the stores and restaurants in the CBD. There is still no sense of purpose among merchants, no will to organize for better promotion and marketing of the CBD.

- The biggest single hindrance to Essex as a revitalized retail center is the volume of traffic on Eastern Avenue. The difficulties identified in all previous plans -- lack of access to parking, difficulties in turning, difficulty in pedestrian crossings -- still remain. Inadequate parking remains the chief complaint of merchants and shoppers.

- The appearance of the CBD is vastly improved, due to the placement of planters, lights, sidewalk improvements, and so forth, as well as improvements to many of the facades in the CBD. Structures remain that need to be addressed, however. The burnt building at 425 Eastern Avenue is temporarily an eyesore but is under repair.

- Two areas are still in need of improvement, however. First, the basic improvements that have been made in the 400 and 500 blocks west of Margaret Avenue need to be extended in the 500 block all the way to Woodward Avenue. As noted, a pocket park has been planned for the vacant Delia Motors site in this vicinity.

- The other area needing basic streetscape and facade improvements is the extended study area to the west -- the 0 to 300 blocks of Eastern Avenue. Cracked sidewalks and curbs need to be replaced, and at least minimal street furniture and planters would be in order. Improving facades here will be a challenge, as a high proportion of all business structures are converted residences, some in poor repair. The structure at 122-140 Eastern Avenue (Mazer Brothers) is a pure retail facility with a wide pedestrian area; it should be targeted as a prime site for facade and concentrated streetscape improvements.

- There is a need for more parking in Essex, but the greatest deficiencies appear to be in parking close to shops, rather than in the overall number of spaces available. Overall deficiencies in spaces for retail activities would be at least 100 percent according to zoning regulations; however, the large amount of vacant space and the low volume of sales at stores suggest that deficiencies in parking for shoppers are much less. A revitalized commercial core, on the other hand, would need more space for shoppers.

- Visitors to the multi-service government center and the career training center keep the nearby non-metered lots full, pre-empting spaces for shoppers. It is likely that the government space generates many more trips than zoning normally attributes to offices (a proposed parking deck at the multi-purpose center was never built). Revenue authority lots at the edges of the CBD are underutilized (the spaces are metered).

- More emphasis and attention should be directed toward the gateways to Essex. The setting for the community logo -- the Essex "cube" -- is a vacant lot adjacent to the nursing home at the western end of community, near the Back River bridge. It is in need of a facelift and warrants much better landscaping as an appropriate setting for the symbol of EDCO and the community. (Funds have been appropriated for such improvements.) Consideration should be given to establishing a similar gateway demarcation to the east of the community.

Strategy Implications

It is the conclusion of this report that the retail revitalization concept that has been the basis for past revitalization efforts needs to be reconsidered and possibly replaced with a more realistic alternative. Four factors lead to this conclusion:

1. The extensively landscaped village retail center concept is not likely to be achieved. Inability to obtain State cooperation in limiting traffic volume and in creating landscaped medians and pedestrian crossings are major reasons, plus simply the significant costs associated with the ambitious village center plan. Other problems include the inability to sufficiently stimulate facade improvements (e.g., through financial incentives) and lack of aesthetic control over those facade improvements that have been made. Improvements that have been made are important but also are uninspiring architecturally and do not create a unified image. The maritime theme suggested in the 1980 plan was somewhat articial and has not taken hold, perhaps because there is no real maritime activity in the vicinity.

2. Diamond Point Plaza may seriously reduce the potentials for additional anchors in the CBD. The Essex CBD finds itself in the position of being sandwiched between two strip centers, each with supermarket and discount department store anchors -- too close to compete successfully with, yet too far away to benefit from their proximity in attracting shoppers. The attempt to create an antiques center was ill-fated; Essex is not an appropriate location for such a center, or perhaps for any upscale specialty shoppers goods.

3. Public facilities have not been successful as "twin anchors" to stimulate business in the CBD. The hope of the revitalization strategy of the 1980 Action Plan was that the government multi-purpose center and the County historical museum would be able to generate additional retail sales through increased visitation to the CBD. This has not happened. In the first place, the restricted hours and modest patronage of the museum are too limited to have much impact. In the second place, visitors to the government center are there primarily for social services; they tend to be of limited means and do not constitute a stable market for retail in the CBD. In fact, their domination of available parking may actually be a detriment to business in the CBD.

4. An Alternative use is planned for the major available retail space in the CBD. The business incubator that has been proposed recently represents a de facto decision to pursue broader economic development objectives in Essex than simply commercial revitalization. This facility would have positive links with the County careers center and would provide important business development assistance opportunities in the community. It would also pre-empt the major available retail space in the CBD, however, further limiting the viability of attempting to attract a major commercial anchor. The challenge will be to take this new initiative and use it to create a new thrust to revitalization in the Essex business district.

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Revitalization Strategy

The revitalization strategy that is proposed here is to build upon the opportunities that will arise due to the incubator without completely abandoning the concept of retail revitalization. Instead, the revitalization concept needs to be reoriented to include shops and services that have natural affinity to incubator activities. In addition, a more conscientious effort should be made to further develop the professional office sector, one of the two sectors in Essex that have shown resilience on their own. The other successful sector is the food service sector; a way should be sought to bring this sector somehow in line with incubator activities. Finally, strategies for physical improvements need to be balanced with strategies for business development. The incubator would make a beginning in this area for industries. Parallel efforts should be extended to commercial enterprises in the CBD.

The discussion to follow maps out the structure of the recommended revised revitalization strategy. This begins first with a description of the incubator concept and proposed plan. The discussion then turns to a statement of the revised revitalization strategy. This is followed by the example of a farmers market, as one possible use with linkages to the incubator; others are also reviewed. In the concluding section, other project opportunities and unfinished improvements in the extended area will be cited, and a general overview statement of policies and implementation issues will be presented.

The Planned Business Incubator

The concept of the business incubator for Essex sprang from two opportunities that arose within the last few years. The first was the desire on the part of the County to undertake job-creating capital investments within the County economic development program. The other was

the presence of the occupational training center in Essex, which was preparing workers for careers but was facing limited opportunities for placing them, as the area's major employers -- such as Bethlehem Steel and Martin Marietta -- were laying off employees.

The purpose of the incubator would be to provide physical facilities, and technical and business development assistance, to small start-up firms. Thus, the incubator would provide employment opportunities (jobs) for newly trained workers under the County program, as well as promoting business development in the Essex area and assisting workers displaced from area industries in starting their own businesses. Space would be leased to qualifying firms at below market rates. The idea is to help provide support for new firms to enable them to move out into market rate space as soon as possible as self-sufficient businesses, thus increasing the success rate of start-up businesses in the area. There would be direct access to business counseling and services. Counseling and services would be made available to firms in the community, as well. An on-site manager would oversee operations.

The incubator is to be targeted toward low tech product-oriented enterprises. These businesses would be producing or servicing a physical product rather than providing a professional service. The incubator would provide jobs that match the skills and occupational profiles of the Essex area and career center graduates. An effort will be made to avoid placing too many other constraints on tenants, in order to provide wider opportunities to the community and to avoid slowing lease-up of incubator space. It has been decided to prohibit automotive repair, although it is a predominant service in Essex, primarily because of its extensive space requirements and nuisance characteristics (e.g., noise). Maritime operations in the vicinity also are predominantly engine repair and servicing and would be excluded on that basis. The incubator space would

not be used for retail activities, although related retail may be included in a high-visibility section of the building (see below).

Incubator Facilities in Essex

If acquisition at a reasonable cost is possible, the long-vacant A&P store at 509 Eastern Avenue would house the incubator. This would achieve a number of desired objectives: close proximity to the career center and other government services; central location in Essex; effective adaptive re-use of the vacant space; and heightened level of activity and attention upon revitalization in Essex. The incubator would occupy the 21,300 square foot ground level section of the large commercial structure that spans the blockface at 501 to 515 Eastern Avenue. The ground floor opens upon the rear parking lot; the Eastern Avenue retail frontage is actually the second floor of the structure. The incubator floor space would include a 9,200 square foot central section that has a two-story ceiling where a mezzanine could be added at a future date, if appropriate. Steps in the implementation of the project are as follows:

- The purchase of the entire structure should be investigated. The hope is to secure financing from MILA, of MICRF; both programs have reasonable terms and interest rates and could be available for incubator development. The incubator portion of the building would accommodate 15 to 20 start-up businesses. The rest of the structure could continue in commercial uses.

- Rents would be pegged at $4.50 to $5.00 per square foot for finished space, including shared services, such as secretaries, office equipment and conference rooms. This is substantially below market rates, even excluding services and tenant build-out. Competitive market rates for shell space are $6.00 per square foot, with finished space going at $7.00 per square foot. Initial pro formas show that the projected rents should cover operating expenses and debt service, although some subsidy may be required in early years until the space is fully leased.

- Current zoning of the property is BR, the most general and broadest of the business zones. Within this zone it is permitted to operate laboratories and perform sheet metal work, although not welding. Thus, there should be no exemption of uses for which the incubator is intended, and the business zone allows for the inclusion of a wide range of other activities and services.

- The activities proposed in this space, as planned, would have a low visibility and would not impact the downtown negatively in their operations. The presence of panel trucks for incubator businesses would be noticeable, but a loading dock and doors on the side are available to minimize the impact. The impact of employee parking would have to be addressed; possibly one of the rear Chertkof lots could be made available. Care will have to be taken that there are not noisy or other nuisance activities that could interfere with upper floor retail.

It should be noted that if the acquisition of the 509 Eastern Avenue property is not possible at a suitable cost, this facility can be established at one of several alternative locations.

Incubator-linked Revitalization Strategy

The presence of the incubator can help generate new activity in the CBD and serve as a catalyst for continued upgrading of the appearance of CBD stores. While it will add employees in the downtown who will contribute to the pool of potential shoppers, however, it will not otherwise stimulate further commercial revitalization unless there is a more direct linkage between the product-oriented incubator and the commercial sector -- as, for example, through the establishment of retail outlets for products made by incubator firms. Some considerations are the following:

- While the existence of supermarkets on each side of the CBD effectively pre-empts the market support for a supermarket anchor in the CBD, other food product and food service specialties offer an excellent possibility to link production with retail sales. The presence of the bakery and baking supplies store in the same block today attests that such firms should be able to find a market in Essex. Food products made on-premises and offered for sale at a discount should be highly competitive.

- Food preparation for consumption on-site, or the development of catering operations, are other examples of possible food service activities. Most plans prepared for the CBD have suggested that a potential might exist for more true ethnic restaurants in Essex. Ideally, food products sales and food preparation should be linked to appropriate career programs at the Essex occupational center to be most effective. At present these are not part of the program at this center, and their addition might duplicate programs at other facilities. However, there seems to be no reason why the incubator could not serve other career centers, as well.

- The concept of an antiques center was presented in the 1976 and 1980 plans, as noted previously. It has been pointed out in the market research, however, that the successful antiques shops in the CBD do not make substantial sales out of the Essex stores but use them as a base for regional operations. Other furniture stores in Essex today tend to be thrift shops for used merchandise.

  Thus, Essex has essentially lost the standing it once had as a furniture center. Still, if corresponding programs exist or are contemplated at the career center, woodworking shops and retail outlets could be a possibility. The recent opening of a La-Z-Boy store on Eastern Avenue west of the CBD attests to demand that should still exist for furniture sales in this area.

- It is likely that many of the firms operating in the incubator will be connected in some fashion with sheet metal work, as this is an occupation or profession of long-standing in the Essex community and would be served by the career center. Ornamental work and metal crafts could be possible ways of linking industrial skills to the development of consumer products to be offered for sale, although prohibition of welding under current zoning might eliminate these as practical considerations.

- It should be emphasized, too, that the concept of joining retail outlets with the incubator and the career center may itself serve as a catalyst for the broadening of the career center program to include more arts and crafts than might otherwise seem appropriate. Further, the presence of the Baltimore County historical museum and the multi-service government center suggest that the incubator could also serve as a demonstration project for exhibiting Baltimore County industrial arts and crafts, as demonstrated by working firms engaged in production.

- One final example to be suggested here is that of a farmers market. Options include inside vendors or, as an alternative, seasonal open-air stalls. Drawbacks to an indoor facility are that there may not be adequate space with the incubator, and many of the market operations may not be amenable to direct linkage to the incubator or career center. A summer evening or weekend open air market would have some advantages, including: less parking conflict and even the possibility of using one of the parking lots; a much needed boost to weekend visitation in Essex; and an outlet for food products made off-season by incubator firms.

  In general, a farmers market, with its image of low-cost/high-value fresh food and specialty food products, should be competitive in Essex despite the presence of the supermarkets. The example of the Baltimore markets (discussed below) indicate that such markets may involve heavy subsidies; perhaps this could be overcome in a smaller outdoor market in Essex.

- Renovation of the structure for the incubator also provides opportunities to make structural changes that could have considerable impact on commerce in the CBD. The inclusion of new retail uses in the structure could reenforce commercial growth elsewhere on Eastern Avenue. Further, pedestrian access through the structure could be provided from the rear parking lot to existing and new shops on Eastern Avenue. Such changes could make the structure the focal point of the Essex Business District. (This idea was suggested in earlier plans for the CBD.)

Farmers Market and Food Service Concepts

The six neighborhood public markets that are operated by the City of Baltimore are described here to provide an example of types of physical and budgetary requirements that might be associated with a farmers market in Essex. These are all enclosed historic markets, dating back to 1765. All six are managed by the Municipal Markets Administration under the Mayor's Office, with funds provided through the City's General Fund. A seventh municipal market, the Lexington Market, is much larger than these six neighborhood markets and is managed separately. It will be noted that food services -- particularly "fast foods" -- make up a significant portion of the tenants in the markets; these will be given special attention below.

Characteristics of Neighborhood Markets

The intended purpose of the markets, in addition to preserving an historic institution for the city, is to provide a market place for basic food staples at reasonable prices for the produce. The markets range in size from 13,500 square feet to 39,000 square feet, with 16 to 29 vendors when surveyed in 1989. The characteristics of the individual markets are given in Table 2. The table shows that of the total of 160,000 square feet of gross space in the six markets, only 70,700 (or 44 percent) is actually in vendor stall space; the remainder is in common area. Stall space varies

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from 35 percent to 60 percent of total space in the individual markets. Average size of stalls for all six markets is 436 square feet per stall. Again, there is quite a bit of variation in average stall sizes for the individual markets: from 373 square feet at the Hollins Market to 522 square feet at the Cross Street Market.

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Table 2. CHARACTERISTICS OF BALTIMORE CITY MARKETS, BALTIMORE, MARYLAND
WINTER, 1988/1989

Market	Total Space (sq. ft.)	Number of Retail Vendors	Total Retail Vendor Space (sq. ft.)	Percent of Total Space	Average Stall Size (sq. ft.)
Belair	29,400	29	13,200	44.9%	455
Broadway	13,500	16	6,070	45.0%	379
Cross Street	27,775	32	16,700	60.1%	522
Hollins	**19,500**	**26**	**9,700**	**49.7%**	**373**
Lafayette	31,000	29	10,700	34.5%	369
Northeast	39,000	30	14,315	36.7%	477
Total	160,175	162	70,685	44.1%	436

Source: Baltimore Municipal Markets Administration and RPR Economic Consultants.

Market Administration and Budget

The Municipal Markets Administration has an operating budget of $1.7 million, plus $170,000 in debt service resulting from a program of market renovations (funded by bond issue). There are six market managers, who share duties in pairs for two markets each. For each market there is a team of custodians (average of three persons) and two maintenance crews (day and night crews). The administration is headed by a director, with two assistant directors, an administrative assistant and an accountant.

Revenues come solely from square footage rents for stalls, with one year being the lease term. Until this year rents were $0.74 per square foot per month ($8.88 per year). In 1989 these were raised to $0.79 per square foot per month ($9.48 per year), plus common area fees (CAF) of $0.06 to $0.09 per square foot per month. These revenues are sufficient to cover only about 44 percent of the operating expenses at the markets, meaning a subsidy from the City General Fund of the remaining 56 percent. Table 3 presents a revenue and expense history for the Administration for the fiscal years 1983 through 1988, with revenues and expenses for the individual markets for 1988. In 1988 the deficits, or operating subsidies, for the individual markets ranged from $81,000 to $239,000; on a net square foot basis (leased stalls), these deficits corresponded to losses of $5.66 to $19.10 per square foot per year.

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Table 3. REVENUE AND EXPENSE TRENDS FOR BALTIMORE CITY MARKETS, TOTAL AND BY INDIVIDUAL MARKETS FOR 1988, CITY OF BALTIMORE, FISCAL YEARS 1983-1988

	Revenues	Expenses	Deficit
Operations By Fiscal Year			
1983	$497,709	$879,368	($381,659)
1984	$491,697	$948,042	($456,345)
1985	$480,208	$1,172,390	($692,182)
1986	$578,559	$1,256,279	($677,720)
1987	$616,057	$1,336,164	($720,107)
1988	$680,989	$1,535,035	($854,046)
FY 1988 By Market			
Belair	$119,971	$359,279	($239,308)
Broadway	72,030	168,195	(96,165)
Cross Street	152,753	304,544	(151,791)
Hollins	80,795	162,216	(81,421)
Lafayette	104,340	308,665	(204,325)
Northeast	151,100	232,136	(81,036)
Total Operations	$680,989	$1,535,035	($854,046)
Debt Service	--	170,000	($170,000)
Total	$680,989	$1,705,035	($1,024,046)

Source: Baltimore Municipal Markets Administration and RPR Economic Consultants.

Food Services and Other Issues

The Municipal Markets Administration fears that the proliferation of fast food establishments will undermine the stated objective of providing space for vendors of staple products. A tabulation of tenants in the six markets indicates that fully 28 percent of the vendors are delis, restaurants and fast food specialties stands (see Table 4). Another 7.4 percent are dry goods merchants; this means that over one-third of the vendors are selling products the Administration wishes to discourage, and

in the future the types of goods sold will be much more tightly controlled in the markets. The remaining -- and desired -- tenants offer a varied mix of food staples, bakery products, and specialty foods.

By comparison, a food market in Essex might intentionally encourage the development of fast food services and other non-food vendors. If these are not linked to incubator tenants or career center trainees, however, it may be desirable encourage such vendors to occupy near-by commercial space at market rates, if this could be accomplished. There remain the questions of how to physically accommodate the market near the incubator, and, even more importantly, how to eliminate the types of deficits evidenced in the Baltimore municipal markets. It is believed that available upper floor space in the building to house the incubator would be appropriate for eateries and other shops. Lower floor space, or new mezzanine space, could be appropriate for produce and meat/seafood/poultry shops with proper fittings.

Table 4. TYPES OF VENDORS IN SIX BALTIMORE MUNICIPAL MARKETS, 1989

Type of Vendor	Number	Percent	Average Number Per Market
Seafood	13	8.0	2.2
Meat	25	15.4	4.2
Poultry/Dairy	9	5.6	1.5
Produce	20	12.4	3.3
Bakery	17	10.5	2.8
Groceries	7	4.3	1.2
Specialty Foods	14	8.6	2.3
Deli/Restaurant	45	27.8	7.5
Dry Goods	12	7.4	2.0
Total	162	100.0%	27.0

Source: RPR Economic Consultants, and Baltimore Municipal Markets Administration.

It would appear that the source of the deficits at the Baltimore City markets derives from the public sector's assumption of a large share of the costs of maintenance and utilities -- perhaps to ensure meeting health and cleanliness standards for food handling -- certainly much more than vendors support through rent. A breakdown of the Administration budget reveals the sources of the $24.00 in operating expenses it incurs per square foot of stall space:

Budgeted Items	Budget	Per S.F.
Personnel	$700,000	$9.90
Gas & Electric	400,000	5.65
Trash Collection	300,000	4.25
Bldg. Maintenance	150,000	2.10
Supplies, Other	150,000	2.10
Total	$1,700,000	$24.00
Rent, CAF	-730,000	-10.30
Subsidy	$ 970,000	$13.70

To eliminate the deficit (subsidy) would require the equivalent of passing through most of the utilities and trash removal, and reducing personnel by 50 percent. The resultant $10.00 rents per square foot per year for stall space translate to roughly $5.00 per square foot in gross space (including common area, at 50 percent), or about the rents now predominating in the CBD.

Summary of the Concept

It should be evident from this discussion that a revised revitalization strategy is being proposed for the Essex CBD. This strategy essentially abandons the highly landscaped retail village concept, to be replaced with a broader multi-service concept. In this concept it is hoped

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that a stronger bridge can be established between the commercial sector and public offices and facilities in Essex, with the planned incubator as the key link among these. To summarize the key points of the strategy:

- The physical improvements program underway in the CBD core needs to be completed and the program extended to adjacent areas. This includes: continuation with facade improvements to private structures throughout the CBD; equal streetscape treatment for the 500 block of Eastern Avenue west of Margaret Avenue, and down side streets (such as Taylor and Margaret Avenue) south of Eastern; improvements and landscaping to parking lots, such as the lot behind 509 Eastern Avenue; extension of the program to Eastern Avenue westward to Back River; improvements to the "cube" and the gateway vicinity; and the implementation of specific public projects, such as the pocket park at the Delia Motors site in the 500 block. Individual sites will be targeted in Section IV.

- Baltimore County and EDCO should proceed with the design and implementation of a joint incubator-retail outlet facility in an appropriate form, to include linked industries, shops, eateries, and/or farmers market, as appropriate. This will entail consideration of the space needs of other shops, and the access needs of the public, in acquiring and improving the incubator structure in the 500 block. The discussion above provided detail on farmers markets.

- The emphasis for assistance to other commercial businesses in the CBD core should gradually shift from physical improvements to business development. For existing firms, this would include marketing, business management, inventory and display, and CBD-wide promotion and coordination. More active participation from local firms is going to be critical if such efforts are to be successful. In the next section, policy recommendations are set forth for different business development activities.

- Responsibility should be designated to an appropriate body for finding tenants for vacant space that can improve the retail mix in the CBD. While it is suggested that the role of retail in the revitalization concept for Essex be scaled back, it is still critical that uses be found for existing vacant or underutilized space if the CBD is to be upgraded. Market potential should exist to support these uses if an environment can be established where they can prosper. Office space should be in demand, but much of the vacant inventory in Essex is not truly competitive. To a greater extent than retail, office development in the CBD will require some new construction or major rehab. Opportunity sites for rehab or new construction are identified in succeeding paragraphs.

- A large stumbling block in implementing the physical improvements program in Essex, and one that will also negatively impact business development activities, is the lack of involvement of area financial institutions in revitalization. Federal policy emphasizes lending by financial institutions within their communities. Banks should also profit by investing in the communities they serve. Ways of encouraging this involvement by local lenders are discussed in the policies section to follow.

Section IV. POLICY RECOMMENDATIONS

Section IV. POLICY RECOMMENDATIONS

Introduction

The following paragraphs provide a synopsis of issues and problems to be addressed in commercial revitalization in Essex. They recommend specific policies, programs and techniques that the County and EDCO should consider for implementation; many of these steps have already been completed in Essex, and progress to date will be noted. Most of these recommendations are aimed towards retailing; while the retail function is de-emphasized in the proposed multi-purpose strategy for the CBD, there is still a pressing need for assistance to small businesses and merchants. The recommendations are grouped under three headings, according to the types of action that are needed for commercial revitalization:

1. improvements to the streetscape and public places
2. support for improvements to private property
3. assistance with business development and promotion

Improvements To The Streetscape and Public Places

Essex is well-along in making streetscape improvements in the CBD core -- the 400 and 500 blocks of Eastern Avenue. Present need is to complete the 500 block and to shift the focus to the 0 to 300 blocks, as noted above. Activities and projects have been successfully targeted to correct some of the major physical deficiencies that limit the competitiveness of the older commercial center. Among the most persistent of those deficiencies are: poor visual appearance, and an accompanying unfavorable image in the eyes of shoppers and the community at large; signs of

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deterioration to structures and public improvements; lack of proper maintenance to both public and private properties; and absence of adequate public facilities for users of the areas, such as accessible parking and informational devices (maps, signage, kiosks, etc.) to direct visitors to destinations and parking lots.

Little can be done to alter the land use pattern and configuration of structures on the land in most of Essex. The functionally inefficient development pattern in terms of arrangement of streets, properties, and structures on the land; this is reflected in the inability of shoppers to move easily between stores, and in the difficulty faced by drivers trying to move through and within the area. Thus, increasing the appeal and functionality of these older structures must be accomplished through beautification, informational devices, upgraded exteriors and interiors of buildings, and better control of traffic in streets and in parking lots.

While Essex is making headway in these areas, there are initiatives that the County could take to assist local revitalization efforts. Support from the County should come from specific actions, roles, tasks, and techniques such as:

- the granting of high priority in the County Capital Improvement Program to critical public projects for revitalization;
- accept responsibility for funding of those projects through existing County sources, including the Community Development Block Grant Program and General Fund appropriations;
- consider as well the financing of public improvements and beautification projects through bonds, most likely to be general obligation bonds, but also possibly tax anticipation, special assessment, or other revenue bonds for unusual major projects with identifiable private sector impacts;

- alternative techniques for recouping public investments, such as: the levying of special assessments for beneficiaries of those public improvements programs in designated districts; and tax increment financing to pay for public improvements;

- establish an easement program to permit County improvements on private property when sufficient public land for key public improvement or beautification projects is not available; sale-lease back might be appropriate when extensive private use of that property is needed. (At present Baltimore County can extend public beautification activity to private property with the permission of the owner.)

Improvements To Private Property

Private businesses and property owners should bear the greater share of the costs of the revitalization of downtown Essex. This is quite proper, as those businesses and owners already have substantial investments sunk in these properties and enterprises; they will have the chief responsibility for bringing about the return of the commercial area to a more competitive position; and they will reap the monetary benefits of that increased competitiveness. While significant strides have been made in improving private property in the Essex CBD -- notably facades and streetscapes -- some areas of concern that remain are:

- Parking lots are almost uniformly bare and uninviting and need landscaping to peripheries. Some are in need of paving and striping. Most large parking lots would be significantly enhanced, and traffic flow improved, by the creation of well-landscaped islands at light and sign pylons and at entrances. County lots no less than private lots in Essex could benefit from such improvements.

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- There are unique problems throughout the area that should be remedied, such as: removal of merchandise display and storage from walks and parking lots; removal of materials, stored automobiles, and dumpsters from highly visible locations; screening and buffering of refuse and other utility areas; and proper care of landscaped areas, unused portions of parcels, and vacant lots. (Many of these problems can be addressed adequately simply by enforcement of existing zoning regulations.)

In many instances the County's low interest loan program has been instrumental in facilitating the making of facade and other structural improvements in the Essex CBD. In other instances, however, this program has not provided enough of an incentive to overcome the considerable reticence among many merchants and property owners to take on debt or to become involved in what are seen as bureaucratic programs. A casualty in this failure to achieve more extensive utilization of the County program has been the inability to institute design standards or controls in facade improvements in the CBD.

At present compliance to design guidelines in Essex (and in other revitalization areas in Baltimore County) is voluntary. It is likely that the array of financial and other incentives may have to be broadened considerably to gain acceptance of mandatory design controls, yet such controls are needed to achieve and to safeguard the public and private investments that have already been made. Tools now used by Baltimore County, and other techniques the County should consider adding to its arsenal of revitalization tools and incentives to leverage private investments and cooperation, are summarized below:

- Financial incentives to induce private investment should be considered by the County to include (in addition to direct low-interest loans): blended-rate loans combining conventional and low-interest loans; buy-down of commercial interest rates; guarantees of commercial loans; reduced processing costs to lenders

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through loan packaging; and reduced risks to lenders through pooling of loans; (Baltimore County currently has a blended rate revolving loan fund for property improvements);

- The most appropriate source of funds for financial incentives is the County's Community Development Block Grant, channeled through a responsible local lead organization for commercial revitalization, although general fund appropriations could be utilized; (Baltimore County uses CDBG funds to capitalize a revolving loan fund to finance direct low-interest loans for revitalization of private property when conventional financing is not available or feasible);

- Whenever possible, the active involvement of local lending institutions should be sought, using techniques such as those listed above to reduce risks and processing costs to those institutions when necessary to secure their services at rates borrowers can afford;

- Financial incentives to induce private investment should be considered by the County to include: direct low interest loans; blended-rate loans combining conventional and low interest loans; buy-down of commercial interest rates; guarantees of commercial loans; reduced processing costs to lenders through loan packaging; and reduced risks to lenders through pooling of loans;

- Tax abatement is a technique of reducing total costs of improvements to businesses and owners, although it does not reduce the direct cost of making or financing those improvements; application should be limited to approved investments in designated areas for a specified period;

- The County should seek out firms in revitalization areas that can qualify for the Small Business Administration 504 Local Development Corporation (LDC) program loans; these loans provide up to 40 percent low interest financing through the LDC, 50 percent at market rate from commercial lenders, and 10 percent equity from the borrower;

- The County should assist owners and merchants in using this and other SBA programs (eligibility requirements may exclude both larger firms and firms that are of marginal stability); the County should also endeavor to provide supplemental loans or other financial assistance to bolster borrower "equity" for SBA loans, where needed and permitted under SBA regulations;

- County purchase of easements can be a form of sale-lease back for making revitalization improvements to private property; for example, the County could purchase an easement to improve the facade of a store, then recoup its costs by leasing the improvements back to the store owner; when the easement expires, the improvements pass to the owner;

- Technical assistance can be a County contribution in the form of services for revitalization improvements to private property; this technical assistance could include planning and design activities, or assistance in obtaining the services of architects, engineers, or contractors; such assistance should be available under a County program;

- Non-financial development incentives can be instrumental in stimulating and guiding providing revitalization improvements in much the same way the proffer technique guides new development; recommended are trade-offs or relaxation of planning or zoning requirements or restrictions on signs, parking, or other controls in order to obtain landscaping or other improvements of desired type or quality. Clearly, however, such trade-offs cannot be allowed to have an adverse impact on existing conditions.

Business Development and Promotion

Business development to improve marketing, merchandising and promotional techniques and practices must accompany a program for physical improvements for the successful revitalization of the Essex CBD. The fact that older areas are not single entities, such as a shopping center under one ownership, greatly complicates the implementation of a business development program, however, since it requires the cooperation of a large

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number of individual owner-merchants and retail tenants at different properties. This places a premium on the leadership of a strong business association with a central role in revitalization, such as EDCO, which is the local lead organization spearheading that effort. EDCO needs to assume this type of leadership in broadening its revitalization involvement from physical improvements to now focus on business development, as well.

Types of problems and deficiencies commonly encountered in older commercial areas toward which a business development program would be aimed include:

- poor image and lack of clear identity, re-enforced by an unattractive appearance, which undermines shopper confidence and expectation of a pleasant and successful shopping experience;
- loss of some of the better merchants in traditional "shoppers goods" retail lines, and an increasing orientation to convenience goods and services with less market attraction;
- increased competition from regional malls which divert sales from the local trading area and induce some of the more competitive local retail establishments to relocate;
- failure of many local entrepreneurs, especially those of the "mom and pop" variety, to keep abreast of changing tastes, preferences and trends in today's retail market;
- changes in buying patterns and habits in the local area as the community demographic structure changes (fewer families with children, more empty nesters, nationalities, singles, young professionals);
- poor synchronization of merchants' business hours, and poor coordination and balance of merchandise and services offered throughout the commercial area;
- display and advertising practices and techniques that are inappropriate and unattractive (merchandise stacked on sidewalks, hand-lettered signs in windows, etc.).

Some merchants in Essex are quite knowledgeable and capable, but their marketing and promotional efforts are not coordinated, and their merchandising and display techniques are often inconsistent and incompatible. The greater need here is both for assistance in targeting markets and selecting merchandise (with some exceptions) and for unifying business activities for maximum effectiveness. Specific actions that can be taken include:

- selection of an area theme or motif and its use in promotion and advertising, and in original window and store displays and interiors, as well as in design of exterior improvements and public facilities;
- area wide promotional activities and coordinated operations, such as uniform business hours, joint advertising, special sale days, and special fetes or festivals;
- development and maintenance of directional and informational devices throughout the area, such as kiosks and mounted layout maps of stores and public destinations in the area, and the posting of current flyers and notices in these and other prominent display locations, such as near parking lots;
- standards for window displays and ads, and other permanent and non-permanent signs and display devices, to provide quality control without undue rigidity;
- expert technical assistance, as needed, for business operations of individual merchants: targeting of markets, selection and pricing of merchandise, advertising and display, purchasing and bookkeeping, etc.;
- market research to identify potentials (see the Technical Appendix to this study).

Long-term responsibility for area wide promotion and assistance to individual merchants for business operations should fall to EDCO and other local business organizations or associations that are actively participating in revitalization. County government should perform certain critical roles and functions in initiating and supporting these business development activities, however. There are three different ways in which the County should assist the business development needed for revitalization in Essex:

- in assisting the community to organize for revitalization, help establish a local business development committee or task force, with central roles for local business organizations and the more experienced and successful merchants, (this stage should be essentially complete in Essex);
- coordinate existing business development resources and technical capabilities of government and other agencies and institutions into a County-directed program for business development in revitalization areas;
- provide financial assistance to local organizations and to businesses for business development activities (e.g., working capital for expanded inventory or upgraded fixtures and equipment) when not available from other sources.

Baltimore County is, in fact, successfully addressing the first two of these three needs through its established commercial revitalization program, and its support and assistance to bodies such as EDCO. An example of the County's financial assistance to these organizations is its new program to help fund local development company advertising and marketing of vacant space, special store discount days, and other promotions. EDCO, for example, will spend $5,000 in County funds for a promotional brochure on Essex and other marketing activities.

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Baltimore County has not yet extended financial assistance to individual firms for these types of activities, however. Direct financial assistance by government to private business, especially for business development and working capital, is a sensitive issue. Technical assistance and guidance should be a condition for financial assistance. Loan programs and aid in securing conventional financing should be the preferred forms of financial assistance. The channeling of aid through local organizations is also desirable. Other difficult issues that may arise could include how to deal with marginal or inappropriate businesses that should not be encouraged to remain in operation, and how to assist businesses that may have to relocate as a result of revitalization improvements or activities.

It is recommended that the County help provide technical and financial assistance for the two types of business development activities that are needed for the revitalization of Essex: promotion and marketing of the commercial center as a whole; and merchandising and marketing assistance for individual merchants and entrepreneurs in the area. Among activities recommended for consideration are:

- the formation of a County business development technical assistance team (as part of a larger team for commercial revitalization) enlisting the assistance, participation and services of government agencies and departments, economic development organizations, and other institutions;
- financial support to local organizations for promotion and marketing, e.g., in the form of loans to be repaid from dues or assessments of area businesses, and/or non-financial support such as staffing and technical assistance;

- the development, utilization, or possibly funding, of educational programs, courses, or seminars on business techniques and practices for firms in revitalization areas; this can be done in cooperation with local chambers of commerce or other organizations, and with colleges or other institutions;

- assistance to businesses in finding sources of working capital, e.g., through Small Business Administration programs for firms that can qualify, and direct assistance (loans) for those firms of promise but without other financial resources;

- a revolving loan fund as the chief vehicle for direct County financial assistance to revitalization area organizations or firms for business development; loans could be at low interest rates to fund the activities described here, or as a contingency source to aid firms in the event of necessary dislocations or other unforeseen events due to revitalization; in short, Baltimore County should consider extending existing loan programs for property improvement to business development activities and working capital, or funding new programs for that purpose;

- business development assistance as mandatory (unless judged unnecessary) for business accepting County financial assistance for working capital or for physical improvements, to protect the public investment.

Program Resources For Essex

The discussion above provides a checklist of possible revitalization tools and agency roles that may need to be beefed up or incorporated in revitalization activities by EDCO and Baltimore County. There are of course, a host of effective program resources available through established agencies, whose missions are highlighted below, beginning with EDCO:

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1. Essex Development Corporation (EDCO)

   Provides site location, referrals to non-profit and government agencies for counseling and design assistance for property improvements. Also helps plan for capital improvements in Essex Revitalization District.

2. Central Maryland Small Business Development Center (SBDC)

   Provides free business counseling for business plans, marketing, financing. Appointments are set up through EDCO office.

3. Baltimore County Chamber of Commerce

   Provides free counseling for small businesses, similar to SBDC.

4. Essex-Middle River Chamber of Commerce

   Provides network of local businesses. Holds seminars regarding taxes, personnel issues, marketing, etc. Seminars are held approximately twice per year. Holds monthly membership meetings.

5. Baltimore County Economic Development Commission

   Provides access to public financing such as Baltimore County Revitalization Area Fund (low interest loans for property improvements in revitalization areas) and Maryland Housing Rehabilitation Program (property improvements).

6. Baltimore County Career Development Center (formerly Eastside Occupational Training Center)

   Provides training for workers in a variety of skills (electronics, drafting, office technology).

Summary of Recommendations

Essex is at a turning point in its CBD revitalization program. It has successfully mounted streetscape and facade improvement programs, and, although there are additional improvements to be completed in the CBD, it

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is appropriate now to extend these programs to an expanded action area. Essex has secured several significant public facilities as major activity centers in the downtown; yet those facilities have been only marginally successful in stimulating the business rejuvenation that was expected of them, perhaps because supporting private sector anchors for the downtown have not been secured. Finally, new initiatives have been seized in the form of the incubator that is planned for the downtown.

Clearly, a revised revitalization strategy in the CBD is called for, one that can build on past successes and recent initiatives This report has laid the foundations for a revised strategy through a number of in-depth surveys and analyses of conditions and potentials (such as the market study presented as a Technical Appendix to the report). The findings of this research indicate that the Village of earlier revitalization planning is not likely to become a reality.

Instead, a multiple purpose function is suggested as the best role for the CBD, since opportunities and potentials can and will exist to support a mix of government, retail, office, service, cultural and educational/occupational activities. In this mix a balance should be sought, with each activity in support of but not dominating the others.

Central to the revised strategy is the opportunity to link the new incubator to commercial revitalization by establishing retail outlets for incubator businesses and career programs, including possibly food products and food services in a market setting. New public investment would come in the preparation of the incubator/market complex recommended for the large retail structure at 509 Eastern Avenue.

At the same time, current improvement programs in the CBD should not be slackened but expanded to include a broader area and to offer business development assistance as well as continued help in undertaking physical improvements. Such business development assistance should include the marketing of the CBD and of vacant space in the CBD, technical assistance to businesses, and financial assistance for working capital in addition to improvements to real property. With assistance from Baltimore County, EDCO is the proper body to rise to the challenge and to spearhead these expanded activities, just as it has lead the way in revitalization activities to date.

There should be no mistaking the thrust of this strategy: in no way should the incubator/market concept, even if highly successful, be expected to be able to draw back to the CBD the wide range of consumer durables stores, dry goods merchandisers, and specialty shops that it once had. Heavy traffic, changing markets, stiff competition, and an obsolete development pattern in the CBD have fairly well laid that possibility to rest. But as one among several action fronts in the CBD the incubator/ market complex should bolster commercial activity in the CBD by effectively improving and utilizing a large empty space, by stimulating and guiding new business development, by creating a market for supporting goods and services, and by providing a new marketplace to attract visitors.

The overall effect of this project would be to help stabilize the CBD, to underwrite the investments that have been made to date, and to add confidence in support of continued expansions of the office and service sectors that are now underway. As cannot be emphasized too much, those other action fronts -- physical improvements and business development -- must be pursued vigorously in the future as key elements in a comprehensive revitalization program. By way of closing, the paragraphs to follow can serve as a summary checklist of the activities that should be on the revitalization agenda in Essex for the next several years.

Streetscape Improvements

Some streetscape improvements in the CBD are not yet fully complete, and there are additions that should be made at key spots or throughout the CBD. Concurrently, the streetscape program should be extended westward to the Back River bridge. Eligibility for the facade improvements program should be extended to this area, as well. Particulars include:

1. Continued and expanded activities in the CBD:
   - o intensification on Eastern Avenue to include more street furniture, directional signs, and informational kiosks
   - o extension of some improvements (e.g., lighting) partially down side streets (e.g., Taylor and Margaret avenues)
   - o complete improvements in the 500 block of Eastern Avenue east of Margaret Avenue
   - o address the unsightliness of parking lots: paving, striping, landscaping, lighting (especially the lot to the rear of 509 Eastern Avenue)
   - o institute stricter design controls under the facade improvements program (may require greater financial incentives; see below)
   - o consider rationalizing and simplifying zoning in Essex, employing different zones only where necessary to clearly achieve revitalization objectives.

2. Initiation of activities in the extended area:
   - o improvement of basic infrastructure that is in poor repair: cracked curbs, gutters, sidewalks, drains, etc.

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- streetscape improvements: less intense than in the CBD but at least planters, benches, and trash receptacles for appropriate priority locations

- implement planned improvements and landscaping to the Essex Cube site at the western gateway; consider better landscaping and maintenance at the park and ride lot opposite

- target particularly the many converted residences for facade improvements; enforce zoning regulations for parking or storing vehicles and other items

Opportunity Sites

Actions at specific sites are recommended to complement the more generalized streetscape improvements program. Recommendations vary considerably in scale and cover both the CBD and the extended revitalization area (see Map F for locations of opportunity sites and other treatment areas):

1. Target sites in the CBD:

   - expand planning (and funding) for the incubator to include a marketplace linked to incubator businesses and career programs

   - carry through on the funded park improvements planned for the Delia Motors site

   - target for facade and other improvements the properties identified in the 400 block of Eastern Avenue as being in especially poor condition

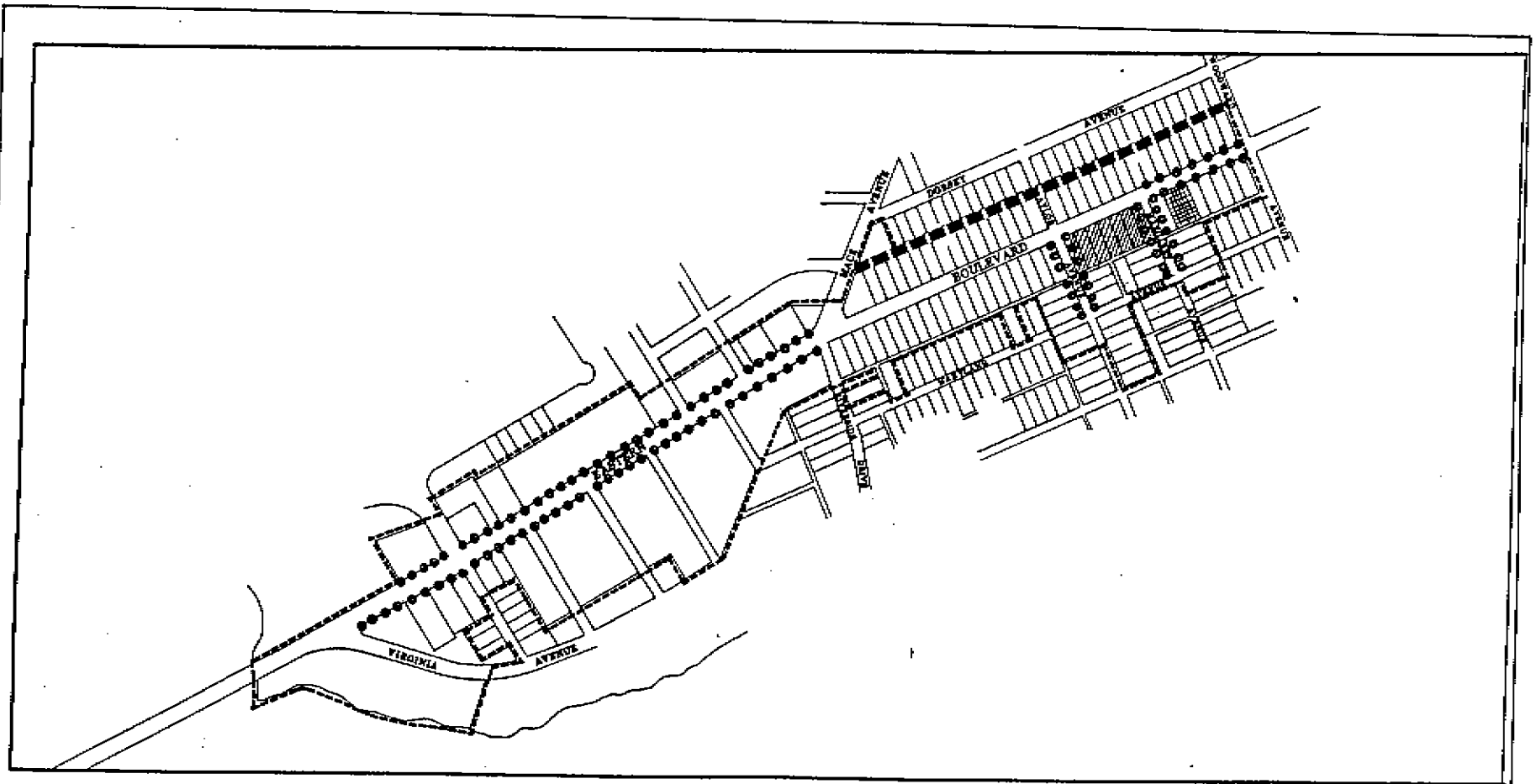
   - secure historic designation for Guttenberger's store, highlight role in Essex, and seek funds for restoration

2. Sites in the extended area:

- Consider for targeting as rehabilitated multi-tenant retail complexes, the Mazer Brothers store group (122-140 Eastern Avenue) and the two-story building at the corner of Riverside (113 Eastern Avenue)

- Work with the Amoco station on design and site usage in its addition of a convenience store (220 Eastern Avenue)

- Target the Fruitland Produce Market as an eyesore that may have potential for a "period" or "maritime" facelift



MAP F. Essex Study Area Proposed Improvements

Effect of Critical Areas Legislation

The entire extended section of the Essex Revitalization District has been classified as an Intensely Developed Critical Area by the Baltimore County Department of Environmental Protection and Resource Management (DEPRM). All new development or redevelopment that occurs in this area must reduce pollutant loading by 10 percent of the on-site level prior to the new development or redevelopment. If the new development or redevelopment cannot produce the 10 percent reduction on-site, off-site improvements that achieve the same results in the watershed are allowed.

The fact that the 0-300 blocks of Eastern Avenue are in an Intensely Development Area means that any new development or redevelopment in the area should be brought to the attention of DEPRM in the early stages of planning in order for the developer to properly plan for the pollutant reductions necessary. In some cases the additional costs needed to achieve the pollution reduction may slow redevelopment activities in the extended area that may have other wise occurred if no critical areas controls were applicable.

Parking and Traffic

There can be no relief to parking and traffic problems in Essex without the aggressive participation of Baltimore County. The County should not cease to intercede with the State Highway Department concerning traffic flow and control policy for Eastern Avenue; results may be a long time in coming but there is no other alternative. The County does have more say in parking matters; it also bears a certain responsibility for accommodating visitors to the multi-services center in a way that will not adversely impact the availability of parking for shoppers.

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Baltimore County should encourage more turnover of on-street parking spaces and encourage better utilization of off-street long-term metered lots. Increasing the pricing of on-street meters to $.20 per hour, while removing the meters at the Revenue Authority lot at 409 Eastern Avenue (the second Revenue Authority lot would remain metered at $.10 per hour), would make the long-term lots more desirable for employees who are currently parking on Eastern Avenue and feeding the meters. EDCO should also work toward educating business owners as to the value of on-street parking spaces. Business owners would then be more likely to force employees to use the long-term metered lots.

The alleys between Eastern Avenue and Dorsey Avenue in the 400-500 blocks should be reconstructed in order to provide access to parking spaces behind businesses along Eastern Avenue. These spaces would be used primarily by employees, many of whom now take up valuable on-street meters.

Business Development

EDCO should take the lead in initiating a business development program for the expanded revitalization area. There should be increased technical and financial assistance from Baltimore County. Activities should include:

1. EDCO activities and roles:

   - Carry out new County program for advertising and lease up of vacant space
   - Design and implement a program for area promotion and marketing
   - Implement a program of technical assistance for merchants and other businesses
   - Pressure local banks and financial institutions to get involved in lending and investing in revitalization areas and projects

2. Roles and responsibilities for Baltimore County:

- o Extend loan and other financial assistance programs to working capital as well as improvements to real property
- o Provide staff and facilities for technical assistance programs managed by local development companies (chambers of commerce and other civic groups should participate, as well)
- o Make a special effort to support code enforcement and compliance with regulations in revitalization areas

Timetable For Action

Table 5 presents a summary listing of recommended actions for Phase II of the revitalization program for Essex. The table identifies the agents that should be responsible for project implementation, and a timetable for project completion.

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Table 5. IMPLEMENTATION SCHEDULE FOR PUBLIC IMPROVEMENTS, ESSEX REVITALIZATION DISTRICT

	Recommended Action	Year	Responsible Agent
1.	Acquisition and Establishment of Business Incubator (500 block Eastern Avenue).	FY'91	Baltimore County EDC
2.	Streetscape Designs for Eastern Boulevard from Margaret to Woodward Avenue (500 block) and on Taylor and Margaret Avenue to Maryland Avenue.	FY'91	Baltimore County EDC/ EDCO/Property Owners
3.	Acquisition and design of Essex Village Green Park at Delia Motors site (523 Eastern Blvd.)	FY'91	Baltimore County EDC/ Baltimore County Recreation and Parks
4.	Reconstruction of alleys in the 400-500 blocks between Eastern and Dorsey.	FY'91,92	Baltimore County Public Works/Property Owners
5.	Streetscape design for 0-300 blocks of Eastern Avenue.	FY'92	Baltimore County EDC/ EDCO/Property Owners
6.	Streetscape construction for Eastern Avenue from Margaret to Woodward Avenue and on Taylor and Margaret Avenue to Maryland Avenue.	FY'92	Baltimore County EDC/ EDCO/Property Owners
7.	Construction of Essex Village Green Park (523 Eastern Blvd.).	FY'92	Baltimore County EDC/ Baltimore County Recreation and Parks
8.	Streetscape construction for 0-300 blocks Eastern Avenue.	FY'93	Baltimore County EDC/ EDCO/Property Owners

Source: RPR Economic Consultants and EDCO.

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