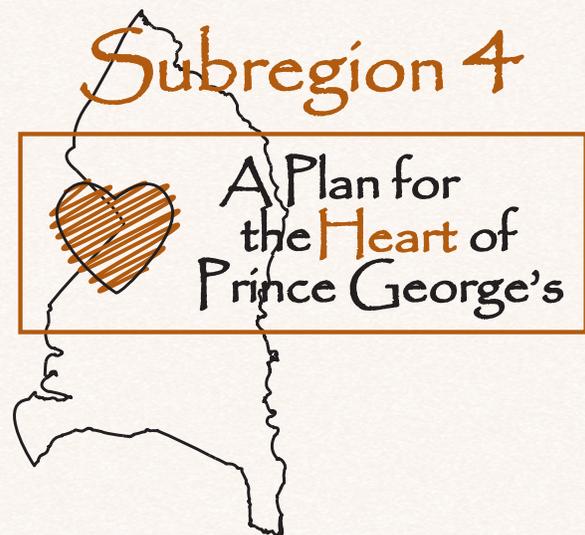
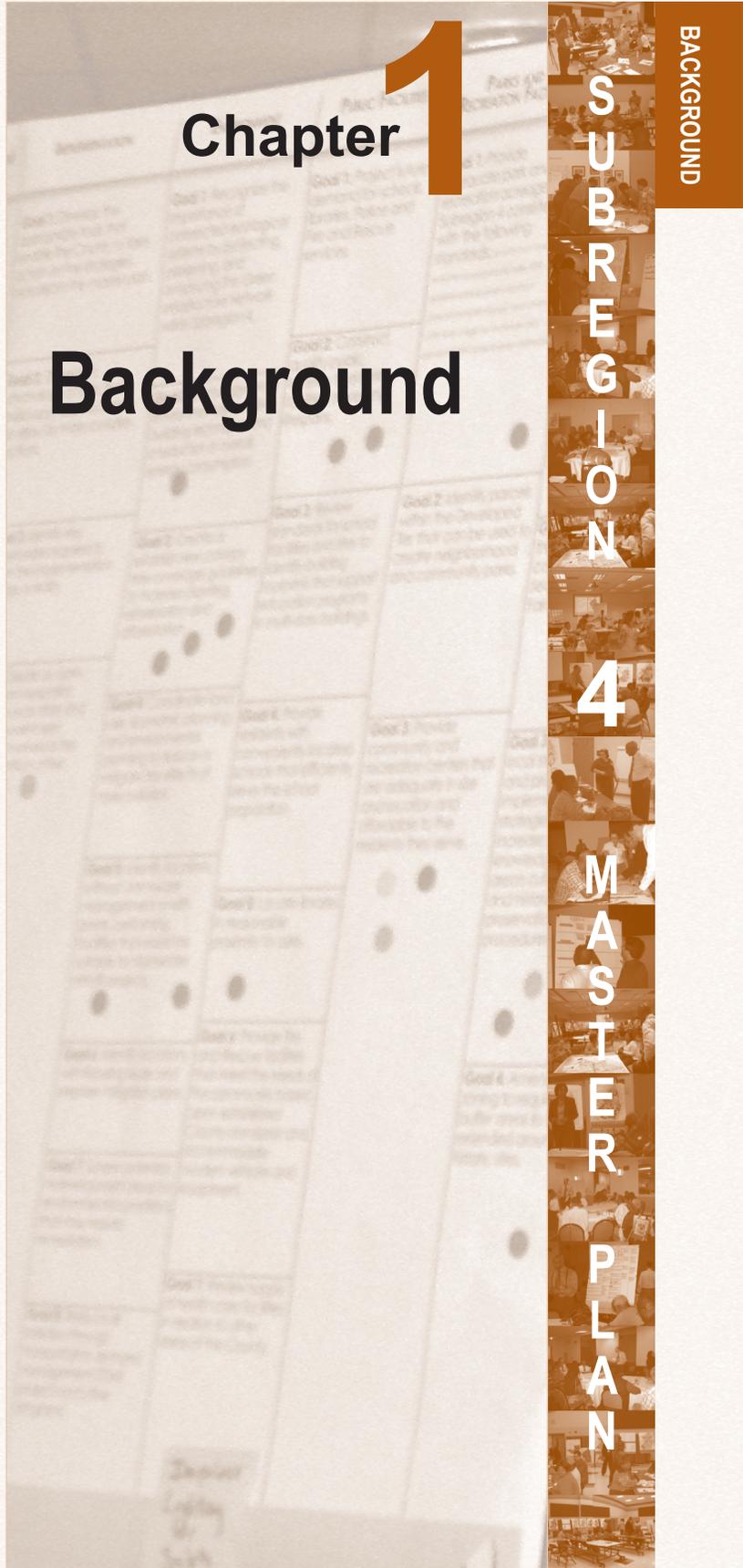


Part I: Introduction





The District Council initiated the Subregion 4 Master Plan and Sectional Map Amendment on September 16, 2008, and it was approved on June 1, 2010. The Subregion 4 Master Plan area includes the communities that are located in central Prince George’s County from the District of Columbia boundary (Southern and Eastern Avenues) on the west, the Capital Beltway on the east, US 50 (John Hanson Highway) and the Metro Orange Line rail corridor on the north, and Suitland Parkway on the south (see Map 1-1 on page 5). This plan replaces the master plans for Planning Areas 72 and 75A and B, which compose Subregion 4.

The Subregion 4 Master Plan, developed in conjunction with the municipalities of Capitol Heights, Cheverly, District Heights, Fairmount Heights, Glenarden, and Seat Pleasant, contains goals, policies, and strategies to guide future growth in the plan area. The accompanying sectional map amendment implements the master plan recommendations by amending the zoning map.

Plan Organization

This plan is organized around five parts with 15 chapters to generally reflect the policies and elements of the 2002 General Plan. Part I, Introduction, provides a description of the existing plan area and the public participation process. Part II, Vision and Recommendations, provides a description of all of the key components, including the proposed land use and development pattern for the subregion, with detailed descriptions of the plans for the living areas, centers, and industrialized areas. The chapters in Part III, Infrastructure Elements, along with Part IV, Community Development and Character, establish the goals, policies, and strategies for achieving the vision. Part V, Implementation, includes strategies to achieve the key objectives identified in the plan along with the sectional map amendment, which identifies recommended zoning changes necessary to implement the proposed land use plan.

Plan Purpose

The purpose of this master plan is to implement the recommendations of the 2002 *Prince George's County Approved General Plan*.

The major goals of this master plan are:

- To enhance the quality and character of the existing communities.
- To encourage quality economic development.
- To preserve and protect environmentally sensitive land.
- To make efficient use of existing and proposed county infrastructure and investment.
- To provide for a safe and accessible multimodal transportation system.
- To provide needed public facilities in locations that efficiently serve the region's population.
- To identify feasible implementation strategies to achieve the key recommendations of the master plan.

This plan provides strategies for revitalization and redevelopment, policies to preserve and enhance the area's assets, and strategies to encourage economic development and improve the quality of life in the area.

This plan is useful for property owners, residents, developers, and the general public as a guide for future development in the area. For planning staff and other government agencies, it provides a guide for evaluating development proposals and setting priorities for service delivery, program funding, and capital improvements. For elected officials, it becomes a reference guide for making land use, development, and funding decisions.

Planning Area Boundary and Regional Setting

The Subregion 4 plan area is largely residential, but also includes seven Metro stations (Cheverly, Landover, New Carrollton, Capitol Heights, Addison Road-Seat Pleasant, Morgan Boulevard, and Suitland), significant industrial/employment areas, several shopping centers, and regional open space, such as Walker Mill Regional Park. (See Map 1.1) Subregion 4 is approximately 29 square miles.

Relationship to the 2002 Prince George's County General Plan

The Subregion 4 Master Plan establishes development policies consistent with the intent and vision of the 2002 General Plan. The General Plan established three growth policy tiers, seven corridors, and 26 centers to guide the future development in the county. Subregion 4 is located in the Developed Tier. The vision for the Developed Tier is a network of sustainable, transit-supporting, mixed-use, pedestrian-oriented, medium- to high-density neighborhoods. The supporting policies for the Developed Tier emphasize quality infill and redevelopment and a streamlined review process. It also should be considered the highest priority for public funding.

The General Plan creates a planning framework that emphasizes mixed-use (residential, office, and commercial) development around the 26 designated growth centers and nodes along seven designated corridors. Subregion 4 contains eight of the General Plan designated centers and two designated corridors.

Most of these General Plan centers are located around the county's existing or planned transit stations to take advantage of the transportation infrastructure. The centers are divided into three categories based on the character and intensity of development that is anticipated at that location.

Metropolitan centers have a high concentration of land uses that attract employers, workers, and customers from other parts of the Washington, D.C., region. The **New Carrollton Metro** area is a metropolitan center.

Regional Centers are locations for regionally marketed commercial, office, some higher education, and sports or recreation facilities that primarily service Prince George's County. **Landover Metro, Landover Gateway, Morgan Boulevard Metro,** and the **Suitland Metro** areas are regional centers.

Community centers are locations for concentrations of activities, services, and land uses that serve the immediate communities that surround that station. **Capitol Heights Metro, Addison Road-Seat Pleasant Metro,** and the **Cheverly Metro** areas are community centers.

Central Avenue and Pennsylvania Avenue are two of the seven corridors designated in the General Plan where nodes of more intensive development and redevelopment should be encouraged. In the Developed Tier, these corridors should contain a higher intensity of residential and nonresidential land uses and a greater mix of uses that are regional in scope. Corridor development should occur at designated nodes and be transit oriented.

Relationship to Other Plans, Studies, and Legislation

In addition to implementing the 2002 *Prince George's County Approved General Plan*, the Subregion 4 Master Plan replaces the following plans:

- 1985 *Approved Master Plan for Suitland-District Heights and Vicinity, Planning Areas 75A and 75B*
- 1993 *Approved Master Plan and Sectional Map Amendment for Landover and Vicinity (Planning Area 72)*

Updates are:

- 2000 *Approved Sector Plan and Sectional Map Amendment for the Addison Road Metro Town Center and Vicinity*
- 2004 *Approved Sector Plan and Sectional Map Amendment for the Morgan Boulevard and Largo Town Center Metro Areas*

It also builds upon the 2006 *Central Avenue Corridor Development Strategy Planning Study*, the 2007 *Greater Central Avenue Public Facilities Implementation Plan*, 2009 *Approved Landover Gateway Area Sector Plan and Sectional Map Amendment*, 2010 *Approved New Carrollton Transit District Development Plan (TDDP) and Transit District Overlay Zoning (TDOZ) Map Amendment*, the 2005 *Approved Sector Plan and Sectional Map Amendment for the Tuxedo Road/Arbor Street/Cheverly Metro Area*, 2006 *Approved Suitland Mixed-Use Town Center Development Plan*, 2007 *Capitol Heights Approved TDDP and TDOZ Map Amendment*, and the 2009 *Approved Marlboro Pike Sector Plan and Sectional Map Amendment*.

2009 Smart, Green, and Growing Act

This act, which went into effect on October 1, 2009, replaced the state's eight existing planning visions set forth in the 1992 Maryland Growth, Resource Protection, and Planning Act and the 1997 Smart Growth and Neighborhood Conservation Act with 12 new visions in order to guide growth and development in Maryland. Local jurisdictions are required to include these visions in their comprehensive plan and implement them through the adoption of applicable zoning and subdivision ordinances and regulations. The Maryland growth, resource protection, and planning policy is the following:

1. **Quality of Life and Sustainability:** a high quality of life is achieved through universal stewardship of the land, water, and air resulting in sustainable communities and protection of the environment.
2. **Public Participation:** citizens are active partners in the planning and implementation of community initiatives and are sensitive to their responsibilities in achieving community goals.

3. **Growth Areas:** growth is concentrated in existing population and business centers, growth areas adjacent to these centers, or strategically selected new centers.
4. **Community Design:** compact, mixed-use, walkable design consistent with existing community character and located near available or planned transit options is encouraged to ensure efficient use of land and transportation resources and preservation and enhancement of natural systems, open spaces, recreational areas, and historical, cultural, and archeological resources.
5. **Infrastructure:** growth areas have the water resources and infrastructure to accommodate population and business expansion in an orderly, efficient, and environmentally sustainable manner.
6. **Transportation:** a well-maintained, multimodal transportation system facilitates the safe, convenient, affordable, and efficient movement of people, goods, and services within and between population and business centers.
7. **Housing:** a range of housing densities, types, and sizes provides residential options for citizens of all ages and incomes.
8. **Economic Development:** economic development and natural resource-based businesses that promote employment opportunities for all income levels within the capacity of the state's natural resources, public services, and public facilities are encouraged.
9. **Environmental Protection:** land and water resources, including the Chesapeake and coastal bays, are carefully managed to restore and maintain healthy air and water, natural systems, and living resources.
10. **Resource Conservation:** waterways, forests, agricultural areas, open space, natural systems, and scenic areas are conserved.
11. **Stewardship:** government, business entities, and residents are responsible for the creation of sustainable communities by collaborating to balance efficient growth with resource protection.

12. **Implementation:** strategies, policies, programs, and funding for growth and development, resource conservation, infrastructure, and transportation are integrated across the local, regional, state, and interstate levels to achieve these visions.

The Maryland Department of Planning (MDP) is required to prepare and publish a report on the statewide impacts of Adequate Public Facilities Ordinances (APFO) on or before January 1st every two years; in order for the state to accomplish this, the bill requires local jurisdictions to submit a report to MDP every two years if an APFO results in a restriction in a priority funding area (PFA).

The bill authorizes local jurisdictions to establish both transfer of development rights and land acquisition programs within PFAs. Proceeds from the sale of these development rights must be used for land acquisition and public facility construction in the PFA. A public facility includes recreational facilities, transportation facilities, transit-oriented development, and schools and educational facilities.

2006 Central Avenue Transit-Oriented Development Corridor Development Strategy

The study focuses on four major goals:

- Advancing circulation and safety—especially for pedestrians and bicyclists.
- Utilizing land use planning to maintain the integrity of the existing residential neighborhoods, and commercial and industrial areas.
- Maintaining and improving the quality of the environmentally sensitive areas along the corridor.
- Improving the image and identity of the area by enhancing the cultural and natural elements along the corridor.

The Subregion 4 Master Plan builds upon the recommendations and strategies that were presented in this study. Those recommendations were considered within the larger context of the subregion and some modifications were made to address the market conditions forecasted for the area. However, the overall vision and the vast majority

of recommendations that arose from the Central Avenue corridor are included in the Subregion 4 Master Plan.

2009 Approved Landover Gateway Sector Plan and Sectional Map Amendment

This plan focuses generally on the former Landover Mall site and the commercial and residential properties located within approximately a half-mile radius of the former mall site.

The plan envisions a transformation of the Landover Gateway area into a vibrant 24-hour activity center with a dense urban form and a mix of uses. The core area is anchored by a complex of signature office towers offering a range of civic uses, from governmental to cultural facilities, adjacent to the Capital Beltway and including a mixed-use main street.

The 2002 General Plan designates the Landover Gateway Sector Plan area as a community center. The land use mix and development intensity recommended for community centers in the General Plan are incompatible with the new downtown area envisioned in the sector plan. Therefore, the sector plan recommends redesignating the Landover Gateway area as a regional center. A regional center designation allows for a higher concentration of land uses and economic activities, including a higher density and intensity of development.

Portions of the Landover Gateway Sector Plan area west of the Capital Beltway are included in the Subregion 4 Master Plan boundaries. All of the recommendations from the Landover Gateway plan have been accepted as a foundation for this Subregion 4 plan. The goal is to build upon those recommendations, provide for future connections, and develop complementary land use plans to those provided in the Landover Gateway plan. (In the event that there are any contradictions in the two documents, the 2009 *Approved Landover Gateway Sector Plan and Sectional Map Amendment* will supersede any information provided in the Subregion 4 Master Plan. The Subregion 4 SMA amends the previous zoning recommendations.) For further details see the Landover Gateway Plan.

2010 Approved New Carrollton Transit District Development Plan and Transit District Overlay Zoning Map Amendment

The New Carrollton TDDP sets out a development vision for the New Carrollton Transit District that articulates vibrant and diverse neighborhoods, a multimodal transportation system, sustainable and accessible environmental infrastructure, and pedestrian-oriented urban design. This vision emphasizes:

- Transit-oriented development (TOD) near Metro stations and clearly defined neighborhoods with distinct characters and functions.
- Pedestrian-oriented (re)development in the transit district.
- Protected environmentally sensitive areas, minimal impacts of development, and expanded recreational opportunities and trail/bikeway connections.
- Maximum housing opportunities within walking distance of Metro stations.

Portions of the New Carrollton TDDP area are included in the Subregion 4 Master Plan boundaries. All of the recommendations from the New Carrollton TDDP and TDOZ have been accepted as a foundation for this Subregion 4 plan. The goal is to build upon those recommendations, provide for future connections, and develop complementary land use plans to those provided in the New Carrollton TDDP and TDOZ. (In the event that there are any contradictions in the two documents, the 2010 *Approved New Carrollton Transit District Development Plan and Transit District Overlay Zoning Map Amendment* will supersede any information provided in the Subregion 4 Master Plan. The Subregion 4 SMA amends the previous zoning recommendations.) For details see the New Carrollton TDDP.

2009 Approved Marlboro Pike Corridor Sector Plan and Sectional Map Amendment

The vision for the area is to revitalize and preserve the Marlboro Pike corridor and surrounding

communities. The goal of the plan is to address the area's deteriorating condition by developing policies that will guide future investment, revitalization efforts, and development along the corridor. The plan recommends enhancing existing major commercial nodes, supporting transition areas for secondary redevelopment opportunities, and promoting conservation areas to protect established communities. The SMA recommends zoning changes to implement the plan's vision and land use concepts.

The Subregion 4 plan encompasses Marlboro Pike within its boundaries. The adoption of the Subregion 4 Master Plan does not alter the legal status of the Marlboro Pike Sector Plan as the guiding policy for the area. The plans will mirror each other and, in certain locations, the Subregion 4 plan will expand upon land use concepts recommended in the Marlboro Pike Sector Plan. All of the recommendations from the Marlboro Pike Sector Plan have been accepted as a foundation for this Subregion 4 Master Plan. The goal is to build upon those recommendations, provide for future connections, and develop complementary land use plans to those provided in the Marlboro Pike Sector Plan. (In the event that there are any contradictions in the two documents, the 2009 *Approved Marlboro Pike Corridor Sector Plan and Sectional Map Amendment* will supersede any information provided in this document.) For details see the Marlboro Pike Corridor Sector Plan.

2008 Approved Capitol Heights Transit District Development Plan and Transit District Overlay Zoning Map Amendment

The goal of the Capitol Heights TDDP is to provide for TOD within the Capitol Heights TDOZ. The Capitol Heights TDOZ is intended to ensure that the development of land in the vicinity of the Capitol Heights Metro Station maximizes transit ridership, serves the economic and social goals of the area, and takes advantage of the unique development opportunities that multimodal public transportation provides.

The Subregion 4 Master Plan encompasses Capitol Heights within its boundaries. The adoption of the Subregion 4 plan does not alter the legal status of

the Capitol Heights TDDP and TDOZ as the guiding policy for the area. All of the recommendations from the Capitol Heights TDDP and TDOZ plan have been accepted as a foundation for this Subregion 4 plan. The goal is to build upon those recommendations, provide for future connections, and develop complementary land use plans to those provided in the Capitol Heights TDDP. (In the event that there are any contradictions in the two documents, the 2008 *Approved Capitol Heights Transit District Development Plan and Transit District Overlay Zoning Map Amendment* will supersede any information provided in the Subregion 4 Master Plan. The Subregion 4 SMA amends the previous zoning recommendations.) For details see the Capitol Heights TDDP/TDOZ.

2006 Approved Suitland Mixed-Use Town Center Zone Development Plan

The goal has been to create a new mixed-use town center (M-U-TC) for Suitland. The vision for this regional center is mixed residential and non-residential development at moderate to high densities and intensities, with a strong emphasis on TOD. The Suitland M-U-TC Development Plan is intended to capitalize on the new development and redevelopment that is occurring at the Suitland Federal Center and at various older apartment complexes abutting the business district.

The M-U-TC Zone, as established by the county, is intended to encourage flexibility in land uses within a defined area in order to create active, economically viable settings in which to live and work. To ensure that each M-U-TC Zone is responsive to its specific context, a set of local design standards and guidelines are established as part of the M-U-TC zoning process. Through the establishment of a clear set of expectations and a simplified development process, it is anticipated that an M-U-TC Zone will be able to attract new development more readily than it might without such designation. Finally, each M-U-TC encourages ongoing community involvement with the establishment of a local advisory group to review development proposals for the area.

The Subregion 4 Master Plan encompasses Suitland M-U-TC within its boundaries. The adoption of the Subregion 4 plan does not alter the legal status of the Suitland M-U-TC as the guiding policy for the area. All of the recommendations from the Suitland M-U-TC plan have been accepted as a foundation for the Subregion 4 plan. The goal is to build upon those recommendations, provide for future connections, and develop complementary land use plans to those provided in the Suitland M-U-TC plan. (In the event that there are any contradictions in the two documents, the 2006 *Approved Suitland Mixed-Use Town Center Development Plan* will supersede any information provided in the Subregion 4 Master Plan. The Subregion 4 SMA amends the previous zoning recommendations.) For details see the Suitland M-U-TC plan.

2005 Approved Tuxedo Road/Arbor Street/Cheverly Metro Area Sector Plan and Sectional Map Amendment

The vision for the Tuxedo Road Arbor Street/Cheverly Metro area is to create a neighborhood shopping street to serve residents' and employees' needs and to provide pedestrian connections to the Cheverly Metro Station. The plan envisions compact and mixed-use TOD, including an attractive and efficient industrial community at Tuxedo Road and Kenilworth Avenue.

The Subregion 4 Master Plan incorporates the southern portion of the sector plan area, including the Cheverly Metro Station. The adoption of the Subregion 4 plan does not alter the legal status of the Tuxedo Road/Arbor Street /Cheverly Metro Area Sector Plan as the guiding policy for the area. All of the recommendations from the Tuxedo Road/Arbor Street /Cheverly Metro Area Sector Plan have been accepted as a foundation for this Subregion 4 plan. The goal is to build upon those recommendations, provide for future connections, and develop complementary land use plans to those provided in the Tuxedo Road/Arbor Street/Cheverly Metro Area Sector Plan. (In the event that there are any contradictions in the two documents, the 2005 *Approved Sector Plan and Sectional Map Amendment for the Tuxedo Road/Arbor*

Street/Cheverly Metro Area will supersede any information provided in the Subregion 4 Master Plan. The Subregion 4 SMA amends the previous zoning recommendations.) For details see the Tuxedo Road/Arbor Street/Cheverly Metro Area Sector Plan.

Public Participation Process

One of the most critical components of a successful and sustainable plan is an open and inclusive public participation process that provides for broad and active community engagement. Effective community engagement is the process of involving the public in plan making starting from its early stages, including identifying issues and assets, setting goals through visioning, and formulating the final plan. Through the involvement of community residents, business owners, and government officials, there is a conscious effort to incorporate the ideas and aspirations of all segments of the community into a shared vision for the future.

The plan was developed in partnership with the six municipalities, numerous community organizations, and a broad-based representation of residents, landowners, business owners, members of the development community, and representatives from federal, state, and county agencies. As a result, this plan contains an assessment of existing conditions in the master plan area, including retail and residential markets, along with community and household demographics.

The Subregion 4 Master Plan effort established an inclusive public engagement process. Through this process, every voice in the Subregion 4 community was given the opportunity to be heard. Community meetings were held in three different zones of the subregion to ensure that everyone had a chance to participate and to discuss in more detail the area in which they lived and were most familiar. The three zones were identified at the beginning of the process and serve a purely organizational role.

Communication Tools

The planning team used various communication tools to effectively inform, educate, and encourage public participation.

A project web site was established early in the planning process and to provide community meeting and event information, project team contact information, presentation materials, as well as summaries of the public comments from different meetings and planning efforts.

An extensive mailing list was also employed. The mailing list is an important notification tool for public meetings and project activities. It includes county elected officials, registered homeowner associations, participants in previous planning efforts in Subregion 4, and citizens. Groups, organizations, officials, and residents were encouraged to notify other stakeholders about Subregion 4 Master Plan activities. The planning team made every effort to provide sufficient notice of meetings and events through the project web site, by delivering flyers to key locations in the community, and by notifications sent via mail.

Notices announcing each meeting were mailed to households within the project area. Addresses were attained from the county tax assessor's mailing list as well as the roll of registered voters within the area. Over 20,000 mailings were sent to residents within the project area through the course of the planning process to announce master plan meetings and workshops.

Involving the public is vital to fulfilling the project's mission. This component includes researching community needs, taking the message to the public, and getting citizens to the community meetings. The project team worked closely with individuals and local groups at community meetings, interviews, workshops, and presentations.

Community Meetings Approach

A series of community meetings were facilitated to solicit public comments. This public engagement process consisted of over 20 key community meetings in the Subregion 4 Master Plan area between August 2008 and February 2009. Some of the meetings were focused on the living and



PowerPoint presentation during community meeting in Zone 1



Break-out group discussion during community meeting in Zone 2



Group discussion during community meeting in Zone 3

industrial areas and some on the specific challenges and opportunities regarding the eight centers that were identified in the 2002 *Prince George's County Approved General Plan*.

In addition, staff attended more than 20 other meetings and events in the community to share information with the municipalities, civic associations, and community organizations during the planning process.

Summary Documents

A written report for each public meeting was prepared and made available for public review. These reports included a summary of the background material reviewed and distributed during the meeting and the residents' feedback.

Public Input Process and Findings

Small Group Introductory Meetings and Interviews

Seven introductory small group meetings took place throughout the entire Subregion 4 area during the week of August 11, 2008. In addition, individual stakeholder interviews took place at the end of August and at the beginning of September. During the meetings, information was gathered from stakeholders about the area. Key issues and opportunities that needed to be addressed in this effort emerged. The initial input that was gathered helped form the public engagement methods and was used to frame subsequent meetings.

Market Assessment Interviews

The Planning Department, in coordination with the Prince George's County Economic Development Corporation, conducted several interviews with real estate professionals to better understand the market climate and opportunities within Subregion 4. These interviews offered the respondents an opportunity to provide their perspectives on the subregion and its role within Prince George's County and the greater Washington, D.C., metropolitan area.

Opportunities

The consensus among the respondents indicated there are very few market opportunities within Subregion 4 in the short term. It was noted that

the national economic downturn and financial problems, combined with local over-speculation in the real estate market, has adversely impacted all of the metropolitan area. However, it was noted that the comparatively weaker markets in Subregion 4 have led to a more pronounced impact for local residents and businesses. The only market believed to have short-term viability within Subregion 4 is industrial and warehouse/flex development. The exodus of businesses from Washington, D.C., and the location's competitive advantages make the subregion a desirable place for businesses to locate.

Longer-term prospects are more positive. The locational advantages for industrial users apply to residential users as well. Given the potential to develop around the subregion's seven Metro stations, most respondents believe that market pressure will eventually push into Subregion 4. The initiation of developments, such as Woodmore Town Center, Ritchie Station Marketplace, and Westphalia Town Center, also were noted as positives for Subregion 4.

Community Representative Discussions

One of the important elements that has defined the community engagement effort in Subregion 4 has been meetings and discussions with active neighborhood and civic organizations, as well as discussions with representatives of the municipalities that compose much of Subregion 4. In particular, planning team representatives met with Prince George's County government officials to discuss how county government interfaced with cities, such as Glenarden, Seat Pleasant, Capitol Heights, Fairmount Heights, and District Heights.

First Community Input Meeting

In the second week of September 2008, three community meetings took place in the respective zones of Subregion 4. During these meetings, a short PowerPoint presentation provided the participants with background information regarding findings from the preplanning efforts, professional research, and analysis outcomes to that date. The planners facilitated two exercises with the attendees to obtain input at this early stage of the project.

A summary of the opportunities, assets and strengths, shortfalls and weaknesses, issues and

threats, and sustainability factors was compiled for each zone and per each topic and was shared with the community in subsequent meetings and through the project website.

Second Community Input Meeting

The second round of community meetings occurred the evenings of October 13, 14, and 15, 2008. Having taken into consideration public comments regarding challenges and opportunities as they emerged in the previous community meetings, and as they were identified from the professional planning research to that date, a list of goals was created. The emerging goals were categorized under the appropriate topic for each zone. During the break-out group sessions, the attendees were asked to review the listed goals and to identify additional ones. Subsequently, with the use of colored dots, the participants were asked to prioritize which goals they thought were most important in each category. A prioritized list of goals for each zone is listed on the following pages.



Discussion on housing revitalization and economic development at the third community meeting.



Group discussion on plan elements at the third community meeting.

Third Community Input Meeting

The purpose of the third community meeting was to present how the opportunities, issues, and goals for each of the zones interrelate and have led to the creation of initial action items/strategies in the form of policies, programs, or projects. The emerging action items were presented briefly to stakeholders for consideration and then the groups were divided into their geographical zones to discuss the policies, programs, and projects. Some groups participated in a supplemental plan mapping exercise that entailed rotating through three group stations: (1) economic and land use, (2) housing/neighborhoods and transportation, and (3) environment/public facilities/historic preservation, etc.

Final Community Input Meeting

In mid-February 2009, through an open house format, the final plan recommendations were presented to the community. In that final meeting, the plans for the General Plan centers and the living and industrialized area plans and recommendations were merged into an overall plan. During a four-hour open house event, the attendees had the opportunity to interact with the planners and participate in one-on-one discussions about specific recommendations as they related to the area in which they live.

Community Goals

For planning purposes, the subregion was subdivided into six living areas. These living areas were then organized into three zones to facilitate public outreach (see Map 1-2 on page 14). The following introduces the priority goals of each of the three zones:

Zone 1

Land Use and Development Pattern

- Attract higher-quality, desirable uses to the area that meet a current community need or provide a new opportunity for the area.
- Determine the best mix of land uses, densities, and development/design features needed to create a unique sense of place for the established communities of Zone 1 and Subregion 4.





Introductory presentation during community meeting in Zone 1.

Urban Design

- Design and implement public and private spaces that deter crime through the use of defensible space principles.

Transportation

- Improve pedestrian and vehicular safety.
- Create a comprehensive pedestrian circulation system connecting living areas, commercial corridors, recreational facilities, and Metro stations.
- Improve walkability and pedestrian facilities, including sidewalks, crosswalks, pedestrian lighting, and special pavement.

Housing

- Increase the number of single-family detached homes for first-time home buyers.
- Encourage the development of two new senior housing developments to accommodate active and assisted senior citizens.

Revitalization

- Establish program(s) and funding support that assist existing homeowners as a strategy tool for neighborhood revitalization.
- Develop a comprehensive revitalization strategy that uses code enforcement as a revitalization tool.

Economic Development

- Provide a strong investment climate to stimulate opportunities to attract good-paying, stable jobs.
- Improve the perceptions and realities of public safety.

Implementation

- Create an open line of communication between local, state, and federal government agencies involved in the implementation of the master plan.

Environment

- Coordinate land use, economic planning, and environmental planning to reduce or mitigate the effects of noise pollution.
- Identify locations without stormwater management or with poorly performing facilities that would be suitable for stormwater retrofit projects.
- Reduce air pollution through transportation demand management projects and other programs.

Public Facilities

- Project future demand for schools, libraries, police, and fire and rescue services.
- Review supply of health care facilities in relation to other areas of the county.

Parks And Recreation Facilities

- Provide community and recreation centers that are adequate in size and location and affordable to the residents they serve.



Break-out group discussion during community meeting in Zone 2.

Historic Preservation

- Ensure that historic sites and resources—a part of the subregion’s rich cultural heritage—are properly documented and protected from the onset of new development through proper and consistent historic preservation practices.

Zone 2

Land Use and Development Pattern

- Establish higher design standards for commercial development and a wider variety and higher quality of businesses throughout the area.
- Determine the best mix of land uses, densities, and development/design features needed to create a unique sense of place for the established communities of Zone 2 and Subregion 4.

Urban Design

- Design and implement public and private spaces that deter crime through the use of defensible space principles.
- Establish a continuous network of both natural and manmade open spaces that create a unique environmental framework/setting for future development and redevelopment activities.

Transportation

- Improve walkability and pedestrian facilities, including sidewalks, crosswalks, pedestrian lighting, and special pavement.
- Improve pedestrian and vehicular safety.
- Provide adequate funding for the maintenance of existing transportation system.

Housing

- Stabilize the existing housing inventory in tipping-point neighborhoods.
- Establish an elderly housing program that assists lower-income senior homeowners.

Revitalization

- Establish program(s) and funding support that assist existing homeowners as a strategy tool for neighborhood revitalization.
- Develop a pilot comprehensive and uniform code enforcement program between the county

and the municipalities (Fairmount Heights, Seat Pleasant, and Capitol Heights) in Zone 2.

Economic Development

- Encourage the development of mixed-use commercial centers in appropriate locations.
- Provide a strong investment climate to stimulate opportunities to attract good-paying, stable jobs.
- Improve the perceptions and realities of public safety.

Implementation

- Create an open line of communication between local, state, and federal government agencies involved in the implementation of the master plan.
- Identify key stakeholders required to make the implementation strategy a reality.

Environment

- Create new canopy tree coverage guidelines to increase planting, reforestation, and afforestation.
- Recognize the importance of connected ecological systems by protecting, preserving, and enhancing the green infrastructure network within Subregion 4.
- Encourage more environmentally sensitive building techniques and a reduction in overall energy consumption.



Urban design and land use goals prioritization in Zone 3.

- Identify locations with flooding issues and prepare mitigation plans.

Public Facilities

- Provide community and recreation centers that are adequate in size and location and affordable to the residents they serve.

Historic Preservation

- Explore the designation of the following communities as historic districts: Old Seat Pleasant and Fairmount Heights.

Zone 3

Land Use and Development Pattern

- Establish higher design standards for commercial development and a wider variety and higher quality of businesses throughout the area.
- Limit/control unwanted or incompatible uses in Zone 3.

Urban Design

- Design and implement public and private spaces that deter crime through the use of defensible space principles.
- Provide the infrastructure needed to enhance walkability, neighborhood linkages, and pedestrian access throughout Zone 3 and the subregion.

Transportation

- Improve pedestrian and vehicular safety.
- Improve walkability and pedestrian facilities, including sidewalks, crosswalks, pedestrian lighting, and special pavement.
- Improve environmental quality by creating a comprehensive pedestrian circulation system, as well as a multimodal transportation system.

Housing

- Encourage the development of senior housing through a nonprofit community development corporation.
- Design a policy that supports neighborhood stabilization through mixed-density development.

- Create a new land use policy to regulate buffering between nonresidential and residential areas.

Revitalization

- Establish program(s) and funding support that assist existing homeowners as a strategy tool for neighborhood revitalization.
- Create a designated area as a conservation district pilot project and include provisions that address code enforcement.
- Develop a memorandum of understanding between planning and implementation agencies that link planning recommendations to program funding decisions.

Economic Development

- Build spending potential within the subregion through supporting quality residential development.
- Improve the relationship between adjacent residential and industrial areas.

Implementation

- Create an open line of communication between local, state, and federal government agencies involved in the implementation of the master plan.
- Develop a chronology of tasks that build upon early successes to allow for more complex actions.
- Identify the key stakeholders required to make the implementation strategy a reality.

Environment

- Identify locations with flooding issues and prepare mitigation plans.
- Identify locations without stormwater management or with poorly performing facilities that would be suitable for stormwater retrofit projects.
- Coordinate land use, economic planning, and environmental planning to reduce or mitigate the effects of noise pollution.

Public Facilities

- Project future demand for schools, libraries, police, and fire and rescue services.

- Provide residents with conveniently located schools that efficiently serve the population.
- Locate libraries in reasonable proximity to users.
- Provide fire and rescue facilities that meet the needs of the community based upon established county standards and accommodate modern vehicles and equipment.
- Review supply of health care facilities in relation to other areas of the county.
- Identify parcels that can be used to create neighborhood and community parks.

Historic Preservation

- Ensure that historic sites and resources—a part of the subregion’s rich cultural heritage—are properly documented and protected from the onset of new development through proper and consistent historic preservation practices.
- Encourage local stewardship and pride by implementing strategies that will increase public knowledge of the area’s cultural assets and historic preservation procedures.

Chapter 2

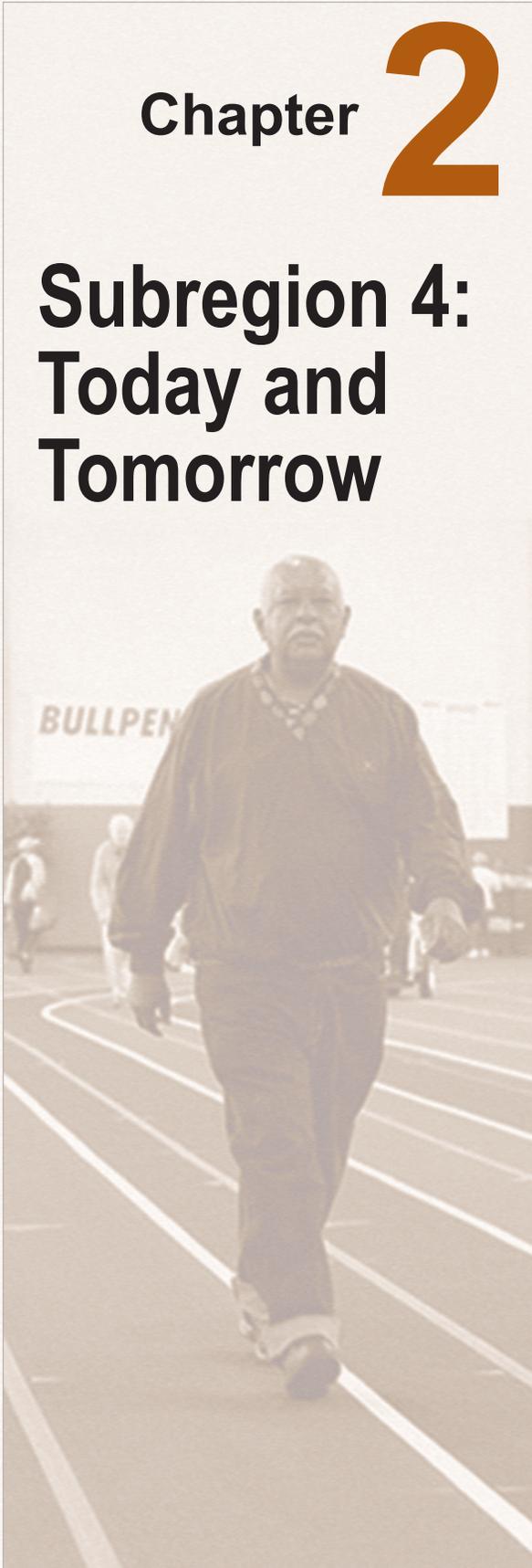
Subregion 4: Today and Tomorrow



AREA CHARACTER

History of the Planning Area

The early history of Subregion 4 is intricately woven into the colorful past of Colonial Maryland and Prince George’s County. Before Colonial settlement, the area was part of the Piscataway Indian Nation. The first Colonial settlement in Subregion 4 occurred in the mid-seventeenth century, when large land grants were being developed into plantations and manors in Prince George’s County. Some of the oldest land patents of the Colonial era straddled what is now the dividing line between Subregion 4 and the District of Columbia. Large estates representing land claims originating in the 1670s and 1680s lay along Oxon Run, bearing the names Green’s Delight, Good Luck, and Nonesuch. Among the first names to appear in historical records are those of Colonel Ninian Beall and John Addison.



It is reasonable to assume that, at one time, the great bulk of the northern half of Subregion 4 was owned by the Bealls and the Berrys, with the Addison, Sheriffs, Stodders, and other prominent Prince Georgians also having sizable holdings within the area and nearby. Some family names are still visible on roadways, such as Addison Road and Sheriff Road.

Tobacco and other agricultural products were the main industries during the 18th and 19th centuries. These products were exported from area farms owned by settlers, such as the Bowie and Berry families. During the 1800s, the movement of people and commodities took place on a very limited, unsurfaced road system connected to the path of the old Washington–Marlboro Turnpike (now known as Marlboro Pike), which linked the county seat, at Upper Marlboro, to Washington, D.C. Designated stopping points were at Walker Mill Road, which led to Charles Walker’s mill on Southwest Branch, Old Silver Hill Road, which connected to another stage coach route along what is presently known as Branch Avenue, and Long Old Fields, which intersected a north/south road on the present Forestville–Ritchie Road alignment. The present-day Central Avenue began at Addison Road and ran eastward only.

One of the first land divisions, Jackson’s subdivision, occurred in 1873 in the central part of Subregion 4. A proposed toll road through the tract was not built, but later became the section of Central Avenue west of Addison Road.

Although the subdivision of land was practiced throughout the 19th century, Subregion 4 was still rural farmland and estates at the beginning of the 20th century. The suburbanization of the area began around the turn of the century, when subdividers and real estate agents started platting the older section in small, 25-by-100-foot lots. Skilled and semiskilled laborers from the congested neighborhoods of the District of Columbia were the first to settle in the newly subdivided areas of Capitol Heights, Highland Park, Carmody Hills, and Seat Pleasant in 1904. Fairmount Heights, which was subdivided in 1900, has the distinction of being the first African-American community settled in Prince George’s County and was incorporated in 1935. Property in Cedar Heights

started changing hands in the early 1900s when Senator Dodge of Ohio—who owned most of the land—began selling small parcels. In 1910, African-Americans also started to move into the Glenarden subdivision.

The opening of the railroad lines and electric streetcars at the turn of the 20th century contributed substantially to the growth and development of the area. Seat Pleasant became the terminal, not only for a number of the streetcar lines, but also for the Washington Rapid Transit Company and the Washington and Chesapeake Beach Railway Company. Many of the early residents rode these lines to get to their jobs elsewhere in the metropolitan area. The Chesapeake Beach Railroad was incorporated in 1896 to carry vacationers from the Washington D.C., area to the new resort at Chesapeake Beach. The new line traveled the subregion from Seat Pleasant east to stops near the Brooks and Ritchie properties. The Washington-Baltimore-Annapolis Electric Railway Company began operations about 1900 and ceased operating in 1935. This railway followed the present route of the George Palmer Highway, MD 704.

In the 1930s, the communities in Subregion 4 grew slowly, remaining principally rural in nature, with rolling hills and open space. With the large increase in the number of government jobs during the New Deal era, African-Americans from other parts of Maryland and from the South began moving into the Washington metropolitan area. Families who could afford to own inexpensive properties moved in increasing numbers into the area. Capitol Heights, Bradbury Heights, Deanwood Park, Beaver Heights, Jefferson Heights, and Columbia Park were developed at that time.

During the 1940s, Subregion 4 experienced its first large-scale in-migration. Population increased as new military and other government jobs in the Washington area were created as a response to World War II and as subsequent waves of veterans returned home and sought housing and employment in the Washington region.

In the early 1940s, the West Brothers Brick Company moved its operation into the area. This

stimulated additional industrial development and created jobs, attracting more residents.

In the 1950s, the area experienced its greatest growth rate. It was during the 1950s that Palmer Park, Columbia Park, Booker T. Homes, and Highland Gardens were developed within the northern half of Subregion 4, adding to the population and increasing the overall residential density of the area. Most of the new housing development constructed during these years was in garden-type apartments; there was also an unprecedented demand for suburban single-family housing. Major federal installations were built in the area, including the Census Bureau complex in Suitland and the nearby Joint Base Andrews. Suitland Parkway was built, and sewer and water lines were extended throughout the area. Many neighborhoods grew rapidly. District Heights was completed, designed with a modern street pattern of curvilinear streets complete with curbs, gutters, street lighting, and some sidewalks.

Townhouses appeared in the 1960s for the first time. However the focus of the 1960s was on the development of new apartment complexes, mainly along the new Pennsylvania Avenue extension, Marlboro Pike, and Suitland Parkway.

Subregion 4 Today

Background

The Subregion 4 Master Plan area, comprising approximately 18,624 square acres, is distinguished by the varied nature of the land development.

In the 2000 census, there were 131,614 residents in Subregion 4. In 2008, it is estimated that the population has grown to 132,695. The subregion includes first ring suburban communities and new sprawling single-family neighborhoods. It is the home of seven Metro stations and regional attractions, such as FedEx Field, the Prince George's County Sports and Learning Center, and the Prince George's Ballroom. There are older strip commercial centers along Marlboro Pike, in addition to the regional mall located along Donnell Drive, that have shown signs of revitalization. The industrial market is strong, characterized by the variety of intensities and types of services offered in

the area, providing an important economic base for the subregion and the county.

Finding a balance between the suburban and urban characters of the subregion while capitalizing on its greatest strengths—proximity and access to Washington, D.C., the region, and seven Metro stations—will be critical to the implementation of the vision of the Subregion 4 Master Plan.

Land Use

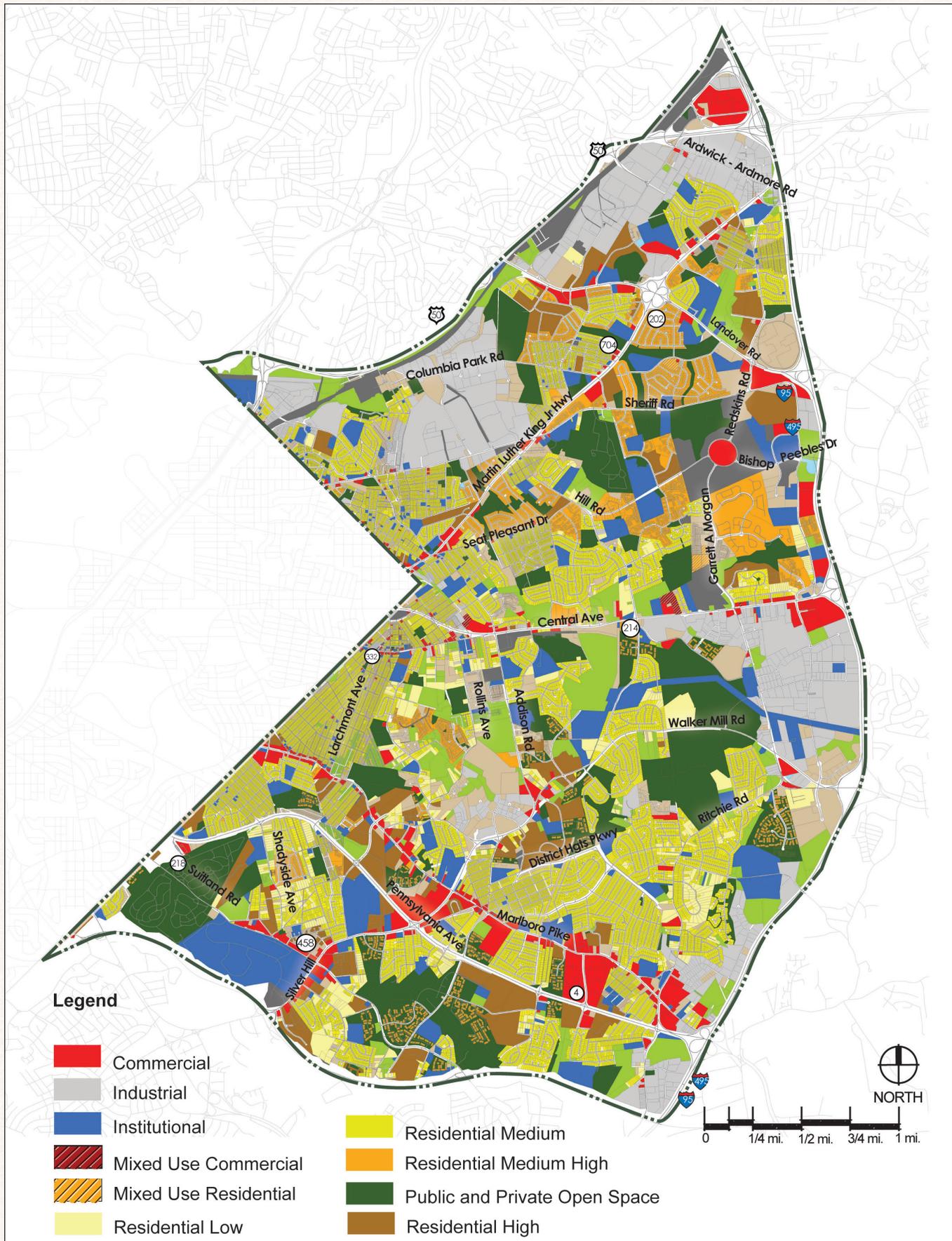
The six living areas that comprise Subregion 4 are primarily residential and are served by smaller retail/commercial uses scattered throughout the area, such as hubs and strip malls along corridors including Marlboro Pike, Central Avenue, and Martin Luther King Jr Highway, and by larger commercial mall developments adjacent to the subregion. The living areas are surrounded by industrial uses, business parks, and flex space to the north and east. Each living area possesses unique characteristics and distinct identities, yet the entire subregion can be classified as suburban/urban in nature. Although many places within the area offer opportunities for pedestrian connectivity and access to an operating bus system, the main form of transportation remains the automobile. Single-family homes are the most common housing option in the area, followed by a high number of multifamily apartments and a small number of townhomes, which are most prominent in recent developments.

The subregion currently lacks vertical integration of uses, such as a mix of employment and residential, which reinforces the suburban character of the area. A concentration of higher density areas, located adjacent to Metro stations, would help capitalize on the existing transit system network. The juxtaposition of the proximity of the area to Washington, D.C., and the surrounding expansive highway system, previous planning efforts, identified centers, and well-established residential zones provide a catalyst for future growth.

Housing and Neighborhoods

Over time, most communities will experience a range of indicators that affect the quality of life within their neighborhood. Some trends of disinvestment include the transition of long-time

Map 2-1: Existing Land Use



residents, deferred maintenance of older housing stock, decrease in owner-occupancy, and zoning and land use changes that adversely affect the residential environment. Unless the cycle of disinvestment is reversed through an intervention strategy, neighborhoods, like the ones located near the Subregion 4 boundary with the District of Columbia, will not recover. Trends noted in Subregion 4 communities located close to the District of Columbia boundary illustrate the type of socioeconomic and housing conditions that represent the greatest threat to neighborhood instability. These areas could be characterized as “tipping point” neighborhoods because they illustrate areas in danger of becoming blighted within the subregion without planned intervention to reverse the trend. Tipping point areas are scattered throughout Subregion 4 and many are found within older, established communities.

A great asset relating to the housing and neighborhood character has been established areas, consisting of stable, long-term residents. These characteristics are important attributes to neighborhood stability and also provide a foundation for future marketing to new homeowners. The most frequently mentioned strength relating to housing within Subregion 4 was affordability. Many of the long-time residents, along with more recent residents to the area, choose to live in the subregion because it offers affordably priced homes located in quiet neighborhoods.

Economic Strengths and Opportunities

The economic development opportunities and strengths identified for Subregion 4 focus on the potential to enable (re)investment that will benefit local residents and the entire Prince George’s County economy. The main strengths and opportunities of the subregion are:

- Close proximity to various employment, entertainment, historic, and recreational amenities found in Washington, D.C., northern Virginia, and central Maryland that make its location ideal for continued economic growth.

- Existing federal employment centers and potential recruitment due to its proximity to Washington, D.C.
- The attraction of new retailers into Subregion 4 to increase the variety and quality of goods offered locally.
- Residential affordability.

Some of the most prominent issues and threats that the area faces and needs to overcome in order to capitalize on the many opportunities include:

- The lack of high-quality, good-paying employment opportunities.
- Limited retail and service options in both the variety of offerings and the level of quality of goods within a particular category (e.g., dining venues).
- The perceived ineffective public outreach and communication methods of sharing the progress of new developments with residents of the subregion.
- Lower educational levels of Subregion 4 residents in comparison to the rest of the county.
- Real and perceived criminal activity.
- The area’s image due to high levels of industrial uses that may prevent other quality businesses from selecting a site in the area.
- The high rate of foreclosures.

Environmental Resources

Much of Subregion 4 was developed before significant environmental protections, including stormwater management regulations, were enacted. Consequently, streams were piped and channeled and stream buffers removed. These actions have contributed to the degradation of water quality in local streams, the Anacostia River, the Potomac River, and ultimately, the Chesapeake Bay.

Limited stormwater management controls, combined with large areas of impervious surfaces and a relatively low percentage of tree and forest coverage, have contributed to very poor water quality in Subregion 4. Drainage problems are also common. The region suffers from illegal dumping into streams, parks, and open spaces. As the region’s

green infrastructure is restored and public areas are made more green, people who live, work, and visit Subregion 4 will have opportunities to reconnect with the environment.

About 55 percent of the land area of the subregion is in the county's green infrastructure network, or six percent of the county's entire network. The subregion also contains two of the county's special conservation areas, including one of the 12 remaining magnolia bogs in the Washington metropolitan area. Restoring this network will provide many benefits to the region and support many of the goals in this master plan.

The county's Woodland Conservation and Tree Preservation Ordinance seeks to preserve woodlands in conjunction with floodplains, wetlands, stream corridors, and steep slopes and emphasizes the preservation of large, contiguous woodland tracts. Using this ordinance as a guide to increasing tree cover will provide opportunities to improve water quality and the quality of life in Subregion 4.

Tree cover has decreased in Subregion 4 over many years to approximately 4,400 acres in 2005, or about 23 percent of Subregion 4 as a whole. During the preplanning phase of this project, an analysis of tree cover and its relationship to stormwater management was completed. The analysis showed a need for additional tree cover in areas along stream corridors, stream buffers, and floodplains.

Public Facilities and Parks

Public Schools

Subregion 4 has a considerable share of the county's excess public school capacity: 72 percent of the available elementary school seats and 39 percent of the available middle school seats. Subregion 4 has 30 elementary schools, five middle schools, and four high schools. Prince George's County Public Schools (PGCPS) also operates an early childhood center, an alternative elementary school, and a visual and performing arts academy in Subregion 4. In addition, two closed elementary school buildings are still in PGCPS's capital inventory. Subregion 4 has several school administrative facilities and alternative schools, as

well as several former PGCPS facilities now used for other purposes.

Generally speaking, public school facilities are aging in Subregion 4 and enrollment is declining, creating a myriad of planning issues relative to educational programs, school capacity, and school facilities. As older schools are redeveloped or replaced, the urban school model should be utilized, especially in and near the centers and corridors.

Public Libraries

There are three branches of the Prince George's County Memorial Library System (PGCMLS) in Subregion 4. The Spauldings and Glenarden Branches are considered to be underutilized, but the Fairmount Heights branch is generally thought to be undersized and inadequate to serve the highly populated region.

Public Safety

The Prince George's Police Department (PGPD) District III is contiguous with Subregion 4. The Prince George's Police Department's headquarters is adjacent to District III station at 7701 Barlowe Road in Palmer Park. The 2008 *Approved Public Safety Facilities Master Plan* recommends that this facility be renovated in the long-term (after 2021). Because of the increased urbanization of the region, response times have increased and a need has developed for a second station to be located in or around Capitol Heights.

The towns of Capitol Heights and Fairmount Heights, and the cities of District Heights, Glenarden, and Seat Pleasant have police departments that provide additional first response capability within their town limits and supplement the efforts of PGPD.

Fire and emergency medical services (EMS) are provided by the Prince George's County Fire/EMS Department (PGFD), which has both career and volunteer elements. There are seven fire/EMS stations in Subregion 4. Subregion 4 stations responded to 18,959 EMS calls for service in 2007, nearly 20 percent of all the calls in the county. They also responded to 5,901 fire calls, 19 percent of the county's calls.

Parks

Park facilities in Subregion 4 provide a wide selection of recreational amenities, such as indoor spaces, outdoor facilities, nature, sports and fitness, history, and education. Fourteen of the sites are park/school sites, where a school and a park facility (either a community center or a developed park) are co-located and spaces are shared by both facilities. In all, Subregion 4 has 1,874 acres of parkland at 54 developed park sites and 15 undeveloped sites.

The 2002 General Plan included a standard of 15 acres of parkland per 1,000 residents. Using this measure, Subregion 4 lacks adequate parkland, and by 2030, the region would need to add approximately 9,100 acres of parks to their inventory. In an effort to meet this standard, several parks are undergoing expansion and several sites have been identified as potential future parks that would add approximately 600 acres of parkland to the subregion. On a subregion scale, these additions would still not meet county standards. However, this plan also includes a new category of open space: urban squares, civic greens, and plazas. The creation of this category would allow for an alternative to the existing park models and provide the county different means through which to meet the minimum open space requirements.

Historic Resources

Subregion 4 includes many historic sites and resources in addition to the historic communities of Fairmount Heights, Capitol Heights, and other municipalities. These are chronicled in the *Prince George's County Historic Sites and Districts Plan* and other historic preservation documents. Planning issues that should be considered by each community include the preservation and enhancement of community character through potential historic or conservation districts, façade improvement programs, and interpretive signage programs. Historic preservation efforts help to ensure the longevity and health of the built environment, economy, and social resources. By protecting and encouraging adaptive reuse of historic resources, opportunities can be created to embrace and celebrate the history that defines and

unites the people of Prince George's County and Subregion 4.

Transportation

The plan area is currently served by an excellent transportation system, with direct access to the Capital Beltway (I-495/I-95). In addition to the Capital Beltway, major roadways serving the subregion are the John Hanson Highway (US 50), Suitland Parkway, Pennsylvania Avenue (MD 4), Central Avenue (MD 214), Landover Road (MD 202), Martin Luther King Jr Highway (MD 704), Silver Hill Road (MD 458)/Walker Mill Road, Forestville Road/Ritchie Road/Garrett A Morgan Boulevard, Addison Road, Shady Glen Drive/Hill Road, Brightseat Road, Ardwick-Ardmore Road, Sheriff Road, Columbia Park Road, and Marlboro Pike. All these facilities provide local or regional mobility and access to destinations inside and outside the Subregion 4 area. It is important, however, to note that the existing road network is marginal in providing direct and continuous access and mobility within the subregion in the north/south direction. Another concern is with regard to the lack of convenient and pleasant local street grids especially within the designated centers and areas close to the seven Metro stations.

Industrial activities in Subregion 4 generate significant amounts of truck traffic. The increased truck traffic along some residential streets and neighborhoods in close proximity to the industrial uses is a concern.

The planning area also has excellent transit service offered by three Metro lines (Blue, Orange, and Green). Seven Metro stations (Cheverly, Landover, and New Carrollton along the Orange Line; Capitol Heights, Addison Road-Seat Pleasant, and Morgan Boulevard on the Blue Line; and Suitland on the Green Line) are within the subregion.

Sidewalks are available along most major roadways in the subregion. However, there are some roadway sections where sidewalks are missing, limited to only one side of the roadway, or are in poor physical condition.

Demographic and Economic Base Analysis

Introduction

This section is an analysis of the demographic and economic conditions in Subregion 4 in relationship to Prince George’s County and the surrounding region. It examines trends and projections in population, households, income, employment, and occupations. At a more detailed level, much of the demographic data in Subregion 4 are subdivided into three zones comprising six living areas as defined by the planning team. Detailed information regarding the unique demographic and economic characteristics of each zone is included in Chapter 5, Living Areas and Industrial Centers.

This closer analysis allows the planning team to better determine where particular efforts need to be concentrated. County and regional data are examined to better comprehend the competition that exists around Subregion 4.

Summary of Major Findings

- Since 2000, the overall population growth rate in Subregion 4 (0.08 percent) has been substantially lower than in Prince George’s County as a whole (7.9 percent). However,

projections over the next five years show the annual growth rate in the subregion increasing to 0.3 percent. Much of this increase is expected to occur in Zones 1 and 2. Zone 3, the largest of the zones with 58,782 residents, will maintain its stable growth rate.

- Nearly one-third of the residents in Subregion 4 are school-aged (under 20), compared to 28 percent in the county and 26 percent in the region. More specifically, Zone 1 has the highest percentage of school-aged residents as 37 percent of its population is less than 20 years old.
- More than 90 percent of the population in Subregion 4 is African-American. This low level of diversity is not expected to change substantially in the next five years. However, every race has increased marginally except the Caucasian population, which continues to decline.
- The average household size in Subregion 4 (2.77) is lower than the rest of the county (2.82), but four of the six living areas have household sizes that either equal or exceed this average. Furthermore, Living Areas D and F have average household sizes closely resembling the regional average (2.55), largely due to both

Table 2-1: Population Trends 2000-2013

Study Area	Population			Percent Change		Annual Percent Change	
	2000	2008	2013	2000-2008	2008-2013	2000-2008	2008-2013
Zone 1: Living Areas A & C	36,126	36,643	37,700	1.4	2.9	0.2	0.6
Zone 2: Living Areas B & D	37,173	37,270	37,740	0.3	1.3	0.0	0.3
Zone 3: Living Areas E & F	58,315	58,782	59,059	0.8	0.5	0.1	0.1
Subregion 4	131,614	132,695	134,499	0.8	1.4	0.1	0.3
Rest of Prince George’s County	669,901	722,517	753,162	7.9	4.2	1.0	0.8
Region	2,764,760	2,958,311	3,077,678	7.0	4.0	0.9	0.8

Source: Site to Do Business online (STDB online) & RKG Associates, Inc., 2008.

having the highest rate of single-occupant households, exceeding 26 percent.

- Both median household and per capita income levels in Subregion 4 are growing at slower paces than in neighboring study areas. Currently, the median household income in Subregion 4 is \$51,763, which is 24.5 percent lower than in the rest of the county and 43.6 percent lower than in the region. Households in Living Area E have the highest median income (\$64,464) of all living areas, which is 15 to 32 percent higher than in any other living area.
- Relatively few Subregion 4 residents 25 years of age and above have completed any form of post-secondary education (19.3 percent). Comparatively, nearly 40 percent of this cohort in the rest of Prince George's County and 61 percent of the regional population have completed a post-secondary degree. This difference limits the ability of the subregion to attract higher paying jobs as most of such positions are filled by applicants with higher levels of educational attainment.
- In almost every category (forcible rape and nonresidential burglary excluded), the incidence rate for crimes reported in Subregion 4 is higher than the county by at least 60 percent. Larceny/theft was the largest offense; it occurred 34 times for every 1,000 residents, whereas motor vehicle theft occurred nearly twice as often in Subregion 4 as it did throughout the county.
- The retail trade and construction industries provide for the greatest number of jobs in Prince George's County. However, much of the growth in the construction industry is likely to slow down as financing for projects is becoming more difficult to obtain due to the current mortgage-related banking crisis.
- Within Prince George's County, employment in educational services (3,859 total jobs) is growing rapidly with a 38 percent increase since 2000. The presence of four large colleges in the county greatly contributes to the growth in this industry; however, none of these schools is located in Subregion 4.
- The largest employment decline in the county has occurred in the management of companies and enterprises industry. While more than 4,000 jobs have been lost since 2000, the total number of companies (80) has remained the same. This change is likely the result of severe downsizing.
- The largest job losses in the region have occurred in the information, transportation, and warehousing industries; yet, these industries have grown in Prince George's County. The information industry has declined by 11,698 jobs in the region but has experienced a modest 8.2 percent growth rate in the county. The transportation and warehousing industry has lost 1,449 jobs regionally compared to the 1,062 added in the county. These growth trends provide foundations for Subregion 4 and the rest of the county to build upon as their market and industry presence continues to expand while they are shrinking regionally.
- The county's unemployment rate generally falls below that of Washington, D.C., and is slightly higher than the rest of the region. This indicates there may be more labor available for new or expanding employers in Prince George's County than in the rest of the region, excluding Washington, D.C.
- More than three-quarters of the occupations in Prince George's County are considered white-collar positions. The largest occupational skill group is high-skilled white-collar positions (123,995 workers), which comprised 36.6 percent of the occupational workforce in 2004.
- A computer specialist is a high-skilled, white-collar occupation that is growing quickly. Jobs in this category include network systems and data communication analysts, computer software engineers/systems software, network and computer systems administrators, and computer software engineers/applications occupations.
- In Prince George's County, 12 of the top 14 highest paying detailed occupations are categorized as management or computer and mathematical positions. Over 27,000 positions are included in these 12 occupations. Management occupations have a median salary of \$88,302 and computer and mathematical occupations have a median salary of \$77,574.

Implications

Subregion 4 has not experienced comparable levels of growth and prosperity as the rest of Prince George's County and the Washington metropolitan area. The subregion is largely built out, offering few opportunities for new, greenfield development. Redevelopment projects are often more time-consuming, expensive, and controversial, making them less desirable to developers. Similarly, the subregion's demographic and economic conditions have not kept pace with other study areas.

Subregion 4 residents generally have lower levels of educational attainment and income, and the area experiences higher crime rates. The impact of both limited development and economic growth have adversely impacted the other, creating a "Catch-22" situation in Subregion 4.

However, the growing disparity in affordability between Subregion 4 and the Washington metropolitan area creates a balance of risk and reward for certain business types and residents. The close proximity to Washington, D.C., combined with the subregion's relative affordability, lately attracted the attention of enterprising business owners and residents alike. Recent residential and non-residential development brought new, higher income workers and residents into the subregion. Opportunities still exist to reinforce the residential character of the living areas through strategic investments in high-quality housing. Continued investment in employment-producing areas, such as the industrial centers and the eight designated growth centers, will also bring prosperity to the subregion. However, these investments need to be coupled with social and workforce programs to enable the access of all area residents to new opportunities, thereby bolstering the subregion and its economy. The demographic data indicate a substantial divide between the poorest and wealthiest residents in Subregion 4. Bringing prosperity for some at the exclusion of others does not meet the stated goals of the county's 2002 General Plan, the expressed desires of Subregion 4 residents, nor does it create a sustainable community.

The perceptions and realities of safety impact the economic viability of Subregion 4 as an investment center. Concerns about safety were expressed

almost universally by persons involved in this plan, such as elected officials, real estate professionals, and residents. Concerns about the ability to keep one's person and property safe has adversely impacted the market potential of Subregion 4. Crime statistics corroborate what individuals expressed; there is a higher incidence of crime in Subregion 4 than the rest of the county. This concern directly impacts the decision-making of business owners. Improving the perceptions and realities of safety should be a top priority.

In addition, focus should be given to improve the educational opportunities for the subregion's large young population. As stated earlier, attaining higher levels of education typically correlates to higher income. The four post-secondary institutions located in Prince George's County and even those in Washington, D.C., provide ample alternatives for students pursuing the traditional college track. However, for those students not on this track, there is not sufficient access to the training required to pursue jobs in fast-growing occupational fields. Other outlets, such as training or work-to-hire programs are necessary. With a disproportionate number of residents under the age of 20, Subregion 4 needs a network in place to bridge the gap between employment growth and job preparedness.

Increasing educational attainment will be necessary to achieve higher resident incomes to counter the disparity between Subregion 4 and the neighboring areas. This widening income gap makes it difficult to attract diverse retail offerings to the subregion. Many residents and stakeholders in the initial public meetings stated they wanted to see a larger variety of retail in and around their neighborhoods; this will only occur once the area spending potential increases. In addition, emphasizing the development of new single-family, detached housing while assisting homeowners in renovating the existing housing stock will likely lead to an increase in the area's disposable income as individuals and families with greater levels of wealth are attracted to the subregion.

Residential Market Analysis

Summary of Major Findings

Residential housing accounts for the largest percentage of land uses within Subregion 4. Among these uses, single-family housing parcels comprise nearly half (3,717 acres) of the total developed land area and more than 28 percent (26.7 million square feet) of the total developed space. Townhouses and condominiums have a much smaller footprint than other for-sale housing options in the study area.

- Approximately 40 percent of the single-family units in Subregion 4 are located in Zone 2, where many of the subregion's established neighborhoods are located; much of the development occurred before townhouse and condominium development became popular in Prince George's County. As a result, this area is the least diverse in regard to the types of for-sale units. Of all the for-sale housing units in Zone 2, 84.3 percent are classified as single-family, detached. Comparatively, single-family units in Zone 1 account for 59.6 percent of all units and Zone 3 has a 62.9 percent share.
- Apartment development is concentrated in Zone 3; more than 10 million of the 21.1 million square feet of apartment buildings are located there. This concentration of apartment development is due, in part, to the concentration of high-density apartment complexes along Brooks Road, including Oakcrest Towers, Sussex Square, Lexington Courts, and Fox Club.
- Since 1998, nearly half of new for-sale residential units have been constructed in Zone 3. Zone 2 has experienced the least development, likely due to the limited amount of developable land. Although the pace of development for single-family, detached houses has remained stable in Zone 2, development of these units has slowed in both Zones 1 and 3 due to impacts of the regional and national economic downturn.
- As with much of the nation, the rate of home foreclosures has been increasing in Subregion 4, and 1,337 housing units are actively in the foreclosure process as of December 2008. Of this total, 90 have already been repossessed by the lender and over 350 were going to auction.
- As of October 1, 2008, there were nearly 1,900 for-sale housing units planned, proposed, or platted in Subregion 4. Of these units, 769 had reached the recorded plat stage. The likelihood that these projects will be constructed is generally higher than the 1,121 units in the preliminary subdivision stage. Most of the residential development (74 percent) is projected to occur in the Suitland/District Heights communities south of Central Avenue.
- Over the next five years, the region is projected to add nearly 1,000 additional apartment units. A majority (856 units) of these are anticipated to be developed in the Landover market area. This development is projected to occur at a steady pace, as fewer than 200 units are forecast to arrive on the market each year from 2009 to 2012.
- Apartment vacancy has been very low in Subregion 4. Despite a slight increase in vacancy between 2001 and 2007 (most likely due to the strong purchase market), vacancy remained below five percent. Within the subregion, vacancy varied by submarket, as an increase in one area would correspond with a decline in another, suggesting high mobility within the local market.
- Sale prices for housing units in Subregion 4 declined substantially over the last year. According to a third quarter 2008 report released by Zillow, an on-line real estate services company, the average sale price for a residential unit in Subregion 4 fell below \$240,000. This amount reflects a yearly percentage drop exceeding 17 percent in certain areas. Decreasing sale prices are also occurring throughout the region. Prince George's County experienced similar trends as sale prices fell by 16.9 percent over the past year.
- Subregion 4 experienced a decline in sales activity. The number of single-family units that sold each year in Subregion 4 steadily decreased over the last two-and-a-half years. In 2006, nearly 2,100 units were sold. One year later, the sales volume declined to 1,553 units. The

number of sales for 2008 is anticipated to total approximately 1,000 units.

Implications

For-sale housing demand in Subregion 4 is below recent activity levels. This is reflective of the national trend where the downturn in the economy and the struggling financial market adversely impact housing values. Demand for ownership housing has declined as potential buyers are concerned about continued loss in value.

With fewer homeowners entering the area and the market remaining soft, new investment opportunities and development efforts are likely to slow down. The effects of the for-sale housing demand downturn are further complicated by the area's foreclosure issue. Housing values are likely to continue to decline as foreclosures in the subregion exceed regional averages. This climate creates insecurity for developers of any housing project in the pipeline.

The southern half of Subregion 4 was impacted harder by these factors. For example, neighborhoods in District Heights and Suitland saw single-family units sell further below initial asking prices than in northern areas, while also remaining on the market for longer periods of time. In addition, housing units in the southern portion of the subregion incurred the largest percentage losses in average sale prices over the past year. Although these trends eventually will reverse as the economy and financial markets rebound, the ownership market will remain a risky investment in the near future. As such, current vacancies, potential foreclosures, and pipeline projects will likely meet market demand for housing units for an extended period of time.

Conversely, the area's for-rent housing market continues to be relatively strong. The low apartment vacancy rate in the area is evidence that demand continues to exceed recent trends. As mentioned, this is due, in part, to potential buyers remaining in rental units until the ownership market stabilizes. This demand level likely will continue to remain strong into the near future. Although there is a substantial number of apartments in the development pipeline, the market is projected to absorb this supply in a short period of time. As such,

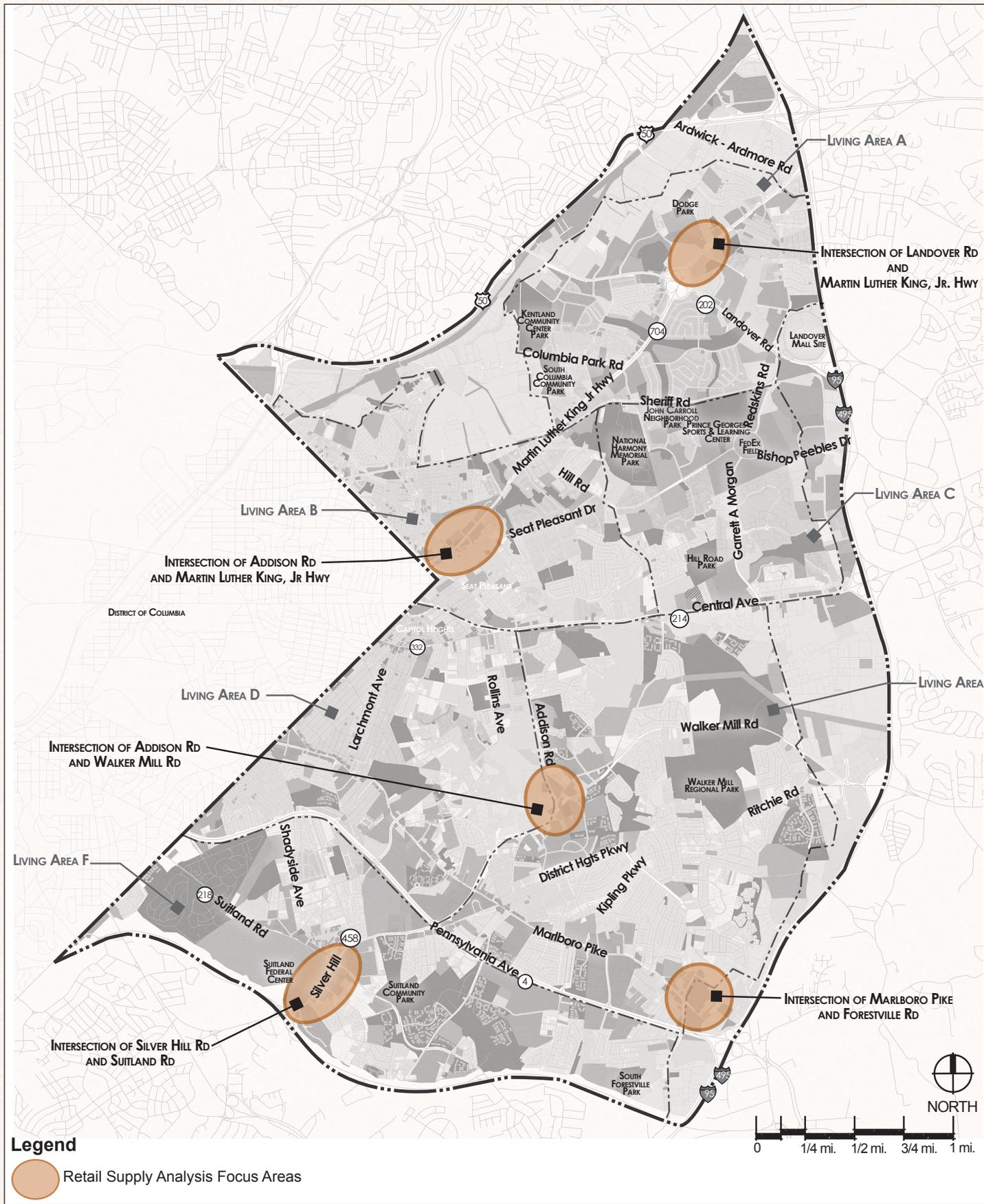
there may be opportunities to build new apartment developments in Subregion 4. In turn, the resulting increase in residents may boost spending potential, thereby increasing the marketability of the subregion to retailers and service providers.

Retail Market Analysis Introduction

A neighborhood-level retail opportunity analysis and a regional analysis were performed for growth centers. Although the regional analysis focuses on the supply and demand for retail space to be occupied by businesses serving a larger client base, the neighborhood-level retail market analysis concentrates on identifying the unmet needs of specific neighborhoods. This was done to avoid creating conflicting strategies about how to meet the demands for larger, more regionally-focused businesses. Simply stated, the current and projected level of demand for services will only support a fixed number of businesses. Trying to accommodate these businesses in multiple areas of the same community will create unhealthy competition between property owners and business owners. Therefore, this analysis focuses on those retail uses that generally serve a smaller market area, such as convenience stores, eating establishments, and personal services.

Most activity and major investments in the retail and office markets primarily occur at the eight growth centers located at the seven Metro stations and the former Landover Mall site (now Landover Gateway). Retail and office development activity occurring outside of these growth centers will focus on support services to the living and industrial areas.

The following section provides an overview of the supply and demand for retail goods and services in five neighborhood-serving commercial areas. These areas are anchored to a key intersection. They include: (1) Martin Luther King Jr Highway and Landover Road; (2) Martin Luther King Jr Highway and Addison Road; (3) Addison Road and Walker Mill Road; (4) Silver Hill Road and Suitland Road; and (5) Marlboro Pike and Forestville Road.



These study areas were selected because they met two primary criteria: (1) they were identified through market analysis and stakeholder input to have potential for development (redevelopment); and (2) they are not covered in the growth centers analysis. Although other neighborhood-serving commercial areas exist, these other areas do not present comparable potential to accommodate new development. The purpose of this section is to identify the market potential of these areas and make the appropriate recommendations about their viability as commercial centers.

Summary of Major Findings

- The amount of sales capture varies greatly by study area. The Marlboro Pike/Forestville study area captures the greatest amount of sales, at more than \$88.4 million. This is not surprising, as the half-mile study area surrounding the Marlboro Pike/Forestville Road intersection includes the Penn-Mar Shopping Center along Donnell Drive. In contrast, the Addison Road/Walker Mill Road study area businesses only captured \$7.0 million in sales as a result of the lack of retail presence in the area.
- Consumer expenditures in the neighborhood commercial areas vary but not as widely as retail sales capture. This is due to the relatively similar level of residential development surrounding these selected intersections. Four of the five study areas have 2008 estimates for consumer expenditures ranging between \$43 million and \$51 million. Only the Marlboro Pike/Forestville study area has a substantially lower demand for retail goods and services in terms of dollars spent than the other study areas. However, this finding is consistent with development trends in that area, as commercial and industrial land uses account for a majority of the local development.
- Most of the neighborhood commercial areas generally leak sales. Sales leakage is the difference between the purchasing power of residents in a specified area compared to the retail sales actually generated in the same geographic area, i.e., the loss of potential sales. The Martin Luther King Jr Highway/Landover Road, Martin Luther King Jr Highway/Addison Road, Addison/Walker Mill Road, and Silver

Hill/Suitland Parkway study areas had a combined estimated net sales leakage of more than \$75 million. If the Giant grocery store calculation is removed from the Martin Luther King Jr Highway/Addison Road study area, this total would be substantially higher. Although these study areas did have some retail categories where actual sales captured exceeded demand, the majority of the retail categories experienced a net sales leak. This finding is consistent with other neighborhood-serving venues.

Implications

The market analysis indicates that the Addison Road/Walker Mill Road study area has the greatest potential to support additional neighborhood-serving retail. The continued development of residential uses will add to the need for new commercial development. Serious consideration should be given to developing some retail venue at the Walker Mill Business Park, particularly on the “island” piece bound by Walker Mill Road, Hazelwood Drive, and Rochelle Avenue.

The Martin Luther King Jr Highway/Landover Road and the Martin Luther King Jr Highway/Addison Road study areas also have opportunities for additional retail service provision but much more limited than the Addison Road/Walker Mill area. This is due to the much larger existing commercial base in each study area. Within the Martin Luther King Jr Highway/Landover Road study area, any new commercial development should be done in close proximity to existing centers, preferably the Dodge Park Shopping Center or the King Shopping Center. Although there are scattered retail/service sites to the northeast of the intersection along Martin Luther King Jr Highway with vacant adjacent parcels, clustering new retail with larger centers strengthens the viability of those sites and reduces the potential for disjointed development patterns. At the Martin Luther King Jr Highway/Addison Road study area, focus should be placed on improving the connection between the existing centers to the east of Addison Road along Martin Luther King Jr Highway and the Martin Luther King Jr Highway/Eastern Avenue intersection at the Washington, D.C., boundary. The existing stock along this corridor is a mixture of uses and conditions.

Reinvesting in these parcels and connecting Eastern Avenue to Addison Road, in terms of retail service, will draw shoppers from Fairmount Heights, Seat Pleasant, and Washington, D.C.

The current development plan for the property owned by Mid-Atlantic Real Estate Investments, Inc., at the corner of Silver Hill and Suitland Roads will increase the market demand for goods and services, making new development viable. However, the plan also calls for 36,000 square feet of commercial space, including restaurants and a pharmacy. As such, the demand created by the project likely will be met by the commercial component of the project. Given that the recapture potential is relatively small for this area, the new development likely will capture this spending as well. As such, providing support for this project will improve the health of the retail market, meet the short-term needs of existing residents, and provide additional dining and shopping alternatives for employees at the Suitland Federal Center.

In contrast to the other neighborhood commercial study areas, the Marlboro Pike/Forestville study area generally is well supported by existing retailers along Marlboro Pike, despite the lack of economic activity of the Forestville Plaza and the strip center in front of the Marlo facility. Given that the Forestville Plaza is not supporting the retail operations of the study area, consideration should be given to the future of the property. Despite the general use of the facility as a religious center, the site has the potential to accommodate new industrial development within the subregion without substantial impacts to the existing residential community. If redeveloped as an industrial site, the plaza will improve the county tax base by bringing in revenue-producing tenants, increasing the number of jobs available for subregion residents, advancing the reinvestment occurring along Marlboro Pike between Forestville and the Capital Beltway, and enhancing the existing Forestville Center industrial area. This redevelopment also could accommodate industrial users potentially dislocated by the development of the growth centers, particularly those along US 50, where industrial users fall well within the growth center boundary.

Households and Neighborhood Analysis

Introduction

This master plan provides a framework for how housing development and neighborhood revitalization should be approached in Subregion 4. The plan provides an opportunity to achieve a healthy balance between the conservation of existing housing stock and traditional neighborhood development patterns and the introduction of new housing developments that are attractive to a range of household incomes currently living or moving into Subregion 4.

An overview of current housing-related economic and demographic conditions strongly suggests that Subregion 4 is the most affordable area to live in Prince George's County. However, over the past ten years, the subregion experienced a significant reduction of owner-occupied households and a sharp rise in lower-income households. Immediate action is required to address these trends in order to stabilize and then reverse disinvestment. Key socioeconomic and demographic characteristics that reflect current trends follow.

Summary of Major Findings

- The 2000 census reported that 52 percent of households in Subregion 4 are owner-occupied, compared to 62 percent in Prince George's County.
- Ten percent of residents now living in Subregion 4 lived in Washington, D.C., in 1995 versus five percent now living in other parts of the county.
- As of August 2008, housing in Subregion 4 had a median sales price range between \$199,900 and \$251,700, compared to housing in nearby cities in Prince George's County with a median price range between \$329,445 and \$337,000.
- Housing and neighborhood conditions in communities close to Washington, D.C., and the Subregion 4 boundary reflect significant in-migration of lower-income households that require public support for housing expenses and other basic household functions.

- Significant shifts from owner-occupied, single-family homes to single-family rental homes; decreases in the median income of households; and significant increases in the number of homes with outstanding code violations are indicators that some neighborhoods within Subregion 4 are at critical tipping points in their life cycle.
- Important cultural and historic landmarks and defining neighborhood characteristics are in danger of being lost because of a lack of neighborhood reinvestment, an increase in crime, outstanding building code violations, and an increase in vacant homes caused by foreclosures. This trend is more evident in older areas of Subregion 4, such as in Glenarden, Fairmount Heights, Seat Pleasant, Capitol Heights, and District Heights.

Implications

Household income distributions are important since they translate into housing affordability. In the third quarter of 2008, for most of Subregion 4, mortgages ranged from \$199,000 to \$251,700. In order to service a mortgage in this price range, the household income should be approximately \$100,000 annually (depending on the interest rate, taxes, and insurance). The 2000 census estimated that the median household income in Subregion 4 was slightly more than \$45,000. Even though it is likely that median household income rose significantly over the past eight years, it is unlikely that income increased by over 100 percent. A continued increase in rental households and a continued decrease in the development of new owner-occupied households, especially single-family detached homes, is expected. Although this is not necessarily a bad trend for neighborhoods, a stable neighborhood is generally defined by the amount of home ownership. However, this is not necessarily indicative of neighborhood decline. Yet, an overwhelming number of residents interviewed for preparation of this plan expressed a preference for living in neighborhoods with suburban characteristics. Generally suburban housing characteristics are defined by single-family detached development patterns.

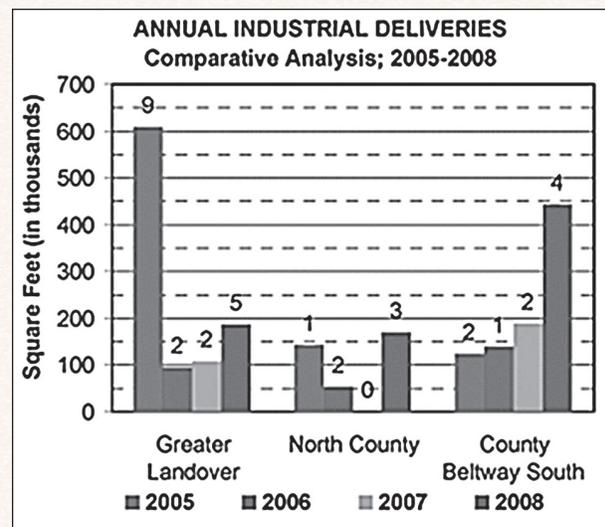


Figure 2-1

Stakeholders were concerned about the perceived lack of code enforcement and the demographic shifts in Prince George's County caused by the influx of lower-income Washington, D.C., residents. Stakeholders expressed concern about the stability of the older Subregion 4 neighborhoods. However, because of housing affordability, close proximity to employment opportunities in Washington, D.C., and easy access to transit stations, Subregion 4 has an opportunity to reestablish itself as a great place to live.

Industrial Market Analysis

Introduction

This section outlines the industrial market forces in and around Subregion 4 that are influencing development activity within the main industrial area. Gaining an understanding of the local and regional real estate conditions informs recommendations for the subregion vision plan. Current trends and projections in supply, vacancy, sale pricing, leasing, and absorption were analyzed.

Summary of Major Findings

- Subregion 4 constitutes approximately 34.5 percent of the county's industrial building space. Development is concentrated along US 50 and I-95/I-495.

- The size and type of industrial users vary greatly, as Subregion 4 has a wide variety of industrial stock. The average industrial property in Subregion 4 has a floor-to-area ratio of 0.30. This represents a very dense development pattern for industrial uses.
- Newly developed projects have had greater densities than previously existing properties. The scarcity of industrial zoned land has created a demand for a higher-density development in order to maximize land use and value.
- Most of Prince George’s County’s industrially zoned land is developed, with the exception of a few parcels in the Brandywine area at the far southeast corner of the county. As a result, the level of industrial development has been comparatively modest.
- Subregion 4 has experienced industrial development activity comparable to the rest of Prince George’s County. Most of the development within Subregion 4 occurred in Zone 3. This activity primarily occurred in the Steeplechase 95 industrial park, located on Ritchie-Marlboro Road and the Capital Beltway.
- In contrast, only one industrial project was delivered in both Zones 1 and 2 since 1998. This primarily is due to the lack of desirable, developable industrial land in either zone.
- There are approximately 270,000 square feet of industrial space currently being built in the regional study area, predominantly along the I-95 corridor on the north side of the county. Approximately 500,000 square feet of additional warehouse and flex office space is proposed at the Steeplechase 95 development within Subregion 4. This additional space is projected to be completed by November 2011.
- Subregion 4’s industrial vacancy rate is between 10 percent and 13 percent, two percentage points higher than the regional industrial average. The Ardwick/Ardmore and the Steeplechase 95 industrial parks have relatively low vacancy rates.
- The regional study area’s average asking rent for third quarter 2008 is \$7.18 per square foot, 25

percent higher than the national average of \$5.75.

- Local real estate professionals indicated that demand for all classes of space is strong. The location benefits of Subregion 4 make it very desirable for tenants who find less utility in the amenities of Class A space. However, tenants of Class B and C spaces generally do benefit from slightly lower rents in lieu of “better” space.

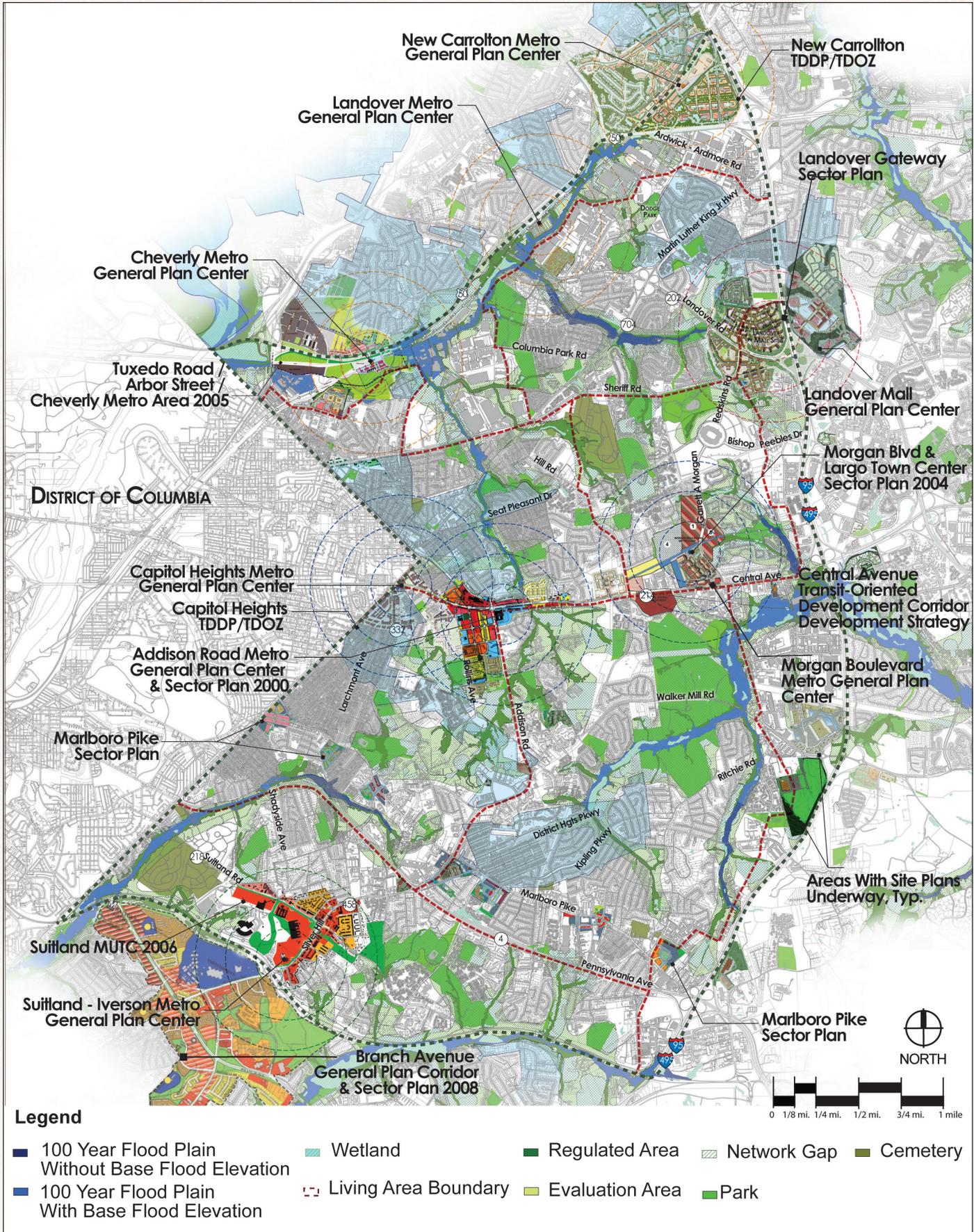
Implications

The regional industrial market remained stable despite the recent economic and fiscal fluctuations. Unlike the retail and residential markets, industrial property owners have not seen a sharp decline in demand. As a result, industrial vacancy rates remained stable and rental rates steadily increased through the third quarter of 2008. Data provided by realtors and industrial property owners in Subregion 4 indicate the local market remains strong as well. In particular, interest for the industrial portion of the Steeplechase 95 project is keeping the development timeline on pace with the owner’s expectations.

Although it is likely that a prolonged slowdown of economic activity eventually will adversely impact the industrial market, the market data indicate that the portions of Prince George’s County nearest to the Capital Beltway, including Subregion 4, are highly desirable to industrial users. As mentioned, Subregion 4 provides an industrial user excellent access to local, regional, and national markets. Given the fact that the Washington, D.C., government has made consistent decisions to limit, and even eliminate, industrial uses within its borders, areas like Subregion 4 provide the next best location to those companies that serve Washington, D.C., clients. Furthermore, Prince George’s County and Subregion 4 provide a better value to industrial users, as lease rates are below regional competitive areas. Local lease rates are half of some Washington metro competitors.

The existing industrial developments in Subregion 4 along US 50 and I-495 likely will continue to thrive into the future. However, the potential development strategy for the growth centers at the Cheverly, Landover, and New Carrollton Metro Stations may create a conflict, as

Map 2-3: Summary of Completed or Currently Underway Plans and Projects



industrial users are within the development area. As such, a strategy should be incorporated into the sector plan to accommodate the displaced businesses elsewhere in the county. There currently are not many options for businesses to locate within proximity to the Capital Beltway.

Completed or Currently Underway Plans and Projects

During the Subregion 4 master planning process, a series of development projects within the subregion boundaries and in the immediate vicinity were already underway. The planning team utilized the county’s available database and recorded conceptual site plans and detailed site plans that had been approved by the Planning Board and therefore would most likely be implemented in the near future. Map 2-3 on page 36 on includes all these plans overlaid on the existing road network, as well as the area’s environmental constraints. The resulting map is a more accurate depiction of the

subregion’s urban framework and the base upon which additional proposals could be made.

Growth Forecasts

As part of the economic development analysis, growth forecasts were developed for the living areas and industrial areas within Subregion 4 through the year 2030. These projections are intended to help determine the potential demand for additional capital investments in infrastructure (e.g., roads) and community facilities (e.g., emergency services) as a result of development outside the growth centers. The projections were calculated using two methods, household growth and housing development. These methods provide different ways to better understand the subregion’s market potential.

Projection periods beyond five to ten years become speculative. It is nearly impossible to determine the investment climate for real estate long term. This is evident in the current economic cycle. The “boom and bust” real estate market shifts experienced

Table 2-2: Round 7.1 Cooperative Forecasts for Subregion 4

	Count			Change		
	2010	2020	2030	2010-2020	2020-2030	Total 2010-2030
Household Count	49,167	50,560	55,242	1,393	4,682	6,075
Housing Unit Count	53,923	55,850	58,569	1,927	2,719	4,646

Source: Prince George’s County and RKG Associates, Inc., 2009.

Table 2-3: Household Formation Trends and Projections

	Households			Change		Annual Change	
	1990	2000	2008	1990-2000	2000-2008	1990-2000	2000-2008
Zone 1: Living Areas A & C	10,346	11,990	12,225	1,644	235	164.4	29.4
Zone 2: Living Areas B & D	12,491	13,794	13,880	1,303	86	130.3	10.8
Zone 3: Living Areas E & F	21,122	21,632	21,840	510	208	51.0	26.0
Subregion 4	43,959	47,416	47,945	3,457	529	345.7	66.1

Source: Site to Do Business online (STDB online) & RKG Associates, Inc. 2009.

regionally and nationally between 1998 and 2008 are anomalies to historic patterns. Predicting such vast shifts in the market is highly problematic. In addition, the recent market turmoil of 2008 and early 2009 adds to the difficulty in projecting patterns into the future. Most notably, there is much debate over the potential “recovery time” required for regional and national markets to return to some form of equilibrium. As such, the projections presented in this report represent the best anticipation of market conditions by the planning team.

The residential projection analysis is slightly more complex than the retail and industrial analysis. Prince George’s County produces forecasts for the Metropolitan Washington Council of Governments (MWCOCG). This information is combined with assessments from each of the other member jurisdictions and is used to plan for future regional investment needs due to local growth patterns. The results of the county’s effort, as well as the internally generated data, were considered. The results of these efforts are presented in this section.

MWCOG Round 7.1 Cooperative Forecast

Prince George’s County’s Round 7.1 projections for housing units and household counts were used for this analysis. The Cooperative Forecast information developed by Prince George’s County

reflects both previous market performance, as well as policy goals established by the county’s elected officials. Based on this analysis, the Round 7.1 projections indicate Subregion 4 will experience a net increase of 1,927 new housing units and 1,393 new households between 2010 and 2020. Growth and development is projected to increase in the long-term, as the subregion is expected to experience a net gain of 2,719 housing units and 4,682 households between 2020 and 2030 (Table 2-2 on page 37).

Household Growth Approach

An analysis of recent household growth trends within Subregion 4 was prepared to determine the net migration patterns in and out of Subregion 4. Household growth trends indicate the subregion experienced a net increase of approximately 67 households annually between 2000 and 2008. This pace of growth is well below the average for the 1990s, when Subregion 4 experienced a net gain of nearly 350 households annually (Table 2-3 on page 37). Overall household growth levels likely will reflect the more recent trends into the near future, as the economic downturn and financial troubles will continue to adversely impact the ability to purchase and maintain a home. However, more stabilized economic conditions likely will trigger additional investment in Subregion 4. As such, the

Table 2-4: Subregion 4 Residential Construction Trends 2000-2008

Year	Single-Family	Townhouse	Condominium	Apartment	Total
2000	58	147	0	0	205
2001	128	197	0	0	325
2002	165	129	0	0	294
2003	171	6	15	253	445
2004	64	10	75	0	149
2005	42	7	5	407	461
2006	55	52	62	0	169
2007	49	149	52	291	541
2008*	17	28	40	0	85
Total Annual	749	725	249	951	2,674
Average	83.2	80.6	27.7	105.7	297.1

Source: Prince George’s County and RKG Associates, Inc., 2009.

*Data include January to October of 2008 only.

Table 2-5: Household and Housing Unit Growth Projections

	2015	2020	2025	2030	Total
MWCOG Round 7.1 Household Projections	284	1,109	2,009	2,673	6,075
MWCOG Round 7.1 Housing Units Projections	1040	887	793	1,926	4,646
Household Growth Approach	375	625	1,000	1,000	3,000
Housing Development Approach	250	500	700	700	2,150

Source: Site to Do Business online (STDB online) & RKG Associates, Inc. 2009.

growth in households is projected to remain more modest over the next five to seven years and will likely increase as economic conditions begin to improve. Projections indicate that there will be a net increase of approximately 1,000 households within the living areas of Subregion 4 between 2010 and 2020. The subregion may experience a net increase of 2,000 more households in the living areas by 2030.

Housing Development Approach

Similar to the household growth approach, the housing development approach was produced by studying recent housing construction trends, adjusting these levels based on projected market performance and economic certainty. Approximately 300 housing units were constructed each year during the 2000s within Subregion 4. Development was strongest between 2005 and 2007 at the height of the housing boom in the region. However, Prince George’s County property assessment records indicate that fewer than 100 units were delivered between January and October of 2008 (Table 2-4 on page 38). This trend most likely will continue into the future as the housing market recovers from the recent downturn. Conditions in Subregion 4 are exacerbated as more than 1,300 housing units currently are somewhere in the foreclosure proceedings. As such, a majority of these units likely will be available on the market over the next three years, increasing the competition for residential developers. Housing development likely will remain slow over the next five to seven years for the entire subregion. The focus of development at the General Plan centers will limit the market opportunities for higher-density housing within the living areas, as

the development in the centers likely will offer better amenities and more convenient access to mass transportation. As a result, housing development within the living areas of Subregion 4 will be more concentrated in single-family, detached houses rather than condominiums and townhouses. It is projected that Subregion 4 will experience a net gain in housing units of approximately 750 dwellings between 2010 and 2020. Growth projections are higher over the next ten-year period. The net gain projected for the living areas between 2020 and 2030 is approximately 1,400 housing units.

Implications

The growth projections prepared by the county and those prepared by the planning team vary greatly. County-developed growth projections identify a net gain of more than 6,000 households and nearly 4,650 housing units during the 20-year study period (Table 2-5 on page 39). In contrast, the planning team projects a net growth of 3,000 households and 2,150 housing units within the living areas during the same time. The disparity is due, in part, to the fact that the planning team’s numbers do not include development at the General Plan centers. As mentioned, the county-derived numbers were developed utilizing market data as well as policy preferences of the elected officials. In comparison, the planning team’s calculations rely solely on market conditions. The policy decision to promote development at the General Plan centers within Subregion 4 is as much a policy mandate of the county as it is a market-driven opportunity. As such, the round 7.1 forecast developed by the county’s planning department for MWCOG

includes the impact of interregional shifts in consumption of housing. This shift will only occur if living within close proximity to a Metro station continues to be desirable. For the centers to succeed, existing demand patterns in the marketplace will need to adjust based on the introduction of the new market opportunities at these sites.

Summary of Economic and Market Opportunities

Assets

Accessibility and Proximity

Markets

One of the strongest assets of Subregion 4 is its location and accessibility. The close proximity of Subregion 4 to various employment, entertainment, historic, and recreational amenities found in Washington D.C., northern Virginia, and central Maryland make it ideal for continued economic growth. Close spatial relationships often are drivers for economic development, as they provide the foundations for agglomeration economies and the growing desire of households to minimize their consumption of fossil fuels. This is evident in the amount of development activity and planning occurring on the immediate border of Subregion 4. The Ritchie Station Marketplace, Woodmore Town Center, and Westphalia are all examples of the benefits Prince George's County and Subregion 4 enjoy, in terms of favorable location opportunities.

Workforce

Subregion 4 also benefits from being able to draw from Washington's regional labor pool. Having multimodal access and being located inside the Capital Beltway makes commuting to Subregion 4 just as convenient as, if not more so, other areas of the metropolitan region. Subregion 4's growth centers have become instant focal points for attracting workers due to their access to Metro, as commuters will benefit from the scheduled bus and train service. The region would also benefit from a more even distribution of growth centers and the emergence of new employment opportunities in Subregion 4 and Prince George's County. More employees would be able to work closer to home, reducing some of the current congestion that

occurs along the western portions of the Capital Beltway.

Mass Transit

This proximity advantage is strengthened by the subregion's multimodal transportation system, another asset that can act as a catalyst for economic growth. Most notably, Subregion 4 is served by seven Metro stations and two major bus systems (WMATA and TheBus). The Metro station areas, identified as growth centers within this analysis, have the potential to support varying levels of retail, service, office, entertainment, and residential growth. Examples of successful transit-oriented development abound throughout the Washington metropolitan area, including such areas as the five stations that compose the Rosslyn/Ballston corridor in Arlington County, as well as individual stations, such as Silver Spring.

Highway System

The major roadways within and surrounding Subregion 4 provide strong connectivity with nearby local and regional activity centers. This connectivity allows residents and business operators to more easily reach and serve other markets. I-95/I-495, which stretches from Boston to Florida, forms the eastern border of Subregion 4, thereby connecting the subregion to the entire East Coast economy. As such, Subregion 4 has a competitive advantage in attracting firms focused on servicing the greater East Coast market. At a regional level, the research completed for this planning effort indicates that market forces are making it difficult for industrial and warehouse/distribution operations to remain inside Washington, D.C.'s boundary due to increasing values and subsequent increases in operational costs. As such, these entities are seeking new opportunities within close proximity to their downtown market. Subregion 4's proximity to the Washington, D.C., market makes it a prime alternative to meet this need.

Affordability

Commercial/Industrial Competitiveness

Subregion 4 provides greater value to both businesses and potential residents than other areas within the Capital Beltway. The commercial and

industrial analyses indicated that for-sale and for-lease pricing within Subregion 4 are comparably lower than other submarkets in the area. Most notably, the industrial markets to the north of Subregion 4, within close proximity to the I-95/I-495 split and BWI airport, have sustained greater rent rates than those in the subregion. The disparity of rental rates for retail and office space is substantial, given the comparatively lower market strength and quality of space. In both cases, a strategic recruitment package could capitalize on this relative affordability, providing the prospective tenant lower operating costs without adding to the financial cost to the community.

Residential Competitiveness

From a residential perspective, the median sale prices for homes in Subregion 4 are more affordable compared with other regional cities/centers. The four zip codes within the majority of Subregion 4 have median sale prices ranging between \$199,900 and \$251,700 for houses that have recently sold. Nearby communities in Prince George’s County have seen houses sell for slightly higher prices during this time, while communities bordering Washington, D.C., on the north and south have median home prices closer to \$400,000. The affordable nature of the subregion gives people the opportunity to purchase a house comparable to ones in other parts of the region at a more reasonable price. As economic uncertainty remains at the forefront of consumers’ minds and the price of gas continues to remain above historic levels, the desire to live closer to one’s job and recreation outlets will continue to grow.

**Vision
Living Areas**

The living areas of Subregion 4 provide an eclectic mix of housing that includes historic neighborhoods, high-rise apartment and condominium developments, new urbanist transit-oriented housing communities, and expansive public housing developments. The variation in housing types offers existing and potential residents the opportunity to find a home suitable to their needs and means. However, the variety of housing also has an inherent set of challenges. Most notably, many of the older,

established neighborhoods have been adversely impacted by deferred maintenance problems. Furthermore, this area of Prince George’s County was especially hard hit by foreclosures during the recent housing downturn. As a result, the subregion has not benefitted from the stability of homeownership as much as other areas in the county.

The overarching vision for the living areas within Subregion 4 is threefold:

1. Promote and sustain long-term owner-occupancy within all neighborhoods in the subregion, thereby reducing deferred investment and stabilizing at-risk areas;
2. Continue to promote a mix of housing types and values within the subregion to ensure that existing and future residents have suitable choices in housing regardless of socioeconomic status; and
3. Increase the overall population base in the subregion (thereby improving the consumer base) through higher-density, mixed-use development in the subregion’s established growth centers.

The county likely will need to become proactive in the short-term in providing social and financial assistance to potential residents of Subregion 4. Simply put, the impacts of the recent housing downturn have undone the progress occurring within the local market toward greater homeownership and neighborhood stabilization. Although there are measurable effects on those that directly have lost their home, there are substantially more current residents who are maintaining their mortgages despite having lost any equity and/or having to adjust their finances. These “at-risk” households need direct and indirect assistance to avoid becoming the second wave of foreclosures.

Industrial Centers

Of all the nonresidential markets in Subregion 4, industrial real estate historically has been, and remains, the strongest land use type. These properties have maintained high occupancy levels and continue to thrive due to the locational and economic advantages of Subregion 4. The industrial businesses generate tax dollars and provide stable, well-paying jobs accessible to local residents. New

developments, especially Steeplechase 95 Business Park located at I-95 and Ritchie Road, have been very successful at attracting new industrial users to the subregion.

There are several benefits to maintaining Subregion 4's industrial and employment areas. First, there are few remaining sites available for industrial development within Prince George's County, a factor that restrains supply. Second, industrial users in Washington, D.C., continue to be displaced into Maryland or Virginia as industrial properties are redeveloped into other uses, (e.g., the Navy Yard area in Southwest D.C.). This displacement increases the demand for industrial space on the periphery of D.C. Finally, much of the county's industrial property is clustered along I-95/I-495, providing good access to a major transportation corridor, which is often viewed as a coveted amenity for industrial users. In order to position itself for future growth and changes in the regional and local economy, sustaining the presence of the industrial and employment areas will provide the county with an opportunity to capitalize on the subregion's strong transportation access.

The long-term vision for the industrial centers should focus on two principles. First, efforts should be made to support and retain existing industrial areas, as appropriate. In cases where retaining the industrial base is not the highest and best use for an area, efforts should be made to find suitable alternate locations for those businesses that need to be relocated. The existing industrial centers generally are functional. Even the more marginal areas have maintained stable occupancy, albeit with businesses that do not provide comparable benefits to the community as the typical industrial resident. However, there are some areas where market growth is infringing on the existing center (e.g., New Carrollton) and some areas that are not competitive in the marketplace (e.g., Walker Mill Business Park). Although these areas may eventually transition from industrial to other uses, their existing tenant base does provide fiscal benefits to the county. Therefore, all efforts should be made to aid these businesses in identifying new locations within the county.

Second, recruitment and retention efforts should focus on businesses that would benefit the most

from the subregion's strengths. Most notably, warehouse/flex operations have shown the greatest interest in the subregion. The Steeplechase 95 area has experienced noticeable success in recruiting businesses seeking 25,000 to 50,000 square feet of space with ceiling heights above 30 feet and a minimum of five percent of the space for offices. These businesses typically are seeking a base of operations to support their regional clients while having the flexibility to provide showroom-style capabilities by modeling the entrance area of the space in a manner similar to retail frontage. Examples include building contractors, as well as furniture and fixture wholesalers/retailers. In addition to the flex/warehouse market, it was noted that the automotive-related industrial users (e.g., repair facilities) consistently have had strong demand within the Subregion 4 market.

Growth Centers

As detailed in Chapter 6, the eight General Plan centers are the key locations for future development and redevelopment in the subregion. The centers provide a unique opportunity to create mixed-use, walkable districts that can serve as economic engines for the subregion as well as the county. The majority of the new office, retail, and higher-density residential development planned for Subregion 4 is focused in these areas.

Other Opportunities

Beyond the overarching visions for the living areas, industrial centers, and growth centers, other non-location-based initiatives were identified through either market research or the public involvement process. The following vision initiatives reflect those with the greatest chance for success.

Federal Employment Recruitment

Attracting federal employment was consistently cited by local residents, public officials, and real estate professionals as an opportunity for Subregion 4. This opportunity primarily is attributed to the area's close proximity to the District of Columbia. Although the subregion's location is ideal for this opportunity, the limited amount of quality, appropriately located office space currently prohibits any substantial growth in office employment. This is evidenced by the many

subregion residents commuting into D.C. and neighboring counties to work. Increasing the availability of quality office space in the subregion may attract new high-paying, stable jobs.

In addition, there are opportunities to attract the many private contractors that are being awarded contracts to provide support operations for the federal government. The percentage of federal jobs in the Washington, D.C., metropolitan statistical area has been declining as the amount of “professional and business service” jobs, many of which involve government contracts, have been increasing. Between 1990 and 2005, Fairfax County added approximately 100,000 new professional and business jobs while Washington, D.C., and Montgomery County added roughly 30,000 each. Prince George’s County, by comparison, added only 12,000.

Retail/Service Recruitment and Retention

Another opportunity includes attracting new retailers into Subregion 4 to increase the variety and quality of goods being offered locally. The best opportunity is to increase the spending potential within the subregion. One method of obtaining this goal is to create more high-quality, owner-occupied residential options on vacant and infill parcels. By increasing the amount of high-quality residential options on underutilized parcels, the base of higher income households in the area will increase. In 2008, the median household income for Subregion 4 was estimated at \$51,763, nearly 25 percent lower than the county level (\$68,540).

This action should help attract the more diverse mix of retailers desired by community residents. Preliminary market analysis corroborates the perception that Subregion 4 historically has been underserved in retail and service businesses, creating a pent-up demand for a broad range of store types. Only 277,000 square feet of commercial space has been built within the subregion since 1998, despite the development of more than one million square feet of industrial space and nearly 4.8 million square feet of residential space. Of this total, approximately one-half is in self-storage facilities. As such, opportunities may exist to enhance commercial offerings along the major corridors in the

subregion, particularly Martin Luther King Jr Highway, Sheriff Road, Central Avenue, Addison Road, Silver Hill Road, Marlboro Pike, and Ritchie Marlboro Road. This new spending potential, combined with the existing pent-up demand for retail goods and services, could attract the types of businesses desired within the community to the available land along these thoroughfares and in existing neighborhood centers.

Site Specific Opportunities

Lastly, opportunities exist for site-specific assets within Subregion 4. Most notably, the FedEx Field complex provides an opportunity regardless of whether the Washington Redskins remain playing at this stadium. Although it could not be wholly agreed upon whether the community was in support of the stadium’s presence, most acknowledged there is an opportunity to capitalize on the visitors it attracts. Commercial activity surrounding the stadium catering to these visitors is largely absent. Creating these complementary businesses outside the stadium has the potential to provide local entrepreneurs the opportunity to establish new businesses while providing local residents an increase in the variety of retail and service venues.

Outside of typical entertainment venues targeted at visitors, other options suggested by residents included utilizing the parking lot during days when the stadium is not in use. For example, some of the residents urged establishing a weekly farmer’s market outside of the stadium. On the other hand, if the Redskins’ owner chooses to relocate the team, the newly available land would possess substantial development opportunities. In this scenario, many residents wanted to see office development occur on site as nearby shopping centers and easy access to the Capital Beltway could support this endeavor.

The current Walker Mill Business Park in Capitol Heights also provides an opportunity to attract and develop a transformative project. Very little development has occurred in the business park, leaving large lots available for new development. Observations from local real estate professionals and an analysis performed by University of Maryland indicate that the business park is not ideally located to attract the type of industrial and

employment-generating uses once envisioned for the site. As such, local residents and elected officials have indicated a desire to see alternative uses proposed for the site. The overwhelming majority of respondents desire to see a mixture of high-value, owner-occupied residential developments with supporting retail and service uses located near the intersection of Walker Mill and Addison Roads.