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Turner Station Housing Survey
Executive Summary

The team of Lipman Frizzell & Mitchell LLC and Freeman Consulting Group LLC has been engaged by Baltimore County Government on behalf of the Department of Planning to survey the housing and community conditions of the Turner Station community in the Dundalk Area of Baltimore County. The core of the study was a parcel-by-parcel inventory of conditions and photographs, to be used by the government for planning and revitalization guidance. Additionally we interviewed community stakeholders and researched other concepts and programs that could enhance the ongoing community revitalization.

Turner Station is a historically segregated African-American community that grew with the steel industry support for warcraft at the nearby steel mills in the mid-twentieth century. With the demise of the steel mills and desegregation, the community diminished in popularity and began to generally fall into disrepair. There are currently major efforts and investment in restoring the community by both private development at Lyon Homes and also by the Baltimore County government through institutional redevelopment and enhancement.

We find that Turner Station is a proud community of both legacy residents and new, youthful tenants. The community is positioned well geographically to access downtown Baltimore City, the redeveloping Sparrows Point industrial complex and the highway network to the remaining Baltimore-Washington metropolitan area. The potential for investment in this community is strong. However programs and assistance are necessary to help existing residents preserve their place in the community as values will increase with popularity of revitalization. In summary, our reasoning is as follows:

- Community Features – Turner Station was evaluated as once-complete community now in need of revitalization of abandoned sites and buildings in the southern Dundalk area of Baltimore County. The infrastructure and fabric of this community is long established as a historic family neighborhood with a variety of housing types and institutions, but lacking in commercial operations.

    - Neighborhood Plan – For the purposes of this housing condition study, the LFM/Freeman team has divided the Turner Station community into mini-neighborhoods. The mini-neighborhoods are an analysis tool and in no way

represent any planning process. It is simply a tool to create a smaller study area to better understand and explain the complex housing scenarios that exist in Turner Station. These mini-neighborhoods provide the opportunity to discuss the physical data of each block. Two of the neighborhoods are specifically the managed developments of Lyon Homes and Day Village.

- Community Amenities - Turner Station is centrally located and proximate to a broad range of commercial and public services. The community is well-located in the historic Dundalk neighborhood, with easy access to all the advantages of urban life. The subject is located proximate to all community, health care, educational, public transit and retail services.

- Growth Trends – The Turner Station market environment demonstrates a clear need for revitalization and for quality affordable housing. Our research points to a number of factors supportive of the subject's affordable family housing units including.

  - Population Trends – Turner Station is projected to grow by an estimated 26 persons in the next five years (1.0% growth), which is slower than Baltimore County as a whole. The senior population is projected to grow at a more rapid rate (8.1%) over the same time frame, which is an important fact for Turner Station demographics. The area has a high proportion of family households (65.9%), but still more than two-fifths (42.6%) are single parent households.

  - Housing Trends – Turner Station is projected to have no growth in households over the five-year study period. In concert with the population growth, the expansion of senior households is projected to grow by approximately 5.2% by 2022, which is significantly faster than the general population. Turner Station has a very low homeownership rate of 28.7%, as compared to Baltimore County with 66.8%.

    More than one data source can be examined to report home value and pricing information. Each data source uses a methodology that best suits its needs. LFM examined data from the U.S. Census Bureau, the multiple list service (MRIS) often used by real estate agents, and tax assessment values recorded by the State of Maryland. The Turner Station Housing Survey examined a small inventory of properties, a fact that raises complications when compiling aggregate price/value data.

The U.S. Census Bureau reported a median home value of $130,952, and median rent of $706. LFM believes the Census data is biased by including commercial residential properties such as apartment buildings that hold higher real estate value than typical homes. MRIS data indicated an average home sale price of $67,104 in 2017. Detailed analysis of tax assessment data indicated a median residential property value of $38,300 community-wide, which included vacant properties. Vacant properties are included in this calculation as a reflection of the overall community value and illustrates that the value of any particular property is influenced by the neighborhood environment. LFM estimates that owner-occupied home values are nearer to the $50,000 range.

- Economic Trends – Turner Station household incomes are low, with the 2017 median estimated at only $34,909 and over one third of all households earned less than $25,000. Almost one eighth of households (12.3%) have earnings below the federal poverty line. Area renters earn significantly less than homeowners. Employment opportunities are available, but Baltimore County's unemployment rate remains stubbornly high.

- Area Investment - The Turner Station Market Area has benefited from private and public investment in recent years, offering hope for an improving living environment.

- Neighborhood Surveys – Popular topics encountered during the neighborhood surveys were Gentrification, Eminent Domain and Neighborhood Representation. That helped us understand the perspective of the residents of this community. Using the mini-neighborhood model discussed above, we analyzed each property in the community, block-by-block:

  - Turner Station North – This neighborhood is four-fifths rowhomes in good condition, with the exception of the vacant properties. Vacancy in this neighborhood calculates to approximately 6.0%, which is reasonable in any community. Median assessed residential property value is approximately $37,900.

  - Turner Station East – This neighborhood is developed more as single family detached units, but with a high percentage of vacant lots (25.0%) and vacant units (18.4%). Occupied units were in good condition. Median assessed residential property value is approximately $41,200.

  - Balnew – This is a predominantly single family detached neighborhood, experiencing a very high percentage of vacant lots (16.8%) and vacant homes

(19.0%). Occupied homes are in good condition. Median assessed residential property value is approximately $53,600.

- Main Street – This small segment of the community has more commercial lots and a prevailing housing type of single family detached. There are five vacant lots. Median assessed residential property value is approximately $53,900.

- Carver Manor – This is a rowhouse portion of the neighborhood with very low vacancy of 8.0% and occupied homes in good condition. Median assessed residential property value is approximately $35,100.

- Lyon Homes – There are 31 privately owned duplex units in Lyon Homes that are all in generally good condition, with the exception of the 10 vacant units. Median assessed residential property value is approximately $63,600.

- Other Stakeholder Communities – Within the community and along its perimeters are other communities, features and community elements that influence the life and well-being of Turner Station. The three elements within the community are Lyon Homes, Day Village and the Turner Station Park and Marina, all of which offer opportunity for the community to attract permanent residents from within. The neighboring communities of Watersedge, Carnegie, and Dun-Logan share community features, services and schools with Turner Station and therefore are a contributing group of peers in the greater community. Broening Highway and the four gateway locations are key transportation connections to the outside world, that provide an opportunity to display a welcoming and comfortable introduction to the community.

- Community Outreach – The consultant team with the assistance of the Department of Planning hosted two public meetings and a series of interviews with both community members and housing professionals to develop themes and garner perspectives on the housing and community conditions of Turner Station. There were 21 community interviews and 13 professional interviews. Common themes were developed in no particular order:

    - Pride – Turner Station residents have a very high level of community pride and commitment but that is slowly eroding. Although not exclaimed in an overt manner, racial pride is strong in this community as well. The community was born of racial segregation, which in its time created a sense of security and belonging for a group of society that was unwelcome in other areas of Dundalk and Middle River. The community was historically strong and cohesive, leaving a lasting impression on the legacy residents who were raised here. There is a

unilateral pervasive desire to revitalize the community to what it was in its heyday. Fortunately we cannot regress to a segregated community, but the strong community features of the past in Turner Station could be replicated in a more diverse community of the 21st Century.

- Displacement – The initial perception of this survey project was a defensive fear that the County had hired consultants to analyze the community and prepare a report that could be used to lure the development community to Turner Station to buy up vacant and abandoned properties and redevelop them with modern upscale housing. Although the purpose of the study is not to solicit development, it does catalog vacant and abandoned properties and suggests strategies for revitalization. The values will undoubtedly increase with a cleaner and more occupied community. There will be a greater desire for folks to live in Turner Station, and increased demand tends to increase market values of homes and rents, which in turn increases property taxes. This can be a positive impact, by increasing their asset value, and given the longevity of some ownership, they would have increased borrowing power and also an increase in estate value and perhaps then the ability to afford more improvements to their real estate asset.

- Heirs – The population of Turner Station continues to age as houses are not filtering to the younger generations of family members, which, in turn, creates several other problems such as code violations throughout Turner Station. The abandoned properties and those in severe disrepair become a burden to the community, and thus the County has programs and staff assigned to address weatherization, vacancy and abandonment. Any attempts by local and/or state government to remedy these situations are seen as attacks on Turner Station. The strong bonds of previous generations when houses did filter has created heir problems where senior aged children now live in homes that are not in their names. The legacy owners in the community will be better served if they encourage their neighbors and friends who are absentee owners or heirs to register their homes properly in the County Land Records.

- Community Organizations – Turner station is represented by several strong volunteer organizations and churches that do not always work together as one. It is clear from the community dynamic that the pride that filters into the volunteer organizations has different perceptions and these organizations are not always working for the same cause at the same time. Coordination of

efforts by an umbrella organization (private, public or institutional) would work to accelerate the revitalization of the community.

- Crime – The drug dealing in Turner Station is a nuisance and is somewhat tolerated because of the family relationships, but it must be eliminated as it contributes to the housing problems. The problem is two-fold: the dealers have a grip on the community, wherein they can act with impunity by spreading fear of retribution for interference; and the drugs are being used in the community, which is diminishing the opportunity for individuals to grow as a civil member of society and in-turn contribute to the community in positive ways.

- Vacant Housing – The key issue that both the Community leaders and Housing professionals agree upon is a unified plan is needed, which revitalizes Turner Station and reduces and or eliminates the vacant housing. This plan must be supported by and include all the stakeholders; homeowners, renters, investors, non-profits, and local and state government. Lyon Homes is being completely renovated, which will remove much of the appearance of vacancy and abandonment, as well as add population to the community. Opportunities for a similar collective approach by a third-party housing organization to acquire, renovate/replace and lease abandoned and vacant housing on a scatter site basis would be the most effective practice to revitalize the remaining homes in Turner Station.

- Real Estate Market – LFM researched home sales activity for the calendar years of 2014-2017, using the regional multiple list system, MRIS, to survey sold, rented and active units. Sales averaged 11.3 per year, with an increasing average price of $33,800 in 2014 to $67,104 in 2017. Days on the market have decreased over the same period from 116 to 34, showing signs of an improving market.

- Cost of Construction – The National Association of Homebuilders estimates that construction costs represent 55.6% of the final sales price of a new home.[1] Apartment construction costs are estimated based on an average unit size of 1,000 feet[2] multiplied by the national average cost of construction of $192 per square foot for a multitenant building from Fannie Mae.[3] Every house is unique, and presents different

[1] http://www.nahbclassic.org/generic.aspx?sectionID=734&genericContentID=260013&channelID=311

[2] This is a conservative estimate – the average size of an apartment built in 2016 in the northeast was 1,101 sq. ft. https://www.census.gov/construction/chars/mfu.html

[3] This is a conservative estimate as construction costs in Maryland are likely to be slightly higher than the national average – see http://www.fanniemae.com/resources/file/research/emma/pdf/MF_Market_Commentary_031517.pdf

options for restoration, renovation, or replacement. In some cases, the construction may be superficial, while others may require a partial demolition to remove a portion of a house that cannot be restored. Turner Station would be well served by a contractor who could inspect homes and provide assessments to bring them into sustainable, livable homes.

- Foreclosure – At the outset of this project there was a strong assumption that there was a looming foreclosure crisis in Turner Station. The hypothesis included the caveat that foreclosures were the primary cause for the many vacant and boarded properties. The breakdown by neighborhood for the past 5 years:

Balnew – 8	Main Street – 1
Carver Manor – 1	Turner East – 11
Day Village – 0	Turner North – 5
Lyon Homes – 5	

  It is highly possible that many of the vacant and boarded properties are in some sort of "Foreclosure Status" and not reported, and therefore not included in the map data. The most effective way to define the magnitude of the foreclosure market in Turner Station would be to employ a community partner to monitor the markets.

- Auctions – Community conversations concerns were expressed that auctions were being used to gentrify Turner Station. We were unable to find that connection. Although the result of auction is a perceived gentrification, it is very unlikely as auctions are independent transactions driven principally by institutions and also by individual owners to liquidate a tenancy. The auctions most often resolve to a sale at lower than market value. Auctions do provide an opportunity for outsiders to invest in and perhaps move in to Turner Station. On the other hand, if the current Turner Station residents (owners or renters) could purchase these auction sites, they would be investing in their community in a way that suits their goals. Preparing prospective residents to participate in auctions and monitoring the vacant properties to keep everybody aware of the real opportunities would be a role that could be served by a community partner. This is also an opportunity for identification of partners to assist in the renovations and restoration of existing housing stock, perhaps by taking advantage of economy of scale in bulk work, while also revitalizing the community and bringing housing stock back to market.

- Recommendations – Community building and revitalization is a broad topic and not singularly helped or hindered by any particular component. We found in Turner

Station that there are some social and structural issues that are contributing to the condition of the community. Working to improve a variety of concerns will translate into a more welcoming community overall:

- Aging in Place – There is a strong demographic of long-time residents who prefer to remain in the neighborhood into their senior years, even if the housing units do not support aging in place well. Some of the outwardly evident signs to the community may include lack of upkeep of the home, which may simply be because the tenant is physically unable to do it, and may also have mounting healthcare expenses that take priority over property maintenance. There are a variety of support programs and resources available to individuals and caregivers to address this issue.

- Single Parents – Approximately two-fifths (42.6%) of Turner Station households are single parent households, which is also predominantly female head of household. Most likely these householders simply don't have the time or other necessary resources to adequately maintain a home. The State of Maryland and other organizations offer support in many forms for single parents and their household needs, including food, insurance, etc.

- Drug Activity – A recurring discussion theme in the community is the presence of illicit drug trafficking and associated crime. Battling this scourge requires a community effort with law enforcement. The community needs to identify the criminals when they are active and find ways to band together in a show of unity that is determined to root out and defeat this threat. One key tactic could be community block parties and "take back the streets" style celebrations, that present a unified interest and spirit. This all must be coordinated with law enforcement.

- Education and Programs – The community could benefit from additional educational resources for homeowners and renters who wish to transcend into homeownership. There are steps that existing residents can take to further cement themselves in the community and even help to invest in the community.

- Multifamily Influences – The three professionally managed apartment communities in Turner Station contribute a certain livelihood and populous to the overall community, with tenants who have the prospect of transcending into other home rental or ownership opportunities in Turner Station. Managed community need tenant turnover to stay up to date with the facility and rents. For this reason it would be advantageous for the Turner Station community to attract current and future tenants of Day Village and Lyon Homes to be become permanent residents of the greater community. These multifamily communities then become key feeders of residents for the overall community.

- Unified Community – A clearly evident component of this community is the presence of several concerned citizen's groups, not all of which support the causes of the others. One of the greatest successes that Turner Station could have is a singular, unified strategic plan to revitalize the community. The different perspectives in the community are healthy, and if the priorities of each group are mapped and overlayed, the community would find both common ground and individual strengths that support the priorities of others in the long run. The development of an effective and achievable strategic community plan would provide all interest groups with attainable goals that would be a benefit to all. There is no need for competition among the residents in this community if their ideas are combined for the greater good, and moved forward in a strategic team effort.

- Strategies and Recommendations – The LFM/Freeman team proposes using ready resources to get started, which will in turn develop new advanced strategies that propel the community in a positive direction. Initial short-term concepts and strategies include:

  - Community Clean Up Days – work with the government and local waste haulers to bring in roll-off dumpsters for everybody in the community to use to clean up their blocks. This is a low-expense rapid assault on trash and debris, that turns into an event that builds community cohesiveness, while removing those most visible negative attributes in the community.

  - Block Parties – This is a natural segue from the community clean up days. A celebration of the joint effort in the community. Coordinating with the Baltimore County Police Department, a couple central streets could be closed for a day and turned into a festival atmosphere for everybody to enjoy. Work with the local churches and other sponsor organizations to host game booths for children and find local food vendors to sponsor refreshments. A bandstand and dance area would be a positive as well.

  - Citizens on Patrol (COP) – This program is administered through the Baltimore County Police Department. It requires local volunteer participation to be effective. All the training and materials are provided by the police department.

- Next Level Efforts recommended are:

  - Volunteer Community Resources – Employ local community members to coordinate and assist those who cannot maintain their own homes. Create a civic

task force/organization opportunity for neighbors to support one and other in the goal of stronger community bonds.

- Flex Zoning – With the help of the County Planners and Council, propose flexible zoning for key blocks, such as William Wade Avenue and Avon Beach Road. The community of Turner Station has demand for small service and retail goods, but no viable options in the present zoning to create that nucleus.

- Strategic Planning – Use this document and the past studies on Turner Station to develop a community strategic plan with dates, milestones and assignment of participation. Without a clear strategic plan, the community will be handicapped from true progress.

- Avon Beach Road One-Way – We propose that this road be restricted to West-bound traffic only, thereby limiting the greatest traffic to the morning peak hours. The community will then be quieter and safer in the evening, when more residents and children may be out and about.

- Commercial Corner – Consider rezoning the corner of Sollers Point Road, Avon Beach Road and Avondale Road to permit café-style uses with reduced parking requirements, and promote pedestrian-friendly conveniences, like ice cream, donuts, coffee, etc.

In summary, we find that Turner Station is a strong, historic neighborhood that once had a nucleus of community, investment and pride of ownership that has since waned. However the potential for renewed local investment is present, and with a strategic plan of action there could be a new energy kindled in the neighborhood to revitalize and become a wonderful place for many families to call "home."