



CITY COUNCIL WORK SESSION AGENDA

Work Session - Economic Development Retention & Expansion/ Discussion of Increasing Refuse and Recycling

This meeting will be held in-person and virtual.

**25 Crescent Road
Greenbelt, MD 20770**

OR

Virtual Participation

Zoom Webinar Attendees:

Please submit your request in writing via email to questions@greenbeltmd.gov

[https://us02web.zoom.us/j/84837595010?](https://us02web.zoom.us/j/84837595010?pwd=g7H0wk2CgY9BUwgak3HdZbDi9UyUpu.1)

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Dial-in: 301 715 8592

Webinar ID: 848 3759 5010

Passcode: 603551

Monday, May 5, 2025

7:30 PM

Agenda Packet

1. **Work Session - Economic Development Retention & Expansion**

Suggested Action:

Agenda

- **Introductions**
- **Presentation:**

The city has been working with Willdan Financial for the last several months on an Economic Development Strategic Plan. Willdan has completed the EDSP Existing Conditions analysis, including an economic base analysis, business

interviews, peer city review and SWOT analysis. Attached is the draft EDSP.

- Council Discussion
- Questions and Answers
- Other Items

[Greenbelt EDSP Existing Conditions_2025_05_02_Council Review.pdf](#)

2. Discussion of Refuse and Recycling Service Fees and Services, and Pay as you throw proposal

Suggested Action:

Agenda

- Introductions
- Council Discussion
- Questions and Answers
- Other Items

[Green ACES Green Team recommendation 2025-02 on solid waste.pdf](#)

[Post-Grant Budget Scenarios Attachment - \(3-25-25\).pdf](#)

[2025.03_Solid Waste Discussion.pdf](#)

City Council Work Session Agenda Item Report

Meeting Date: May 5, 2025

Submitted by: Bonita Anderson

Submitting Department: Administration

Item Type: Work Session Item

Agenda Section: Agenda Packet

Subject:

Work Session - Economic Development Retention & Expansion

Suggested Action:

Agenda

- Introductions
- Presentation:

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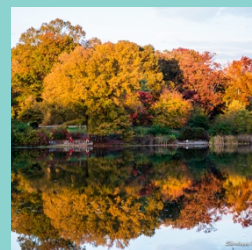
- Council Discussion
- Questions and Answers
- Other Items

Attachments:

[Greenbelt EDSP Existing Conditions_2025_05_02_Council Review.pdf](#)

GREENBELTMD

Economic Development Strategic Plan: Existing Conditions Briefing Book – Preliminary Draft



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Executive Summary

Introduction

The City of Greenbelt, Maryland, is proud to launch its Economic Development Strategic Plan, a forward-looking initiative funded through the American Rescue Plan Act (ARPA). This plan represents a pivotal step in charting a resilient and inclusive economic future for Greenbelt—one that builds upon the city’s rich history, diverse community, and strategic location in the Washington metropolitan region.

Guided by the values of equity, sustainability, and innovation, this strategic plan aims to strengthen Greenbelt’s local economy through a multifaceted approach. Core objectives include enhancing business support services, attracting new business investment, facilitating the redevelopment of commercial centers and underutilized properties, and continuing to support the recovery and growth of small and independent retail businesses still affected by the impacts of the COVID-19 pandemic.

With funding from ARPA, the City of Greenbelt is taking a focused approach to address the economic challenges resulting from the pandemic and further intensified by the Trump Administration’s federal layoffs. With economic uncertainty and business risk in regional landscape, the City is intentionally laying the groundwork for long-term prosperity by moving from planning to implementation.

This plan will serve as a blueprint for coordinated economic development efforts, ensuring that public investments translate into tangible benefits for residents, workers, and business owners alike.

Through data-driven analysis, stakeholder engagement, and a commitment to inclusive growth, Greenbelt’s Economic Development Strategic Plan will help position the city for a more vibrant and sustainable economic future.

To provide City Council with a baseline assessment of existing conditions to inform the Economic Development Strategic Plan, this Briefing Book is organized into the following sections:

- Demographic Overview
- Economic Base Assessment
- Business Climate Survey
- Peer Cities Best Practice Case Studies
- Summary Economic Development SWOT
- Draft Action Plan Recommendations

Policy Context

The City of Greenbelt’s Economic Development Strategic Plan (EDSP) aligns closely with the broader policy frameworks and strategic goals outlined in both Prince George’s County’s Plan 2035 and the Greenbelt City Council’s Foundational Pillars, serving as a locally grounded yet regionally connected roadmap for economic vitality.

Plan 2035, Prince George's County's General Plan, emphasizes economic competitiveness, redevelopment of targeted centers, and equitable growth—goals that directly mirror Greenbelt's ambitions to revitalize underutilized properties, attract new business investment, and support a more resilient and inclusive local economy. The EDSP strengthens the City's ability to contribute to these countywide priorities by identifying actionable strategies that align with regional planning efforts, including transit-oriented development, workforce alignment, and small business support.

At the local level, the EDSP is deeply rooted in the Greenbelt City Council's Foundational Pillars serving as a policy vehicle to advance:

- **Sustainability** through the strategic reuse of existing commercial assets and promotion of long-term economic resilience;
- **Forward Thinking & DEI** by proactively addressing economic inequities, skills gaps, and ensuring access to opportunity for all residents;
- **Exceptional Services** by enhancing business support infrastructure and improving the City's capacity to serve existing and prospective businesses; and
- **Collaboration, Innovation, and Smart Economic Development** through targeted redevelopment efforts, cross-sector partnerships, and a data-informed approach to business attraction and retention.

Together, these connections validate the adoption of the Economic Development Strategic Plan by the Greenbelt City Council as a necessary and timely step toward fulfilling both the City's internal

vision and its role within a broader regional economy. The plan provides a clear and actionable pathway for Greenbelt to proactively shape its economic future while remaining anchored in its values of equity, community, and innovation.

Greenbelt's Economic Development Policy Linkages

Prince George's County Plan 2035 Goals

- Promote Transit-Oriented Development (TOD)
- Enhance Economic Competitiveness
- Foster Sustainable Communities
- Strengthen Workforce Development
- Revitalize Aging Commercial Corridors and Residential Neighborhoods

City Council Foundational Pillars

- Sustainability
- Forward Thinking & DEI
- Exceptional Services
- Collaboration, Innovation, & Smart Economic Development

Pillar 4: Collaboration, Innovation, & Smart Economic Development

- Establishing a jobs and resource lab
- Promoting cross-sector Collaboration
- Invest in digital infrastructure and programs
- Creating a culture of experimentation and Learning

II. Demographic Overview

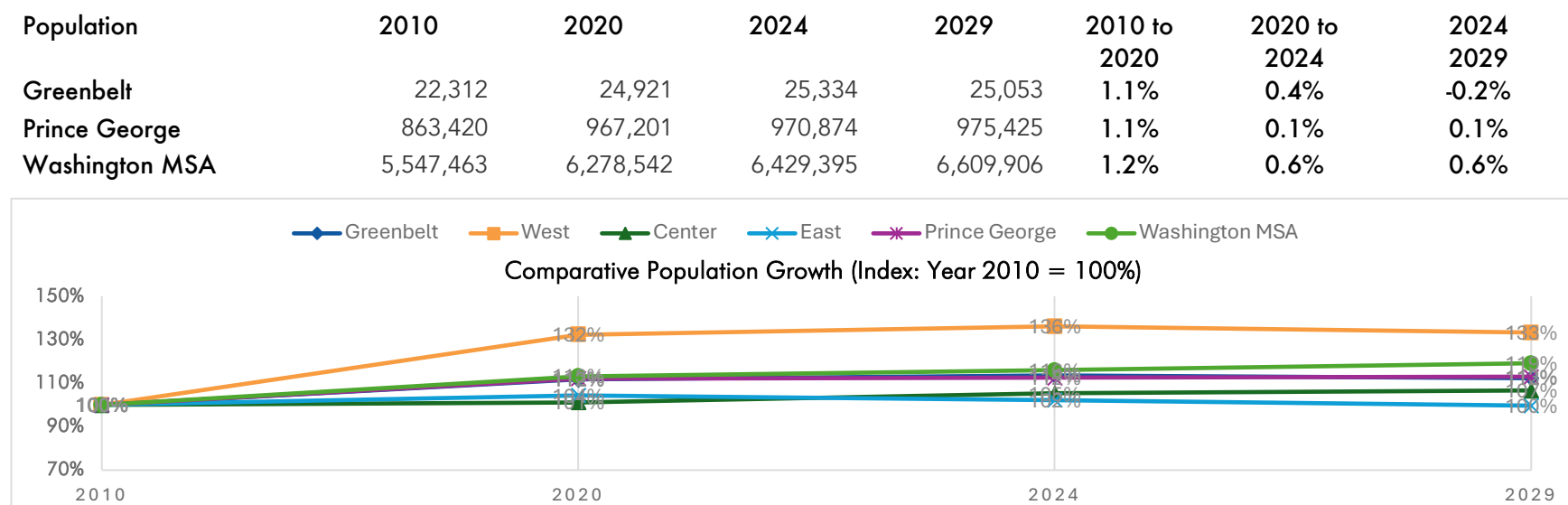
Introduction

The City of Greenbelt, Maryland, occupies a distinct position within the broader demographic and economic landscape of Prince George's County and the Washington, DC metropolitan region. Drawing on data from ESRI Business Analyst, this analysis explores trends and projections related to population, households, income, housing, and educational attainment. These factors are key to understanding Greenbelt's market position and its competitiveness in attracting residents, businesses, and investment over the next five years.

Population Trends

Greenbelt's population growth is expected to remain relatively stable in the near term. Between 2020 and 2024, the city grew modestly from 24,921 to 25,334 residents—a 1.7% increase. However, projections show a slight dip to 25,053 by 2029, indicating potential outmigration or demographic stagnation. In contrast, Prince George's County and the Washington MSA are projected to experience steady population increases through 2029. Prince George's County, for instance, is projected to grow from 967,201 in 2020 to 975,425 in 2029, reflecting broader regional momentum that Greenbelt has yet to fully capture.

Figure 1: Population Trends and Projections, 2010 to 2029



Source: Esri Business Analyst; Willdan, 2025

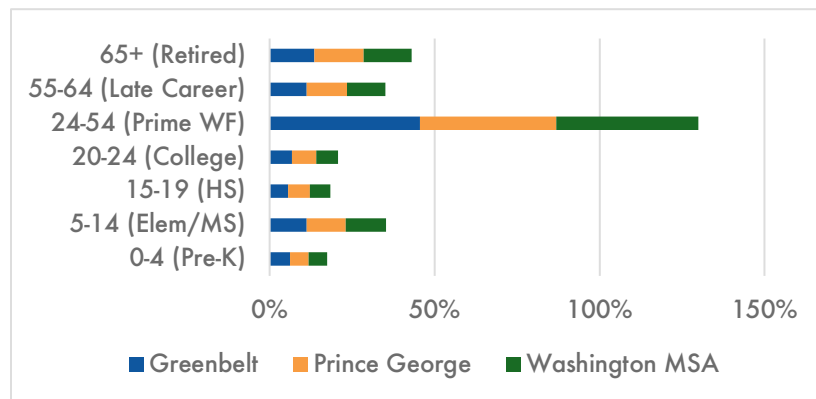
Households and Household Formation

Greenbelt currently exhibits moderate household growth, increasing from 9,528 households in 2020 to a projected 9,979 by 2029. This 4.7% growth rate is notably slower than Prince George's County and the Washington MSA, which project increases of 8.7% and 7.2% respectively over the same period. Slower household growth in Greenbelt may signal constraints in housing availability or limited new residential development, suggesting a need for policy interventions to encourage infill or redevelopment.

Age

The majority of Greenbelt's population is aged 24 to 54, considered "prime workforce age. Locations with a high proportion of working age adults is attractive to businesses and a strong contributor to the labor pool.

Figure 2: Age by Cohort, 2024



Source: Esri Business Analyst; Willdan, 2025

Household Income

Income trends further highlight Greenbelt's middle-market positioning. In 2024, the median household income in Greenbelt is projected at \$72,254—below both the county median (\$96,330) and the regional median (\$114,782). While incomes in Greenbelt are expected to rise to \$79,901 by 2029, the city is not keeping pace with the broader income growth of the region. This disparity may reflect a higher proportion of lower-income renters, fewer high-paying employment centers within the city, or an economic base less oriented toward high-growth sectors.

Housing Characteristics

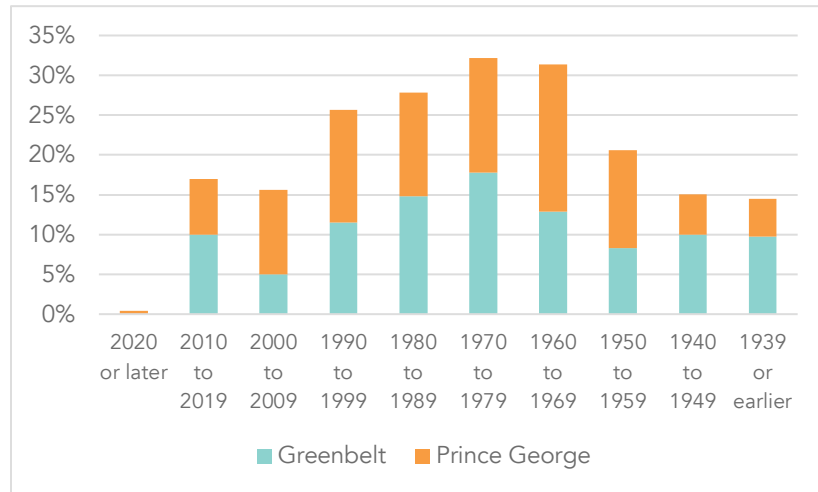
Greenbelt's housing stock is more multifamily-oriented than the surrounding jurisdictions. Over 60% of housing units are in structures with five or more units, compared to approximately 30% countywide. The city also has a higher proportion of renter-occupied units, indicating a less stable residential base and fewer opportunities for long-term wealth accumulation.

Moreover, Greenbelt has a smaller share of new housing starts, especially when compared with growth nodes like Laurel and College Park. This suggests underutilized redevelopment potential and calls for incentives to stimulate housing investment.

Approximately 74% of Greenbelt's Housing stock was built earlier than 1989 (35 years or older). East Greenbelt experienced the

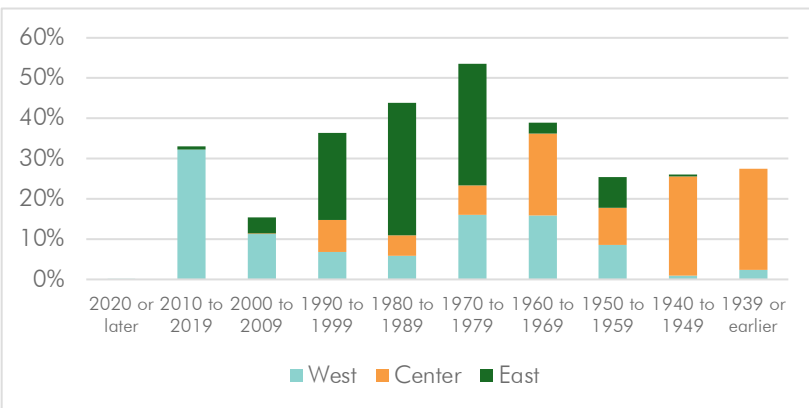
majority of buildout between 1970 and 1999. Essentially no new housing has been built in Greenbelt Center since 1999.

Figure 3: Housing by Year Built – Greenbelt vs. Prince George’s County(<1939 to 2020+)



Source: Esri Business Analyst; Willdan, 2025

Figure 4: Housing by Year Built – Greenbelt West, Center & East (<1939 to 2020+)



Source: Esri Business Analyst; Willdan, 2025

Educational Attainment

Greenbelt exhibits a well-educated population with 48% of residents holding a bachelor’s degree or higher, exceeding the county average (40%) but still trailing the Washington MSA average (52%). This middle-tier standing suggests Greenbelt is attractive to professionals but may lack the economic ecosystem—such as major employers or higher-end amenities—to fully retain or attract top-tier talent.

Strengthening workforce pipelines, increasing connections to regional employment hubs, and promoting mixed-use development could help close this gap.

Economic Development Considerations

Overall, Greenbelt demonstrates modest growth across most indicators but lags behind the more dynamic growth patterns of its county and regional counterparts.

Population stagnation, slower household formation, lower income levels, and constrained housing development are key challenges. However, Greenbelt’s strengths—including its central location, educated population, and transit connectivity—offer significant potential. With targeted economic development strategies, investment in housing and infrastructure, and regional alignment, Greenbelt can reposition itself as a competitive, inclusive, and vibrant city within the Washington metropolitan region.

III. Economic Base Analysis

Introduction

Greenbelt, Maryland, is a city located in Prince George's County, approximately 12 miles northeast of Washington, D.C. It is strategically situated near major transportation routes, including the Capital Beltway (I-95/I-495) and the Baltimore-Washington Parkway (MD 295), facilitating convenient access to both Baltimore and Washington, D.C.

Originally developed as part of the New Deal in the 1930s, Greenbelt has a unique cooperative housing model which fosters community investment. The historic planned community of Old Greenbelt (Greenbelt Center), which features the Roosevelt Center—a focal point for local businesses and community events.

The City has invested in high quality parks, recreation, and community center assets and provides a wide range of public services that far exceed their peer communities. Destination outdoor recreation includes Buddy Attie Lake Park and the Greenbelt Park (National Park Service). These walkable, green spaces support local economic activity.

The city is well-served by public transportation. The Greenbelt station is a significant hub, acting as the northeastern terminus of the Washington Metro's Green Line and providing access to MARC's Camden Line for commuter rail service between Washington, D.C.,

and Baltimore. Additionally, several Metrobus routes, including the G12 and G14 lines, connect Greenbelt to neighboring communities such as New Carrollton and Lanham.

In terms of educational institutions, Greenbelt is served by Prince George's County Public Schools. Notably, Eleanor Roosevelt High School, located within the City, offers a Science and Technology magnet program. The Dora Kennedy French Immersion School serves students K-8 from throughout Prince George's County. Private schools include the Lancaster Bible College/Capital Seminary & Graduate School and the Academy of Saint Matthias the Apostle.

Greenbelt, located in Prince George's County, benefits from various business incentive programs, including tax credits and grants. Its proximity to the I-495 Technology Corridor provides access to a thriving network of tech firms and government contractors. The area also boasts a highly skilled workforce, particularly in government, defense, aerospace, and STEM-related fields, making it an attractive hub for business growth and innovation. University of Maryland, in neighboring City of College Park, strengthens the local talent pipeline through research partnerships and workforce development. The presence of NASA's Goddard Space Flight Center solidifies Greenbelt's role in scientific research and technology.

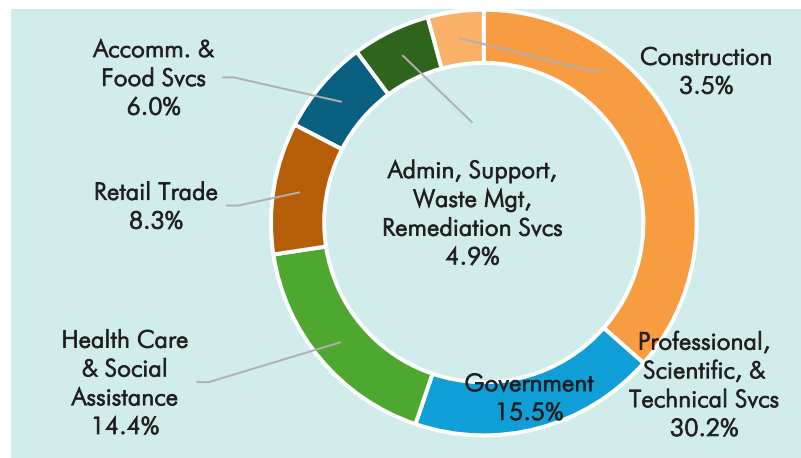
These elements collectively contribute to Greenbelt's unique character as a historically significant community within the

Washington metropolitan area that is a hidden gem in terms of opportunity for real estate investment and development.

Businesses & Industries

The composition of industries reflects a service-based economy, with most of the employment concentrated in professional services, government, and health care. The Professional, Scientific, and Technical Services sector, accounting for 30.2% of employment, indicates a strong reliance on knowledge-based industries such as consulting, engineering, and IT.

Figure 5: Greenbelt's Largest Industries, 2025



Source: Lightcast.io; The Metts Group, 2025

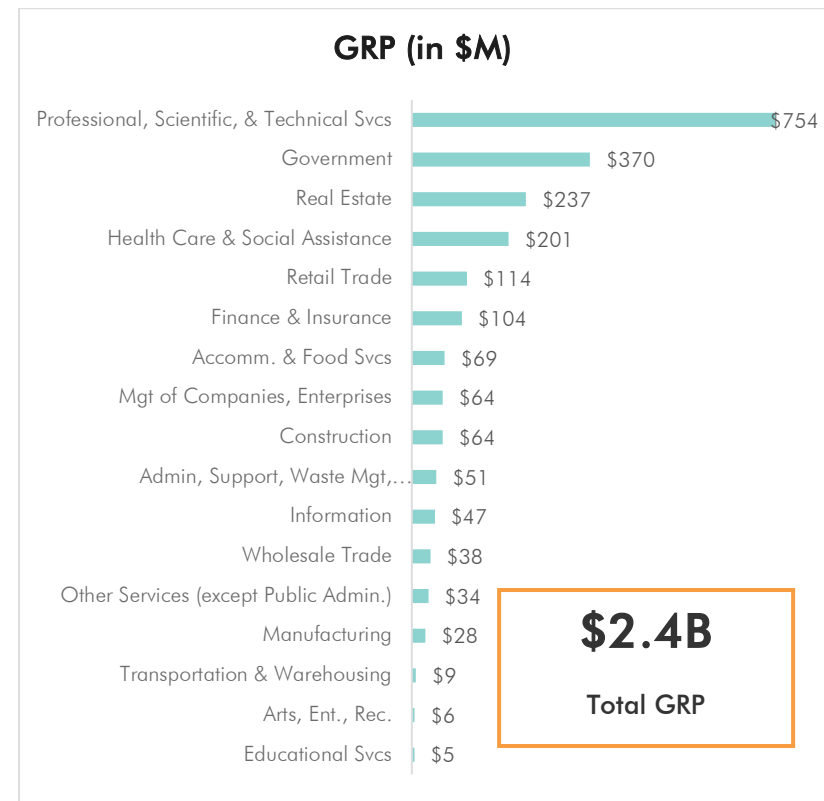
Additionally, the significant presence of government (15.5%) and healthcare and social assistance (14.4%) further reinforces the dominance of service-oriented employment. The inclusion of retail trade (8.3%) and accommodation and food services (6.0%) highlights

Economic Development Strategic Plan 2025

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the role of consumer-driven sectors, while the absence of substantial manufacturing or industrial activity suggests limited dependence on goods production. Overall, this economic composition reflects a workforce that is highly educated and specialized.

Figure 6: Gross Regional Product, 2025



Source: Lightcast.io; The Metts Group, 2025

The table below highlights the largest employers in the City of Greenbelt. Businesses that rely on government contracts are specifically marked.

Table 1: Greenbelt's Largest Employers, 2025

Employer	Number of Employees	Industry	Annual Revenue
NASA Goddard Space Flight Center ¹	10,000+	Government	---
Maid Brigade	430	House Cleaning	\$34.5M
Giant Food	350	Grocery Store	\$90M
Bozzuto & Assoc ²	250	Real Estate Developer	\$53M
Target	169	Retail	\$29M
Springhill Lake Elementary	140	School	---
Trax International Corp	135	Logistics Consulting	\$10M
TGI Friday's	130	Restaurant	\$6M
Safeway	125	Grocery Store	\$32M
Bozzuto Group	122	Real Estate	\$72M
Holcim	120	Concrete Contractor	\$16.7M
Martins Caterers	120	Caterer	\$5.6M
Global Science & Tech	118	Technologists & Applied Sciences	---
City of Greenbelt	250	Government Administration	---
Power Home Remodeling	97	Home Improvements	---
Chevy's Fresh Mex	90	Restaurant	\$4.2M
NASA Space Science Dat	85	Federal Government - Space	---
API Inc	85	Advertising	\$64M
Bozzuto Group	80	Real Estate	\$115.3M
Greenbelt Elementary School	80	Local Government	---
Joseph Greenwald & Laake PA	75	Attorneys	\$115M
Beltway Plaza Mall	75	Shopping Center	\$34.6M
Jackson & Tull	75	Civil Engineers	\$13.7M
CLA Clifton-Larson-Allen	75	Accountants	\$7.6M

Source: Lightcast.io; The Metts Group, 2025

Greenbelt's Largest Employers reflect a diversified business base concentrated in high-value sectors

Table 1: Greenbelt's Largest Employers, 2025, Continued

Employer	Number of Employees	Industry	Annual Revenue
Burlington	73	Department Store	\$12.7M
McNamee Hosea	70	Attorneys	\$10M
KBR	70	Aerospace Support Services	\$8.8M
Maryland State Highway Administration	70	State Government	---
E L Gardner Inc	60	Ready-Mixed Concrete	\$17.5M
Business Integra	60	Computer System Design	\$8.8M
Osteoporosis Center of PG County	56	Physicians & Surgeons	\$10.3M
National Association - Black	52	Associations	---
Innovim	51	Engineering	\$9.3M
Greenbelt Consumer Co-Op	50	Pharmacies	\$15M
Primerica	50	Financial Advisory Svcs	\$14.9M
Retina Group of WA	50	Physicians & Surgeons	\$9M
US Courts - Office of Defender Svcs	50	Legal Services	\$7M
B L Seamon & Assoc	50	Business Mgt Consultants	\$3.7M
Angarai	50	Business Mgt Consultants	\$3.7M
MHI Hotels Svcs	50	Hotels & Motels	\$3M
Hilton Garden Inn WA DC/Greenbelt	50	Hotels & Motels	\$3M
Living Hope	50	Group Homes	---
Educational Systems Federal CU	47	Credit Unions	\$1.2B

¹Employers highlighted relate to businesses dependent upon Federal government contracts and considered at risk for business disruptions.

²Bozzuto is Greenbelt's largest private employer with 452 total employees across all divisions.

Source: Data Axle; The Metts Group, 2025

Federal Layoffs

Approximately 330 jobs could be at risk due to the ongoing government cuts. This would likely result in the loss of an additional 80 jobs across other industries in Greenbelt, driven by the direct job losses, and a reduction of approximately \$770,000 in local tax revenue annually.

Workforce

Commuting data allow economic development professionals to understand which occupations and skills are leaving the area for work or vice versa. These data show the opportunities in the untapped segments of the labor pool. According to Census' LEHD on the Map program, only 4% of Greenbelt residents stay in the city for work. The remainder have found opportunities elsewhere, including DC (24%), College Park (4%), Baltimore (3.4%), and Bethesda (3%).

Workers commuting into Greenbelt come from a wide range of areas, with approximately 5% traveling from Washington, D.C., 3% from Baltimore and Bowie, and 2.5% from Columbia, MD.

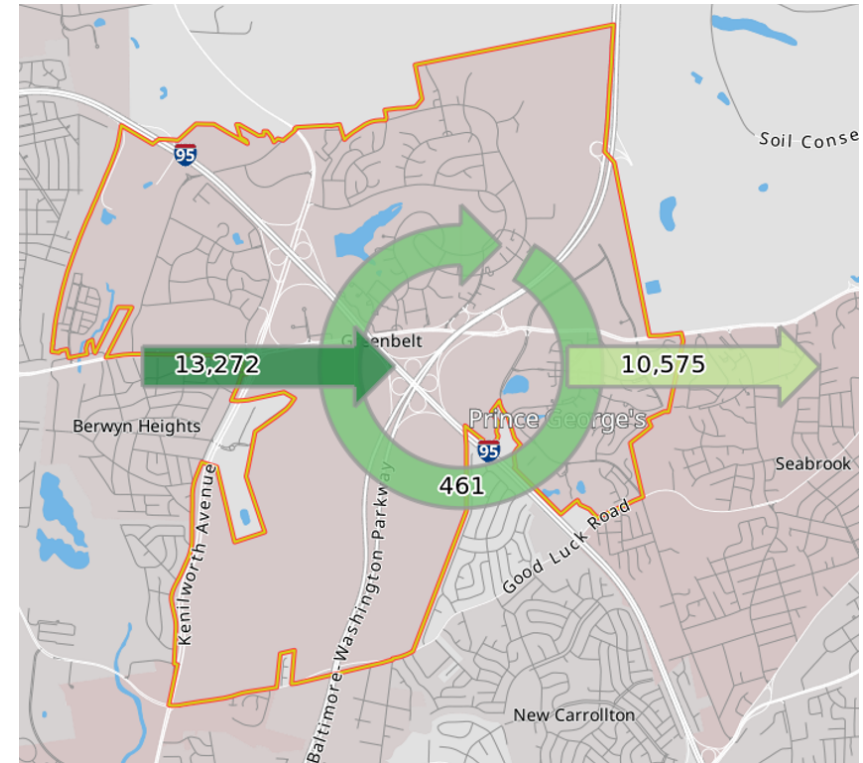
Understanding where talent in Greenbelt currently works compared to where talent lives can help optimize site decisions, target certain industries, and educational opportunities (regional higher ed completions).

Table 2. Distance Greenbelt Residents Travel for Work

Distance	Count	Share
Less than 10 miles	4,780	43.3%
10 to 24 miles	4,920	44.6%
25 to 50 miles	880	8.0%
50+ miles	460	4.1%

Source: Census LEHD on the Map, 2022

Figure 7. Commuting Inflow-Outflow, City of Greenbelt (2022)



Source: Census LEHD on the Map, 2022

Table 3. Available Workforce, Radii from Greenbelt

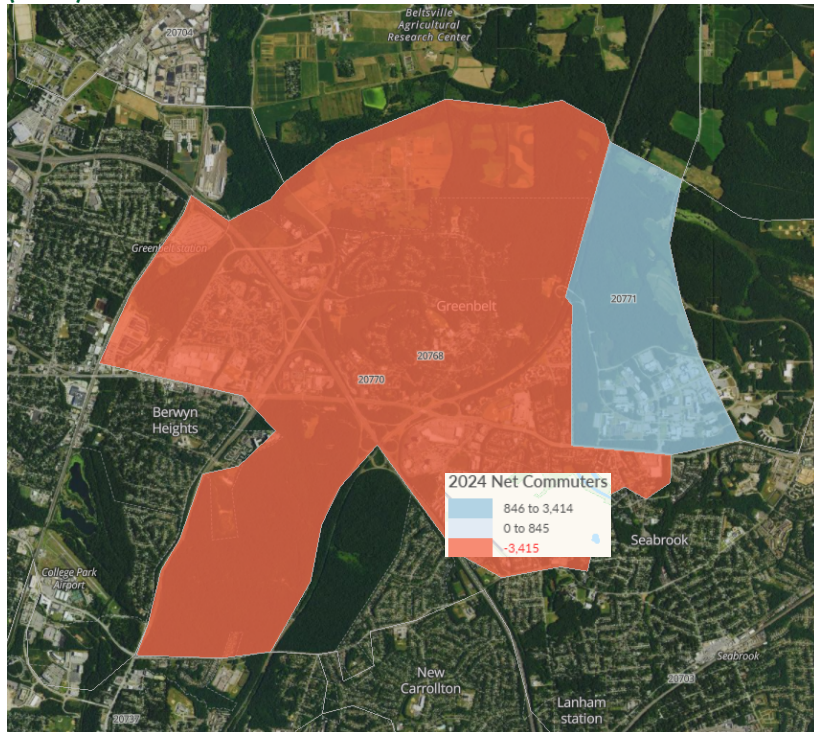
Available Workforce	
10-mile	802,600
15-mile	1,844,180
30-mile	4,443,000

Source: Lightcast, 2024, all classes of worker

City of Greenbelt, MD

The map below shows the gap between the number of resident workers and available jobs. Red areas indicate a surplus of workers relative to available jobs, while blue areas indicate a surplus of jobs relative to available workers. This pattern aligns with expectations, given the presence of NASA Goddard in East Greenbelt, which likely drives higher demand for specialized jobs in the area.

Figure 8. Available Workforce compared to Jobs by Zip Code, Greenbelt (2024)



* Red areas indicate a surplus of workers relative to available jobs, while blue areas indicate a surplus of jobs relative to available workers.

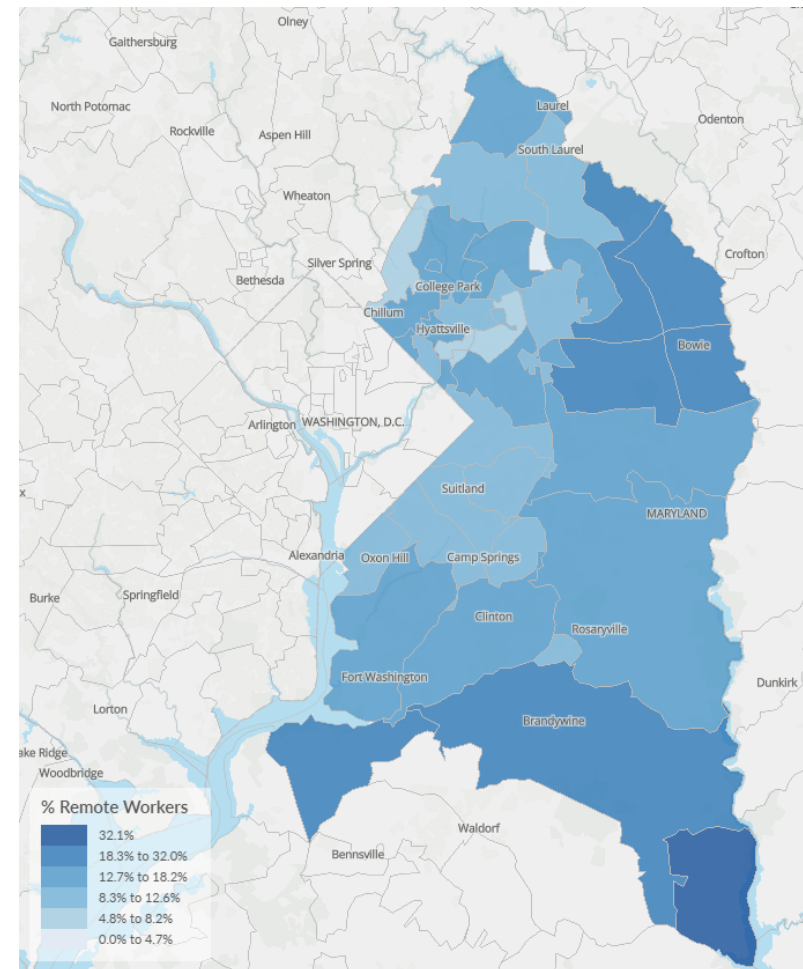
Source: Lightcast, 2024

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According to the Census, nearly 14% of workers age 16 and over residing in Greenbelt are remote workers, compared to 13% in Prince George's County and 15% statewide.

Figure 9. Where Remote Workers Live, Prince George's County (2023)



Source: Census ACS 2023, Lightcast, 2025

Workforce Availability

To better understand the skills Greenbelt residents have acquired, we examine the jobs they hold.

The top occupations for jobs available in Greenbelt include **managers, lawyers, and home health aides**.

From a local workforce perspective, the table below highlights the primary occupations in the area, the number of residents employed in each, and whether there is a surplus or gap in local talent.

A **surplus** indicates **more jobs than residents**, meaning workers commute into the area, while a **gap** suggests more residents than available jobs, leading to out-commuting.

This net effect provides an approximation of workforce alignment and potential employment gaps

Table 4. Industry Inflow-Outflow

Industry	Surplus/Gap of Resident Workers
MORE JOBS THAN RESIDENTS TO FILL THEM (OUT COMMUTERS)	
Public Administration	-572
Transportation and Warehousing	-349
Other Services (excluding Public Administration)	-308
Admin & Support, Waste Management and Remediation	-249
Construction	-186
Educational Services	-167
Wholesale Trade	-129
Accommodation and Food Services	-125
Manufacturing	-82
Arts, Entertainment, and Recreation	-61
Real Estate and Rental and Leasing	-57
Information	-33
Utilities	-16
Agriculture, Forestry, Fishing and Hunting	-12
Mining, Quarrying, and Oil and Gas Extraction	-1
MORE RESIDENTS THAN AVAILABLE JOBS (IN-COMMUTERS)	
Health Care and Social Assistance	125
Retail Trade	393
Finance and Insurance	470
<u>Management of Companies and Enterprises</u>	<u>546</u>
Professional, Scientific, and Technical Services	3,510

Source: Census LEHD On the Map, 2022

Table 5. Top Occupations, Greenbelt (2024)

SOC	Description	Jobs	Available Workforce (Resident Workers)	Surplus/Gap of Resident Workers	Median Hourly Earnings	Avg. Annual Openings
11-1021	General and Operations Managers	451	472	(21)	\$55.28	37
23-1011	Lawyers	345	283	62	\$72.28	20
31-1128	Home Health and Personal Care Aides	335	286	48	\$18.97	72
33-9032	Security Guards	323	207	116	\$20.80	45
41-2031	Retail Salespersons	287	285	2	\$14.20	43
13-1082	Project Management Specialists	280	138	142	\$46.22	20
41-2011	Cashiers	249	271	(22)	\$13.40	49
15-1252	Software Developers	236	153	83	\$67.92	15
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	218	240	(22)	\$22.27	24
13-1199	Business Operations Specialists, All Other	211	370	(159)	\$45.94	19
35-3023	Fast Food and Counter Workers	182	249	(67)	\$14.95	43
13-2011	Accountants and Auditors	178	157	21	\$41.67	14
43-4051	Customer Service Representatives	176	165	11	\$20.45	24
11-9199	Managers, All Other	173	240	(67)	\$59.50	14
13-1111	Management Analysts	167	219	(52)	\$58.67	14
15-1299	Computer Occupations, All Other	165	190	(24)	\$62.74	11
43-1011	First-Line Supervisors of Office and Administrative Support Workers	152	130	21	\$31.79	15
53-7065	Stockers and Order Fillers	148	177	(29)	\$17.53	25
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	140	273	(134)	\$17.87	22

TOP
10

Source: Lightcast.io; The Metts Group, 2025

Table 5. Top Occupations, Greenbelt (2024), Continued

SOC	Description	Jobs	Available Workforce (Resident Workers)	Surplus/Gap of Resident Workers	Median Hourly Earnings	Avg. Annual Openings
41-3091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	134	100	34	\$35.78	13
11-3021	Computer and Information Systems Managers	130	74	57	\$75.87	8
29-1141	Registered Nurses	123	258	(136)	\$40.16	10
31-9092	Medical Assistants	119	83	36	\$21.73	17
17-2051	Civil Engineers	119	38	81	\$45.08	8
43-3031	Bookkeeping, Accounting, and Auditing Clerks	118	100	19	\$23.04	14
23-2011	Paralegals and Legal Assistants	114	55	59	\$30.61	14
15-1232	Computer User Support Specialists	113	71	42	\$29.32	8
43-4171	Receptionists and Information Clerks	110	87	23	\$18.31	16
11-3031	Financial Managers	110	96	14	\$68.35	8
41-1011	First-Line Supervisors of Retail Sales Workers	110	113	(3)	\$21.83	11
13-1161	Market Research Analysts and Marketing Specialists	109	84	25	\$31.96	13
55-9999	Military-only occupations	105	515	(410)	\$24.28	12
31-1131	Nursing Assistants	105	125	(19)	\$19.61	21
47-2061	Construction Laborers	101	105	(4)	\$21.96	11

Source: Lightcast.io; The Metts Group, 2025

Greenbelt's Competitive Business Landscape

In summary, Greenbelt hosts a diverse array of businesses, including high-tech companies, defense-related firms, and retail establishments. Notably, the city is home to significant employers such as Lockheed Martin Corporation, which specializes in aerospace and defense, and Target, a major retail chain. The presence of these large corporations indicates a concentration in sectors like aerospace, defense, and retail.

While Greenbelt contributes to the county's economic diversity, its business establishment count and industry variety are more limited compared to the broader county. Greenbelt's economy is significantly influenced by a few large employers, whereas Prince George's County benefits from a wider distribution of businesses across multiple sectors.

The county's emphasis on fostering innovation and supporting minority-owned businesses has led to a more dynamic and rapidly growing business environment.

Challenges and Opportunities

Overall, Greenbelt demonstrates modest growth across most indicators but lags behind the more dynamic growth patterns of its county and regional counterparts. Population stagnation, slower household formation, lower income levels, and constrained housing development are key challenges. However, Greenbelt's strengths—

including its central location, educated population, and transit connectivity—offer significant potential.

Understanding the distinctions between Greenbelt's more concentrated economic base and the broader, more diversified economy of Prince George's County is crucial for stakeholders. These differences inform the kinds of policies and investments that will be most effective for stimulating growth in Greenbelt.

For example, while the county may benefit from large-scale sector development, Greenbelt may need to focus on niche opportunities, targeted incentives, and place-based strategies to expand its business base.

Tailoring strategies to reflect local conditions ensures that economic development efforts are both realistic and impactful—addressing unique barriers, leveraging specific assets, and aligning with regional trends in a way that amplifies Greenbelt's potential within the competitive landscape of the Washington metropolitan area.

Opportunity for Regional Linkages

The county has experienced a surge in new businesses, particularly in high technology, cybersecurity, and bio-health sectors. This growth is attributed to factors such as business incubators and entrepreneurial support centers at institutions like the University of Maryland and Bowie State University, as well as the presence of federal facilities like NASA's Goddard Space Flight Center.

Business Attraction & Retention Health Check

Introduction

The City of Greenbelt, Maryland, occupies a distinct position within the broader demographic and economic landscape of Prince George's County and the Washington, DC metropolitan region. Drawing on data from ESRI Business Analyst and Lightcast.io and additional economic trend analysis, this assessment explores trends and projections related to population, households, income, housing, educational attainment, and industry sector performance.

These factors are key to understanding Greenbelt's market position and its competitiveness in attracting residents, businesses, and investment over the next five years.

Industry Cluster Analysis

To evaluate Greenbelt's economic base and potential areas for targeted growth, this analysis employs a locational quotient (LQ) methodology.

Location quotient (LQ) measures how concentrated an industry is in a specific area compared to the national average. A low LQ (less than 1.0) suggests the sector is underrepresented locally, meaning there is room to grow, and it may be emerging or newly forming in the local economy.

As the sector gains traction and becomes more established, its LQ may rise above 1.0—indicating that the region has a specialization or competitive advantage in that sector.

By identifying industries that are strong, emerging, or declining, the City can prioritize workforce investments, align land use strategies, and cultivate partnerships that support long-term competitiveness and economic resilience.

Strong but Declining Industries

Several industries in Greenbelt remain concentrated with high location quotients (LQ) but are experiencing job declines. These include Specialty Trade Contractors (electrical, masonry, drywall), Hotels, Clothing Retailers, Transit and Ground Transportation, Electronics and Appliance Retailers, and Printing. These sectors, while still present, face systemic challenges such as shifting consumer behavior, automation, and declining demand.

Strategic recommendations to mitigate job losses and support workforce transition include:

- Supporting retailers and hoteliers through business assistance and customer attraction strategies
- Providing upskilling and reskilling opportunities to help workers pivot into growing sectors
- Encouraging flexible work arrangements and shared staffing models
- Leveraging workforce development grants in partnership with entities like Employ PG

- Promoting local tourism and hosting events to stimulate demand

Weak and Declining Industries

Industries with both low LQ and job losses include Administrative and Support Services, Educational Services, Hospitals, Nursing Facilities, Warehousing and Storage, Vehicle Parts Dealers, and Banks. These sectors may be constrained by broader regional trends, constrained industrial land/building supply, and changing service delivery models. Transitional strategies for weak and declining sectors could include:

- Partnering with Employ Prince George's to leverage career transition pathways for displaced workers (e.g., healthcare administration digital education platforms)
- Promote adaptive reuse of underperforming properties (e.g., transforming vacant bank buildings into neighborhood serving uses like co-working space, community healthcare, or small-scale retail incubators)
- Advocate for co-locating traditional service-sector businesses (banks, admin services) within mixed-use developments
- Support former nursing facility staff with wraparound services such as job placement assistance, credentialing, and transportation support to ensure sustained employment

Important Growth Industries

Greenbelt shows strength in industries with both high LQ and job growth such as Government, Professional Services, R&D in Life

Sciences and Biotech, Administrative Management, and Custom Computer Programming. While some sectors—like Government and Professional Services—are saturated, others like Biotech and Custom Software Development present significant growth opportunities. Recommendations for these sectors include:

- Supporting tech transfer and commercialization of R&D
- Expanding STEM and IT-focused education and certification pipelines
- Investing in workforce development for software and analytics careers
- Promoting Greenbelt as a hub for shared services and regional HQs

Emerging Industries

New opportunities are emerging in Professional Services, Home Health Care, Medical Labs, Medical Equipment Wholesaling, and Freight Trucking. These sectors may benefit from Greenbelt's connectivity, educated labor pool, and regional proximity.

Strategic priorities include:

- Strengthening the talent pipeline with apprenticeships and technical training
- Facilitating B2B collaboration in supply chain and logistics
- Assisting wholesalers and manufacturers with trade and market expansion
- Partnering with healthcare providers and biotech startups to enhance local procurement and research

Table 6: City of Greenbelt Target Industry Health Check, 2025

Strong but Declining (High LQ but Job Decline)	Weak and Declining (Low LQ and Loss of Jobs)	Important Growth Industries (Positive Job Growth + High LQ)	Emerging
- Specialty Trade Contractors (electrical, masonry, drywall, finish carpentry) - Hotels - Clothing Retailers - Transit and Ground Transportation (buses, taxi) - Electronics and Appliance Retailers - Printing and Related Activities	- Administrative and Support Services (Convention and Trade Show Organizers, Temporary Staffing Services, Office Administration Services) - Educational Services - Hospitals - Nursing Care Facilities - Warehousing and Storage - Vehicle Parts Dealers - Banks	- Government (federal, state, local) - Professional Services: Computer Systems Design - R&D in Biotech (or Nanotechnology) - Administrative Management Services - Custom Computer Programming - Residential Remodelers and Commercial Construction - Home Building Centers and other Building Material Suppliers - Civil Engineering Construction (water lines, other heavy civil, power lines, etc.) - Supermarkets	- Professional Services - Professional Employer Organizations - Consulting Services (environmental, vet, marketing) - Health Care - Home Health Care - Offices of Physicians - Medical Labs - Wholesalers - Medical, Dental and Hospital Equipment Wholesaler - Industrial Machinery and Equipment Wholesaler - General Freight Trucking

Source: Lightcast.io; The Metts Group, 2025

Target Sector Attraction Strategies

Greenbelt demonstrates modest growth across demographic indicators and industry sectors. However, economic development efforts must be tailored to reflect the city's unique market dynamics and regional context. Understanding which industries are declining, which are growing, and which are emerging allows stakeholders to develop more targeted strategies.

By aligning workforce development, infrastructure investments, and industry support programs with these insights, Greenbelt can more effectively reposition itself within the regional economy. Coordinated partnerships, especially with Prince George's County and regional employers, will be essential in building a more resilient and competitive economic base. By targeting these interventions, Greenbelt can mitigate economic disruption while catalyzing the transformation of legacy sectors into more resilient and future-facing components of the city's economy. The following

Health Care

A key takeaway from the industry health check analysis is the emergence of health care as a growing sector in the Greenbelt area. This service-based industry aligns well with the local demographics and complements the existing economic landscape. With an office vacancy rate of 22%, the market presents a strong opportunity for medical and wellness services to take root and expand.

The Armory building could serve as an ideal location for a Health & Wellness Center that also functions as a community hub. To ensure long-term success and sustainability, potential tenants should be thoughtfully vetted. Programming within the center could include fitness and movement classes, nutrition and cooking workshops, mental health counseling, and holistic wellness services.

This concept would not only align with the mission of the Greenbelt Community Center but also honor Greenbelt's historical commitment to community and cooperative values.

Aligning Talent, Business, and Opportunity

A strong partnership with Employ Prince George's (EPG) and Prince George's County is vital for supporting both local businesses and the workforce, particularly in times of disruption such as mass layoffs. EPG offers a timely and comprehensive response to these events by deploying coordinated support strategies that include career transition services, workforce training, and job placement assistance.

For example, EPG hosted the Federal Employee Career Transition & Resource Fair on March 12, 2025, which connected displaced workers with personalized career counseling, employers, and service providers—demonstrating their capacity to respond quickly and effectively.

Beyond immediate response, EPG takes a long-term view of workforce development. Through its Business Services, Strategic

Partnerships, Community Development, and Talent Acquisition teams, EPG works to strengthen the region’s economic resilience and ensure a future-ready labor force.

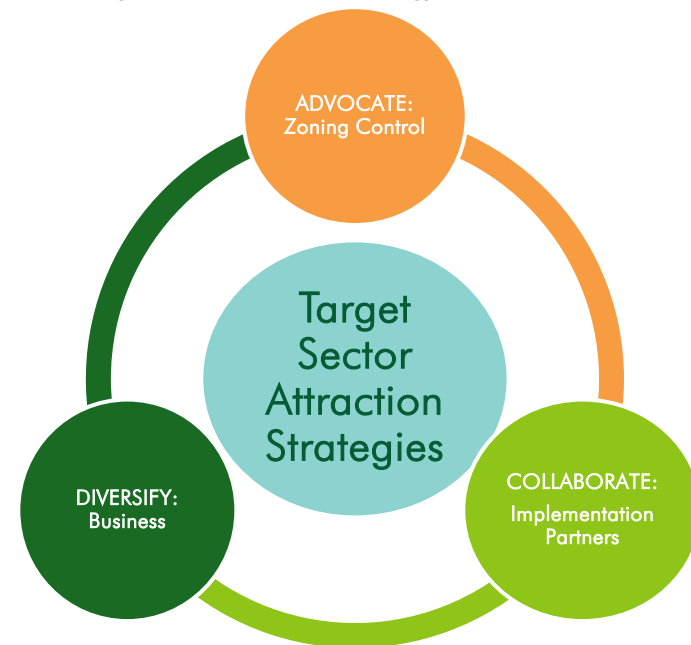
City Action Framework: Control, Diversify, Collaborate

Aligning zoning, business growth, and strategic partnerships will empower the City to better manage tax revenue, support the development of sustainable businesses, and attract new investment. As part of this strategy, the City should also work with local employers—particularly those reliant on government contracting—to explore complementary business opportunities and diversify their revenue streams. By fostering collaboration, thoughtful planning, and economic diversification, the City can strengthen its sense of community and build a more resilient, inclusive local economy.

A key initiative includes the creation of a comprehensive employer database for Prince George’s County, which outlines detailed career pathways within EPG’s target industries. By linking employers to NAICS and SOC codes and aligning them with relevant training programs, this database will serve as a vital resource to connect talent with opportunity. This system is designed not only to support job seekers and students in building lasting careers within the county, but also to provide business development teams with the tools to better engage employers and align workforce programs with local industry needs.

Greenbelt staff should actively engage in this initiative by strengthening relationships with EPG, local employers and collaborating on education and training efforts. This approach will enhance workforce development, create meaningful career pathways for residents, and provide a steady pipeline of skilled talent to meet the evolving needs of Greenbelt’s business community. Continued collaboration with EPG will be essential to sustaining business retention, attracting new investment, and fostering long-term economic growth.

Figure 10: Target Sector Attraction Strategy Framework



Source: The Metts Group; Willdan, 2025

Impact of Federal Government Job Cuts

Since early 2025, the current administration's policies have led to the loss of thousands of government and government contract jobs. While exact numbers are challenging to determine due to ongoing legal proceedings and policy adjustments, the impact on both federal employment and contractor positions has been substantial.

The impact on Greenbelt could be substantial because some of the largest employers who call Greenbelt home are either government or have government contracts. NASA has faced budgetary challenges that have further strained resources at Goddard. Proposed budget cuts have led to reductions in funding for key programs managed by the center, raising concerns about the future of missions and scientific research.

In February 2025, Peraton announced the loss of 123 jobs. Using an input-output model, we estimate the broader economic impact, both direct and indirect. This results in the loss of approximately 10 additional jobs across other industries, along with an estimated \$174,000 reduction in local tax revenue annually. Based on major employer list analysis, approximately 330 jobs could be at risk due to the ongoing government cuts. This would likely result in the loss of an additional 80 jobs across other industries in Greenbelt, driven by the direct job losses, and a reduction of approximately \$770,000 in local tax revenue annually.

Data Limitations

Note that data for this analysis is collected at the County level only. Local applications must be interpreted according to existing conditions and adjacencies to identifiable industry clusters. Taking Professional Employer Organizations" as an example would be the American Physical Society in College Park with 150 employees and all the organizations associated to unions.

Table 7: Target Sector Attraction Strategy Recommendations

Strong but Declining (High LQ + Job Decline)	Weak and Declining (Low LQ + Loss of Jobs)	Important Growth Industries (Positive Job Growth + High LQ)	Emerging (Low LQ + Positive Job Growth)
- Support retailers and hoteliers - Upskilling & Reskilling programs: provide training in digital skills, career pathways, or customer service development to help employees transition into evolving roles - Flexible Work arrangements: partner with other retailers and hoteliers for job-sharing opportunities, cross-training, or part-time options to retain staff - Workforce Development grants: partner with entities like Employ PG for on-the-job training and apprenticeship programs - Tourism & Local Shopping Campaigns – Promote "stay local" initiatives to drive more traffic to hotels and retailers - Events & Conferences – Support initiatives that bring more visitors to the area, increasing hotel stays and retail spending	- Encourage partnerships to make education and healthcare more accessible - Improve local infrastructure to support more warehouses and distribution centers, especially near transportation routes	- Partner with local higher ed to offer specialized training in project mgt, IT certs, data analytics, etc. - Support tech transfer programs that help researchers commercialize software-based IP - Provide opportunities for firms to collaborate to adopt AI-driven analytics, cloud-based tools, etc. - Expand STEM-focused education in high schools (coding, AI, cybersecurity) - Partner with Employ PG to provide WF retraining programs to help professionals transition into software dev roles (career pathways program thru Employ PG) - Leverage existing industry assets and expand niche areas like cybersecurity, fintech, or health IT to attract specialized firms - Promote the City as a hub for shared services to attract corporate HQs or regional offices - Leverage the plethora of talent coming into Greenbelt - Link workforce training better with IT and Engineering Services	- Support Professional Services and Health care through workforce training and small business support and expansion efforts - Potential for expansion of wholesalers and trucking operations - Coordinate with County entities - Strengthen the supply chain & logistics network (establish industrial zones, distribution hubs with easy access to highways; facilitate trade expos and B2B matchmaking events) - Expand talent pipeline & workforce readiness (partner with Employ PG to offer apprenticeships for equip maintenance, med tech sales, and supply chain mgt) - Expand market reach (encourage collaboration between wholesalers, manufacturers, and end-users; assistance for international trade and market expansion efforts) - Encourage partnerships with regional healthcare providers to increase local procurement - Help wholesalers connect with international markets through export assistance programs - Encourage research collaborations with biotech firms and medical device startups

Source: Lightcast.io; The Metts Group, 2025

IV. Real Estate Market Overview

This section provides an overview of current real estate market conditions in the City of Greenbelt, Maryland within the broader submarket of Prince George’s County and the metropolitan Washington, D.C. area. The analysis highlights key trends, opportunities, and constraints across the commercial, residential, and industrial sectors. These findings will inform strategic priorities and investment decisions as the City prepares to implement a new Economic Development Strategic Plan.

Located in northern Prince George’s County, Greenbelt benefits from a highly accessible location with direct connections to I-495, the Baltimore-Washington Parkway (MD-295), and the Washington Metro and MARC commuter rail systems.

This competitive positioning enhances Greenbelt’s potential to serve as a hub for transit-oriented development (TOD), infill housing, and commercial revitalization. The City’s rich planning legacy, strong civic identity, and proximity to regional employment centers make it well-positioned to attract investment and manage growth.

Office Market

SUPPLY. The office sector in Greenbelt mirrors regional dynamics, with elevated vacancies in older buildings, increasing interest in adaptive reuse, and a “flight to quality” by Class A tenants. Proximity to transit and federal employers presents an opportunity to reposition underperforming office space for flexible workspace, medical tenants, or education-related uses. Smaller users, such as nonprofits, consultants, and tech startups, are a potential target market.

OFFICE PERFORMANCE

Estimated Office Vacancy Rate (2024): ~14–18%

Office Lease Range: \$21–\$28/SF (Full Service)

DEMAND. Underutilized office and flex space in West Greenbelt provides an opportunity for repositioning to meet demand in life sciences, R&D, and government services. Public sector employers and contractors create stable demand for professional service and administrative space. Long-term hybrid work trends suggest a shift in demand toward smaller, flexible workspaces and shared amenities.

Focus on the potential to activate first-floor office in mixed-use settings in Center Greenbelt for non-traditional office users such as nonprofits, education providers, or telehealth services.

Industrial and Flex Market

SUPPLY. Greenbelt’s industrial and flex space inventory is relatively limited but fully utilized. Existing properties—typically located near the Beltway and MD-295—are in high demand, particularly among service businesses and last-mile distributors. There are few opportunities for new industrial development without land assembly

INDUSTRIAL PERFORMANCE
Estimated Occupancy Rate: >95%
Industrial Lease Range: \$10–\$15/SF (NNN)

or repurposing existing assets.

DEMAND. There is not enough readily available space offering the floorplates, power demands, and other factors to satisfy demand by higher value manufacturers (i.e., advanced manufacturing, biotechnology, etc.). Redevelopment of older industrial sites and attraction of light industrial build-to-suit users to future large scale redevelopment sites would substantially diversify Greenbelt’s tax base. Flexible zoning approaches could support new uses such as light manufacturing, clean tech, and maker spaces (e.g., flex office combined with Class A research and development labs, light manufacturing, cold storage, and transshipment).

Proximity to employment centers, transit, and green space makes Greenbelt attractive for attainable housing. Lower land costs compared to other inner-Beltway communities support the financial feasibility of new development. These drivers suggest that with **strategic zoning, infrastructure investment, and marketing**, Greenbelt can reassert itself as a desirable destination and attractive investment opportunity for Live—Work—Shop “third places” in the Washington region.

Retail Market

SUPPLY: Greenbelt’s retail landscape is anchored by two main commercial districts: Beltway Plaza Mall and Roosevelt Center. Roosevelt Center, located in the Historic Greenbelt core, remains a vital neighborhood-serving hub, while Beltway Plaza is undergoing a phased redevelopment that will transition the site into a walkable, mixed-use destination.

RETAIL PERFORMANCE
Estimated Retail Vacancy Rate (2024): ~7.5%
Retail Lease Range: \$20–\$32/SF (NNN)

DEMAND. The City’s retail market is experiencing a shift in demand toward experience-driven tenants, food-based enterprises, and locally owned businesses. Commercial vacancy remains moderate but concentrated in older retail centers that require reinvestment and

modernization. The City's façade improvement programs and emerging marketing initiatives aim to increase visibility, pedestrian activity, and tenant attraction.

Retail Customer Journey in Greenbelt

Understanding the customer journey for retail in Greenbelt provides insights into where and how residents shop—and where unmet demand or friction points may exist.

1. Awareness and Discovery

Greenbelt residents experience retail offerings through a mix of word-of-mouth, social media, hyperlocal advertising, and regional digital platforms. Anchor retail hubs such as Beltway Plaza, Roosevelt Center, and Greenway Center serve as well-known landmarks, but many small businesses lack broad visibility.

2. Access and Convenience

Customer journeys are heavily influenced by mobility and proximity. Residents in East Greenbelt tend to frequent Greenway Center and nearby big box retail, while those in Center Greenbelt often walk or bike to Roosevelt Center. West Greenbelt, anchored by institutional employers, lacks convenient retail options, pushing workers and residents to shop elsewhere. Walkability, safe crossings, and transit access affect retail foot traffic.

3. Purchase and Experience

Consumers prioritize convenience, affordability, and quality. Limited diversity in dining, experiential, and boutique options often prompts residents to shop or dine in nearby cities like College Park or Hyattsville. For local businesses, creating an engaging in-store experience is key to customer retention.

Opportunities to Enhance the Customer Journey

- Strengthen branding and wayfinding to guide customers seamlessly across Greenbelt's commercial nodes.
- Invest in streetscape improvements to enhance the pedestrian experience and invite discovery.
- Support pop-ups, local markets, and cultural events to activate underused retail areas and encourage exploration.
- Promote online visibility and digital tools for small businesses to improve discovery and sales.
- Coordinate business engagement and co-marketing among shopping centers to retain spending within Greenbelt.
- By mapping and improving the retail customer journey, the City can boost local business success, encourage cross-neighborhood visits, and reinforce a unified identity for Greenbelt's retail ecosystem.

4. Post-Purchase and Loyalty

Customers express loyalty when businesses foster community connection and offer consistency. Social media engagement, rewards programs, and participation in local events help build ongoing relationships. However, outdated shopping centers and disconnected business districts hinder repeat visits across city zones.

General Residential Market

SUPPLY. Greenbelt's housing stock is diverse, with a mix of mid-century single-family homes, multifamily rental communities, and historic cooperative housing built between the 1930's and 1960's. The City continues to offer relatively affordable housing options compared to surrounding jurisdictions, though rising regional demand is placing pressure on rental prices and ownership opportunities.

RESIDENTIAL PERFORMANCE
Median Home Value (2024): ~\$310,000
Median Gross Rent: ~\$1,430/month
Homeownership Rate: ~40% owner-occupied

DEMAND. Future housing demand will be influenced by ongoing redevelopment at Beltway Plaza, the potential for TOD at Greenbelt Metro, and broader regional affordability trends. Strategic efforts to

preserve affordability, promote middle-income housing, and support infill development will be critical.

According to the U.S. Census Bureau's 2019 American Community Survey 5-Year Estimates, the distribution of housing units by the year built in these cities is detailed in the following table. The types of housing units also indicate comparative development trends.

The data suggests that Greenbelt's housing development has not kept pace with neighboring cities, both in terms of the number of new units and the diversity of housing types. This lag in development may impact the city's ability to attract new employers and residents, and to meet the transitional housing needs of its current population.

Multifamily Residential Market

SUPPLY. Greenbelt benefits from regionally strong demand for rental housing, driven by younger professionals, university affiliates, and federal workers. In addition to approximately 2,500 units proposed, planned or under construction in Greenbelt over the next five years, post-covid inflation and high interest rates have delayed construction activity. Most notably, the Beltway Plaza Mall redevelopment is planned to include approximately 2,500 housing units. In the interim,

MULTIFAMILY PERFORMANCE
Estimated Retail Vacancy Rate (2024): ~7.5%
Retail Lease Range: \$20–\$32/SF (NNN)

the prevalence of a large share of existing multifamily units signals potential for renovation, repositioning, and infill.

DEMAND: The Washington, D.C. metropolitan region is facing a significant shortfall in housing, particularly in the workforce development multifamily sector. According to the Metropolitan Washington Council of Governments, the region needs to construct approximately 32,000 new housing units annually through 2030 to meet demand. However, in 2021, only between 20,000 and 22,000 units were built, indicating a substantial annual deficit.

Strategic Development Sites and Opportunities

The City of Greenbelt is home to a collection of strategic sites that present varying stages of redevelopment potential—from active construction to long-range opportunity planning. Together, these areas represent a roadmap for shaping the City's economic future through targeted reinvestment, civic renewal, and place-based development. This Strategic Plan identifies and categorizes these sites into four focus area types: active construction projects, future opportunity sites, revitalization target areas, and locations suited for placemaking and infrastructure enhancement. These categories are associated with varying degrees of site control or other City influence on the proposed redevelopment activity.

At the forefront is the **Beltway Plaza Mall**, currently under construction as part of a long-term, phased redevelopment into a

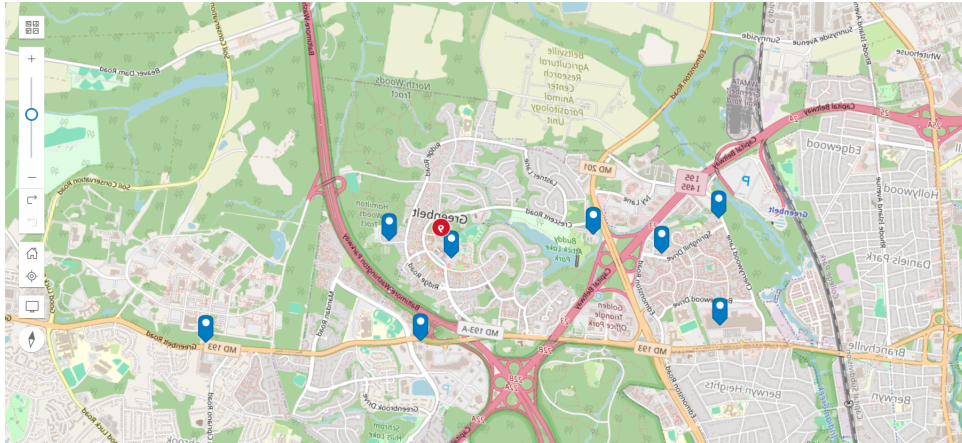
walkable, mixed-use neighborhood. The **Greenbelt Metro Station Site**, a 61-acre parcel adjacent to transit infrastructure, remains one of the most significant future opportunity sites in the region, with potential for public-private partnerships and large-scale mixed-use development.

Nearby, the **Armory Redevelopment Site** has been identified for potential public-private mixed-use anchored by the relocation of the City Administration Building. Greenbelt Center's **PGFD Fire Station 835** offers space for service expansion or new public facilities.

Meanwhile, commercial revitalization targets are concentrated in each of the City's key commercial/retail hubs. **Roosevelt Center**, despite its historic significance, faces challenges related to aging infrastructure and private disinvestment, while **Greenway Center**—another prominent commercial node—offers the potential to be repositioned for modern retail, food-based uses, or health-related services.

Finally, the **Greenbelt Road Corridor** serves as the entrance to the City and the critical transportation infrastructure supporting these projects. Wayfinding and placemaking investments can knit the “three Greenbelts” into one and elevate visitor traffic to better support the City's local and independent retail base.

Figure 11: Recommended Economic Development Opportunity Sites



Source: City of Greenbelt; Esri Business Analyst; Willdan, 2025

This real estate market analysis underscores the importance of proactive policy, intergovernmental coordination, and targeted investment to unlock Greenbelt's development potential.

These conditions will guide the strategic plan's recommendations to attract private investment, enhance fiscal resilience, and shape a sustainable economic future.

Table 8: City of Greenbelt Opportunity Sites

City Assets/Opportunity Sites/Areas		
Name	Address	Opportunity Area Type
Armory Redevelopment Site	7100 Greenbelt Road	Future Opportunity Site
City Administration Building	25 Crescent Road	Future Opportunity Site
PGFD Fire Station 835	125 Crecent Road	Future Opportunity Site
Roosevelt Center	131 Centerway	Revitalization Target Area
Greenbelt Road Corridor	Greenbelt Road	Wayfinding & Placemaking Infrastructure
Greenbelt Gateway 1	Branchville Road & Greenbelt Road	Gateway Focus Area
Greenbelt Gateway 2	Southway & Greenbelt Rd	Gateway Focus Area
Greenbelt Gateway 3	Kennilworth Ave & Good Luck Road	Gateway Focus Area
Greenbelt Gateway 4	Mandan Road & Greenbelt Road	Gateway Focus Area
Hanover Office Park	Hanover Parkway	Medical Mile
Belle Pointe Office Park	Belle Point Dr	Medical Mile
Maryland Trade Center I & II	Greenway Center Dr	Medical Mile
Maryland Trade Center III	Greenway Center Dr	Medical Mile

Source: City of Greenbelt; Civic Consulting Group; The Metts Group; Willdan, 2025

Table 9: City of Greenbelt Opportunity Sites: Other Ownership/Control

Greenbelt Opportunity Sites: Other Ownership/Control		
Name	Address	Opportunity Area Type
Greenway Center	Greenbelt Road	Revitalization Target Area
Roosevelt Center	131 Centerway	Revitalization Target Area
Greenbelt Metro Station Site	Greenbelt Metro Drive	Future Opportunity Site
Beltway Plaza Mall	6000 Greenbelt Road	Under Construction
Prince George's County Health Center (COG Activity Center)	Greenbelt Road to Edmonston	HUB Zone/Medical Healthcare Cluster Target
French Immersion School	Greenbelt Road to Edmonston	Future Opportunity Site
Capitol Office Park 1	Ivy Lane	Largest single campus office park in PGC 1M Square Ft.
Capitol Office Park 2	Ivy Lane	Largest single campus office park in PGC 1M Square Ft.
Edmonston Road Corridor	Edmonston Road	HUB Zone
Greenway Center	Greenway Center Dr	Medical Mile
Greenbelt Commons	Greenbelt Rd	Medical Mile
Commerce Center 1	Greenbelt Rd	Medical Mile
Golden Triangle	Walker Dr	Medical Mile
Patriot Business Park	Walker Dr	Medical Mile

Source: City of Greenbelt; Civic Consulting Group; The Metts Group; Willdan, 2025

Beltway Plaza Redevelopment: Under Construction

The private redevelopment of the 1970's era Beltway Plaza Mall in Greenbelt, Maryland, is progressing through a multi-phase plan aimed at transforming the 54-acre site into a modern, mixed-use community proposed to be a game changing revitalization for Greenbelt Road and increasing market-rate housing in the City.

The comprehensive plan includes up to 2,500 residential units and approximately 700,000 square feet of reconfigured commercial space (reducing the retail mall space from its current one million SF), five acres of open space and a 27,000+ square-foot Recreation Center to be operated by the City of Greenbelt Recreation Department for community programming.

Phase 1 includes the construction of 750 multifamily residential units, a 92-room hotel and open space. Conceptual Site Plan and Preliminary Plan of Subdivision and Phase 1 Small Area Plan have received approval. Currently under construction is the required structured parking component to offset the surface parking lots to be used for the residential development. The mall owner/manager, Quantum Corporation, plans to conduct the redevelopment in phases over the span of a decade or more given the capital required for this project.

Greenbelt Station Metro Site/FBI Headquarters Consolidation Project

The proposed FBI Headquarters consolidation project represents a potentially transformative 2.1 million square foot development on a 61-acre federally owned site adjacent to the Greenbelt Metro Station. While the project advanced significantly in recent years, it has faced ongoing uncertainty following changes in federal administration priorities.

The development was proposed to bring approximately 7,500 FBI employees to Greenbelt, generating significant secondary impacts—including job creation for local businesses, increased demand for housing and commercial services, and the potential for sub-contractor co-location.

In November 2023, the U.S. General Services Administration (GSA) formally selected Greenbelt as the preferred site, with construction projected to begin in 2029 and occupancy targeted for 2036. In parallel, the WMATA Greenbelt Joint Development Approvals Report (September 2022) outlined plans for a Joint Development solicitation for approximately 14 acres of adjacent Metro-owned land.

This portion was to be made available for private, mixed-use development to complement the federal project and help generate new tax and non-tax revenues to support infrastructure financing for the larger site.

Key Challenges

As of April 2025, the future of the 61-acre site remains uncertain following President Trump's decision to halt the FBI headquarters relocation. While the GSA had intended to move forward with development, the project's cancellation has left the site's status in limbo.

Potential Next Steps

Next steps will depend on decisions by federal agencies, in coordination with local and regional stakeholders, in the coming months. In the meantime, the City of Greenbelt has the opportunity to continue advocating for the site's redevelopment with the following actions:

Monitor Federal Reassessment: Designate a staff person responsible for monitoring status updates regarding the GSA's ongoing reevaluation of the site's future use. Create a standing agenda item with Prince George's County implementation partners related to regular "Economic Development Opportunity Site" updates.

Regional Advocacy Efforts: Prince George's County, the City of Greenbelt, and the City's state and federal legislative delegations could collaborate to urge the GSA to either finalize its decision or transfer the site to WMATA for potential redevelopment in line with local and regional economic development priorities.

Exploring Public-Private Partnership Opportunities: While the future of the site remains uncertain, its proximity to the Greenbelt Metro Station and regional transportation networks positions it as a high-value redevelopment opportunity. Prince George's County and the City of Greenbelt could begin jointly marketing the site to private developers, linking the site's capacity to transition quickly into a shovel ready site that could accommodate a wide range of users with specific space requirements. The site's location and scale make it attractive to private sector partners, which could increase pressure on the GSA to release the property for redevelopment tax income generating uses.

The Armory Site: Future Opportunity Site

Constructed in 1954 and located at 7100 Greenbelt Road, the Armory served as a National Guard facility for several decades. In October 2024, the City of Greenbelt acquired the 8-acre property, which includes a 21,500-square-foot main building and several auxiliary structures, for a nominal fee of \$1. This acquisition aimed to repurpose the site for community use, potentially housing a new municipal building or serving as a location for the Greenbelt Volunteer Fire Department.

Re-Use Feasibility Study Findings

Following the acquisition, the city initiated a comprehensive feasibility study to assess the condition of the Armory and explore

potential redevelopment options. In December 2024, the AMAR Group LLC presented preliminary findings to the City Council, highlighting significant structural deterioration, including eroded mortar, exposed rebar, and deep cracks in the building's exterior and interior. The study also identified hazardous materials, such as lead paint and asbestos, necessitating careful remediation efforts. To engage the community in the redevelopment process, the city scheduled a series of public meetings in April 2025 (currently underway).

Key Challenges

Lack of Zoning/Permitting Authority: The City relies on Prince George's County and M-NCPPC for land use control, limiting its ability to streamline projects or shape zoning changes.

Aging Commercial Inventory: Many buildings require upgrades to meet modern tenant expectations and code requirements.

Infrastructure Needs: Redevelopment at scale will require coordination with County and State agencies for infrastructure investment.

Recommended Uses: The redevelopment of the Greenbelt Armory remains a work in progress, offering the City of Greenbelt with an unprecedented opportunity to explore a potential public-private

redevelopment initiative that could create incremental tax-revenue generating uses.

Future Opportunity Sites

City Administration Building

The City Administration Building has exceeded its estimated useful life both in terms of facility conditions and capacity to house primary municipal administrative services (City Manager's Office, PIO, Planning and Housing, Parks and Recreation, Public Works. The site is centrally located in Historic Greenbelt District adjacent to the City's primary economic assets.

Opportunity to redevelop the site is dependent upon relocating the City's Administrative Services to a new location, potentially to the Armory Site.

Fire Station 835

Control of the site now occupied by Fire Station 835 is held by Prince George's County's Fire Department. It is anticipated that the current fire station use will transition to an alternate use within the next 12-24 months. At that point, the City of Greenbelt will have the opportunity to reallocate the site's use for a range of alternative purposes.

Target Revitalization Sites

In addition to advocating for the private revitalization of sites not under the City's control (i.e., Roosevelt Center and Greenway Center), it is recommended that the City prioritize revitalization of the City's primary transportation corridor to focus on short-term, "quick wins" that will serve to communicate the City's focus on improving the business climate.

Greenbelt Road Corridor

In conjunction with the redevelopment of Beltway Plaza Mall, the municipalities of Berwyn Heights, Greenbelt and College Park have formed the Greenbelt Road Task Force and a smaller working group to implement improvements to Greenbelt Road.

The Urban Land Institute conducted a Technical Assistance Panel: Creating a Future for Greenbelt Road/MD-193 in 2018. Kittleson advanced this planning, creating a blueprint for active transportation, better bus and transit service and the creation of a well-connected, safe, and accessible network for people walking and biking.

The project is central for Greenbelt's economic development as transforming Greenbelt Road into a multi-modal Main Street will create an identifiable, attractive spine for the City of Greenbelt. Implementation of this effort depends upon a clearly articulated well-promoted plan and strong cooperation among the stakeholders to

advocate for municipal and County financial support for engineering studies and implementation.

Greenbelt Sub Area Comparisons

While Greenbelt's three subareas—West, Center, and East—have distinct characteristics, they also offer complementary assets that, when strategically aligned, can catalyze unified citywide revitalization. A shared strategy can help bridge physical divides, attract investment, and promote equitable growth across all parts of the city.

The following table provides an overview of the subareas' existing conditions related to land use and real estate, along with opportunities and challenges that tie directly to Economic Development Strategic Plan recommendations.

Land Use Synergies

While Greenbelt's major institutional employment anchors (UMD, NASA) create demand for retail services offered by Beltway Plaza (West) and Greenbelt Plaza (East), Center Greenbelt's cultural and civic core serves as a natural anchor for community engagement and identity. The City's stable but aging residential base and retail nodes is supportive of Citywide redevelopment opportunities aligned with neighborhood-serving uses.

Property Ownership Patterns

Greenbelt's three distinct geographic areas remain disconnected—physically, economically, and visually—by major roadways and a

patchwork of incompatible land uses. In Greenbelt West, land use lacks cohesion, with the Class A Capital Office Park juxtaposed against scattered B/C office buildings, aging market-rate affordable rental apartments, and the aging Beltway Plaza Mall, separated from the community by a sea of surface parking.

Greenbelt Center, while home to treasured civic assets and historic architecture, is defined by low-density buildings, limited foot traffic, and underutilized neighborhood-serving businesses. East Greenbelt features apartment communities insulated from Greenbelt Road by auto-oriented commercial development, including Greenbelt Plaza, hotels, and strip retail. Synergistic commercial uses to the east are blocked by the massive NASA Goddard campus bordering the City limits.

Despite their differences, all three areas face the same core “current state” issues: a lack of modern reinvestment and design that supports a connected, people-centered environment. Together, they represent a major opportunity to unify Greenbelt through targeted, mixed-use, pedestrian-friendly redevelopment. With intentional and cohesive Placemaking investments, these projects will provide Greenbelt with an unprecedented opportunity to unify the community.

Economic Development Opportunities

West Greenbelt: While the Beltway Plaza Mall redevelopment advances slowly through the construction process, there potential opportunity for repositioning underutilized office spaces into office flex life sciences or R&D with a long-term strategy. It is recommended that existing market rate affordable housing stock (i.e., Franklin Apartments) be preserved and protected as an important asset for low- to moderate-income residents.

Greenbelt Center: Greenbelt Center presents a strategic opportunity for revitalization by rethinking how civic and commercial properties are used, while preserving their historical and cultural value.

Important stakeholders in Greenbelt Center include Greenbelt Homes, Inc. (GHI)¹, Greenbelt Co-Op Supermarket & Pharmacy, the owner/operator of Roosevelt Center (private), and Prince George’s County Fire Department (Fire Station 835).

The City has the opportunity to lead the development of a coordinated vision for Greenbelt Center’s future that addresses both public and private assets. This includes repurposing and expanding community-serving uses within City-owned facilities—such as the City Administration Building and the Fire Station—and ultimately

¹ GHI is the housing cooperative that owns and manages 1,600 homes anchoring the core of Old Greenbelt and a large portion of the Greenbelt Historic District.

relocating all City administrative functions to a new consolidated Civic Campus at the redeveloped Armory site.

This move would free up space in the core for expanded cultural, arts, and recreational programming that better serves residents and draws visitors to support the privately owned/operated retail uses.

At the same time, the City should actively engage the private owner of Roosevelt Center—a historically significant but increasingly disinvested retail strip suffering from absentee management—and encourage either a standalone reinvestment effort or a joint venture with a qualified third-party developer.

This strategy would also support the similar reinvestment efforts that could be undertaken by the Greenbelt Supermarket Co-Op & Pharmacy and GHI to modernize facilities, equipment and infrastructure.

As part of a broader Greenbelt Center revitalization initiative, the City can play a catalytic role in convening stakeholders, securing funding for public improvements, and shaping design guidelines that support a walkable, mixed-use district that honors and preserves Greenbelt's legacy while meeting today's market preferences.

East Greenbelt: Adjacency to NASA remains an untapped opportunity for collaboration. The City Manager, Assistant City

Manager and Economic Development Manager met with NASA officials in FY2024. The purpose of the meeting was to discuss collaboration opportunities given NASA Greenbelt location. Subsequent to that initial meeting, the city was invited to attend and speak at the Goodard Contractors Association (GCA) monthly meeting. GCA is a formal 158-member NASA contractor's forum, that serve as a medium for exchange of information between Goddard Space Flight Center (GSFC) management and that of GSFC contractor community. For member firms needing to locate closer to GSFC, Greenbelt would provide a soft-landing" Unfortunately, at the writing of this report, there is uncertainty regarding the NASA budget which could be cut by 50% in the next budget which would put continued funding and support for NASA Goddard in jeopardy. operations.

Citywide: Workforce across the City diversity spans professional services, scientific professionals, creatives, and service employees, enabling a broad talent pipeline. For example, NASA and UMD offer regional R&D momentum that can be leveraged citywide through tech transfer, startup incubation, and education partnerships.

An example of this opportunity is the University of Maryland Discover Campus.

Table 11: Greenbelt Subarea Existing Conditions Assessment

Subarea	Land Use	Real Estate	Opportunities	Challenges
Greenbelt West	Dominated by federal institutions and office parks, including NASA Goddard and UMD research facilities.	Suburban-style office campuses with large surface parking; limited retail or residential development.	Leverage proximity to research institutions for R&D/life sciences; Redevelop underutilized office sites.	Limited pedestrian connectivity; Minimal mixed-use activity.
Greenbelt Center	Historic heart with Roosevelt Center, City Hall, community facilities, and cooperative housing.	Mid-20th century low-rise commercial and civic buildings; high share of public land.	Activate civic spaces through events and placemaking; Support retail and cultural revitalization.	Aging infrastructure; Limited infill options.
Greenbelt East	Primarily market rate affordable multifamily residential with neighborhood-serving commercial centers like Greenway Center.	Mix of garden apartments, townhomes, and aging retail centers.	Reinvest in retail and diverse housing types to attract workforce for higher value businesses; Introduce mixed-use; Improve Greenbelt Road multimodal access.	Commercial vacancies; Fragmented ownership complicates reinvestment.

Source: Willdan; Civic Consulting Group; The Metts Group, 2025

Shared Challenges and Unified Solutions

Greenbelt is challenged by disconnected pedestrian and transit networks Citywide that can be resolved through corridor investments in multimodal infrastructure and cohesive wayfinding. Inconsistent investment patterns and aging infrastructure require a citywide capital improvement strategy and targeted incentives. These capital investments can be further leveraged (and amplified in a civic

branding sense) by incorporating investments in a unified branding, signage, and public realm design strategy. Linking and layering public investments in this strategy will also serve to enhance community identity and cohesion across Greenbelt's subareas.

Economic Development Tools & Resources

City of Greenbelt Programs and Services

In recent years, Greenbelt has focused on reactivating commercial areas and strengthening its small business ecosystem. Prioritized efforts include:

- Launch of small business breakfasts and industry-specific roundtables to foster dialogue between local business owners, City leadership, and regional partners;
- Relaunch of semi-annual Business Conferences to bring key resource providers and subject matter experts to meet with the business community.
- Administration of technical assistance and façade improvement grants aimed at commercial revitalization;
- Coordination with civic associations, business owners, and property managers on storefront activation and placemaking initiatives;
- Development support for long-term redevelopment efforts, including the Beltway Plaza transformation and Greenbelt Metro Station planning.

These programs are helping the City build stronger relationships with existing businesses, identify sector-specific needs (e.g., medical office/health care and hotel/hospitality sectors), and lay the groundwork for future public-private partnerships.

County and Regional Tools

Greenbelt businesses and developers benefit from access to the broader incentive toolbox of Prince George's County, including:

- The Economic Development Incentive (EDI) Fund
- Enterprise Zone Tax Credits
- Revitalization Property Tax Credits
- Opportunity Zone investments
- Façade Improvement and Redevelopment Financing Programs (administered by the Prince George's County Economic Development Corporation)

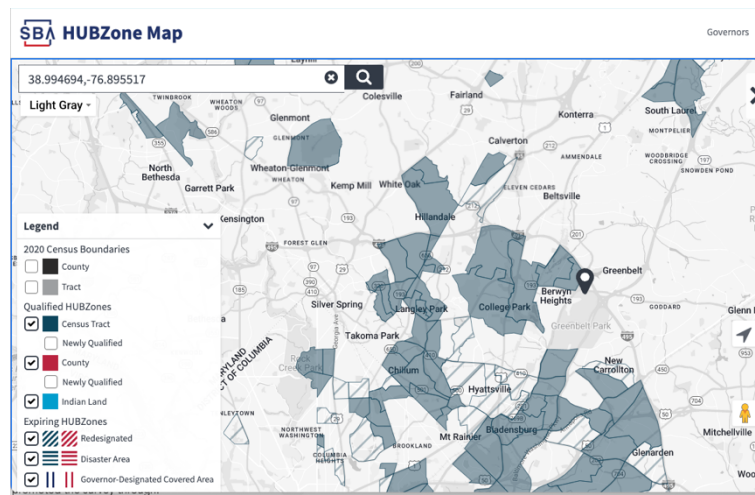
The City collaborates with County agencies to support business retention and attraction, participate in regional planning processes (such as Plan 2035), and advocate for infrastructure investment in targeted growth areas.

Federal HUB Zone

A portion of the City of Greenbelt, particularly areas near the Greenbelt Metro Station and Beltway Plaza Mall, is designated as a federal Historically Underutilized Business Zone (HUBZone) by the U.S. Small Business Administration (SBA). This federal designation is part of a program aimed at stimulating economic development and job creation in underserved communities by providing preferential access to federal procurement opportunities. Small businesses seeking proximity to government customers, and additional supports for minority- and women-owned businesses.

Greenbelt can leverage this designation by partnering with the SBA, Prince George's County Economic Development Corporation, and business incubators to provide workshops, outreach, and technical assistance aimed at increasing the number of HUBZone-certified businesses locally.

Figure 12: Federal HUB Zone Map, 2025



Strategic Implications

Greenbelt's future economic development success will depend on building internal capacity, expanding partnerships, and leveraging county and state-level tools more aggressively. Enhancing coordination with PGCEDC, M-NCPPC, and state agencies—along with pursuing dedicated staff or shared-service models—will be essential to advancing both redevelopment and business attraction activity across all the City's Economic Opportunity Sites.

V. Peer Cities Best Practices Analysis

Introduction and Overview

To inform Greenbelt's economic development strategy, this Peer Cities Comparison examines how nearby suburban jurisdictions—New Carrollton, Hyattsville, Laurel, and College Park—have catalyzed growth through strategic planning, investment, and leadership.

Prince George's County provides a diverse and dynamic regional context in which Greenbelt operates alongside peer cities such as New Carrollton, College Park, Hyattsville, and Laurel.

Each city reflects distinct demographic trends, economic conditions, housing development patterns, and approaches to economic development.

While these municipalities differ in size, resources, and land use strategies, they all navigate similar challenges related to the cost of doing business, quality of life expectations, and attracting investment. Understanding the County's economic development tools—such as grants, tax incentives, and workforce programs—is essential for cities like Greenbelt to remain competitive.

Equally important is recognizing the role of municipal economic development departments and how peer cities have leveraged public-private partnerships (P3s) to advance transformative projects.

Rather than competing, Greenbelt has the opportunity to position itself as a regional partner—sharing resources, aligning strategies, and contributing to countywide economic resilience.

Greenbelt may also collaborate and cooperate with these peers for redevelopment projects and to market and grow market share for Prince George's County within the Metro area. These jurisdictions have attracted and participated in varying types of public-private partnerships to accomplish key development projects. Some of their key projects may provide useful models for Greenbelt

Cost of Doing Business

The City of Greenbelt imposes the highest combined City and County real property tax rate among the peer cities. This is attributed to the relatively higher value community service offerings as compared to the Peer Cities.

Prince George's County imposes development impact fees for mixed-use multifamily projects through two surcharges: the School Facilities Surcharge and the Public Safety and Behavioral Health Surcharge. These fees are designed to offset the costs of new residential development on public infrastructure and services.

Greenbelt and Laurel are at a disadvantage due to their location outside the beltway where impact fees are nearly double those of College Park, Hyattsville, New Carrollton – except for projects located within a Basic Plan or Conceptual Site Plan that abuts existing or planned WMATA mass transit rail stations i.e., the Greenbelt Metro Station site).

Table 12: Peer Cities Comparison – Tax Rate Comparison

City	Population	Municipal Real Property Tax Rate /\$100 Assessed Value	Prince George's County Real Property Tax Rate/\$100 Assessed Value	Total Tax Rate	Median Home Value
Greenbelt	24,572	\$0.83	\$0.87	\$1.69	\$223,000
College Park	34,397	\$0.3018 (Residential) / \$0.3318 (Commercial)	\$0.96	\$1.2628 (Residential) / \$1.2928 (Commercial)	\$258,600
Hyattsville	20,861	\$0.63	\$0.87	\$1.50	\$296,400
Laurel	29,594	\$0.71	\$0.86	\$1.57	\$367,400
New Carrollton	13,544	\$0.59	\$0.87	\$1.47	\$307,800

Source: City of Greenbelt; Esri Business Analyst; CoStar; Willdan, 2025

Housing Development Patterns

Based on available data reported by Esri Business Analyst, Greenbelt appears to be experiencing slower growth in new housing development compared to neighboring cities such as Laurel, New Carrollton, Hyattsville, and College Park.

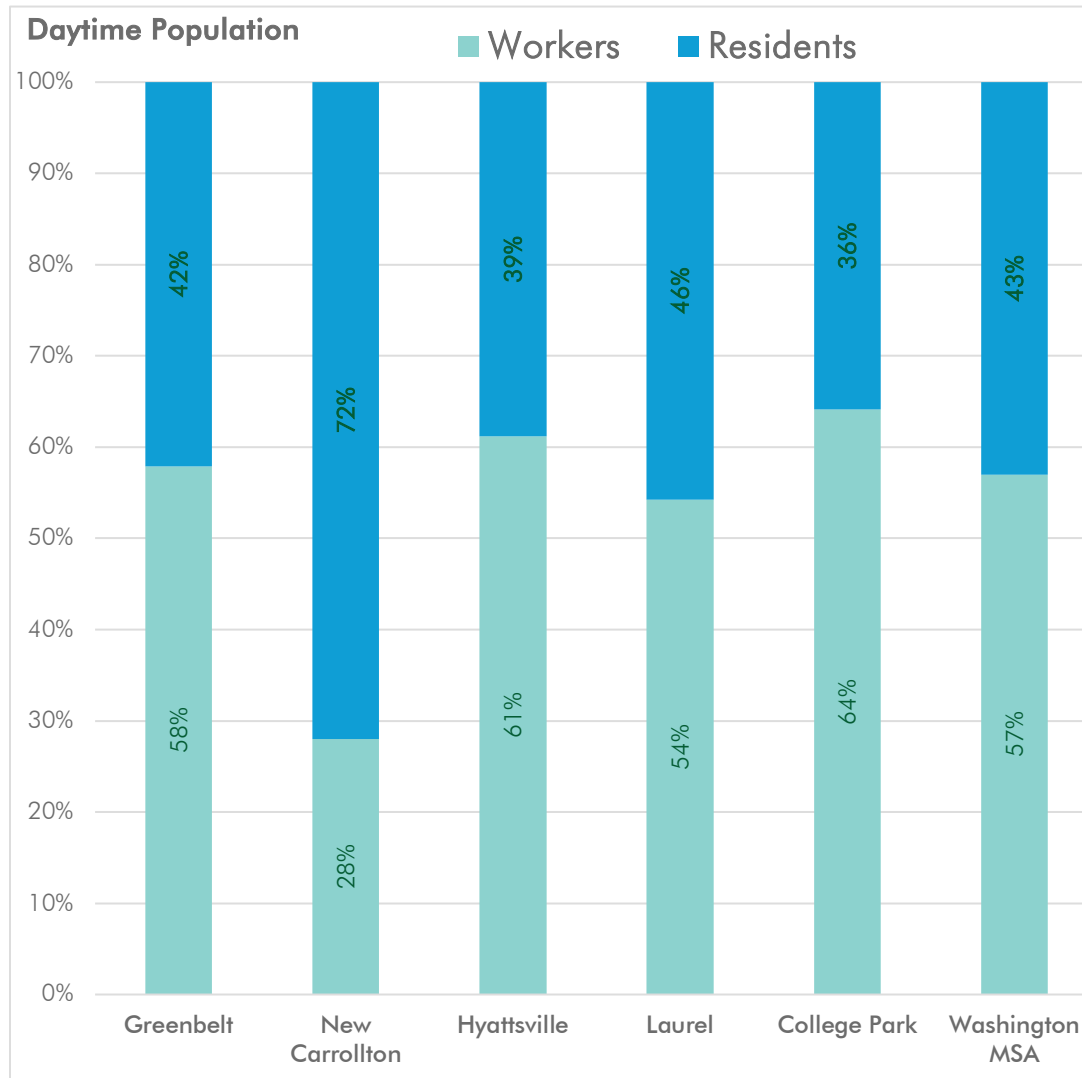
This trend is evident when examining the number of housing units by type and the year they were built.

Table 13: Residential Development Trends – Greenbelt and Peer Cities

Peer Cities	Year Built	Housing Type
Greenbelt	A significant portion of housing units were constructed between 1940 and 1979, with limited new construction in recent decades	Predominantly composed of multifamily units, particularly those with 10 or more units, reflecting its origins as a planned community
Laurel	Consistent housing development with a large number of units built after 2000	Offers a balanced mix of single-family homes, townhouses, and multifamily units, catering to diverse housing needs
New Carrollton	Similar to Greenbelt, many housing units were built between 1960 and 1979, with some new development in recent years	Features a combination of single-family homes and multifamily units, with recent developments adding to the housing diversity
Hyattsville	Exhibits a mix of older and newer housing, with a steady increase in units built post-2000	Has a varied housing stock, including single-family homes, townhouses, and newer multifamily developments
College Park	Significant number of housing units constructed after 2000, reflecting recent development efforts	Characterized by a significant number of multifamily units, many of which are recent additions to accommodate the growing population

Source: Esri Business Analyst; Willdan, 2025

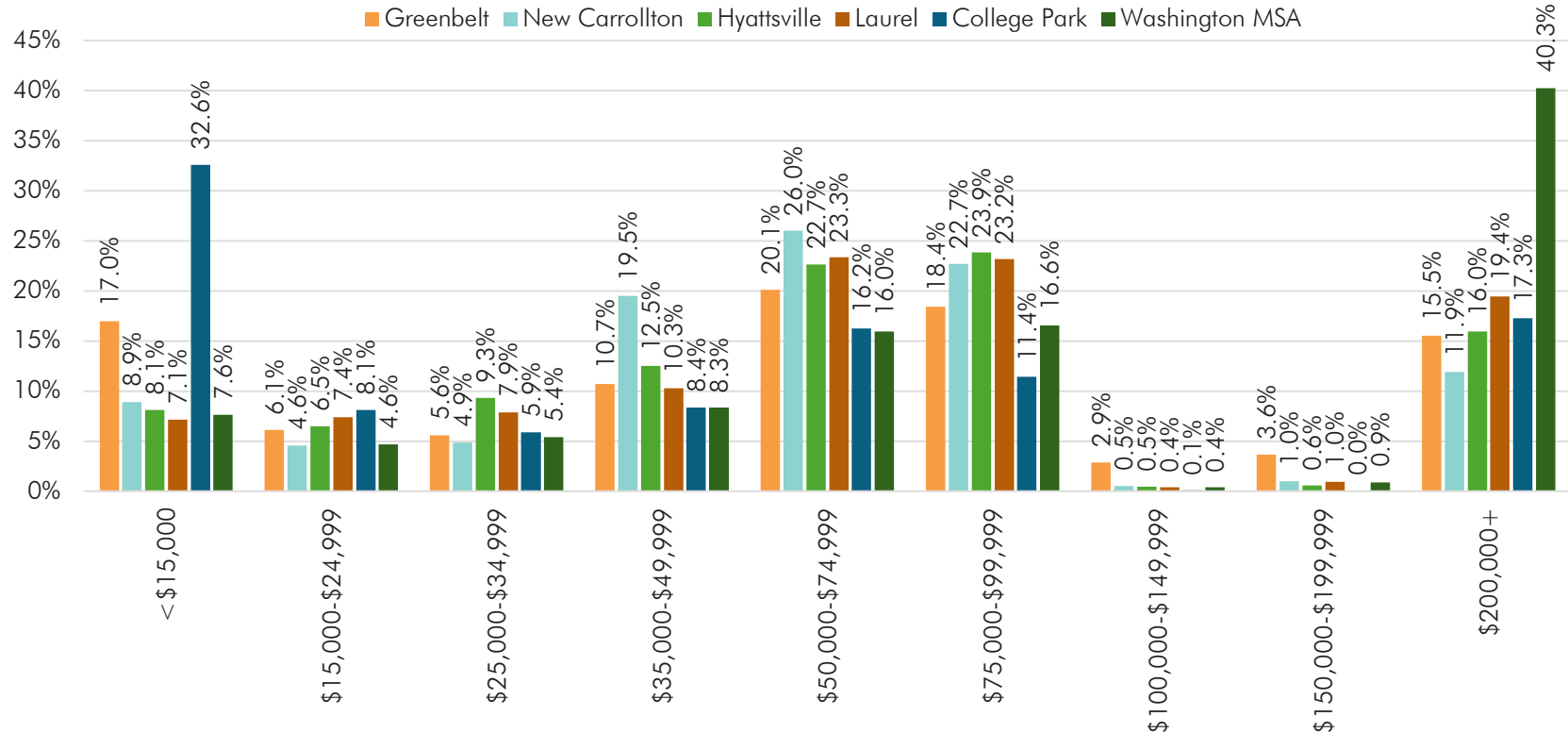
Figure 13: Daytime Population – Greenbelt vs. Peer Cities, 2025



Source: Esri Business Analyst, Willdan, 2025

Greenbelt's daytime population is balanced between workers and residents – similar to the majority of its peer cities

Figure 14: Median Household Incomes by Segment – Greenbelt vs. Peer Cities, 2025



Compared to its peer cities, Greenbelt's household income distribution is concentrated in the mid-range, particularly in the \$50,000–\$74,999 and \$75,000–\$99,999 brackets, where it outpaces most nearby jurisdictions. However, Greenbelt has a lower share of households in the highest income bracket (\$200,000+), at just 6.1%, well below the Washington MSA's 40.3% share.

At the lower end, Greenbelt maintains a moderate 7.0% share of households earning under \$15,000, which is significantly less than College Park's 32.6%, suggesting a more economically balanced profile. The city's income mix reflects a stable middle-income population but also indicates limited growth in higher-income households relative to regional benchmarks, highlighting a potential area for future economic development focus.

Source: Esri Business Analyst; Willdan, 2025

Greenbelt's median housing value (\$430,299) falls below that of Prince George's County (\$453,434) and significantly below the Washington MSA overall (\$618,875).

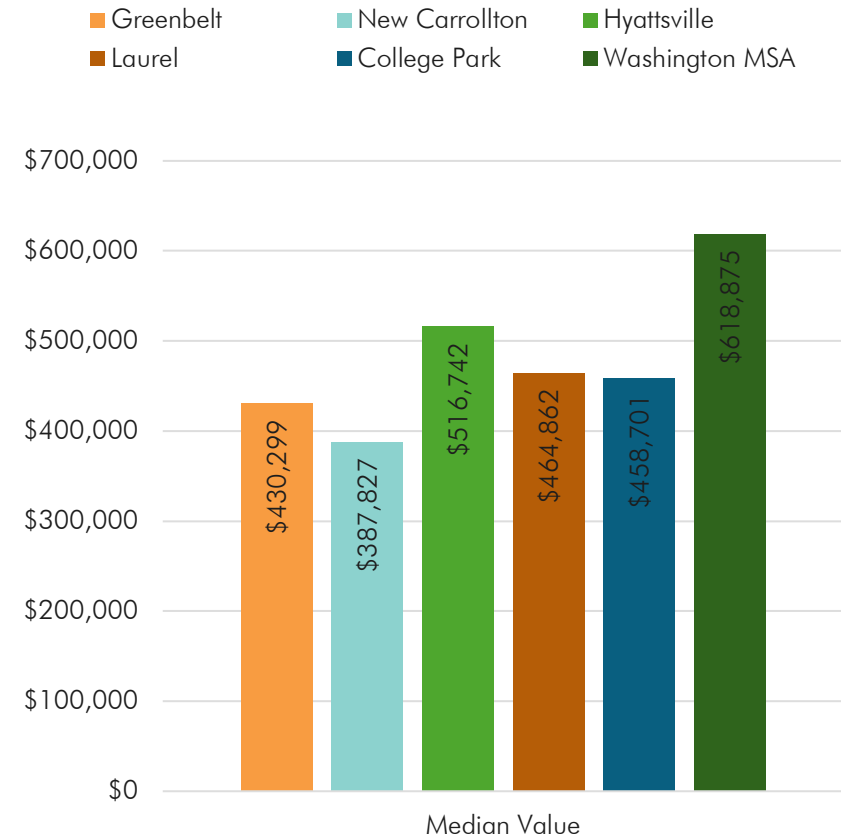
Within the city, values vary by subarea, with Greenbelt West posting the highest median value at \$511,070, followed by Center at \$493,522 and East at \$418,595. These figures reflect both the diversity of housing stock and differing development patterns across neighborhoods.

The comparatively affordable home prices in Greenbelt suggest potential for increased residential demand, especially among moderate-income households priced out of other parts of the region. However, lower valuations may also signal underinvestment in older housing stock and highlight the opportunity for targeted reinvestment and revitalization efforts.

Compared to its peer cities, Greenbelt's median housing value of \$430,000 is in line with its peer cities.

However, lack of new housing supply suggests underinvestment in older housing stock and highlights the opportunity for an urban infill strategy to boost housing production.

Figure 15: Median Housing Value – Greenbelt vs. Peer Cities, 2025



Source: Esri Business Analyst, Willdan, 2025

Educational Attainment

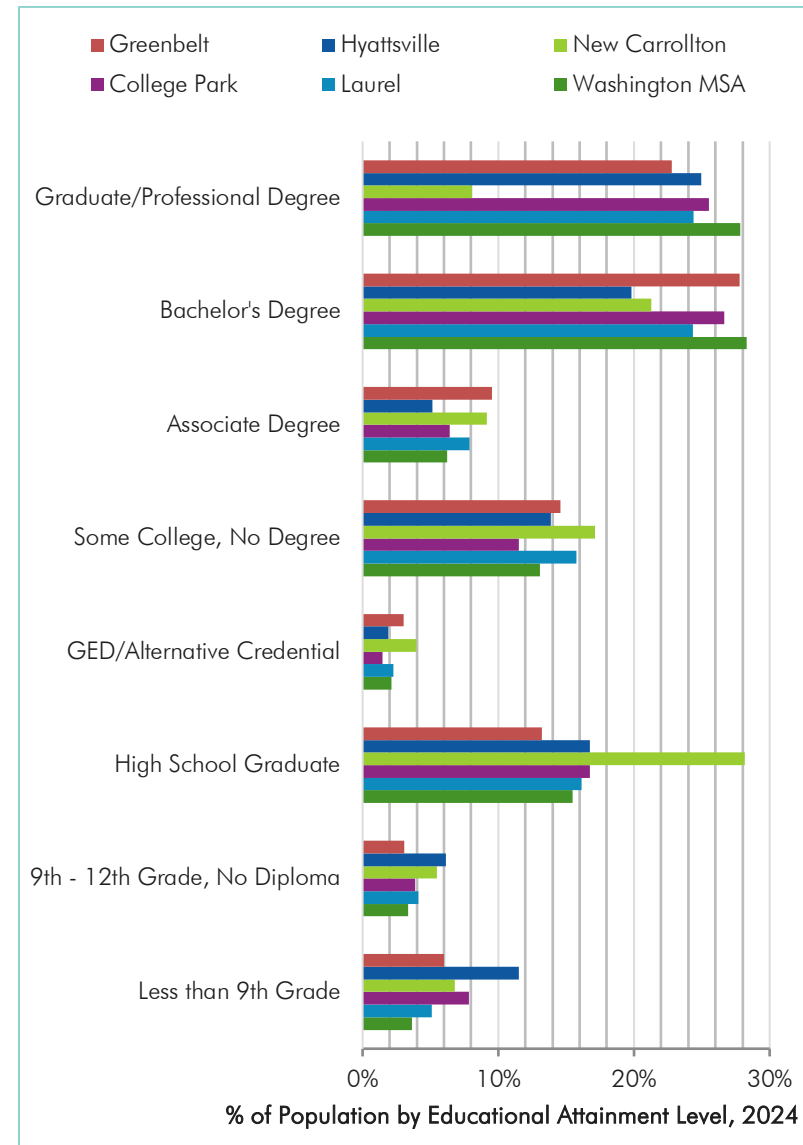
Greenbelt's educational attainment profile is relatively strong compared to peer cities in Prince George's County, with a notable share of residents holding bachelor's and graduate/professional degrees.

Greenbelt ranks second among its peers in the percentage of residents with a bachelor's degree and is on par with Laurel and Hyattsville in terms of graduate-level attainment. The city also shows a balanced distribution across associate and some college/no degree levels.

While the share of residents without a high school diploma is low relative to the region, Greenbelt falls behind the Washington MSA average in higher education degrees, suggesting continued opportunity for workforce training and higher education partnerships.

Overall, the city's educational base supports middle-skill and professional employment sectors and represents an asset for attracting knowledge-based industries.

Figure 16: Population 25+ Years by Educational Attainment – Greenbelt vs. Peer Cities, 2025



Source: Esri Business Analyst; The Metts Group; Willdan, 2025

produced this composite assessment of Greenbelt’s relative performance in providing a high quality of life to the community. Greenbelt performs well in areas such as safety, civic engagement, and environmental quality but lags behind peer cities in education equity, job opportunities, and housing affordability.

While Greenbelt’s strong community identity and sustainability efforts stand out, peer cities like College Park and Hyattsville benefit from stronger employment access, education infrastructure, and mixed-use development momentum.

Table 14: Comparative Quality of Life Indicators, 2025

City	Positive Quality of Life Indicators	Areas for Improvement
Greenbelt	income, safety, housing, civic engagement, environmental quality basic needs, well-being, opportunity walkability, transit access, civic engagement strong sustainability and community engagement	economic diversification housing access pedestrian infrastructure
College Park	income, jobs, education, social connections basic needs, well-being, and opportunity housing, transportation, environment, and community engagement strong commitment to livability and well-being through partnerships	housing access pedestrian infrastructure
Hyattsville	community engagement and amenities access to amenities, healthcare, and inclusion walkability, cultural access, and transit Strong cultural and community assets	housing access public safety
Laurel	strategic location, access to diverse employment, educational resources strong community engagement and proximity to higher education cultural programming enhances social connection well-connected city with robust civic life and access to opportunity	housing access pedestrian infrastructure
New Carrollton	strengths in transportation (Metrorail, Amtrak, bus), healthcare access, and community engagement diverse and vibrant community ongoing development, capital projects, and investment	major projects infrastructure investments

Source: Economic Cooperation and Development’s (OECD) Better Life Index, The Social Progress Imperative’s Social Progress Index, and the AARP Livability Index AARP Quality of Life Index, Willdan, 2025

City of Greenbelt, MD

City Overview

The City of Greenbelt is bifurcated by the I-495 Capital Beltway in Prince George's County, MD. Maryland Route 193 (Greenbelt Road) is the main east-west artery of the City connecting to the local economic engine of College Park via Berwyn Heights to the west, then just south of Old Greenbelt (the historical center of Greenbelt's planned community), and then to the large government headquarters to the east. Today, the City of Greenbelt is known for NASA's Goddard Space Flight Center, the Beltway Plaza Mall, and for its historic Art-Deco town center and history as a New Deal-era planned community.

Greenbelt, MD, boasts a strategic location with access to I-495, I-95, the Baltimore-Washington Parkway, Greenbelt Metro, and MARC trains, ensuring easy connectivity to D.C. and Baltimore. It has a strong government and research sector, with NASA Goddard Space Flight Center and the USDA Beltsville Agricultural Center adjacent to the city and driving economic activity.

The diverse business base includes tech, research, and the retail hubs of Greenway Shopping Center, and Beltway Plaza Mall. Greenbelt's planned community heritage fosters strong civic engagement. The City is committed to sustainability, prioritizing green spaces, walkability and community recreation facilities and programs.

Major private real estate investments include mixed-use projects at Greenbelt Metro and on-going redevelopment of Beltway Plaza Mall. The city has made investments in preservation of green space, walkability and connectivity to support transit-friendly development.

Greenbelt must contend with factors including limited economic diversification due to its reliance on federal institutions such as NASA and USDA. Additionally, a shortage of Class A office space constrains commercial tax revenue. The retail sector nationally has been impacted by changing consumer preferences, and Beltway Plaza Mall must compete against newer shopping centers.

Limited entertainment, nightlife, and cultural attractions hinder business retention and residential appeal. Universal response in stakeholder engagement is that Greenbelt is missing "third places" to take clients and colleagues for lunch or after work happy hour type events. Existing retail dining and entertainment offerings in Greenbelt are not competitive with peer cities.

According to visitor journey data reported by Placer.ai, daytime office workers travel outside Greenbelt's boundaries to find quality retail, dining and entertainment establishments.

Housing affordability remains a concern, with cooperative housing preserving affordability but restricting market-rate and upscale development. Rising property values and rental rates further strain long-term residents. Lastly, Greenbelt struggles with branding and

identity, often perceived as a D.C. bedroom community, limiting its ability to distinguish itself from neighboring cities.

Economic Development

The City of Greenbelt's economic development mission is to "promote economic growth and resilience by supporting local businesses, attracting strategic investment, and facilitating the revitalization of Greenbelt's commercial and residential assets. Through innovative partnerships and community-driven initiatives, Greenbelt ensures that growth enhances the city's distinctive identity while creating opportunities for all."

The City of Greenbelt's Economic Development Departmental functions are housed within The Office of the City Manager and carried out by the City Economic Development Manager and Economic Development Specialist, with oversight by the Assistant City Manager. The department is directly responsible for attracting new business investment, retaining and growing/expanding the city's existing businesses and working with regional partners to facilitate workforce development initiatives. The department

The City's Economic Development Manager administers the following business retention and attraction Functions:

- Support sustainable economic growth in Greenbelt that will maintain and create jobs and grow the city commercial property tax base.

- Recruit new industry using partners, allies, and direct marketing strategies.
- Work with city stakeholder agencies and leadership to produce a thriving competitive environment for local commercial economic growth.
- Establish partnerships with state, county, and local regulatory agencies to support development of infrastructure, transportation assets, promote Greenbelt's favorable business climate factors and amenities.
- Support area education and city and regional workforce development agencies and programs by disseminating information on current and future workforce needs from business and industry.
- Identify available land, sites, and buildings suitable for business development and lead product development.

The City uses Salesforce® (SF) platform as the Client Relationship Management Database (CRM). SF provides a data tracking system to engage city businesses more effectively. Essentially, the CRM provides a real-time snapshot of business-outreach and attraction/expansion project activity by centralizing business engagement history, and enables ED manager to create aggregate reports, and performance dashboards.

Business Retention and Attraction Functions

The City's economic development outreach functions are further supported by a partnership with the Greenbelt Business Alliance (GBA). The City supports the GBA with an annual subsidy of \$5,000 to offset the costs of printing, business events (i.e., the Annual Awards Gala), and other expenses. The City is currently evaluating the roles and responsibilities of each entity in the provision of these services as part of the Strategic Plan process.

Small Business Assistance

The City of Greenbelt offers a wide array of small business assistance programs and services directly to constituents, or via regional providers (i.e., Prince George's County).

Offerings that are differentiated from Greenbelt's peers in Prince George's County are:

Small Business Revolving Loan Fund: The City of Greenbelt deployed American Rescue Plan Act (ARPA) funds to administer capital and operating funds to small businesses impacted by Covid-19 pandemic as follows:

- **Business Capital Infrastructure Program:** capital investments in facilities, furniture, and equipment
- **Business Improvement & Recovery Fund:** rent, salaries, materials, and supplies.

The City is evaluating relaunching its underutilized Small Business Revolving Loan Fund to provide similar capital and operating funds going forward.

Workforce Development/Entrepreneurial Business Incubation

Greenbelt's Economic Development Manager connects local businesses to workforce development programs and services funded by Employ Prince Georges through regular business outreach efforts.

These services are further supported by the Greenbelt Business Alliance as detailed in the organization's vendor contract agreement with the City.

Major Projects

Major projects currently proposed, planned, or under construction in the City of Greenbelt are provided in Section X. Real Estate Market Overview. Successful Public Private Partnerships that demonstrate the City of Greenbelt's capacity to support new development include:

Franklin Park at Greenbelt Station

In 2011, Fieldstone Properties, the owner of the 153-acre Franklin Park at Greenbelt Station, sought approximately \$15 million in tax-increment financing (TIF) for public infrastructure improvements. The proposed enhancements included a pedestrian walkway and bridge connecting the property to the Greenbelt Metro Station, as well as significant energy efficiency upgrades. This initiative aimed at

revitalizing the aging apartment and townhome community, benefiting both residents and the broader Greenbelt area.

Greenbelt Station

The large-scale mixed-use transit-oriented development was a public/private partnership including WMATA, which owns the Greenbelt Metro station property, and Metroland Developers. State of Maryland and Prince George's County provided infrastructure and zoning support. The City of Greenbelt was involved with pedestrian and bicycle connections.

Most recently, the Dolben Company partnered to develop Verde at Greenbelt Station, a 302-unit luxury apartment complex within the Greenbelt Station development. This project achieved LEED Gold Certification in 2017.

City of College Park, MD

City Overview

Located in Prince George's County, Maryland, four miles from Washington, DC and inside the Capital beltway, College Park borders Hyattsville to the south, Berwyn Heights and Greenbelt to the east and Langley Park to the west.

The City of College Park is known as the college town of the University of Maryland as well as home to federal agencies and as a growing hub for research and development. In 2014, the University of Maryland launched the Greater College Park initiative, a \$2 billion

public-private investment to "revitalize the community around the university, develop a robust Discovery District and create one of the nation's best college towns." As a result of deep public-private partnerships, the city is experiencing significant development that has led to new housing, office space, schools, grocery stores, restaurants, and other amenities.

College Park benefits from strong economic drivers, primarily the University of Maryland (UMD), a top-ranked research institution with over 40,000 students. UMD fosters innovation and private investment through partnerships with NASA, NOAA, DARPA, and private tech firms. The city is also a Big Ten hub, attracting tourism, sports, and cultural events. Excellent transportation infrastructure includes Metro's Green Line, the upcoming Purple Line, major highways, and College Park Airport, complemented by bike lanes and sustainable transit initiatives.

Public-private partnerships have driven real estate, office, and business development, and strengthened town-gown relations. College Park offers green spaces, parks, diverse food and arts, and community programs. However, challenges remain in housing affordability, school performance, congestion, aging infrastructure, and business diversity.

Economic Development

The City of College Park's Economic Development functions are housed in the Office of the City Manager. The City has adopted policies and programs geared to expand its tax base through targeted economic development initiatives, business incentives, and, significantly, through strategic partnerships with the University of Maryland. In addition to 5-Year and 10-Year Economic Development Plans supportive of the Greater College Park Initiative, the following policies provide examples of successful implementation.

College Park City-University Partnership (CPCUP)

This standing public-private partnership with the University of Maryland supports economic development, business relocation, and startup growth. CPCUP is a model nonprofit community development corporation with the mission to advance progress toward a shared vision and outcomes.

Collaborations have included support for major infrastructure improvements, such as the redevelopment of Baltimore Avenue and the construction of The Purple Line; commitment to working together to address family and education needs such as daycare, Monarch Preschool, with the Partnership to launch College Park Academy Public Charter School, and; development of the new College Park City Hall building through cross-sector investment.

Business Incentive Programs

Programs designed to encourage high-quality redevelopment include the Revitalization Tax Credit Program, a five-year property tax credit based on the increased assessment following taxable improvements. (The credit starts at 75% in the first year and gradually decreases, incentivizing long-term investment in College Park).

Modified Business Assistance & Façade Improvement Program

This program provides financial support to local businesses and commercial property owners for capital improvements that enhance the physical appearance of their establishments and the broader commercial district. The city reimburses up to \$15,000 for exterior enhancements and \$5,000 for interior improvements, with no matching funds required.

Business Improvement District (BID)

College Park is currently exploring the creation of a Business Improvement District (BID), a self-taxing district established by commercial property owners to enhance economic vitality within a designated area. BIDs generate collective economic benefits by funding streetscape improvements, marketing initiatives, and business support services, contributing to the sustained growth of the city's tax base.

Major Projects

College Park City Hall and Plaza

Completed in December 2021, this collaborative project between the City of College Park, the University of Maryland, and the Terrapin Development Company resulted in a multifunctional building of the city and university offices, retail spaces, and a public plaza. This development serves as a central hub for civic engagement and community events. The state-of-the-art, joint-use project includes 78,000 square feet of city and university office space, 7,000 square feet of ground floor retail space, and a much-needed community gathering place for public events.

The Terrapin Development Company (TDC) was established as a joint venture between the University of Maryland, College Park and the University of Maryland College Park Foundation to focus on real estate strategy, acquisition, development, leasing, and management. Its mission is to transform Greater College Park into a vibrant, diverse, and walkable community through various development projects that carry out the vision of the Greater College Park initiative.

Discovery District

A reimagined research park, the Discovery District is a PPP between the University of Maryland and Corporate Office Properties Trust (NYSE: COPT). The District is conceived as a 2 million square foot, 150-acre. public-private innovation hub for tech startups, research

labs and corporate headquarters near UMD, employing 6,500 people.

The Discovery District stretches from Baltimore Avenue to the research-rich and metro accessible community along River Road. It offers flexible office space locations from co-working options to R&D space for startup companies, contractors, and technology corporations.

The Discovery District is a hub of activity, home to local attractions including The Hotel at UMD, WeWork College Park and The Hall CP. The research park also has quick access to the College Park Airport. The development has successfully created a strong research and technology ecosystem which has fostered partnerships with federal agencies and IonQ, one of the world's top quantum computing firms, which was spun off from UMD. The City also supports incubators and accelerators like the UMD Dingman Center for Entrepreneurship and StartupMD that reinforce innovation in College Park.

Leonardtown

A major redevelopment of townhome style apartment community into higher-density graduate student housing, Leonardtown is a PPP between Campus Apartments, Mosaic Development Partners, and the University of Maryland. Scheduled for completion in 2027, it is a \$148.8 million project to construct a 323,000-square-foot housing facility for graduate students offering 741 beds across various unit

configurations and feature amenities such as conference spaces, lounges, and bike storage.

State Partnership: Regional Institution Strategic Enterprise Zone (RISE Zone) In 2017, the Maryland Department of Commerce approved a RISE Zone, in and around the campus of the University of Maryland, College Park to focus and leverage PPP development. The designation was intended to spur economic development and job creation by allowing commercial and industrial business that move into or expand significantly within the zone to benefit from real property and income tax credits. Businesses in targeted industries, including engineering, cybersecurity, additive manufacturing, aerospace, and biotechnology, among others, are eligible to receive increased incentives.

City of Hyattsville, MD

City Overview

The City of Hyattsville is located Prince George's County, inside the I-495 Beltway, bordered by College Park to the North and Bladensburg to the City's south. Hyattsville is especially known for its walkability and its Arts District, which includes Pyramid Atlantic Arts Center, a nonprofit arts organization and significant new development over the last twenty years that includes multifamily residential, townhomes, live-work units, and retail.

City of Hyattsville Economic Development Goals

To develop and implement creative community-based strategies to enhance economic opportunity, build strong neighborhoods, and foster quality growth.

The Department is dedicated to fostering a robust economy that stimulates balanced growth by connecting businesses, community, and neighborhoods.

Hyattsville has established a strong economic foundation driven by strategic location, robust connectivity, and a vibrant cultural and business environment. The city benefits from excellent transportation infrastructure, including major roadways such as U.S. Route 1 and Maryland Route 410, rail access via MARC and WMATA Metro stations, and an extensive bicycle network with Capital Bikeshare stations.

The city is a hub for arts and culture, being part of the Gateway Arts District, which attracts artists and creative businesses while enhancing local commerce. Hyattsville also supports a diverse and expanding small business sector, particularly along the Route 1 Corridor. Proximity to the University of Maryland and research institutions fosters innovation and business growth. Additionally, the city's transit-oriented developments create high demand for residential and

commercial real estate investments, offering accessibility and walkability within an inside-the-Beltway location.

Hyattsville faces several challenges impacting growth and development. Aging infrastructure, traffic congestion, and limited parking hinder mobility, particularly along Route 1 and East-West Highway. The city lacks large-scale employers, limiting business expansion. While public safety is improving, crime concerns in some sub-areas affect investor confidence. Environmental issues, including stormwater management and flooding near the Northwest Branch of the Anacostia River, pose sustainability challenges. Addressing these concerns is essential for sustaining economic growth and attracting future investment.

The City is focused on growing the tax base through several key initiatives focused on business attraction and retention and streamlining permitting and zoning to make the regulatory environment more business friendly.

The City has promoted transit-oriented and mixed-use development over the last twenty-five years as well as adaptive use of historic buildings and encouraged high-density housing and mixed-use development.

The City's focus on leveraging the arts and culture economy includes supporting local entrepreneurship, promoting local events and

festivals, and attracting food and beverage uses including breweries, cafes and restaurants to maintain Hyattsville as a dining destination.

Economic Development

The City of Hyattsville's Economic Development functions are housed in the Office of the City Administrator, within the department of Community, Business and Economic Development. The department oversees Economic Development, Strategic Planning and Geographic Planning Information. The department's staff of four includes Director, City Planner, Housing Manager and GIS Technician. The City of Hyattsville's business strategy targets three business development corridors:

- The Prince George's Plaza Transit District is zoned to promote higher-density, pedestrian- and transit-oriented mixed-use development. Major projects in this zone include the University Town Center, Belcrest Center, The Mall at Prince George's and The Shops at Metro.
- West Hyattsville Metro corridor consists of the Queens Chapel Shopping Center, and is expected to experience considerable high-density, transit-oriented development in the near future.
- The Gateway Arts & Entertainment District is designated an Arts and Entertainment District by the State of Maryland. It is zoned to promote higher density pedestrian activity and

starts north at the Riverdale Park border and continues south including residential areas, Franklin's Restaurant, Melrose Park, and the Melrose Park Industrial Area.

Specific City economic development tools available are:

- Hyattsville Revitalization Tax Credit Program, which is available to projects that are consistent with the mission and goals of the City and provide a significant fiscal benefit to the City and its residents;
- Commercial Façade Improvement Program which provides funding to business or property owners within the three targeted investment areas to improve their building's façade. The grant is a dollar-for-dollar matching grant of \$5,000 - \$35,000. The use of grant funds is limited to exterior
- Corridor Investment Grant Program is a funding opportunity for private and non-profit partners with creative placemaking projects, programming initiatives, and business development strategies. Grants from \$1500-5,000 are available for programming, placemaking and consulting or workshops for business development activities.
- Tax Increment Financial (TIF) & Prince George's County and State of Maryland Resources: The city can use TIF and advocate for and leverage County and State funding to support local development.

To raise awareness about these programs with the community and to amplify the importance of the economic development function to the City, the Mayor of Hyattsville proclaimed October 21 to 24, 2024, as "Economic Development Week". The goal of this designation is "to highlight the investment in partnerships that strengthen competitiveness in Hyattsville and recognize and reaffirm the importance of business development locally and to amplify statewide efforts."

Major Projects

Hyattsville has been successful in attracting both large and small-scale investment and has been involved in public-private partnerships (PPPs) aimed at real estate development and community revitalization. Notable examples include:

The Riverfront at West Hyattsville Metro

A transit-oriented mixed-use community, this project transformed an 18.5-acre brownfield site. The development includes 183 townhomes, a 49,000-square-foot Kaiser Permanente Medical Office Building, two multifamily buildings with 650 units, 13,000 square feet of retail space, and a 4.5-acre public parkland featuring an amphitheater and a bike/pedestrian loop connecting to the Northwest Branch Trail system. This initiative was a collaboration between private developers including Gilbane Company, and public entities to revitalize the area adjacent to the West Hyattsville Metro Station.

Sovren Apartments at Riverfront

The Sovren is a five-story building offering 293 housing units, with 50% designated as workforce housing for individuals earning less than 80% of the area median income. Prince George's County facilitated this project through a Payment in Lieu of Taxes (PILOT) agreement and support from the Amazon Housing Equity Fund, exemplifying a successful public-private partnership to increase affordable housing near transit hubs.

The Six at University Town Center

This 316-unit multifamily, mixed-use project, includes 2,000 sf ground floor retail and 20,000 square feet of amenities including a courtyard and rooftop pool and a 300-space precast parking garage. Developed by Perseus TDC and including strong ties to the arts through indoor/outdoor murals commissioned by local artists and an abundance of sustainable elements, The Six exemplifies a commitment to building a complete community for Hyattsville: 75 percent of the new housing affordable to low-and middle-income households.

Hyattsville Canvas Apartments

Building upon prior public sector corridor improvement, this project benefitted from the established infill of the Hyattsville Arts District and helped to complete the Arts District build out. The property is directly across the street from a grocery store and is within a short walk of multiple restaurants and boutique shops.

Economic Development Strategic Plan 2025
Existing Conditions Briefing Book

Urban Investment Properties (UIP) redeveloped the site into 285 rental apartments along with 30,000 square feet of retail space and a 680-car garage. The Canvas design completes the western edge of the retail corridor. The building includes two plazas and a gracious sidewalk that encourages outdoor café seating to enhance the vibrancy of the district.

Queens Chapel Road Corridor Revitalization

City of Hyattsville has undertaken important corridor revitalization projects that have contributed to its economic competitiveness. The \$18 million Queens Chapel Road project included streetscape improvements such as sidewalks and streetlights, bike lanes, and stormwater management measures, as well as a wide grass median. While this road is a Maryland state highway, the state shared the costs with Prince George's County and the municipalities of Hyattsville and Mount Rainier, which the road passes through.

District Heights-Hyattsville Gateway Corridor

The District Heights-Hyattsville Gateway Corridor is a strategic initiative aimed at enhancing transportation infrastructure, promoting economic development, and improving community connectivity between District Heights and Hyattsville.

Located adjacent to Hyattsville, this corridor has potential spillover benefits for the city. The masterplan includes mixed-use developments, residential spaces, and improved infrastructure. The

road-related scope focuses on upgrading roadways, enhancing public transit facilities, and improving pedestrian and bicycle pathways. The project also aims to strengthen the connection between District Heights and Hyattsville by developing green spaces, community centers, and cultural amenities that foster social interaction and community engagement.

Funding is anticipated to come from a combination of federal, state, and local sources, including transportation grants and economic development funds. This initiative aligns with broader regional plans, such as the *Prince George's Plan 2035*, which outlines comprehensive recommendations for guiding future development within Prince George's County.

City of Laurel, MD

City Overview

The City of Laurel is located in Prince George's County, MD, approximately 15 miles outside the Capital Beltway and a twenty-minute drive from Greenbelt, MD. The City is known for its charming 19th century historic downtown and the Laurel Park Racetrack, hosting major annual horse racing events. Laurel is also home to the Patuxent Research Refuge for wildlife conservation and the National Wildlife Visitor's Center.

Laurel stands out for its strategic location equidistant between Baltimore and Washington, DC; economic diversity, transportation

access via MARC train and I-95, and strong community amenities. Its blend of historic charm, modern development, and access to job markets make it an attractive place to live and work.

The City faces some longer-term challenges that could impact residents' quality of life and economic opportunities. Access to jobs remains a concern. While some major employers are present, many residents must commute far for better employment prospects.

Additionally, there are public safety concerns, with certain areas experiencing a perceived higher crime rate, which may impact community confidence and investment.

City of Laurel, MD Commercial Corridor Economic Development Program Goals

To support redevelopment in designated Revitalization Overlay Areas, the program offers incentives such as reduced building permit fees, expedited site plan reviews, and potential real property and business personal property tax credits.

Eligibility for these incentives requires a pre-application meeting with the Economic Development Coordinator and submission of detailed development plans demonstrating economic benefits to the city.

Addressing these challenges will be critical in improving economic opportunities, transportation efficiency, and overall livability in the city.

Economic Development

The Office of the City Administrator oversees the City of Laurel's economic development functions. The Department of Economic and Community Development's mission is to maintain and oversee the built environment within the City of Laurel.

The department is responsible for zoning compliance, subdivision and development review, historic preservation review, economic development, affordable housing, and implementation of the City's Master Plan. The department is staffed by a director, deputy director and sustainability manager with an operating budget of \$1.03 million in FY205.

The city's economic development strategy has focused on the Commercial Corridor Program, established in October 2016, to support city businesses; encourage business growth and increased job opportunities; achieve an expanded tax base; and deliver an improved quality of life for residents.

The program focuses on three designated Revitalization Overlay Areas (ROAs):

RO-1: City Center Overlay Area. Targets comprehensive redevelopment with mixed-use complexes that may include retail,

restaurants, entertainment venues, professional offices, and upscale housing.

RO-2: Highway Corridor or Activity Nodes. Encompasses properties along U.S. Route 1 and MD 198, encouraging the consolidation of smaller parcels into mixed-use developments to improve safety and accessibility.

RO-3: Route One Historic District and Gateway Approaches. Focuses on transit-oriented development near the MARC Rail station, promoting mixed-use complexes that serve commuters and enhance the historic district.

The goals of the program also include anticipating and addressing the workforce development needs of the city's business community; providing advocacy for businesses undergoing development review and permitting; and providing incentives for redevelopment and revitalization along identified commercial properties. Qualified properties can receive incentives including reduced building permit fees for revitalization and new construction, expedited site plan review, real property tax credit, and a business personal property tax credit.

The Department of Economic Development also offers grant programs including 1) the Main Street Business Relocation Grant Program to help defer the costs of physically moving an existing business to a vacant storefront or to assist in the start-up of a new

business in a vacant storefront. 2) The Main Street Façade Improvement Grant Program which provides funding to improve the appearance of the Main Street area. And 3) the Thrive Small Business Grant Program. The City also offers a first-time Homebuyer Assistance Program.

[Note that the On December 9, 2024 the Mayor and City Council of Laurel adopted a Resolution for a moratorium on acceptance and processing of zoning requests, special exception requests and text amendments which will be starting January 2, 2025 through October 31, 2025, until the adoption of the new Master Plan and Comprehensive Rezoning Plan.]

Laurel's Community Redevelopment Authority (CRA) is also dedicated to revitalizing specific areas within the city to promote balanced growth, job creation, and an enhanced quality of life. The CRA collaborates with private entities to achieve these goals, focusing on upgrading residential neighborhoods and fostering a mix of office, retail, and industrial uses.

Major Projects

The City of Laurel has experienced significant new townhome and multifamily development in varying project sizes, driven primarily by private sector developers and investors. Two projects that involved public sector support include the Town Centre at Laurel and the Walkable Laurel Initiative.

The Towne Centre at Laurel

The Towne Centre at Laurel, located at 14828 Baltimore Avenue in Laurel, Maryland, is a private mixed-use redevelopment that opened in 2014. Developed by Greenberg Gibbons, the project transformed the former Laurel Mall into a modern, open-air, mixed-use destination featuring approximately 400,000 square feet of retail, dining, entertainment, and residential space.

The center is anchored by major tenants such as Harris Teeter, Burlington Coat Factory, Old Navy, Party City, and Regal Cinemas, alongside a variety of specialty shops and restaurants, reinforcing its role as a community hub. Additionally, residential units within the development contribute to its live-work-play appeal.

The project was part of a broader effort to revitalize the outdated Laurel Mall, creating a vibrant, pedestrian-friendly commercial district. Although a private investment, the City of Laurel's designation as a BRAC Revitalization and Incentive Zone facilitated public infrastructure improvements, including transportation upgrades, brownfield remediation, and mixed-use infill development. While not a traditional public-private partnership (PPP), the project benefited from public incentives, supporting its transformation into a key economic and social center in Laurel, Maryland.

Note: The BRAC Revitalization and Incentive Zone Program was established by the State of Maryland to manage growth resulting from

the federal Base Realignment and Closure (BRAC) process to provide local governments with financial assistance for necessary public infrastructure improvements.

Walkable Laurel Initiative

The Walkable Laurel initiative is a strategic effort to improve pedestrian accessibility, safety, and connectivity throughout the City of Laurel, Maryland. Led by the Environmental Affairs Committee, in collaboration with City Administration and the Transportation and Public Safety Committee, this initiative focuses on infrastructure enhancements that promote walkability and multimodal transportation options.

Key Infrastructure Improvements include city street enhancements such as new paving surfaces, roadway repairs, and upgrades to manholes and valve boxes. A raised crosswalk with enhanced signage and lighting has been installed near the Laurel Library to improve pedestrian safety. In parallel, Laurel is participating in a complete streets pilot project led by Howard County, the Maryland Department of Transportation State Highway Administration along southbound US 1 (Washington Boulevard).

This initiative repurposes a right-turn lane to create a multi-use path for pedestrians and cyclists, enhancing safety and connectivity. Prince George's County Department of Public Works and Transportation is actively planning and implementing improvements such as bicycle

lanes, enhanced sidewalks, pedestrian-scale lighting, and street trees. The Montpelier Drive Project, running from Laurel-Bowie Road (MD 197) to Carland Place, is a key effort to improve pedestrian access and overall mobility in an around the city.

These initiatives reflect Laurel's commitment to fostering a walkable, pedestrian-friendly environment for both residents and visitors. By investing in infrastructure and collaborating with local and state agencies, the city is enhancing safety, connectivity, and accessibility, ensuring sustainable urban development.

City of New Carrollton, MD

City Overview

The City of New Carrollton is located in northwestern Prince George's County, inside the Capital Beltway, approximately five miles from Washington, D.C. and bordered by Greenbelt to the North. The City is known as a key transportation hub, attracting new investment in major transit-oriented redevelopment projects, and for having a vibrant ethnically and racially diverse community.

The city's economic strengths are anchored in its multimodal transit hub, providing direct connectivity to Washington, DC, Baltimore, and the surrounding region via the WMATA Orange Line, Amtrak Northeast Corridor, MARC Penn Line, Greyhound, and Metrobus, with easy access to I-495, U.S. Route 50, and MD-410.

Its strategic location enables quick access to key employment and education centers, including 20 minutes to downtown DC and 10 minutes to the University of Maryland (College Park).

The city is experiencing major large-scale transit-oriented developments, incorporating Smart Growth principles such as walkability, bikeability, and green space investments that is fostering an urban, mixed-use environment. Its diverse housing market offers a mix of apartments, townhomes, condos, and single-family homes at various price points, including workforce and affordable housing. Additionally, the city's multicultural character, with strong Latino, Caribbean, and Asian communities, supports a vibrant local economy, reflected in its diverse restaurants, grocery stores, and markets.

Despite strong transit access and redevelopment potential, New Carrollton faces challenges in walkability, aging infrastructure, safety perception, and city identity. Major roadways prioritize vehicles, limiting pedestrian and bike-friendly design. Retail and entertainment options remain limited until major projects are completed. The lack of large-scale employers forces residents to commute elsewhere, competing with hubs like College Park and Silver Spring. To thrive, New Carrollton must redefine its identity as a destination city rather than a pass-through place.

New Carrollton is actively engaged in growing its tax base through major, transformative real estate projects, economic development

strategies for business retention and attraction, and the development of parks and open space to enhance livability.

Economic Development

The City of New Carrollton's Economic Development functions are housed in the Office of the City Manager.

The City's Economic Development Strategy addresses issues such as commercial tenant retention, business attraction, and linking local businesses to increased activity at the Metro Station. The strategy outlines tools to support existing businesses and attract new ones, with recommended short- and long-term actions to stimulate economic growth. The economic development incentives and programs to attract and support businesses and developers include:

- Enterprise Zone Designation: New Carrollton is part of a designated Enterprise Zone, providing businesses with access to various state and local tax incentives. These incentives include property and income tax credits aimed at encouraging investment and job creation within the zone. Businesses may benefit from real property tax credits, income tax credits (Prince George's County Economic Development Corporation coordinates this program.)
- Collaboration with Prince George's County Economic Development Corporation (EDC): The city works closely with the EDC to provide businesses with access to various

incentives and support services, including: expedited permitting; assistance in identifying and applying for applicable tax credits; support in workforce training and recruitment; helping businesses find suitable locations within the city; and guidance on accessing county and state financial programs.

- Connecting New Carrollton businesses to eligible state-level programs
- Access to the Neighborhood Business Works Program which offers loans and grants to new or expanding businesses in designated sustainable communities. This program is particularly beneficial for small businesses and home-based businesses looking to establish a commercial presence.
- Community Investment Tax Credit (CITC) Program which encourages contributions to nonprofit organizations by providing tax credits to businesses and individuals that donate to approved projects, supporting community and economic revitalization efforts.

Major Projects

Adjacent Metro Development

Located outside of New Carrollton, this PPP involves the Washington Metropolitan Area Transit Authority (WMATA), Prince George's County, the State of Maryland, and developers Urban Atlantic and Brookfield Properties. The project aims to transform 49 acres into a

mixed-use, transit-oriented hub featuring 1,500 residential units, 1.1 million square feet of office space, 150,000 square feet of retail, and a 200-key hotel.

This 2.3 million square foot development is centered around the New Carrollton transit station, which offers access to Metrorail, Amtrak, MARC trains, and the future Purple Line.

The City is also investing in the revitalization of its parks to improve residents' quality of life and attract visitors to create a walkable and bikeable community in support of this redevelopment and to tying in surrounding neighborhoods.

The Margaux

A part of the larger New Carrollton Metro development, The Margaux is a 291-unit residential project offering modern, transit-oriented housing at below-market rates. This initiative is a collaboration between WMATA, Urban Atlantic, Prince George's County, and the Amazon Housing Equity Fund, which provided \$25.4 million in low-rate financing to support the project.

Prince George's County, MD

Greenbelt operates within the dynamic regional landscape of Prince George's County alongside the peer cities profiled in the Existing Conditions Assessment. As the County continues to invest in transit-oriented development, innovation hubs, and workforce pipelines, understanding and leveraging the full range of available economic

development resources will reduce Greenbelt’s expenditures on these activities and accelerate implementation of the Strategic Plan.

The following provides an overview of Prince George’s County’s competitive positioning, planning and economic development functions, and a profile of economic development policies and tools available to Greenbelt.

Fully accessing/optimizing these tools will improve Greenbelt’s capacity to attract regional business investment and development while also expanding services to existing local businesses.

Planning and Economic Development Overview

Prince George’s County is a diverse and strategically located jurisdiction in the Washington, DC metropolitan region. Its robust transportation infrastructure—including I-495, I-95, the Baltimore-Washington Parkway, MARC, and Metrorail—positions the County as a key hub for regional mobility and access.

The County benefits from a diverse, highly skilled workforce due to its proximity to major universities and Washington, DC’s labor market, providing a strong foundation for economic development across a range of industries.

Within this regional landscape, the City of Greenbelt stands out as a distinctive community with competitive locational assets, a rich legacy of progressive planning, and strong multimodal connections.

Greenbelt’s proximity to the Greenbelt Metro and MARC station, adjacency to major employment centers like NASA Goddard, and access to the Baltimore-Washington Parkway make it one of the most transit-accessible municipalities in the County. Its unique identity, historic character, and extensive green space offer quality of life advantages that few suburban jurisdictions can match.

Despite these strengths, Prince George’s County faces several structural and socioeconomic challenges. The K–12 public school system continues to grapple with funding gaps and inconsistent academic outcomes. In areas like Hyattsville, schools face performance issues that limit workforce readiness. At the post-secondary level, there remains a disconnect between the skills produced by local institutions and those required by employers in high-growth sectors.

Public perception of safety, while improving, remains influenced by pockets of property crime. Infrastructure across the County—including aging public schools—requires substantial modernization to meet future needs. Transportation bottlenecks during peak hours, particularly along I-495 and the Baltimore-Washington Parkway, contribute to congestion and highlight uneven transit accessibility and walkability in some communities.

The County’s rising housing costs are intensifying concerns about affordability and displacement. As rents and home prices rise, lower-

income households and long-time residents are increasingly priced out of the market. This dynamic threatens community stability and the survival of small businesses, raising the urgency for equitable housing policies.

Environmental vulnerabilities, particularly flood-prone areas, underscore the need for investments in stormwater infrastructure and climate resilience. Additionally, the County's economic base remains heavily tied to Washington, DC. With many residents commuting out of the County for work, local job density and daytime economic activity remain limited.

In this context, Greenbelt is uniquely positioned to lead on economic diversification and revitalization. Through its strategic planning efforts, targeted business support programs, and potential to guide mixed-use redevelopment at some of the region's remaining key sites, Greenbelt can serve as a model for how smaller cities within the County can anchor vibrant, transit-oriented economic nodes.

By aligning local priorities with County and state-level investments, Greenbelt—and the County as a whole—can build a more resilient, inclusive, and opportunity-rich future.

Economic Development Policies and Tools

Prince George's County offers a variety of economic development incentives that can benefit developers and businesses operating in municipalities like Greenbelt. These programs are designed to stimulate investment, job creation, and revitalization across the County.²

Economic Development Incentive (EDI) Fund

A \$50 million fund providing conditional loans and grants to support job creation, business expansion, and capital investment. Eligible projects must demonstrate significant economic impact and alignment with County priorities.

<https://fscfirst.com/learn/programs/economic-development-incentive-edi-fund/>

Micro Business Technology Integration Grant

ARPA fund provides up to \$2,500 to Prince Georges County-based micro businesses to support low-cost marketing efforts, remote processing, equipment for credit card processing, social media marketing efforts, and enhancing their technological capabilities.

<https://fscfirst.com/learn/programs/small-business-capital-and-growth-stimulus-fund/>

² <https://www.pgcedc.com/incentives-1>

Enterprise Zone Tax Credits

Businesses located within designated Enterprise Zones may qualify for real property tax credits and state income tax credits in exchange for job creation and investments.

<https://commerce.maryland.gov/fund/programs-for-businesses/enterprise-zone-tax-credit>

Revitalization Tax Credit

Offers property tax credits for improvements made to real property in designated revitalization areas, encouraging redevelopment in existing communities.

<https://www.princegeorgescountymd.gov/departments-offices/county-executive/economy/geographic-development-incentives/county-incentives>

High Technology Facilities Tax Credit

Provides property tax credits to encourage the growth and development of high-technology facilities, including manufacturing, fabrication, assembling, and research and development operations. Requires minimum \$500,000 investment in 5,000 square feet or more of real property that is newly constructed or substantially improved by, or for, them and create at least 10 new full-time positions over a period of three years. The tax credit is phased in over a five year-period, beginning with a 100% exemption on the increased

assessment in year one; 80% in year two; 60% in year three; 40% in year four; and 20% in year five.

<https://www.pgcedc.com/high-tech-real-property>

Opportunity Zones

Investors can receive federal tax incentives for investing unrealized capital gains into Opportunity Funds that invest in designated Opportunity Zones within the County.

Tax Increment Financing (TIF) Districts

A financing mechanism that uses future increases in property taxes to fund current public infrastructure improvements, facilitating economic development projects.

School Facilities Surcharge Reductions/Exemptions

Reductions or exemptions from the school facilities surcharge for certain residential developments, lowering the cost burden for developers.

More Jobs for Marylanders Program

Provides tax incentives to new and existing manufacturers for job creation, including income tax credits, accelerated depreciation, and workforce training support.

Maryland Commuter Tax Credit and Ride Smart Commuter Programs

Employers who subsidize their employees' commuting costs through transit or vanpool programs can receive state tax credits and reductions on certain payroll taxes.

One Maryland Tax Credit

Businesses that invest in economic development projects in Tier 1 Counties and create a minimum number of new jobs may qualify for state income tax credits up to \$5 million, depending on the number of jobs created and eligible project costs.

Commercial Property Improvement Program

The CPIP assists owners of shopping centers and retail street storefronts properties with improving exterior facade, place making, lighting, and major building systems improvements that enhance retail competitiveness and viability. The program targets shopping centers and retail space for eligible improvements. Funding awards require a 50% applicant match with a minimum grant of \$50,000 for \$100,000 and a maximum grant of \$350,000 for \$700,000 or more in total project costs.

Award rankings are based on applicants with the strongest market potential for investment. Ineligible uses/applicants include commercial space occupied exclusively by places of worship, non-retail uses, and previous CPIP awardees (2021 to 2024). Architectural

design and permit costs will not be reimbursed until after construction is completed. Construction on approved projects must begin within 90 days after grant approval and must be completed within 180 days after approval. The application cycle begins in October (participation in a pre-application webinar required).

Retail Revitalization Resources

The City of Greenbelt can leverage existing Prince George's County revitalization resources by undertaking targeted outreach to owner/operators of disinvested shopping centers to promote retail vitality, municipal branding, and placemaking.

- Retail/Dining/Entertainment:
<https://www.pgcrguide.com/success-stories/>
- Placemaking/Wayfinding:
<https://www.pgplanning.org/community-planning/placemaking/placemaking-pilot-projects>

More information is available from the Prince George's County Economic Development Corporation Business Specialist:

Victor E. Sherrod: vsherrod@co.pg.md.us
<https://www.pgcrguide.com/we-can-help/>
<https://www.princegeorgescountymd.gov/departments-offices/county-executive/economy/geographic-development-incentives/county-incentives>

Workforce Development/Business Incubation

Employ Prince George's (EPG) is a nonprofit organization incorporated to serve as the primary workforce intermediary for Prince George's County. It operates as the administrative and service delivery arm of the Prince George's County Workforce Development Board, giving it a direct link to County economic priorities, funding, and strategic planning. This structure allows it to align employer services with local hiring needs and County economic development goals. EPG provides a full menu of employer services, including:

- Talent recruitment and pre-screening
- Customized hiring events and job fairs
- Labor market analysis
- Industry sector partnerships
- Access to workforce training funds and apprenticeship development

Their Business Services Division works directly with employers to design hiring pipelines and connect them with job-ready candidates through initiatives like the Prince George's County American Job Center Community Network.

EPG also leads sector-specific initiatives relevant to the City of Greenbelt's target industries such as:

- The Experience Prince George's Hospitality Training Program
- The Prince George's County Construction Works Program

- The Healthcare & Allied Services Talent Pipeline

These initiatives are designed to address both current labor shortages and long-term talent pipeline needs in priority industries.

EPG maintains partnerships with local community colleges, training providers, and economic development entities such as the Prince George's County Economic Development Corporation (PGCEDC). This allows for integrated services that link workforce development to business retention and expansion efforts.

EPG consistently reports high placement outcomes and is recognized for its agility in responding to both employer and community needs. EPG serves as a central partner in County economic resiliency strategies.

VI. Business Climate Survey

As part of the City of Greenbelt's Economic Development Strategic Plan, a Business Climate Survey was launched to gather direct input from local business owners, entrepreneurs, property managers, and commercial stakeholders.

The survey was a key component of the broader community engagement strategy designed to ensure that the Plan reflects real-world conditions, challenges, and opportunities faced by the City's business community.

Purpose of the Survey

The Business Climate Survey was developed to:

- Understand local business conditions and industry trends
- Identify barriers to growth, investment, and job creation
- Assess satisfaction with City services, infrastructure, and policies
- Collect feedback on future priorities related to revitalization, talent, and support programs

Survey Design and Promotion

The survey was conducted electronically over a three-week period and was accessible via QR code and direct link featured on public outreach flyers, the City's website, social media platforms, and through partner organizations. To reach a diverse audience, the City promoted the survey through:

- The Greenbelt Business Alliance and commercial property owners
- Direct outreach to business license holders in target sectors (Co-Operatives, healthcare, real estate developers/brokers, small/independent retailers, hospitality, professional services, etc.)
- Flyers and posters at Roosevelt Center, Beltway Plaza, and community facilities
- City-provided email list-serves and direct cell follow-up calls

Key Focus Areas

Respondents were asked to provide feedback on:

- Business performance and workforce needs
- Satisfaction with permitting, utilities, and City responsiveness
- Desired improvements in commercial areas and infrastructure
- Access to capital, technical assistance, and marketing support
- Priorities for future economic development, including redevelopment, training programs, and housing options for workers

Findings from the Business Climate Survey are summarized in the following Economic Development SWOT analysis and directly inform the Strategic Plan's vision, priorities, and action strategies to ensure that Greenbelt's economic future is guided by the needs and aspirations of its business community.



Economic Development Strategic Plan

The City of Greenbelt is preparing our community's Economic Development Strategic Plan for the next five years.

TELL US ABOUT YOUR PRIORITIES

for future city growth and development

- **Managed Growth**
- **Redevelopment & Revitalization**
- **Support for Businesses & Industry**
- **Housing for All**
- **Community Amenities, Identity & Sense of Place**
- **Training & Jobs for our Young Residents**

WE WANT YOUR INPUT!

To take the electronic survey, 3 ways to access 1) [click here](#) or

2) Scan the QR code or

3) visit www.slido.com and enter the code below:



#GreenbeltEconomicDevVision



For more information, please contact **John Mason, Economic Development Manager**
 25 Crescent Road • Greenbelt, MD • e: jmason@greenbeltmd.gov • p: 301-580-6385

City of Greenbelt, MD
Business Climate Survey Questions

1. What is your business sector?
2. How many employees are located in Greenbelt? In other locations?
3. What are Greenbelt's greatest locational strengths?
4. What are Greenbelts biggest economic challenges?
5. What is one word to describe doing business in Greenbelt?
6. What is missing in Greenbelt?
7. How can the City of Greenbelt help you to grow your business?
8. Do you have any other thoughts you would like to share to help guide the City's Economic Development Strategic Plan priorities?

VII. Economic Development SWOT Findings

The basis for the proposed Economic Development Strategic Plan initiatives is summarized in the following SWOT assessment. These findings highlight critical gaps, structural challenges, and untapped opportunities that validate the need for targeted initiatives and investment.

Limited Redevelopment Momentum

Greenbelt is experiencing a slower pace of redevelopment compared to peer jurisdictions in Prince George's County. Strategic sites along key corridors—such as Greenbelt Road—remain underutilized due to fragmented ownership, infrastructure gaps, and limited developer engagement. The absence of catalytic public-private partnerships and targeted incentives hinders the City's ability to accelerate transformative mixed-use development.

Lack of Business- and Growth-Friendly Culture

Findings from the stakeholder interviews underscore the need for a cultural shift in City Leadership that welcomes responsible growth while preserving Greenbelt's strong sense of community. To support long-term fiscal sustainability, the City must actively work to improve perceptions among developers and businesses regarding the ease of doing business, clarity of process, and openness to investment. Peer city comparisons reveal that successful economic development is often driven by proactive, City-led initiatives that balance growth with

community values. For Greenbelt to remain competitive, it will need to foster a more business-friendly environment that aligns with its identity while expanding its tax base and supporting thoughtful, inclusive development.

Absence of a Recognized Business Retention & Expansion (BRE) Program

Prior to September 2024, there has been no BRE strategy to serve as a roadmap to focus on and support the growth and expansion of existing businesses within Greenbelt. Greenbelt's new BRE strategy will promote relationship-building engage with and thus understand the needs of Greenbelt's existing businesses. As their needs are better identified, the ED office will commence with connecting those firms to critically needed resources and resource provider organizations needed for them to thrive, grow and ultimately boost job growth and economic stability in Greenbelt.

Aging Commercial Centers and Storefronts

Greenbelt's legacy retail centers face increasing vacancy, outdated storefronts, and competition from newer regional destinations. Many small business tenants lack the capital for interior or exterior upgrades. Combined with weak consumer-facing marketing, these conditions reduce foot traffic and contribute to commercial stagnation.

Lack of Local Permitting Authority

The City does not control zoning or permitting decisions, which are managed by Prince George's County and the Maryland-National Capital Park and Planning Commission (M-NCPPC). This structure limits Greenbelt's ability to proactively shape land use outcomes, respond to market opportunities, and support infill development aligned with community goals.

Underdeveloped Entrepreneurial Ecosystem

Despite proximity to major research institutions and federal employers, Greenbelt lacks a cohesive support network for entrepreneurs and startups. Many residents with business ideas do not have access to mentorship, seed funding, or low-cost workspace. The absence of dedicated small business infrastructure constrains local innovation and inclusive economic growth.

Underutilized City-Owned Assets

Greenbelt owns civic properties—such as the Armory and other underperforming facilities—that are well-positioned for redevelopment. The City is actively engaged in developing a formal framework and allocating staff resources to evaluate reuse potential, issue redevelopment solicitations, or structure public-private partnerships that generate economic and community value.

Untapped Tourism and Experience Economy

Greenbelt is rich in historical, cultural, and natural resources—including its legacy of cooperative planning, arts assets, and green spaces—but lacks a coordinated tourism strategy. The City does not actively market itself to regional visitors or integrate into broader tourism networks. Event programming is limited in scale and reach.

Structural Fiscal Inequities

While Greenbelt delivers a wide range of municipal services independently of the County, the City receives a disproportionately low tax differential. This inequity limits local fiscal capacity to fund infrastructure, economic development initiatives, and service enhancements. Reform is needed to secure fair recognition of the City's service load and revenue needs.

Marketing and Branding Gaps

Greenbelt faces the challenge of influencing economic development within a county-controlled planning and zoning environment. The city needs to shift from a reactive to a proactive stance, clearly articulating its vision and priorities to attract desired businesses and development. Existing businesses require support and resources, while attracting new retail and targeted industry clusters is crucial for economic growth. The city's image and brand need to reflect its commitment to sustainable development. A consolidated summary of stakeholder input is provided on the following pages.

Key Components of Greenbelts BRE Strategy

Proactive Business Engagement: As previously mentioned, Greenbelt's BRE strategy involves actively connecting with local businesses to understand their needs, challenges, and growth opportunities. To that end, the ED office has incorporated a Salesforce CRM system that now provides a tool for data collection, disseminating of valuable industry-specific information to targeted industry-clusters within Greenbelt, tracks progress of economic development expansion projects, and provides reporting capabilities to City leadership of business trends with those targeted industry sectors. **Needs Assessment:** Greenbelt's BRE strategy BRE programs will incorporate surveys, business visits, and data analysis to identify the specific needs of Greenbelt's businesses community.

Resource Provision: Greenbelt's BRE strategy includes disseminating pertinent information about public funding opportunities, government assistance programs for small businesses, workforce development resources, economic tax statutory and discretionary tax credit and funding incentives, and training-grant opportunities to other support building a quality talent pool.

Collaboration and Partnerships: Greenbelt's BRE strategy will encourage collaboration between stakeholder organizations that included government, economic development agencies, and business and associations.

Action Planning: Greenbelt's BRE strategy is critically needed to develop sound action plans that merit specific initiatives to address business challenges and support their growth. Creation of four Greenbelt industry-sector roundtables will bring together business leaders quarterly within targeted sectors to discuss business challenges precluding growth and identify available city resources to mitigate those challenges.

Continuous Improvement: Greenbelt's BRE strategy involves implementation of an ongoing system and process, versus one-time programs and events. The system and its processes will require augmentation, continuous monitoring and evaluation, and improvement based on trends and the changing landscape of Greenbelt's target industry-clusters.

Job Creation: Greenbelt's BRE strategy will connect existing businesses with access to capital and public sector procurement opportunities that potentially spur job growth as businesses are potentially win contracts that require additional human capital.

Economic Stability: Greenbelt's BRE strategy will provide support local businesses to stabilize Greenbelt's local economy and reduce the risk of business closures.

Capital Investment: Greenbelt's BRE strategy will encourage businesses to invest in their operations, expand their facilities, modernize processes, systems, and equipment as well as embrace

technology-innovation that ensures they remain competitive.

Enhanced Business Climate: Greenbelt's BRE strategy will ultimately enhance the overall business climate within the community by fostering a spirit of collaboration, providing support system that makes it easy for businesses to locate and expand.

Stakeholder and Partner Engagement: Greenbelt's BRE strategy will serve to foster stronger connections between our businesses and the community, which leads to greater cooperation and collaboration, such has occurred with the City's seamless relationship with the County Chamber of Commerce, Greenbelt Business Alliance, County ED Office, and various County and city regulatory agencies.

Strategic Plan Considerations

Background

The findings of the existing conditions assessment underscore key challenges and opportunities facing the City of Greenbelt. Demographic and economic trends reveal stagnant population growth, skills mismatches between residents and available jobs, and a slower pace of redevelopment compared to peer jurisdictions in the region. These factors highlight the need for a more proactive, coordinated approach to economic development.

Historically, Greenbelt has focused primarily on delivering residential services. This Economic Development Strategic Plan—the first of its kind in the City’s history—marks a turning point. It offers a roadmap to expand Greenbelt’s focus to include robust partnerships with the business community, a renewed commitment to economic vitality, and a shift toward a City-led culture of revitalization and investment attraction.

As Greenbelt enters a new chapter after more than 70 years of progressive planning and community-building, the City is uniquely positioned to take a more active role in shaping its economic future. Although Greenbelt does not hold zoning or permitting authority, it can lead through strategic advocacy, partnership development, and targeted investment, especially in areas critical to the City’s long-term prosperity.

Key Findings

Greenbelt’s future economic development success will depend on building internal capacity, expanding partnerships, and leveraging county and state-level tools more aggressively. Enhancing coordination with PGCEDC, M-NCPPC, and state agencies—along with pursuing dedicated staff or shared-service models—will be essential to advancing redevelopment, small business support, and housing innovation across the City’s commercial districts and growth nodes.

Greenbelt’s evolving economic development approach demonstrates a shift toward greater business engagement, proactive redevelopment planning, and local capacity building. By leveraging its locational assets, community values, and new channels for business feedback, Greenbelt is well-positioned to shape a more responsive, resilient, and inclusive economic development strategy.

Key Challenges and Opportunities

1. Development Readiness and Process Reform

Despite strong location assets and demand for mixed-use development, Greenbelt has a reputation for being resistant to growth. Stakeholder feedback cited lengthy, uncertain, and costly development processes, lack of local zoning authority, and inconsistent Council support. There is a clear opportunity to improve clarity, coordination, and predictability in the development process.

2. Underutilized Commercial and Civic Assets

Key assets like Roosevelt Center, Beltway Plaza, the Armory, and other historic or city-owned properties remain under-leveraged. Stakeholders recognize the potential for these sites to be revitalized as anchors for walkable, mixed-use, and health-oriented districts with improved placemaking.

3. Need for Dedicated Business Support Infrastructure

Greenbelt lacks a centralized business assistance function and has no full-time staff dedicated to economic development or small business services. This contributes to business disconnect, underutilized partnerships, and inconsistent communication with commercial property owners.

4. Perception, Branding, and Communication Gaps

Stakeholders highlighted branding confusion, a lack of visible business communication, and a disconnect between the City's historic identity and its future vision. Public safety misperceptions and inconsistent messaging also weaken investor and visitor confidence.

5. Organizational and Fiscal Capacity Constraints

Economic development efforts are limited by staffing bandwidth, grant management capacity, and internal coordination challenges. Stakeholders noted siloed planning, a lack of lobbying strategy, and underutilized financial tools, even as new grant and partnership opportunities emerge.

Recommended Economic Development Goals and Objectives

The following summary of recommended economic development goals and objectives is intended to provide an initial opportunity to collect feedback from Staff and City Council regarding the EDSP's initial policy recommendations:

1. Support and Operationalize the City's New Economic Development Function

In October 2024, the City of Greenbelt hired its first Economic Development Manager, marking an important step toward more proactive local economic leadership. The purpose of this Strategic Plan is to provide a five-year implementation roadmap that equips the new Manager—and all supporting departments—with a clear work plan aligned to Greenbelt's values, priorities, and capacity. To maximize the City's investment in this staff resource, the City should:

- Ensure cross-departmental coordination and resource alignment in support of the Manager's prioritized work tasks;
- Clarify roles and responsibilities across departments and implementation partners (i.e., Greenbelt Business Alliance) related to business services, grants, communications, and project development;
- Institutionalize regular reporting on performance metrics and feedback loops via Salesforce or another CRM tool to track

progress and maintain City Council and community alignment.

This new position, supported by this Plan, provides a foundation for consistent business engagement, strategic partnerships, and implementation of key redevelopment and revitalization initiatives.

2. Streamline and Clarify the Development Process

Work with Prince George's County and M-NCPPC to pilot a Greenbelt Development Review Framework that increases transparency, reduces permitting delays, and includes clear guidance for prospective developers. Consider targeted zoning overlays and expedited review zones around key **Economic Development Opportunity Sites**.

3. Launch a Greenbelt Business Services Hub

Develop a centralized small business portal (online and physical) to offer technical assistance, licensing support, façade and fit-out grants, and marketing coordination. Formalize regular business breakfasts, industry roundtables, and site tours to strengthen engagement and feedback loops.

4. Reposition and Rebrand Key Commercial Assets

Develop asset-specific revitalization plans for Roosevelt Center, the Armory, Beltway Plaza, and Greenbelt Metro. Pair capital planning with a new place-based branding campaign that emphasizes Greenbelt's unique livability, history, and accessibility.

5. Expand Capacity for Regional Cooperation and Collaboration

To improve Greenbelt's competitive position for new investment and redevelopment opportunities, the City should explore ways to improve coordination across County departments while also targeting new public and private funding sources.

This strategy can guide efforts to work more closely with Prince George's County on zoning tools—such as overlay districts—that make it easier to attract the types of businesses and development Greenbelt desires.

It can also help connect local employers and residents to workforce training programs, support improvements to roads, sidewalks, and public spaces around key redevelopment sites, and advance housing and health-related projects that benefit the broader community.

To support this work, the City should establish an internal team to coordinate grant applications. Developing an annual list of high-priority grant opportunities would help staff focus their efforts and stay on track with key deadlines. When needed, the City can bring in outside support to help with complex applications and reporting requirements.

With a clear plan and coordinated approach, Greenbelt can better compete for the resources it needs to strengthen its economy and deliver long-term benefits for residents and businesses.

Next Steps

Following incorporation of feedback from Staff and City Council, the forthcoming Economic Development Implementation and Funding Plan will translate these goals into detailed programs, timelines, and investment strategies.

It will provide a five-year roadmap to help Greenbelt enhance business engagement, catalyze redevelopment, and build the internal capacity needed to advance inclusive economic growth.

By connecting Greenbelt's values with the needs of its businesses, the community goals of its residents, and the momentum of the region, the City has a real chance to lead—not just manage—its future. With the right focus, Greenbelt can turn long-standing challenges into new opportunities for smart growth, vibrant redevelopment, and lasting financial stability

Appendix I: Business Climate Survey SWOT

Strengths:

- **Strong Community & Livability:**
 - Strong community sense and simple living (GHI).
 - Desirable living environment with greenspace and walkability
 - High resident satisfaction (low turnover)
 - Inclusive community (GHI attracting diverse families)
 - Established city amenities with exceptional service
 - Existing Mixed-Use Environment with "amazing livability"
- **Strategic Location & Assets:**
 - Strategic location (proximity to UMD, Metro, Beltway)
 - Existing assets: office spaces, arts initiatives, Greenbelt Metro
 - Access to healthcare through CCI
 - Access to trails (Sligo Creek, Anacostia, Rock Creek) and recreational amenities
 - Attractive Location: Greenbelt's location, parks, lake, and central core (including the movie theater and New Deal) are seen as positive attributes
- **Established Relationships & Collaboration:**
 - Collaborative relationships with the City (work sessions)
 - City staff support (great, nice, professional, helpful)
 - Existing relationships with some property owners
 - Established Business Alliance
 - Active regional health groups
 - Good communication between departments
- **Development & Economic Potential:**
 - High demand for GHI housing (good coop sales)
 - Proactive zoning (successfully navigated rezoning)
 - Existing development projects (Verde at Greenbelt Station)
 - Potential for mixed-use development
 - Developer interest
 - Potential for senior housing development
 - Established Health/Wellness Cluster
 - Potential for Medical District
- **Financial & Grant Opportunities:**
 - Potential grant opportunities (stormwater management)
 - Co-op financial strength
 - Dedicated Grants Writer and ARPA Funding Experience
 - Hiring incentives for police
- **Historic & Cultural Value:**
 - Historic significance (GHI values its history)
 - Unique historic town center
 - Strong arts center and cultural potential
 - Historic Cemetery Focus
 - Strong community pride

Weaknesses:

- **Development Challenges & Resistance:**

- Negative development reputation
- City Council open and hostile opposition to development
- Pushback on development projects
- Lengthy development processes
- Councilmember and resident resistance to change
- Difficult initial development process (Greenbelt's history)
- Historically problematic zoning
- Lack of clarity and certainty in development
- Perception of anti-development
- High development costs
- Lack of incentives for developers
- Long approval processes for development

- **Infrastructure & Service Concerns:**

- Infrastructure issues (WSSC aging lines, electric vehicle capacity)
- Dissatisfaction with WAMTA "Better Bus" Plan
- Traffic calming study concerns
- Police staffing shortages
- Financial pressures (budget deficit)
- Parks and Recreation funding deficits

- **Economic & Retail Vulnerability:**

- Concerns about Roosevelt Center
- Vulnerability to retail closures (Beltway Plaza)
- Impact of federal layoffs
- High interest rates hindering development
- Partner pullout (Atapco)
- Zombie retail/vacant retail spaces

- Financial viability concerns

- **Perception & Communication Issues:**

- Misperception of safety
- Prince George's County negative perceptions
- Public school system concerns
- Lack of visible business communication
- Lack of centralized business support
- No dedicated small business staff
- Disconnect between historic value and development
- City trifurcation (uneven development)
- Branding issues
- Divisive branding approach
- Complex customer experience
- Limited city center access

- **Operational & Bureaucratic Issues:**

- Membership approval process (GHI)
- Absentee landlords/lack of code enforcement
- Non-responsiveness of PG non-profits
- County implementation issues
- Siloed planning/difficulty navigating county bureaucracy
- Delayed information from county
- Limited grant department bandwidth
- Earmark application challenges
- Unclear lobbying effectiveness
- Organizational capacity issues
- Limited grant writing work plan/resources
- Recruitment challenges for police
- Difficulty acquiring space

Opportunities:

- **Development & Revitalization:**

- Armory project site development
- Roosevelt Center ownership succession planning (discussions held in the past, no movement)
- Historic building renovation
- Beltway Plaza redevelopment
- TOD development at Greenbelt Metro
- Franklin Park revitalization
- Recreation center development
- Improved development processes
- Attracting better tenants
- Revitalization of city center
- Surface parking opportunities
- ("Gentle") densification

- **Economic Growth & Partnerships:**

- Collaboration with PEPCO (electric vehicle capacity)
- Finding a new partner for residential development
- Financial assistance (grants, loans, tax relief)
- Attracting national tenants
- GIS mapping for business clusters
- Joint ventures and partnerships
- Formalized business support
- University of Maryland collaboration
- Regional innovation hub
- Non-Profit Partnerships

- **Infrastructure & Service Improvements:**

- Stormwater management improvement (grant funding)
- Improved transit and walkability
- Curb cut opening (Breezewood)

- Improved Business Community Interaction from Police
- Marketing and advertising improvements for police recruitment
- Addressing homelessness and related issues

- **Branding & Community Enhancement:**

- Branding and marketing Greenbelt's strengths
- Destination development (arts, culture)
- Addressing misperceptions about safety
- Strong mayoral leadership
- Collaborative approach with developers
- Learning from other jurisdictions
- Creating a clear vision for Greenbelt
- Unified City Branding
- More visible events
- Tourism promotion
- Grant distribution equity
- "Blue Zoning"
- City-Sponsored health initiatives
- Marketing medical and healthcare services
- Research Focus
- Fee Initiatives for medical space
- Conference Participation

- **Financial & Grant Opportunities:**

- EDA grants
- New grant development program
- Increased departmental grant contribution
- Bond bill and state/federal earmark pursuit
- Improved lobbying efforts
- Attracting medical grants
- Falling interest rates

Threats:

- **Development & Economic Risks:**

- Retail closures
- Federal layoffs
- Infrastructure problems (WSSC, electric vehicle)
- Negative impacts of WAMAT plan
- Traffic calming study challenges
- Continued resistance from councilmembers and residents
- Unfavorable market conditions (high interest rates)
- Partner uncertainty
- Financial risks associated with development
- Quantum Properties under-delivery
- Failure of FBI development
- Stagnant tax base
- Escalating public service costs
- Long-term financial impact
- Loss of major tenants
- Increased tax burden on residents
- Retail Disinvestment
- Lack of Financial Viability
- Failure to attract investment
- Competition from other areas
- Rising interest rates
- Political obstacles and delays

- **Community & Safety Concerns:**

- Ongoing safety concerns in Franklin Park
- Continued negative perceptions
- Recurring crime issues
- Negative perceptions of crime
- Inbound crime and homelessness
- Shell station crime hotspot

- **Operational & External Challenges:**

- Absentee landlord inaction
- Internal divisions within the city
- Lack of regional cooperation
- Development delays
- Market fluctuations
- Competition for grant funding
- Federal funding uncertainty
- Organizational capacity limitations
- Reporting requirements for grants
- Changes in grant availability
- County's lack of implementation
- Funding alignment issues
- City's bifurcation by Beltway road network

City Council Work Session Agenda Item Report

Meeting Date: May 5, 2025

Submitted by: Bonita Anderson

Submitting Department: Administration

Item Type: Board and Committee Reports

Agenda Section: Agenda Packet

Subject:

Discussion of Refuse and Recycling Service Fees and Services, and Pay as you throw proposal

Suggested Action:

Agenda

- Introductions
- Council Discussion
- Questions and Answers
- Other Items

Attachments:

[Green ACES Green Team recommendation 2025-02 on solid waste.pdf](#)

[Post-Grant Budget Scenarios Attachment - \(3-25-25\).pdf](#)

[2025.03_Solid Waste Discussion.pdf](#)



Greenbelt Advisory Committee on Environmental Sustainability

**GREENBELT ADVISORY COMMITTEE ON ENVIRONMENTAL SUSTAINABILITY
REPORT TO CITY COUNCIL**

**Date: April 24, 2025
Recommendation # 2025-02**

SUBJECT: Solid Waste Disposal Options

BACKGROUND: The City of Greenbelt has a waste problem—that is, a problem with trash/garbage collection and disposal. For a couple of years, the City has posted a deficit of nearly \$300,000 annually to collect and dispose of solid waste. This problem has been compounded by a city-wide deficit this year. And to make matters worse, the local landfill in Upper Marlboro is filling up, and Prince George’s County is raising their tipping fee on July 1, 2025, and again on July 1, 2026. To help fill the gap between revenue and expenses, City Council will need to raise the fees it charges its customers to remove trash and recycling.

WasteZero, a mission-driven Certified B Corporation, has offered to help Greenbelt implement a Pay-as-You-Throw program that would more equitably assign the burden of paying for trash pickup based largely on the amount of trash that must be disposed of. The more trash one generates for the City to pick up, the more customers would pay. In a sense, the system would be metering of trash in a similar way that electricity or water utilities are charged by usage. In addition, the curbside food scraps pickup pilot program is coming to the end of its funding, as its supporting USDA grant concludes in August 2025. The program has allowed more than 400 households to divert their food scraps from the landfill to its composting site within Greenbelt, while providing valuable finished compost to Greenbelt gardeners.

Green ACES and the Greenbelt Green Team believe that the solution for Greenbelt’s solid waste problem is to address all three of the above issues simultaneously. The three prongs of increased fees for current service, a pay-as-you-throw pricing model, and continued food scraps pick-up complement each other, providing a solution that addresses equity, provides the opportunity for residents to keep their trash/recycling fees reasonable, and subsidizes the continuation of the curbside food scraps pickup program.

HOW WOULD THIS WORK?

First, let's tackle the raising of the current trash/recycling collection fees. Looking at neighboring jurisdictions, Greenbelt's fees are comparatively low. Greenbelt households currently pay \$280 a year. Annual fees are nearly \$500 in Montgomery County and more than that in Rockville. Prince George's County charges its residents just under \$360 annually. It is only logical that charging our residents \$90 per quarter, or \$360 annually, makes sense. Informing our residents that the County charges basically this same amount for its residents where it collects trash, that the County is raising its landfill tipping fees both this year and next, that Greenbelt has not raised its fee in years, and that the City is facing a budget deficit should facilitate obtaining buy-in from our residents.

CURBSIDE FOOD SCRAPS PICKUP

The pilot curbside food scraps pickup program is by numerous metrics highly successful. Compost Crew reports that the weekly participation rate has been very high (about 90%) and the contamination rate very low. The average collection per household has been 11.5 pounds of food scraps per week. This amounts to 122 tons of food scraps diverted from the landfill annually for 410 households, for a yearly savings of more than \$10,000 in tipping fees. The finished compost is much appreciated by community gardeners. As the coordinator for Henry's Hollow community garden said: "It's great to have a program whereby the community enriches the gardens of Greenbelt."

This service is currently free to participants except for a \$20 charge for a small bucket, with the grant picking up the expenses. As stated above, the grant subsidy ends in August. The chart below, excerpted from the attachment "Post-Grant Budget Scenarios Update" which contains all the chart's footnotes, shows various possible examples of monthly rates the participants would have to pay to continue this service for 10 months, the amount of time remaining in FY26 after the USDA grant ends in August, depending on varying proposed subsidy levels from the City. Green ACES and the Green Team recommend that the City continue the curbside food scraps pickup service to maintain momentum from the pilot. As part of this recommendation, we suggest the City take Compost Crew's offer to purchase the converted shipping containers known as a Compost Outpost, leading to a per-household discount of \$2.55 for two years (Scenarios 2-5). We will indicate later in the recommendations section of this report which scenario we recommend, and how it will be funded.

Curbside Food Scrap Pickup Program: Post-Grant Budget Scenarios¹

Scenario 1 Current Program	Scenario 2 Compost Outpost Buy Back ² Households Pay \$0 City Subsidy: \$19.13	Scenario 3 Compost Outpost Buy Back ² Households Pay \$9 City Subsidy \$10.13	Scenario 4 Compost Outpost Buy Back ² Households Pay \$12 City Subsidy \$7.13	Scenario 5 Compost Outpost Buy Back ² Households Pay \$15 City Subsidy \$4.13
\$21.68/household X 410 homes = \$8,888.80/month	\$19.13/household X 410 homes = \$7,843.30/month	\$10.13/household X 410 homes = \$4,153.30/month	\$7.13/household X 410 homes \$2,923.30/month	\$4.13/household X 410 homes \$1,693.30/month
\$8888.80 X 10 months ³ = \$88,888 total cost	\$7,843.30 X 10 months ³ = \$78,433 total cost	\$4,153.30 X 10 months ³ = \$41,533 total cost	\$2,923.30 X 10 months ³ = \$29,233 total cost	\$1,693.30 X 10 months ³ = \$16,933 total cost
Less \$8,540 tipping fee savings (savings based on expected 122 tons of food scraps diverted)	Less \$8,540 tipping fee savings	Less \$8,540 tipping fee savings	Less \$8,540 tipping fee savings	Less \$8,540 tipping fee savings
= \$80,348 net cost to city	= \$69,893 net cost to city	= \$32,993 net cost to city	= \$20,693 net cost to city	= \$8,393 net cost to city

PAY-AS-YOU-THROW (PAYT)

When cost is out of sight and out of mind, there's less incentive for the average busy individual to absorb waste reduction education or take advantage of waste diversion. Charging residents according to the amount of waste they generate for collection and disposal can change people's mindset and awareness of their habits. According to WasteZero, this unit-based waste collection is used by thousands of communities nationwide—including all of Minnesota and half of Massachusetts, and has resulted in an average of 44% reduction in waste. PAYT is a proven model that changes behavior.

Under the Pay-As-You-Throw model, households pay a base fee for service, and then purchase official municipal trash bags at local stores instead of their usual disposal bags. They buy the number and size of bags they need to accommodate the amount of trash they generate. This means households pay for exactly what they use, instead of averaging costs with the rest of the community. Those who make an effort to reduce their waste by donating items, composting, recycling, etc. pay less. Revenue from the base fee and from the sale of bags funds waste collection and disposal services. Households may choose not to participate in the PAYT service and continue with the current service model, but will pay a higher opt-out convenience rate; these households will be allowed to put out 3 large trash bags for pickup each week but would need to purchase official municipal trash bags if more is needed. Below is a chart that WasteZero developed for the City of Greenbelt showing various scenarios. Whether the City covers all or some of its expenses or runs an annual deficit for waste collection and disposal depends on the base fee, the opt-out convenience rate fee, the prices of the bags, and the participation rate. Assuming an opt-out convenience fee of \$410 for the first year of this pilot program, Green ACES and the Green Team recommend that the City adopt either the scenario where the annual base fee is either \$220 or \$240, both of which are lower than the current fee.

RECOMMENDATIONS:

With the above cost scenarios, Green ACES and the Green Team recommend that the City Council raise the solid waste collection fee to \$360 a year (\$90 a quarter), equal to what Prince George's County charges its residents for trash collection and pickup. We understand that City Council was considering raising the existing fee to either \$336 a year or \$350 a year for the upcoming fiscal year. Our recommendation is only \$2 a month above the \$336 option, and only 84 cents a month above the \$350 option.

We further recommend that City Council move to a Pay-As-You-Throw system, adopting either the \$220 or \$240 scenario. Because of the time needed to educate both residents and vendors (who need to procure and sell the bags), we recommend that this start on October 1, 2025. This would coincide with the next quarterly billing period and will also give residents time to think about the increase in the trash/recycling collection fee and will incentivize them to want to participate in the Pay-As-You-Throw service model to save money.

We also recommend that City Council provide a subsidy to continue the curbside food scraps pickup program. The amount of subsidy (which curbside budget scenario) to choose will depend on the Pay-As-You-Throw scenario selected and the estimated surplus it would generate.

Curbside Food Scrap Pickup Program: Post-Grant Budget Scenarios¹

Scenario 1 Current Program	Scenario 2 Compost Outpost Buy Back ² Households Pay \$0 City Subsidy: \$19.13	Scenario 3 Compost Outpost Buy Back ² Households Pay \$9 City Subsidy \$10.13	Scenario 4 Compost Outpost Buy Back ² Households Pay \$12 City Subsidy \$7.13	Scenario 5 Compost Outpost Buy Back ² Households Pay \$15 City Subsidy \$4.13
$\$21.68/\text{household}$ $\times 410 \text{ homes} =$ $\$8,888.80/\text{month}$ $\$8,888.80$ $\times 10 \text{ months}^3 =$ \$88,888 total cost Less \$8,540 tipping fee savings <i>(savings based on expected 122 tons of food scraps diverted)</i> = \$80,348 net cost to city	$\$19.13/\text{household}$ $\times 410 \text{ homes} =$ $\$7,843.30/\text{month}$ $\$7,843.30$ $\times 10 \text{ months}^3 =$ \$78,433 total cost Less \$8,540 tipping fee savings = \$69,893 net cost to city	$\$10.13/\text{household}$ $\times 410 \text{ homes} =$ $\$4,153.30/\text{month}$ $\$4,153.30$ $\times 10 \text{ months}^3 =$ \$41,533 total cost Less \$8,540 tipping fee savings = \$32,993 net cost to city	$\$7.13/\text{household}$ $\times 410 \text{ homes}$ $\$2,923.30/\text{month}$ $\$2,923.30$ $\times 10 \text{ months}^3 =$ \$29,233 total cost Less \$8,540 tipping fee savings = \$20,693 net cost to city	$\$4.13/\text{household}$ $\times 410 \text{ homes}$ $\$1,693.30/\text{month}$ $\$1,693.30$ $\times 10 \text{ months}^3 =$ \$16,933 total cost Less \$8,540 tipping fee savings = \$8,393 net cost to city

NOTES

1. All scenarios are based on the current program threshold of 410 households (See Note 2 below) and expected food scrap diversion total of 122 tons. These scenarios are calculated on a per-household basis, and will vary depending on the number of households that actually participate in the post-grant program. Both the program cost and amount of food scraps diverted will vary according to the number of participating households.
2. All post-grant scenarios assume a rate reduction of 2.55 per household [to \$19.13/month] from the current rate [\$21.68/month] based on **440 households**--the maximum number of households that the Trinity Church Compost Outpost can handle--that would result from Compost Crew purchasing the shipping containers at the Compost Outpost composting site at Trinity Church, and paying for the buy-back over a two-year period.
3. All calculations are based on a 10-month period of the fiscal year, since July and August will still be covered by the USDA grant.
4. With no city subsidy, households would pay full price for the service, which could vary between \$19.13 (for 440 households) and the full regular \$32 rate, depending on number of subscribing households. The \$19.13 rate assumes that Compost Crew would purchase the shipping containers located at Trinity Church (see Note 2 above), and that participation reaches 440 households. If participation remains at 410 households, participation would be about 20 cents more per month than in the chart above. Compost Crew's general regular stand-alone household rate is \$32/month. This general household rate can be lower with a higher number of subscribers.

March 3, 2025

GREENBELTMD

Solid Waste Rate Proposal



Background: Waste Collection Fund Deficit

- The **Solid Waste operation** has been operating at a deficit since **2019** and has relied on **General Fund subsidies** to cover shortfalls.
- In **FY2024**, the **General Fund** subsidized **Waste Collection** by **\$270,313** to cover operational expenses.
- **Increasing Costs:**
 - The County is **raising tipping fees** from **\$70 per ton** to **\$85 per ton** on **July 1, 2025**, and to **\$90 per ton** on **July 1, 2026**.
 - The tipping fee increase will result in an annual cost of **\$132,005** starting **July 1, 2025**, when the rate rises to **\$85 per ton**, and **\$139,770** starting **July 1, 2026**, when the rate increases further to **\$90 per ton**, based on **1,553 tons collected in FY2024**.
 - The tipping fee increase totaling a **\$31,060** increase over two years. **\$23,295** in **FY2026**, and an additional **\$7,765** in **FY2027**.
 - These increases will **further widen the funding gap**, which the **General Fund cannot sustain**.
- **Projected Deficit:**
 - In **FY2026**, the **Solid Waste Fund** is projected to run a deficit of **\$279,635**, representing a **37.34% funding gap**.



Background: Waste Collection Fund Deficit

Abbreviated Summary of Revenues Over Expenses (P&L by Year)

Year	2019	2020	2021	2022	2023	2024	2025 (EST)	2026 (EST)
Revenues (\$)	747,814	745,769	737,397	741,340	730,092	812,053	748,900	748,900
Expenses (\$)	798,591	718,731	772,239	791,923	893,085	1,082,367	956,700	1,028,535
Net Income (\$)	(50,777)	27,038	(34,842)	(50,583)	(162,993)	(270,313)	(207,800)	(279,635)



Background: Current Rate (Select Examples out of 18 rates)

Account Type	Description	Current Quarterly Rate (\$)	Current Annual Rate (\$)
W01	Residential	70	280
W04	Business Rate	70	280
W06	Business Rate 3	204	814
W07	Church	84	335



Proposed Fee Adjustments-Options

- **Objective:** Implement a **40% fee increase** over two years to close the deficit and ensure long-term financial stability for solid waste operations.
- **Option 1: Even Distribution (20% + 20%)**
 - **Year 1:** 20% increase **Year 2:** 20% increase
 - Spreads the increase evenly, ensuring gradual adjustment.
- **Option 2: Front-Loaded (25% + 15%)**
 - **Year 1:** 25% increase **Year 2:** 15% increase
 - Addresses the deficit faster, reducing the financial burden on the General Fund sooner.
- **Option 3: Three-Phase Increase (15% + 15% + 10%)**
 - **Year 1:** 15% increase **Year 2:** 15% increase **Year 3:** 10% increase
 - Spreads the increase over three years for **smoother financial adjustments**.
- **Option 4: Continue General Fund Subsidy (*Not Recommended*)**
 - No immediate fee increase.
 - Continues reliance on General Fund support, which is **unsustainable given rising costs**.



Proposed Fee Adjustments-Options

Account Type	Description	Current Annual Rate (\$)	Option 1: Even Distribution (20% + 20%)	Option 2: Front-Loaded (25% + 15%)	Option 3: Three-Phase (15% + 15% + 10%)	Option 4: No Increase (General Fund Subsidy)
W01	Residential	280	Year 1: 336 Year 2: 392	Year 1: 350 Year 2: 392	Year 1: 322 Year 2: 370 Year 3: 392	280 (No Change)
W04	Business Rate	280	Year 1: 336 Year 2: 392	Year 1: 350 Year 2: 392	Year 1: 322 Year 2: 370 Year 3: 392	280 (No Change)
W06	Business Rate 3	814	Year 1: 977 Year 2: 1,140	Year 1: 1,018 Year 2: 1,140	Year 1: 936 Year 2: 1,076 Year 3: 1,140	814 (No Change)
W07	Church	335	Year 1: 402 Year 2: 469	Year 1: 419 Year 2: 469	Year 1: 385 Year 2: 442 Year 3: 469	335 (No Change)



Comparison to Other Jurisdictions

Even with the proposed increases, our rates would remain competitive with those of surrounding counties while continuing to provide a higher level of service.

2025 Waste Collection Fees in Nearby Jurisdictions

County/City	Total Fee per Year (\$)
Montgomery County	594.59
Prince George’s County	356.32
Anne Arundel County	298.00
City of Rockville	503.00



QUESTIONS?

