

Howard Avenue Revitalization Study

A Pictorial Synopsis of

# *Howard Avenue Streetscape Design Concept Plan*

The Town of Kensington, Maryland

January 14, 1997

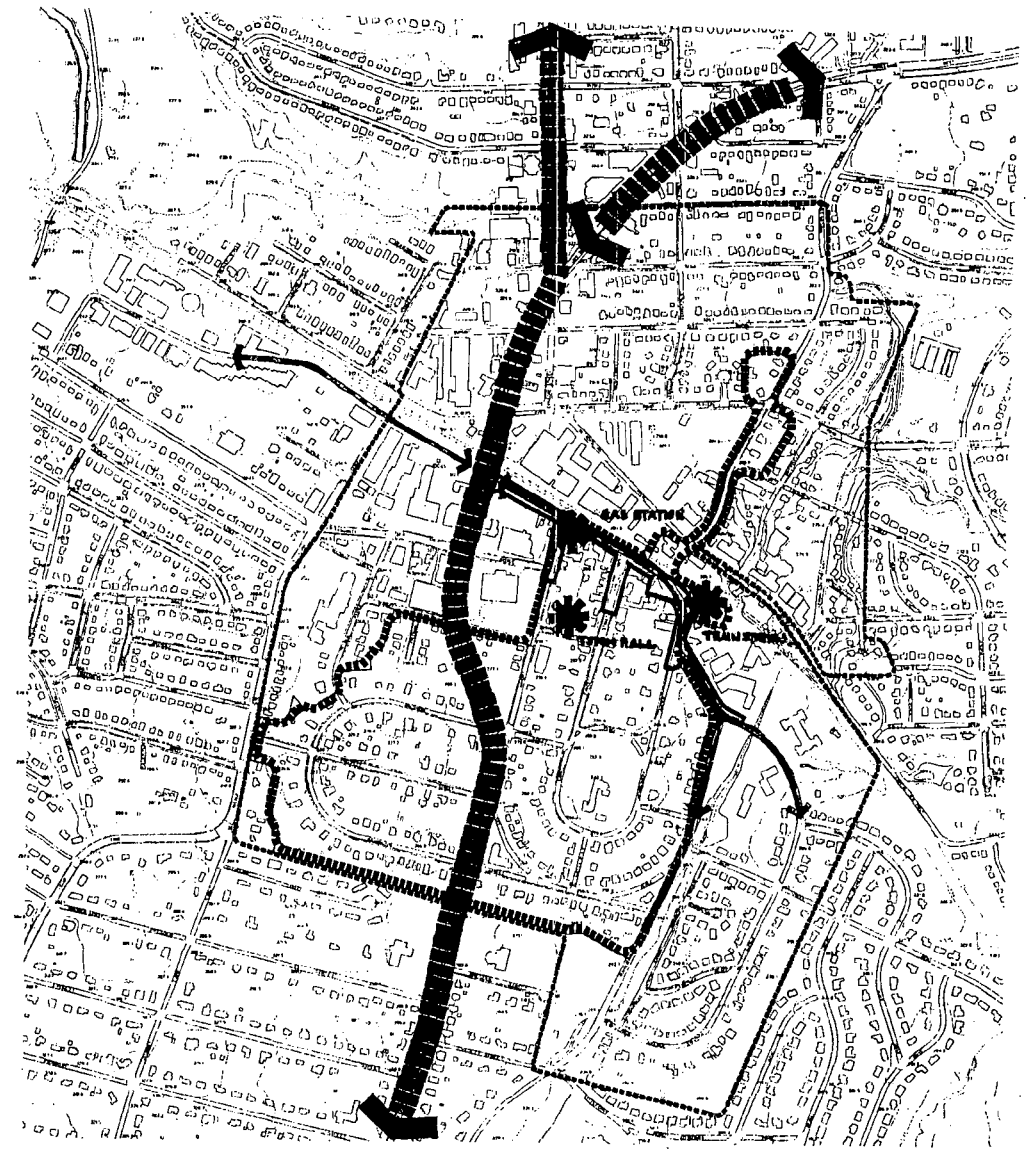


Prepared By: P.E.L.A. Design, Inc.  
2204 Maryland Avenue  
Suite 300  
Baltimore, Maryland 21218

Prepared For : The Montgomery County Government  
Dept. of Housing & Community Affairs  
and  
Town of Kensington, Maryland

# Introduction

- \* Connecticut Avenue is the major approachway to Howard Avenue
- \* Howard Avenue's Antique Row is located in the Town's center
- \* Part of Howard Avenue is located within the Kensington Historic District
- \* Major historic landmarks along Howard Avenue - Train Station  
- Gas Station
- \* Project Area Description: Howard Ave., east of Connecticut Avenue, Armory/Howard Ave. Intersection, Fawcett/Howard Ave. Intersection, Montgomery Avenue, and a portion of Kensington Parkway



**KENSINGTON VILLAGE STREETSCAPE DESIGN PROJECT**  
TOWN OF KENSINGTON, MD

PREPARED FOR:  
MONTGOMERY COUNTY PLANNING & COMMERCIAL REVITALIZATION  
61 MONROE STREET, ROCKVILLE, MD 20860

PREPARED BY:  
P.E.L.A. DESIGN, INC.  
8204 MARYLAND AVE., BALTIMORE, MD 21215

**VENUE MAP**

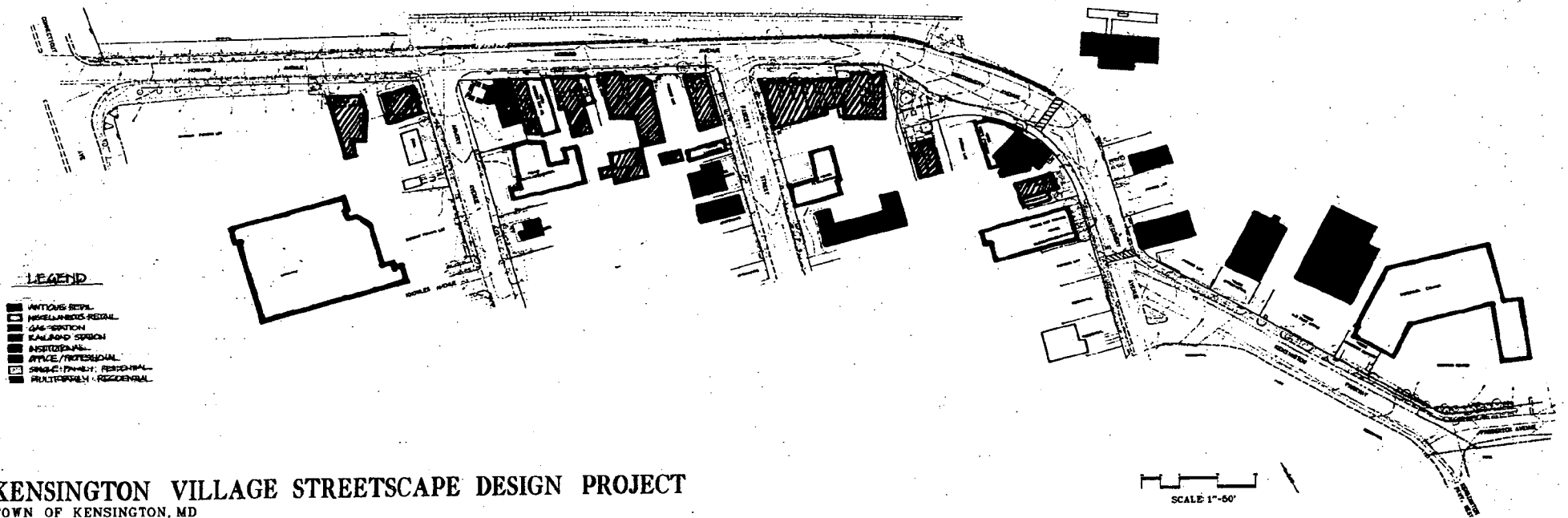
10TH OF KENSINGTON BOUNDARY  
 LOCAL KENSINGTON HISTORIC DISTRICT  
 STREETSCAPE DESIGN PROJECT BOUNDARY

SCALE: 1"=200'

# Structure Use and Space Use

Structure Uses - Antique Shops, General Retail, Offices, Public Building and Residential Use.

Space Uses - Street, Parking Lot, Sidewalk, Public Amenity Space and Private Green Space.



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# Functional Analysis

North Side of Howard Avenue -

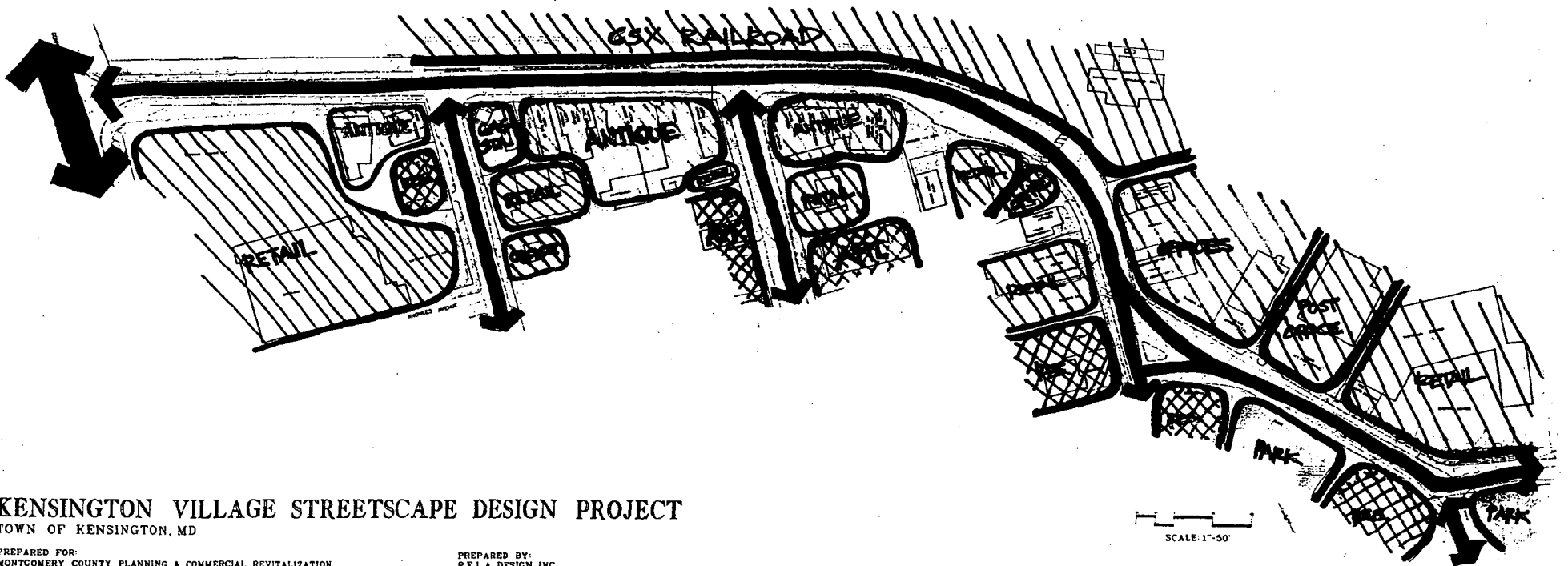
CSX Railroad

East and West Ends of Howard Avenue -

Neighborhood Serving Retail, Offices and Post Office

Central Portion of Howard Avenue -

Antique Shops



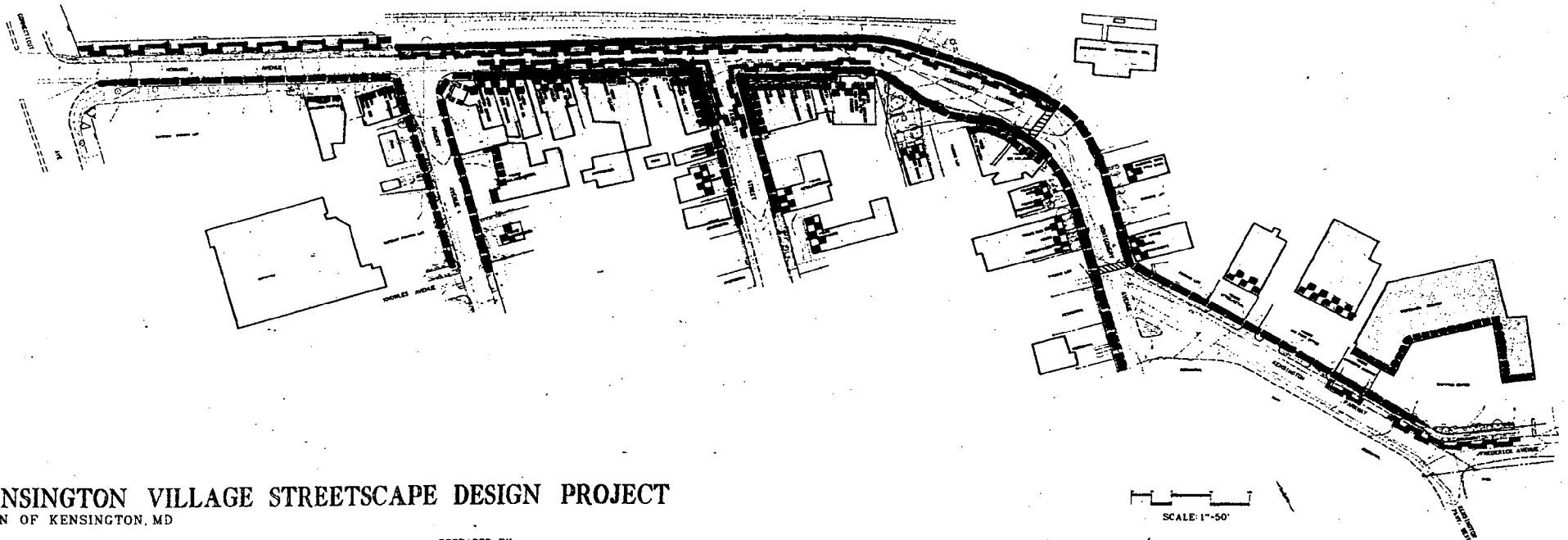
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# Building Facade Analysis

- \* Building facade features are diverse. Only a portion of the street frontage present a unified facade.
- \* Brick wall creates a solid and continuous edge along the north.
- \* Antique Village buildings and canopies create a sense of enclosure.
- \* Large building setbacks with parking does not create any feeling of enclosure.



## KENSINGTON VILLAGE STREETScape DESIGN PROJECT TOWN OF KENSINGTON, MD

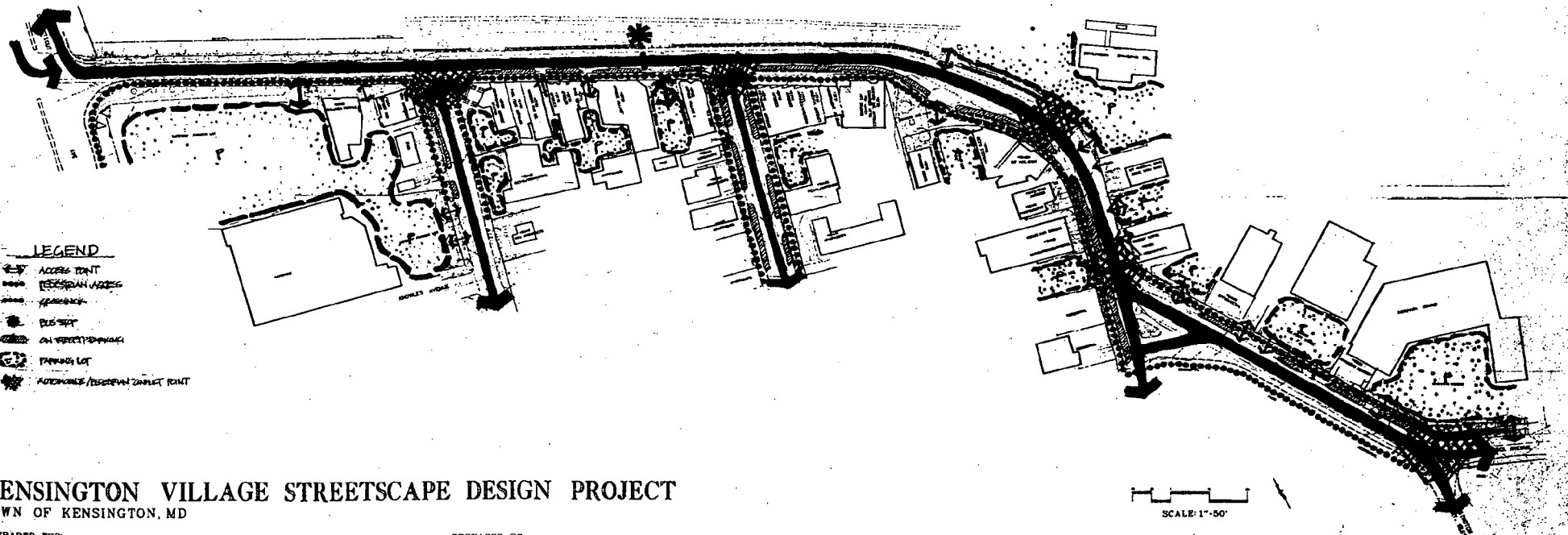
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SCALE: 1"=50'

# Traffic and Parking Analysis

- \* Left turns prohibited from Howard Avenue onto Connecticut Avenue
- \* Major pedestrian/vehicular conflicts occur at street intersections
- \* Knowles Avenue is signalized, and is an easier ingress/egress street to the Howard Avenue Antique Row.
- \* Most major pedestrian activities occur on the south side of Howard Avenue
- \* Crossing Howard Street near bank poses especially risky conditions due to sight distances and excessive street width



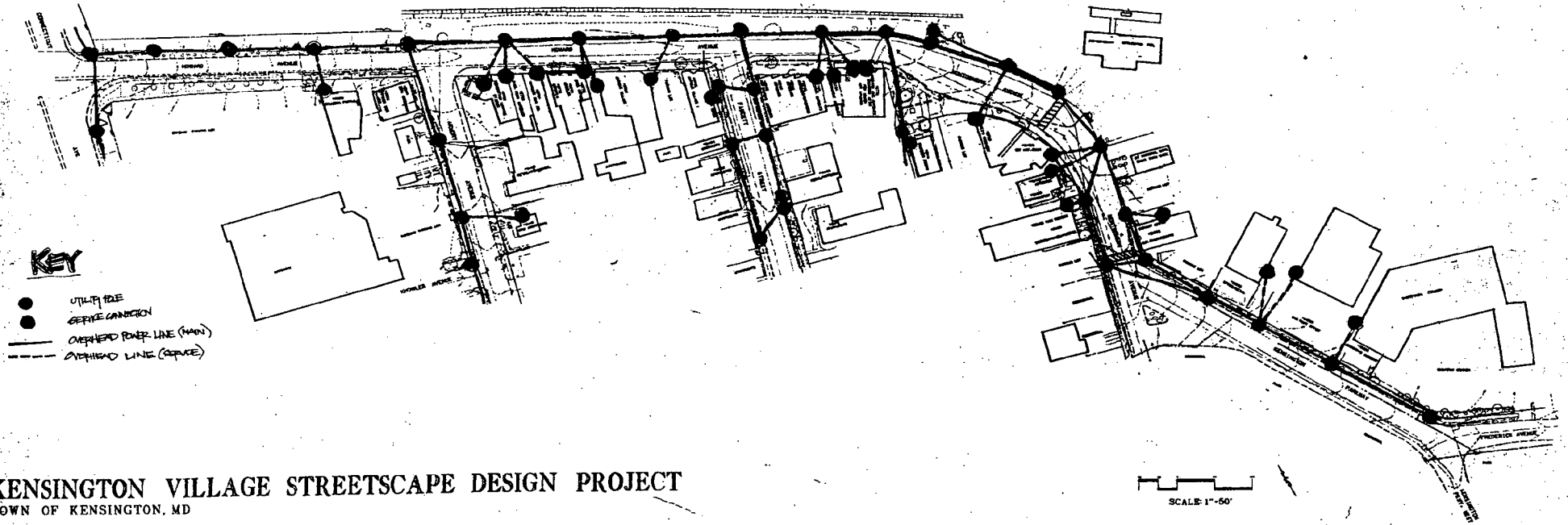
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# Utilities

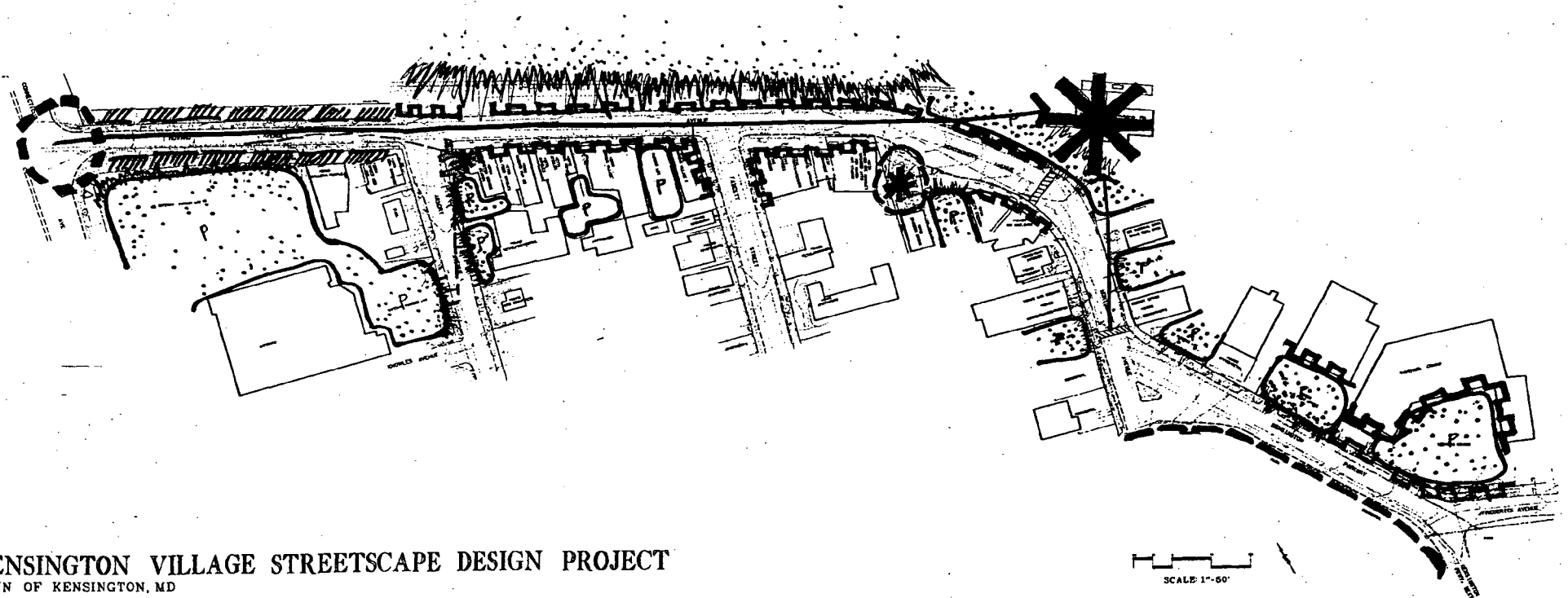
- \* Electrical overhead wires detract visually from the area, and should be placed underground. Relocation of the overhead lines elsewhere to serve the buildings is not considered feasible.
- \* Any adjustments to utilities at the surface due to streetscape improvements are considered incidental.
- \* No other utility conflicts found.





# Visual Analysis

- \* Land use along north side of CSX railroad right-of-way creates a negative image
- \* Weak and unidentifiable entrance and entranceway at Howard Ave. with Connecticut Ave.
- \* Parking lots should be screened
- \* Train station, a major historic landmark, is screened from view largely by illegally parked vehicles



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# Summary Analysis - Problems and Opportunities

## CONN. AVE/HOWARD AVE.

- NOT WALKABLE, NOT IDENTIFIABLE ENTRANCE. LACK OF STRONG LANDSCAPE STATEMENT. UNSUITABLE GUARDRAIL, CLUTTERED SIGNS.
- REPLACE GUARDRAIL W/ORNAMENTAL FENCE OR BRICK WALL. COMBINE SIGN W/FENCE OR WALL. COHERENT TREATMENT ON BOTH SIDES OF HOWARD AVE. INSTALL ARCHED GLAZIUM W/PENICILIN LOOP.

## ANTIQUE ROW

- STRENGTHEN THE IMAGE OF ANTIQUE ROW BY USING BRICKS, SPECIAL PAVING PATTERNS, SITE FURNISHING, LIGHTING, ETC.

## HOWARD AVE OVERHEAD UTILITIES

- OVERHEAD UTILITIES DISTRACT FROM THE LANDSCAPE, CREATE CLUTTERED VISUAL EFFECT.
- UNDERGROUND ALL OVERHEAD UTILITY LINES / SERVICES. AS 1" OR UNDERGROUND SERVICES ONLY. ELIMINATES CLUTTERED OVERHEAD WIRE CROSSINGS.

## PROBLEMS & OPPORTUNITIES

### TRAIN STATION

- MAJOR ARCH. FEATURE, LANDMARK.
- PARKING ADJACENT TO BLDG. CROWDS NEARBY PARKS, NOT COMPLEMENTARY TO THE BLDG. SHOULD NOT BE ALLOWED.
- REMOVE PARKING SPACES NEAR BLDG. CREATE AMENITY SPACE TO HIGHLIGHT & COMPLEMENT THE BLDG. INSTALL METAL Picket FENCE. ADJUST LOCATIONS OF APPROX. 14 PARKING SPACES ALONG WALL @ WEST END OF PARKING LOT. RELIEVE ALONG TRACK R/W.

### PEDESTRIAN CROSSWALK

- SIDEWALK CROSSINGS MAY BE PROVIDED @ ALL MAJOR CROSSINGS.

## THE ENTRANCEWAY

- WEAK IMAGE, WEAK EDGE.
- ALT 1 - INTRODUCE VICTORIAN STYLE LANDSCAPE TREATMENTS W/EVERGREEN SHRUBS AND CROSNED ON BOTH SIDES OF HOWARD AVE.
- ALT 2 - WIDEN THE STREET AND INTRODUCE A LANDSCAPED MEDIAN AND ON-STREET PARKING EITHER ON THE NORTH OR SOUTH SIDE OF HOWARD AVE.

## WIDER FRONTAGE

- SPECIAL SIDEWALK TREATMENT. IMPROVE OR INTRODUCE PLANTING AREAS IN FRONT OF SHOPS CREATING A GARDENESQUE STREETSCAPE THROUGHOUT HOWARD AVE.

## HOWARD AVE PARK

- OVERGROWN SHRUBS, UNSERVED PARKING LOT, UNDERUTILIZED PARK.
- RELIEVE CURB TO REMOVE HEAD-IN PARKING AND TO CREATE MORE AMENITY SPACE. REMOVE CURBS, REDUCE CURBING TREES. INSTALL SITE FURNISHING RAIL AS USE, SEATING, BENCH, TOWN RECEPTACLES AND LIGHTING. GREEN PARKING LOT. INTRODUCE PARALLEL PARKING. BOTH SIDES OF STREET TO ADD LOSS OF PARKING SPACE AND SIDEWALK. ALONG NORTH SIDE HANDED AMENITY SPACES.

## KENSINGTON VILLAGE STREETSCAPE DESIGN PROJECT

TOWN OF KENSINGTON, MD

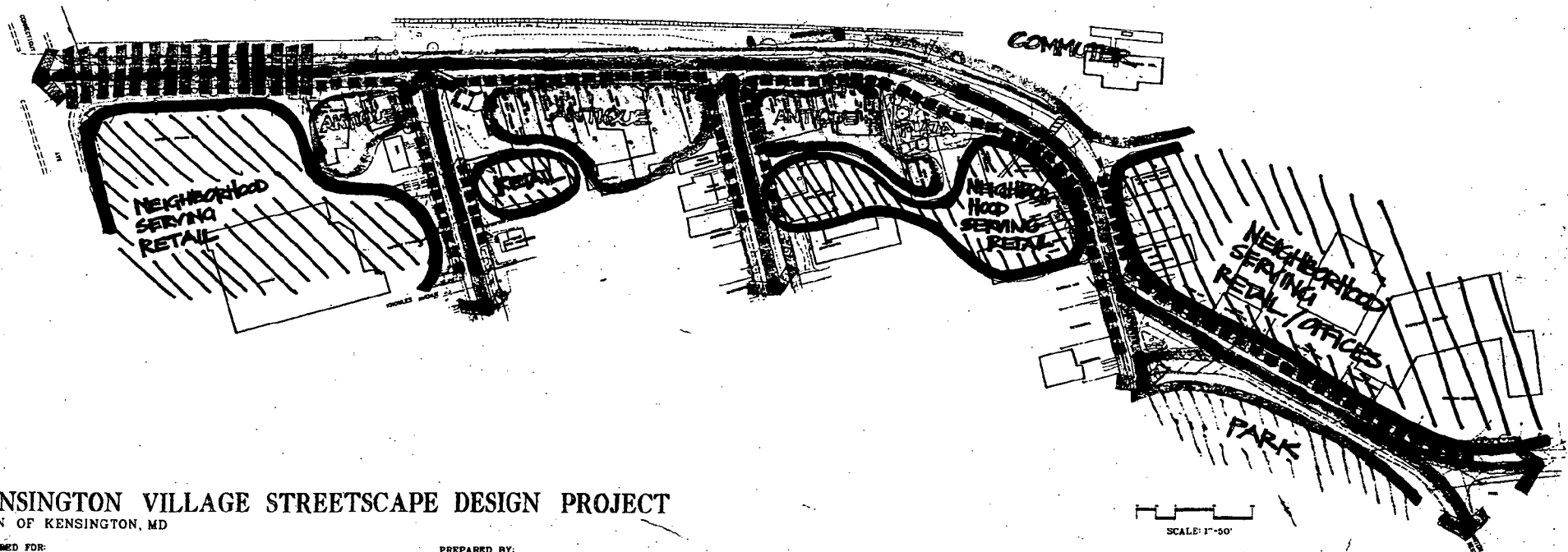
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SCALE: 1"=50'

# General Design Concept

- \* Enhance the visibility and imageability of the entrance and entranceway of Howard Avenue.
- \* Highlight Antique Row.
- \* Connect Parks.
- \* Improve the Howard Avenue Park.
- \* Provide additional on-street parking.
- \* Improve visual quality of the brick wall.



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# Concept Plans

## Plan 'A'

---

- |    |                       |                  |  |
|----|-----------------------|------------------|--|
| 1. | The Entrance          | *                | Brick walls with signs both sides  |
| 2. | The Entranceway       | *<br>*           | Add planting median<br>Construct additional parking spaces on north side   |
| 3. | Highlight Antique Row | *<br>*<br>*      | With special sidewalk design for Antique Row<br>Planters in front of shops<br>No street trees<br>Provide sidewalk extenders  |
| 4. | Howard Avenue Park    | *<br>*<br>*<br>* | Re-set curb line parallel to and toward the centerline of Howard Avenue<br>Delete head-in parking replace with parallel parking both sides of street<br>Enlarge ex. park create a major amenity space incl. town clock, benches, raised planters, kiosk, trash receptacles |
| 5. | Brick Wall            | *<br>*           | Replace existing shrubs w/ viney & cascading plants<br>Pave space in front of wall   |

## Plan 'B'

---

- |    |                            |                  |  |
|----|----------------------------|------------------|--|
| 1. | The Entrance               | *                | Metal archway and picket fence with sign   |
| 2. | The Entranceway            | *<br>*           | Add landscaping<br>Improve Howard and Conn. Ave intersect'n  |
| 3. | Unified Design of Sidewalk | *                | Brick band and conc. paving with square tree pits throughout Howard Avenue   |
| 4. | Howard Avenue Park         | *<br>*<br>*<br>* | No curb relocation<br>Improve the park<br>Install shelter and seating<br>Install kiosk, benches, bollards, trash receptacles, etc. |
| 5. | Brick wall                 | *<br>*           | Replace ex. shrubs w/ Perennials and vines<br>Add parking behind wall  |

# The Entrance

## Existing Condition

- \* Non-imageable
- \* Cluttered



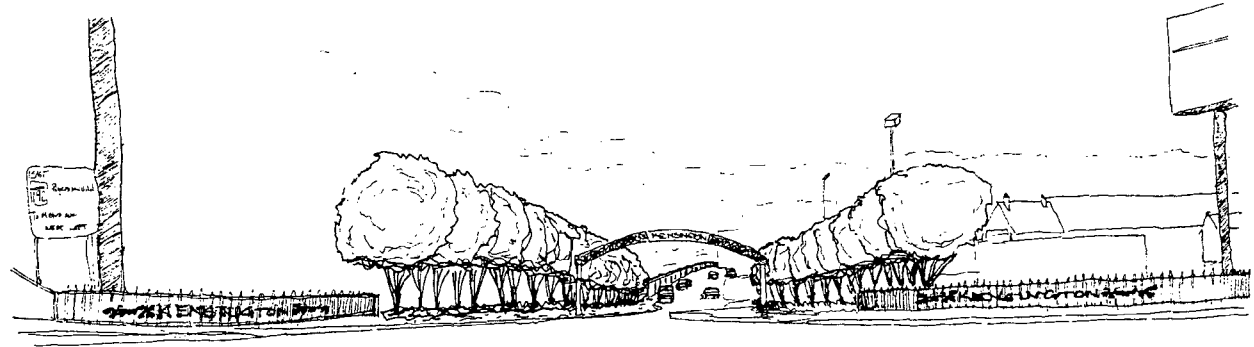
## Concept 'A'

- \* Install Brick Wall With Sign



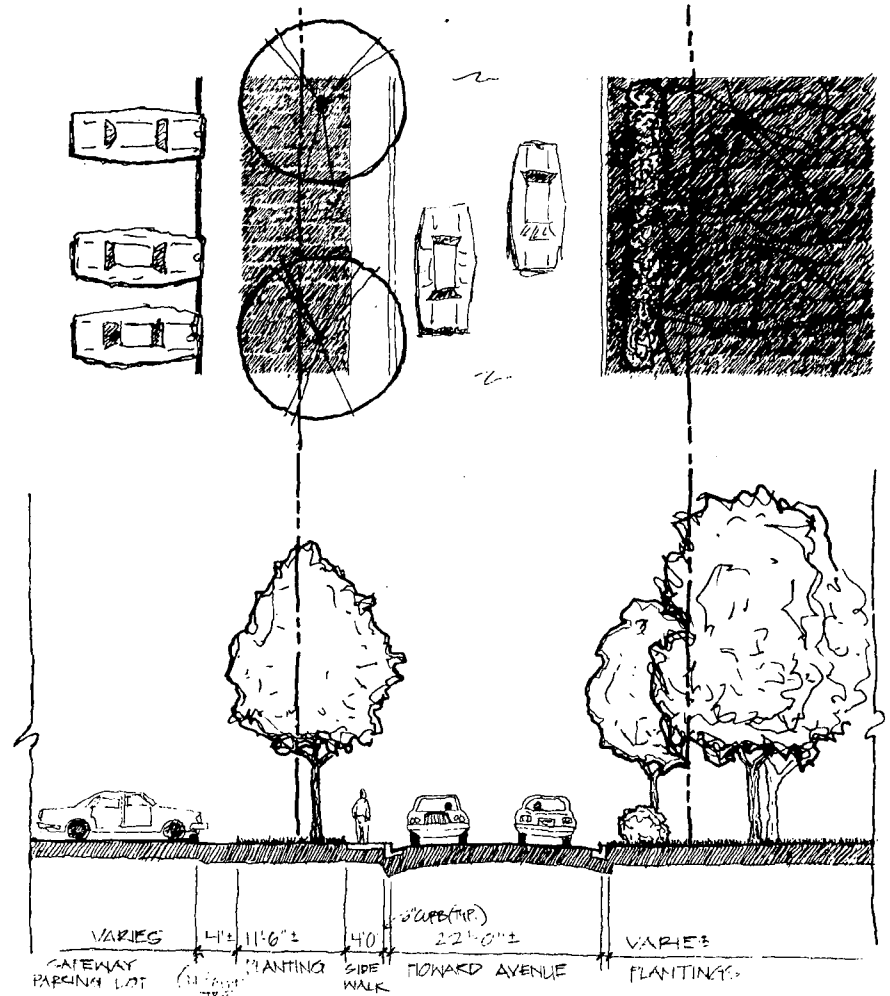
## Concept 'B'

- \* Install Metal Archway and picket fence with sign



# The Entranceway - Existing Condition

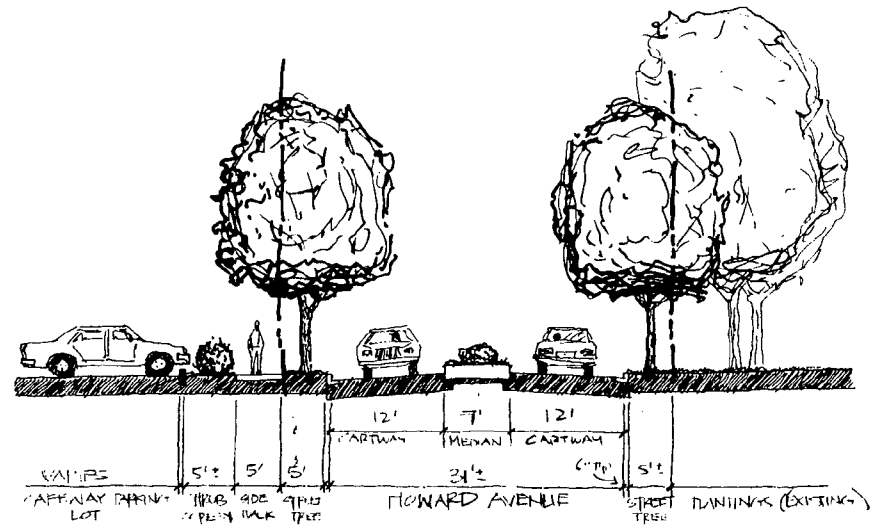
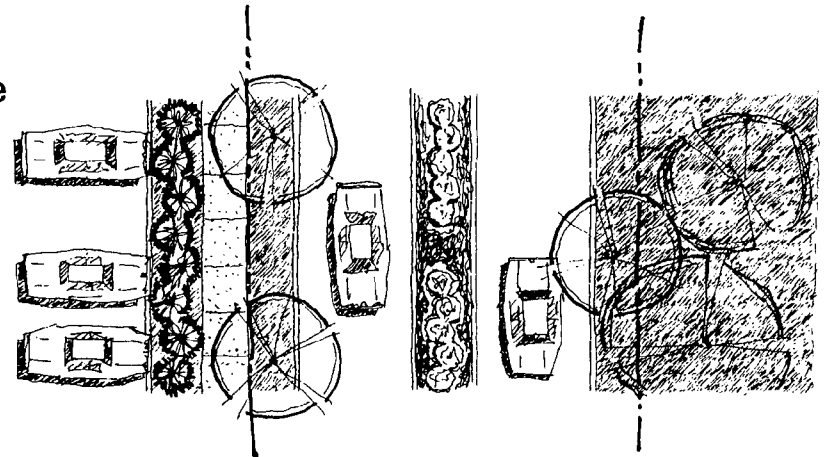
\* No distinct image.  
Weak entry statement



HOWARD AVENUE @ SAFEGWAY PARKING LOT

# The Entranceway - Concept 'A'

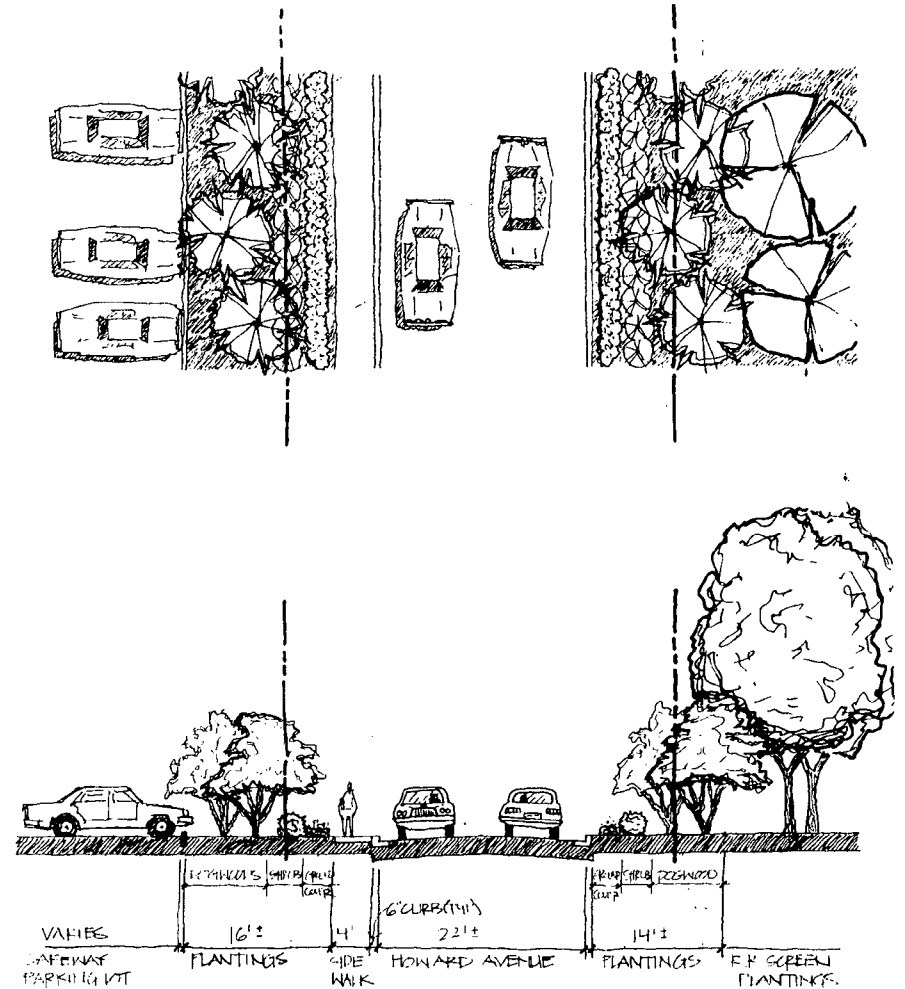
- \* Set back curbs on both sides of Howard Avenue.
- \* Add a planting median.
- \* Add more screen planting along parking lot edge
- \* Add parallel parking on north or south side of Howard Avenue.



HOWARD AVENUE @ CAFENWAY PARKING LOT

# The Entranceway - Concept 'B'

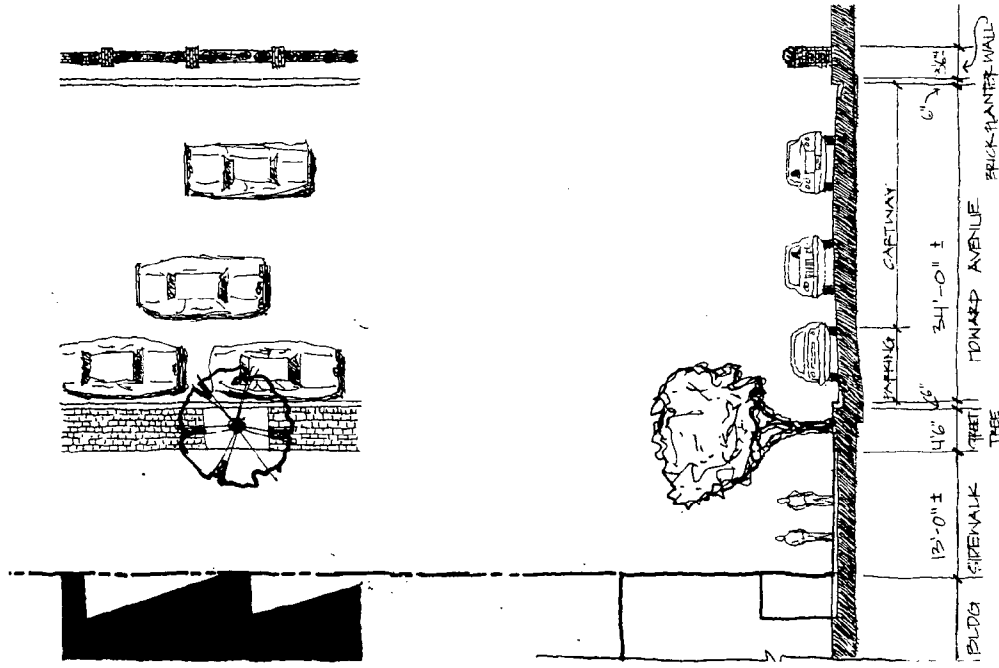
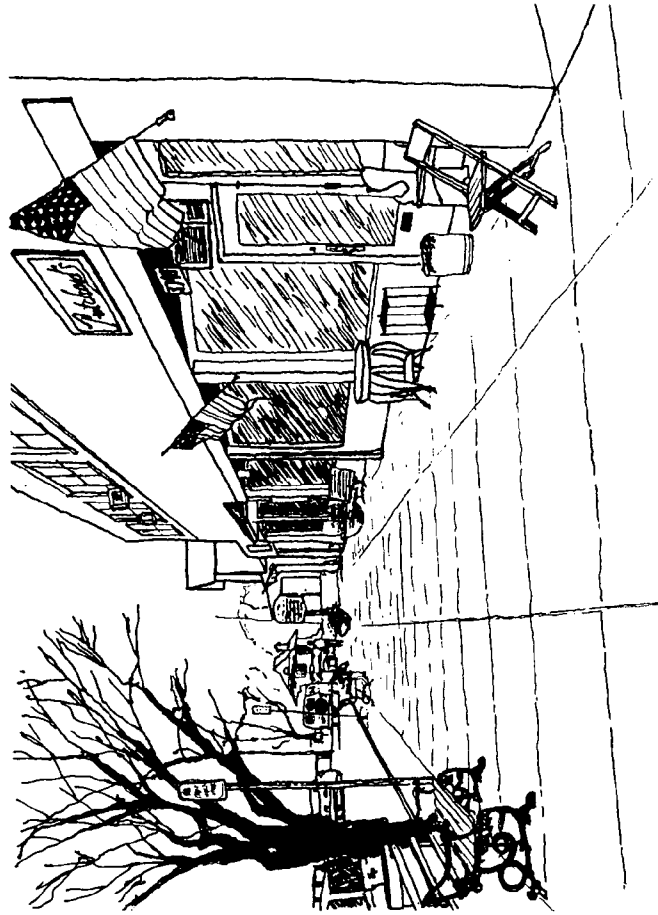
- \* Introduce additional planting mass: Perennials, shrubs, and flowering trees
- \* Option - One-way east with parallel parking on south side



HOWARD AVENUE @ CAFEWAY PARKING LOT

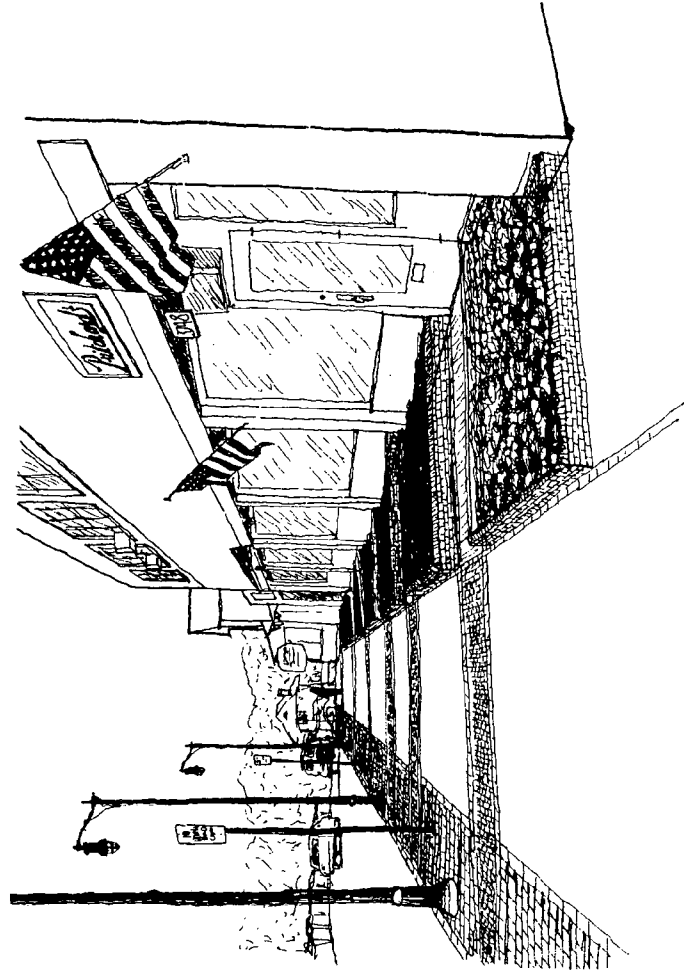
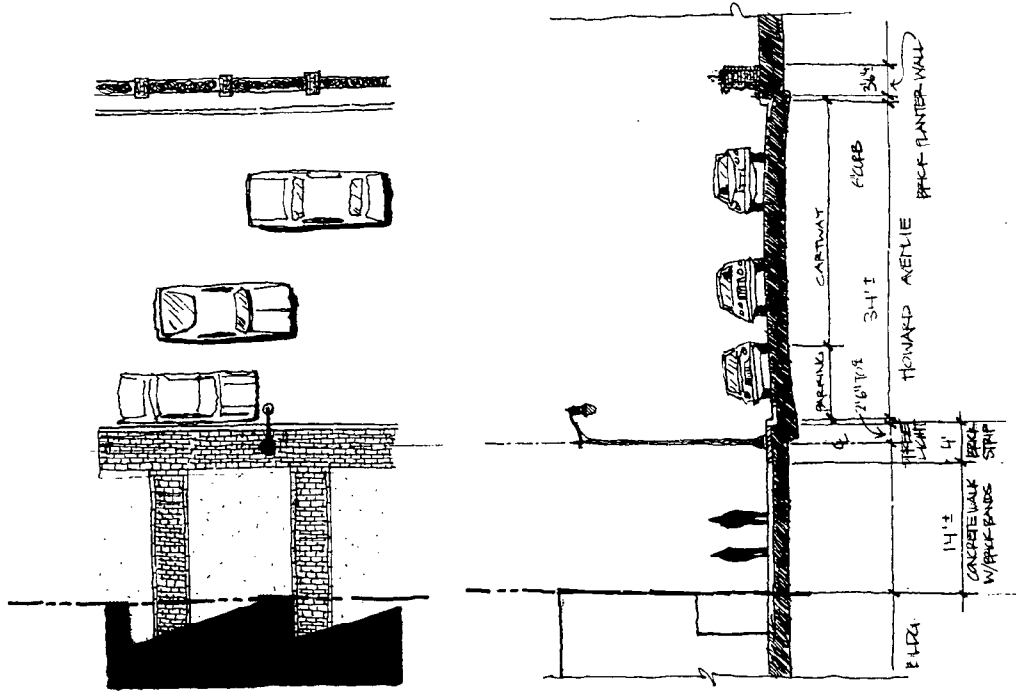


# Sidewalk - Existing Condition

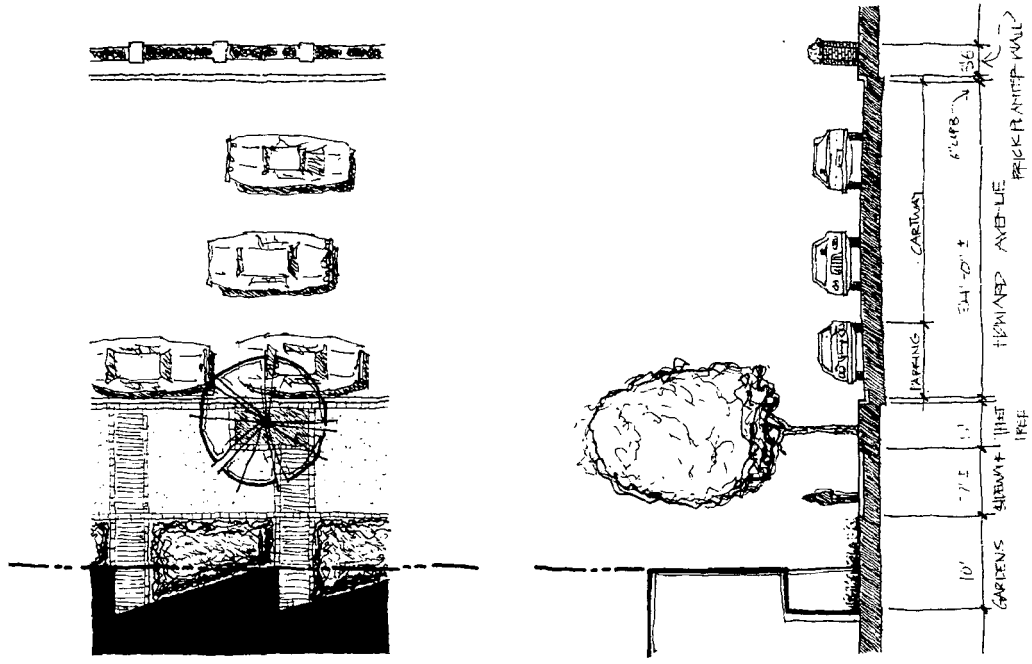
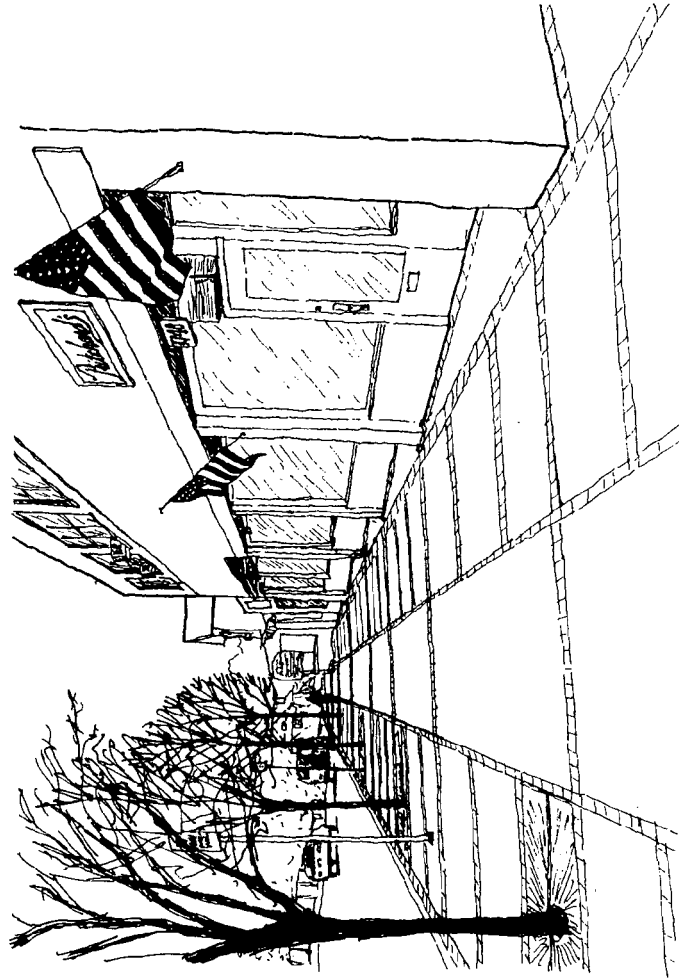


371-6 TOWARD AVENUE

# Sidewalk Improvement - Concept 'A'



# Sidewalk Improvement - Concept 'B'

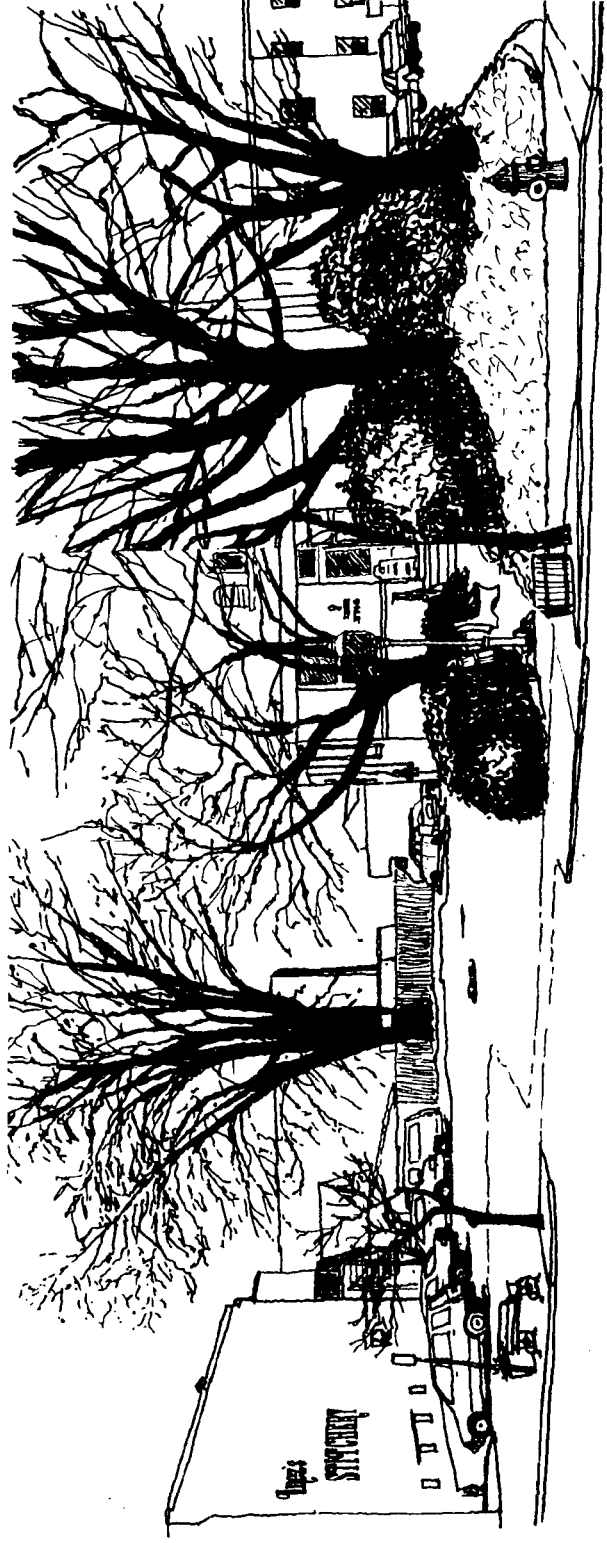


ST. 16 HOWARD AVE. "STOREFRONT GARDENS"

# Howard Avenue Park

Existing Condition

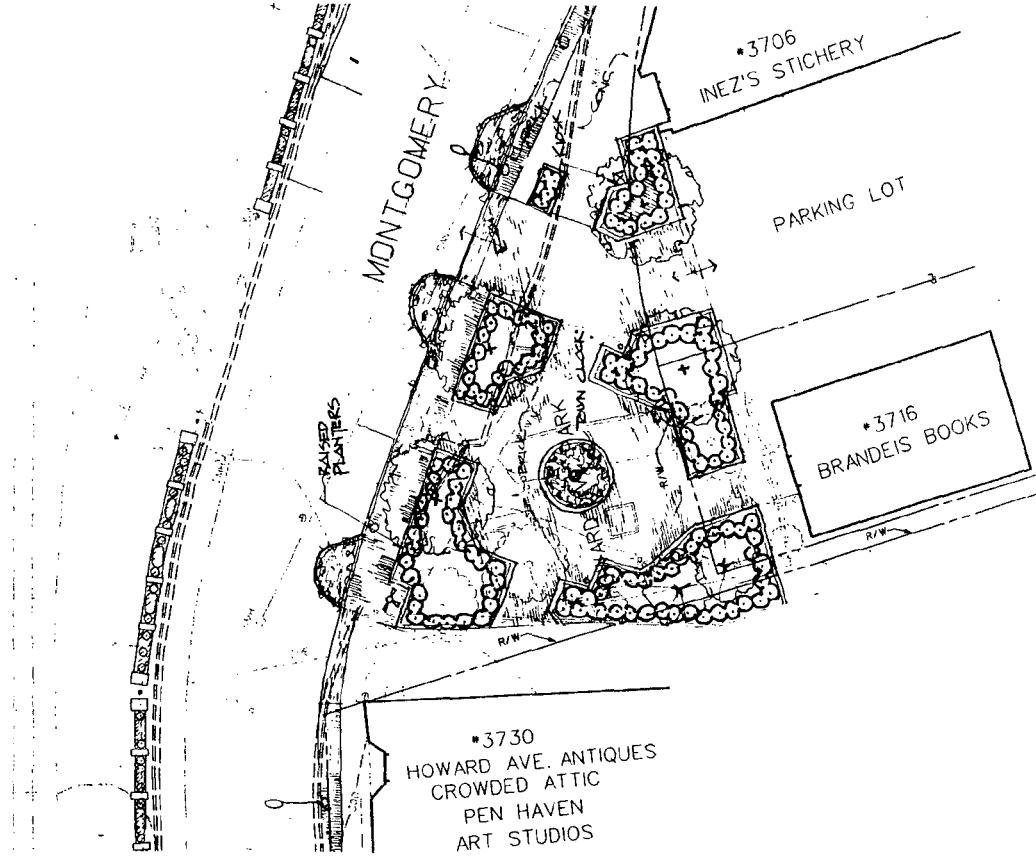
- \* Unscreened parking
- \* Overgrown shrubs



# Howard Avenue Park

## Concept 'A'

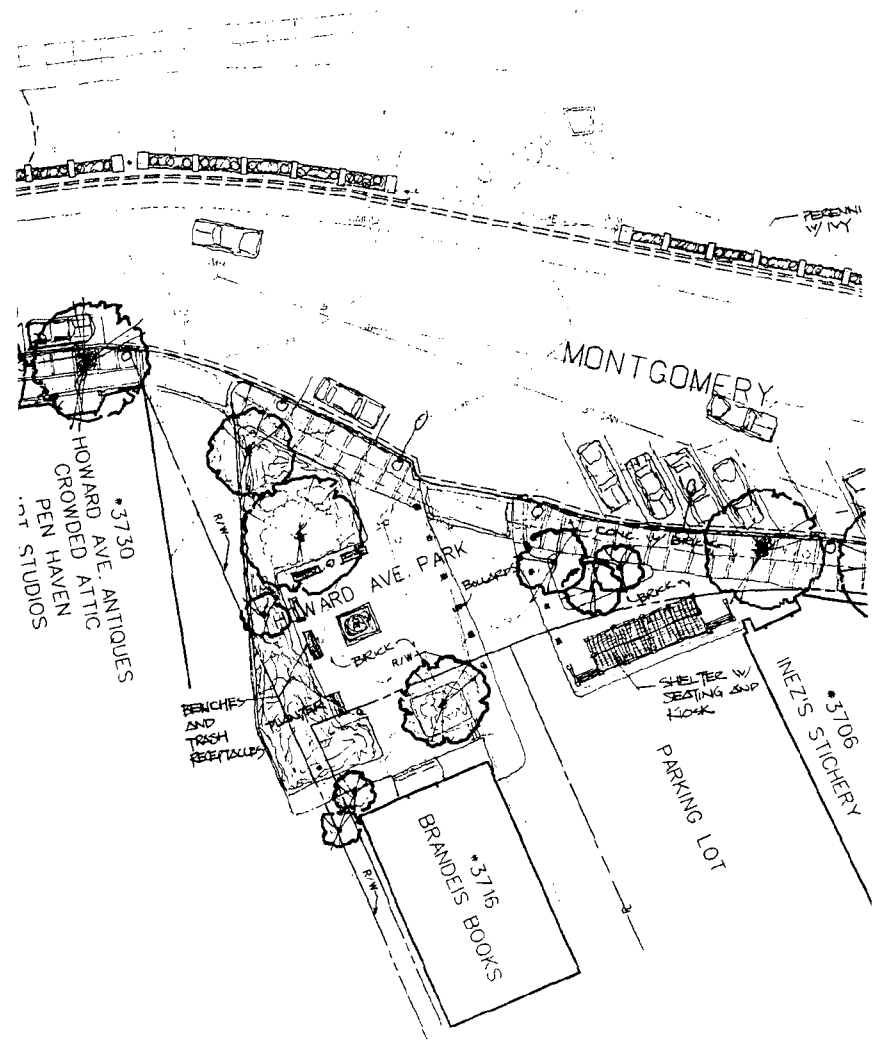
- \* Install raised planters
- \* Install brick driveway
- \* Re-set curb line
- \* Delete head-in parking and replace with parallel parking both sides of street



# Howard Avenue Park

## Concept 'B'

- \* Remove shrubs to open up the park
- \* Install shelter to provide site amenity, to screen the parking lot, and to create the image of a continuous edge



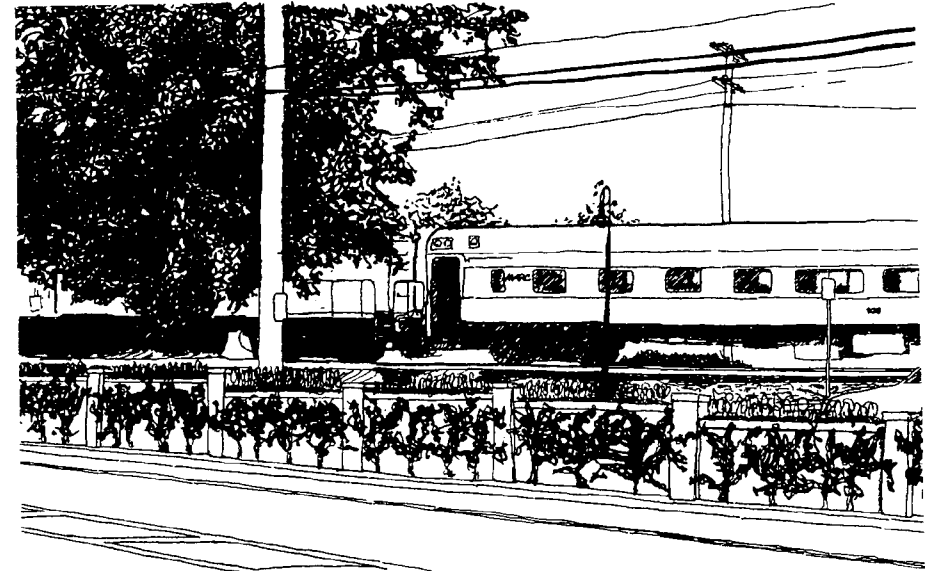
# Brick Wall

## Concept 'A'

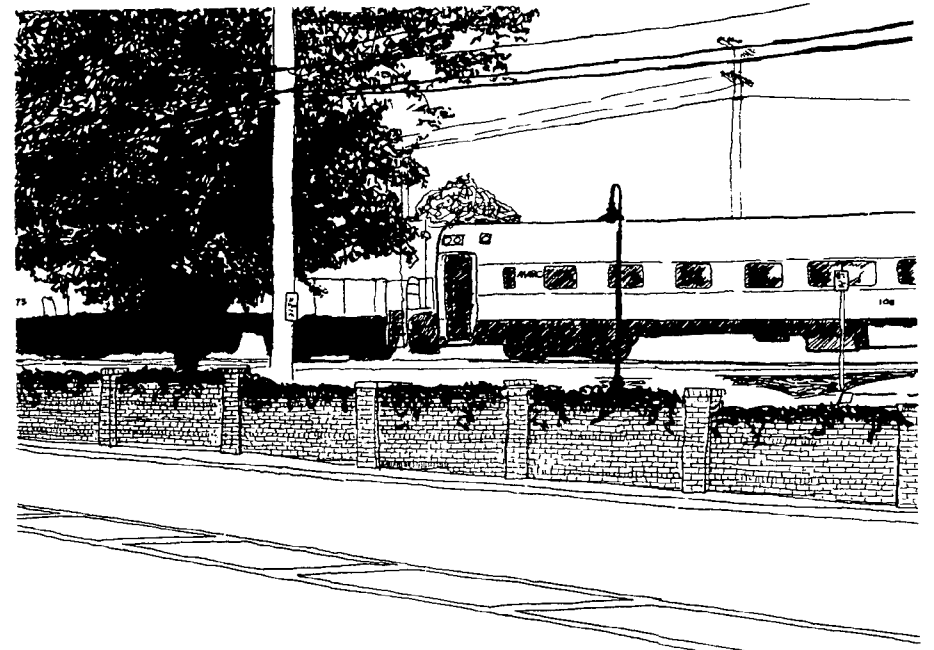
- \* Plant perennials in planters
- \* Plant vine in front of wall

## Concept 'B'

- \* Space in front of wall to be paved
- \* Replace existing shrubs with viney/ cascading types of plants



Concept 'A'



Concept 'B'



Existing Condition

# The Train Station

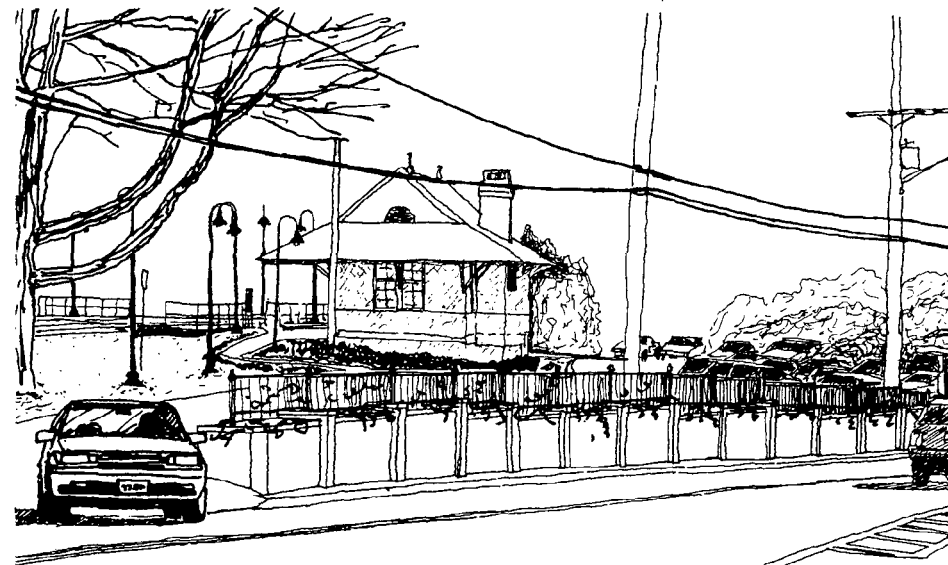
## Existing Conditions

- \* Parking near building creates negative image



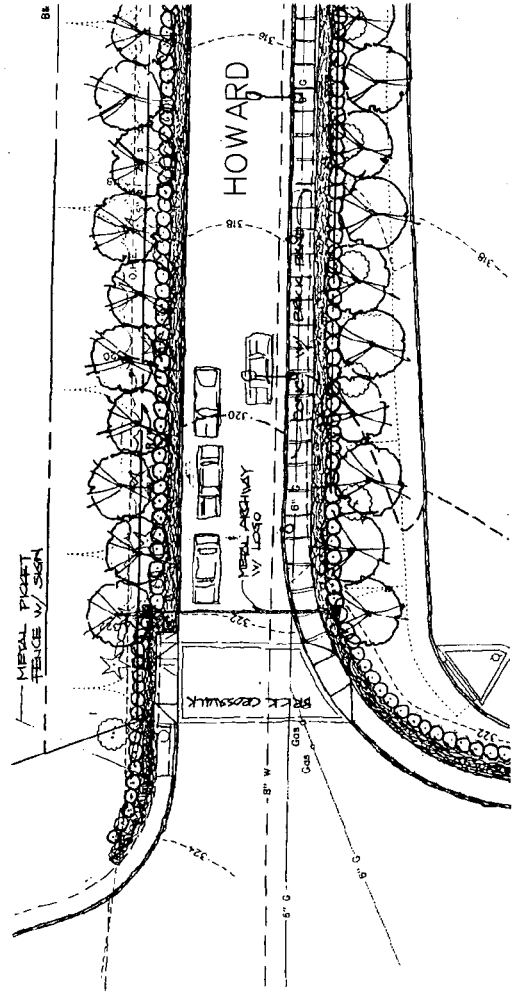
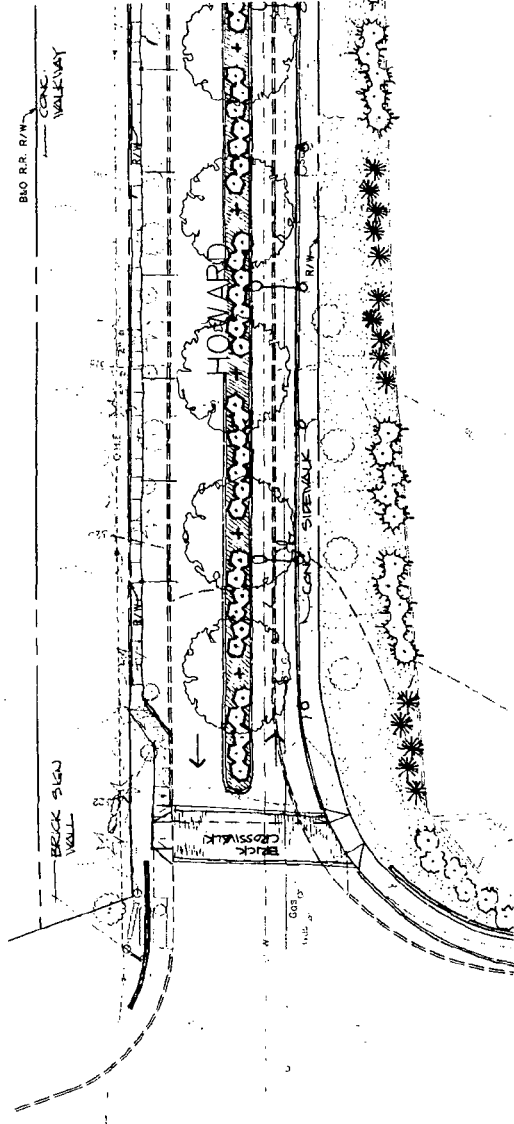
## Concept 'A'

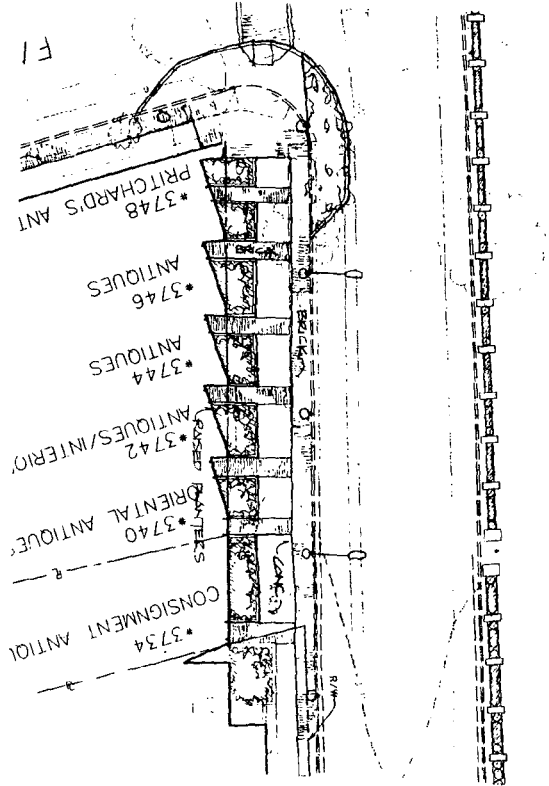
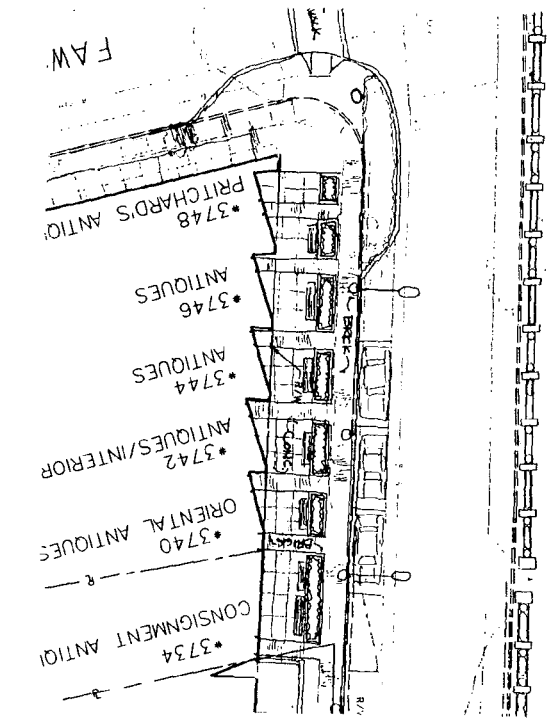
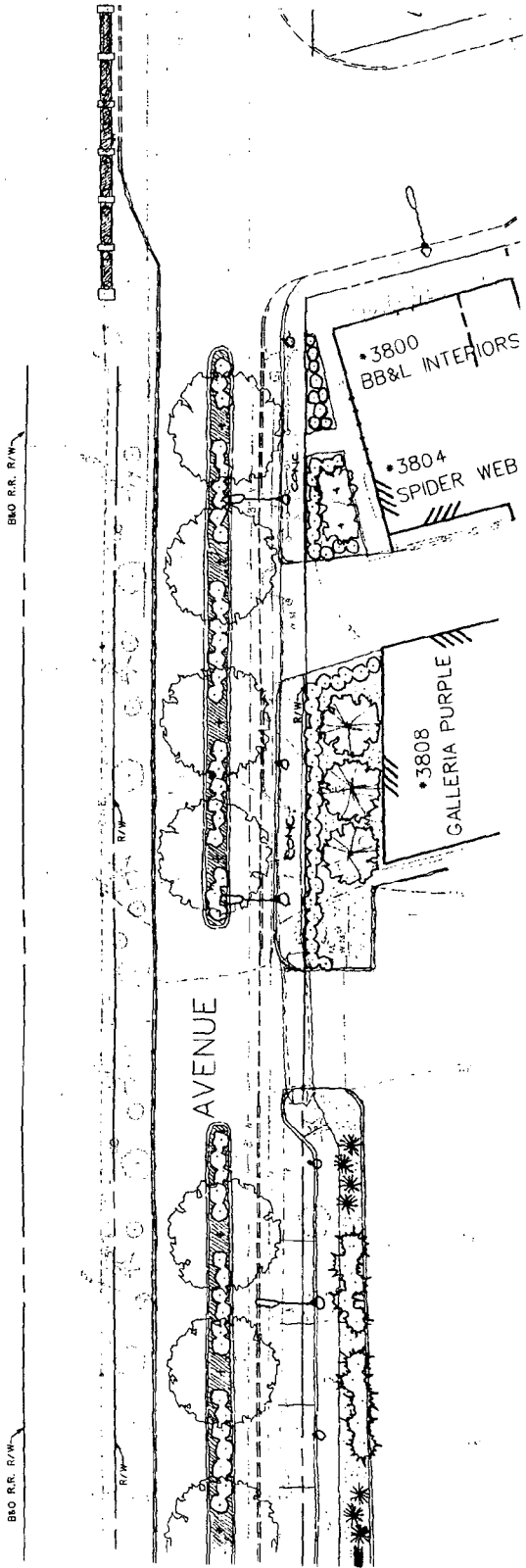
- \* Create planting area near the train station building
- \* Install metal picket fence on top of brick wall

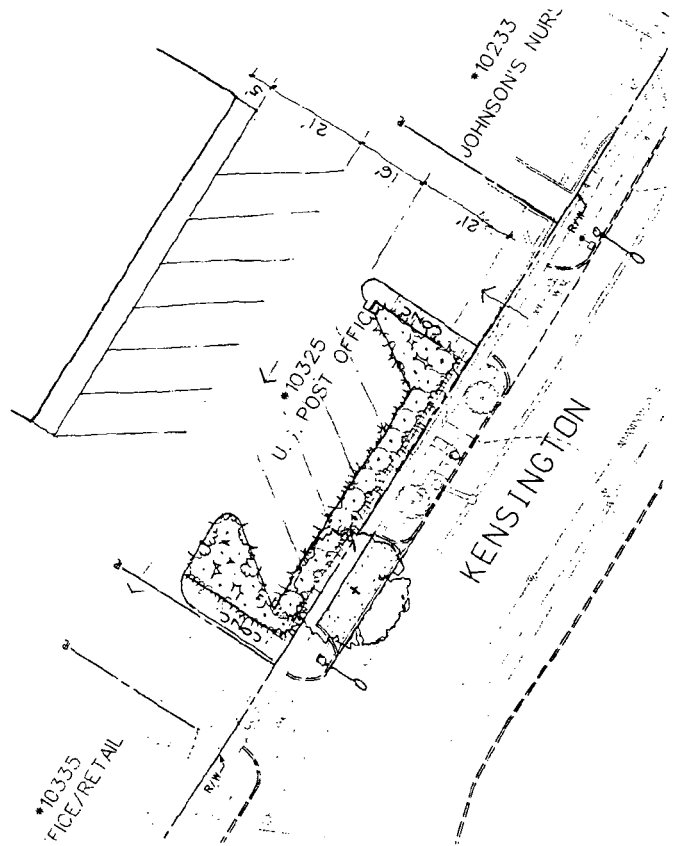
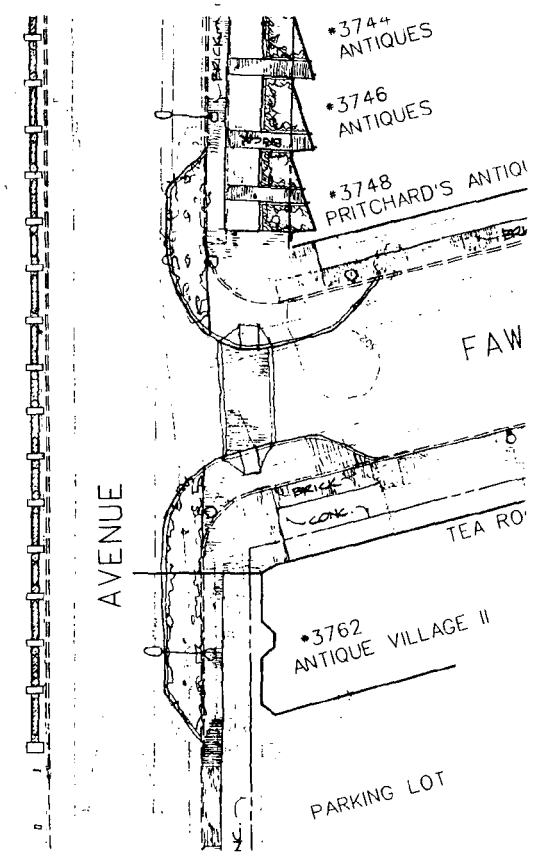
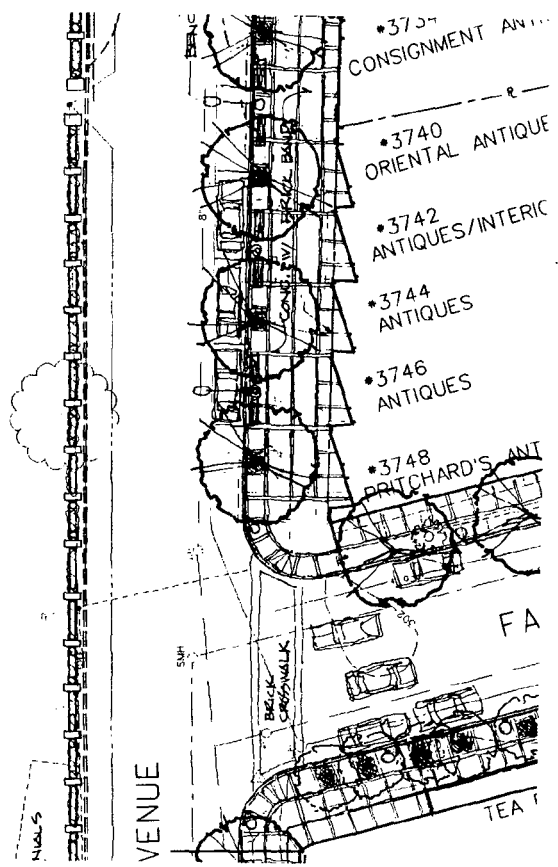


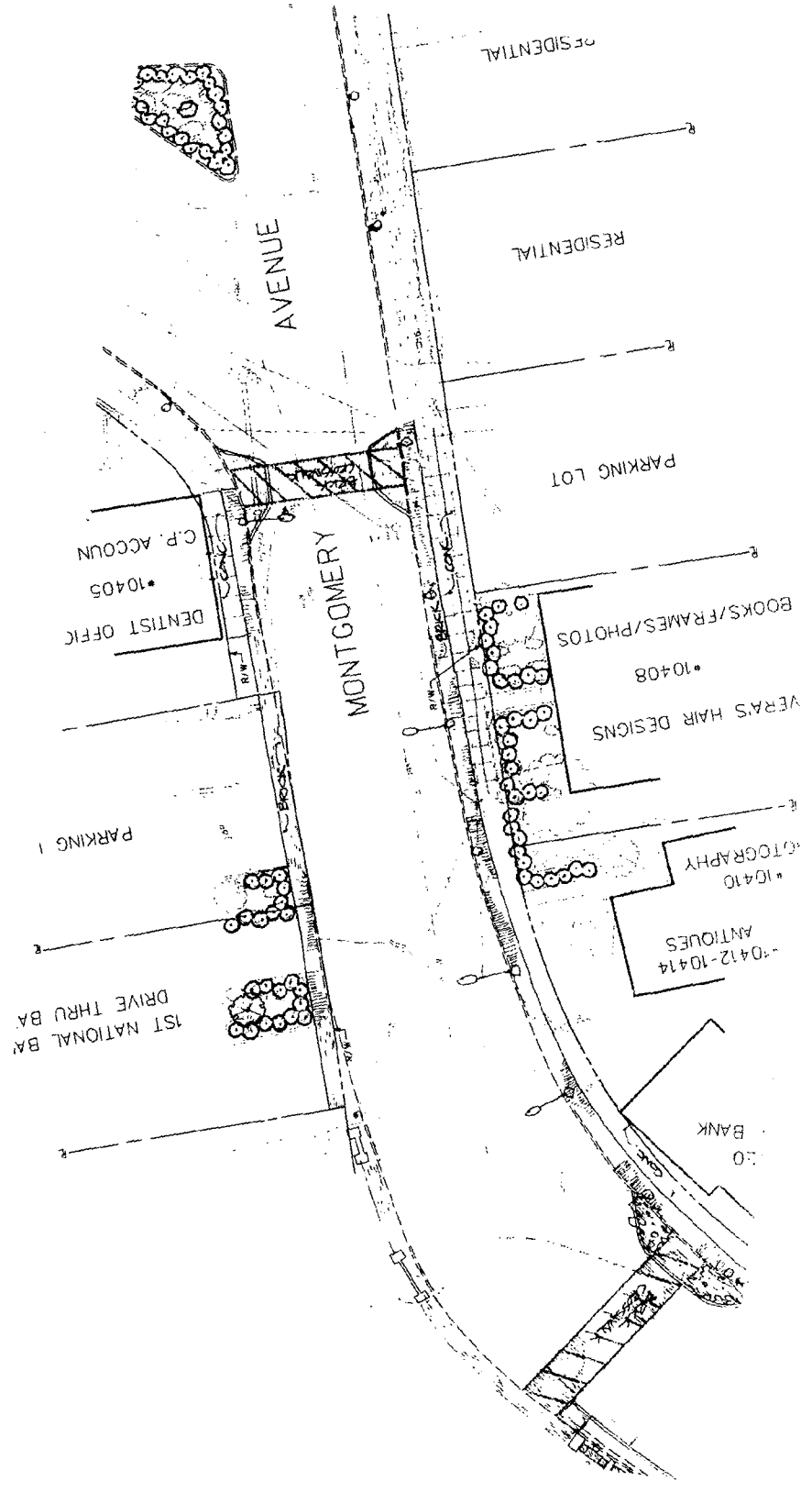


# Miscellaneous Design Ideas









- Materials:**
- tan brick facade w/ plate glass windows
  - shake shingle canopy
  - rough hewn wood post

- Structures:**
- canopy and signage create "Antique Village" image
  - good pedestrian scale
  - display windows

- Opportunities:**
- replace worn shingles on canopy w/ standing seam roofing
  - remove wood post, upgrade fixtures for facade lighting
  - provide coordinated signage
  - provide new address sign

- Materials:**
- white brick w/ black grout
  - alum. storefront door and window

- Structures:**
- good masonry proportions
  - large interior

- Opportunities:**
- add second floor.
  - change building use, i.e. restaurant

- Opportunities:**
- add scale to facade w/ canopy, facade lighting, change sign proportions to match facade
  - remove defunct alarm box
  - provide new address sign

- Materials:**
- stucco 2" floor w/cedar shingles 1" floor
  - vinyl windows w/ cedar canopy 2" floor
  - wood doors w/ transoms and plate glass window 1" floor

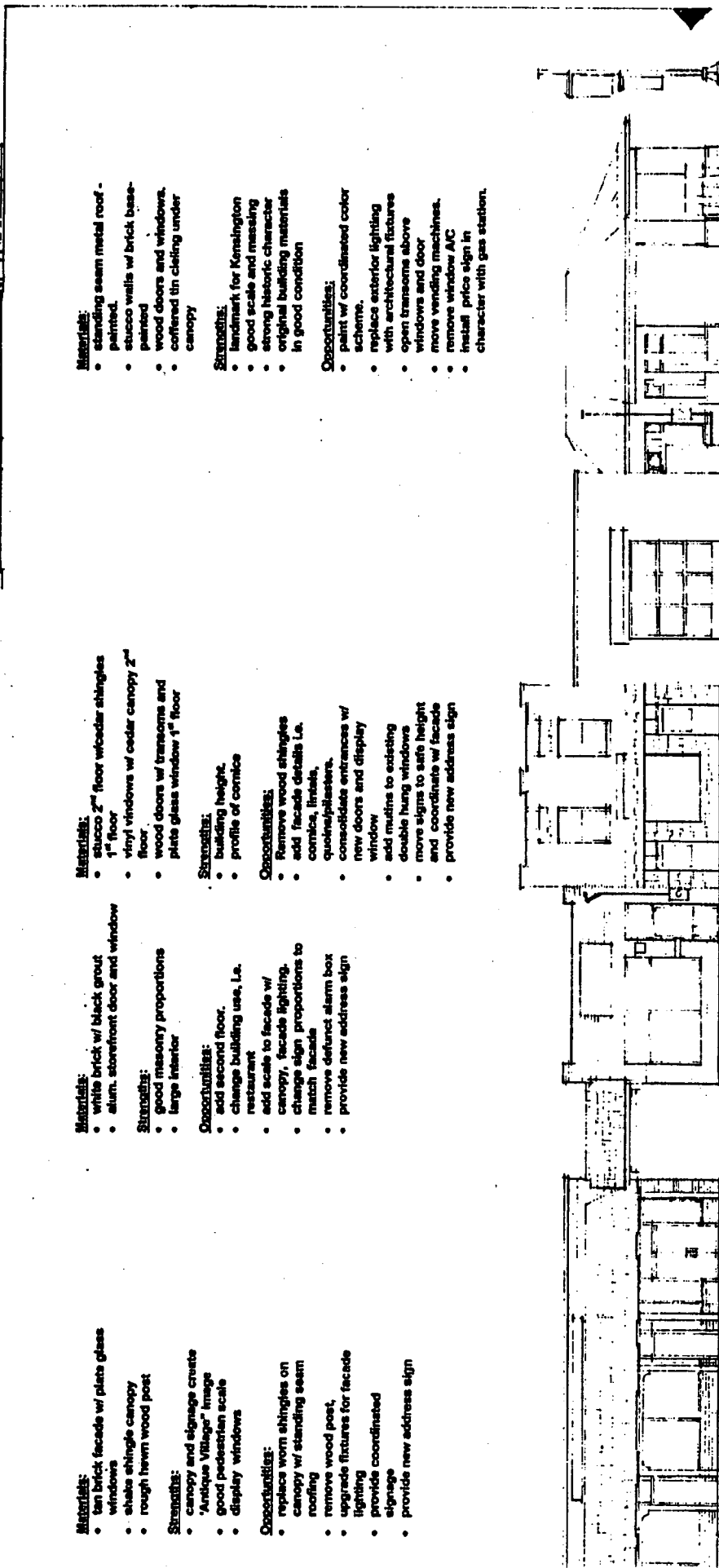
- Structures:**
- building height.
  - profile of cornice

- Opportunities:**
- Remove wood shingles
  - add facade details i.e. cornice, lintels, quoins/pilasters.
  - consolidate entrances w/ new doors and display window
  - add mutins to existing double hung windows
  - move signs to safe height and coordinate w/ facade
  - provide new address sign

- Materials:**
- standing seam metal roof - painted.
  - stucco walls w/ brick base-painted
  - wood doors and windows.
  - corrugated tin ceiling under canopy

- Structures:**
- landmark for Kernington
  - good scale and massing
  - strong historic character
  - original building materials in good condition

- Opportunities:**
- paint w/ coordinated color scheme.
  - replace exterior lighting with architectural fixtures
  - open transoms above windows and door
  - move vending machines.
  - remove window A/C
  - install price sign in character with gas station.

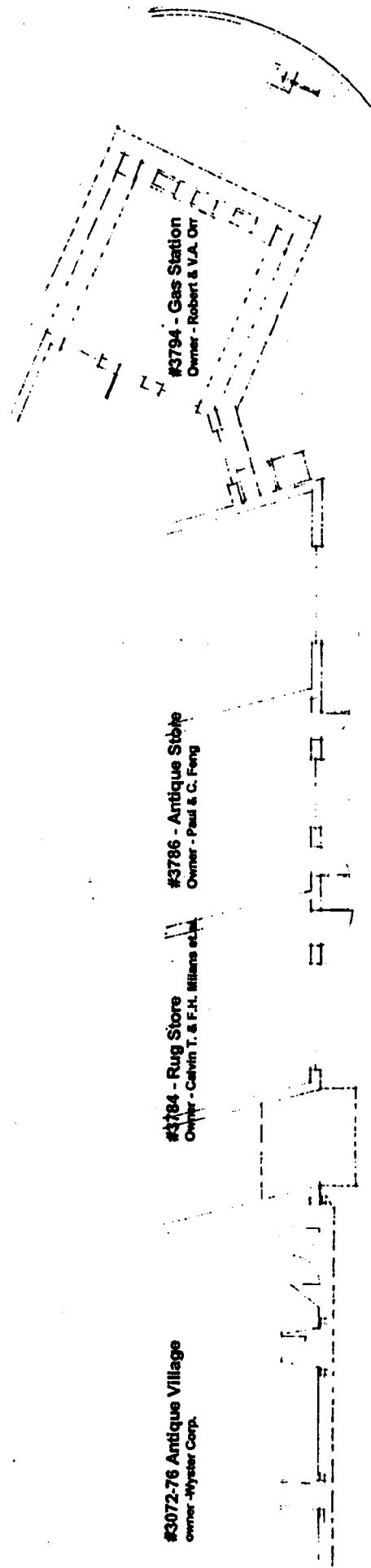


#3072-76 Antique Village  
owner - Mystar Corp.

#3784 - Rug Store  
Owner - Calvin T. & F.H. Milans et al

#3786 - Antique Stöble  
Owner - Paul & C. Peng

#3794 - Gas Station  
Owner - Robert & V.A. Orr



- Materials:**
- brick facade
  - steel windows - 2<sup>nd</sup> floor
  - storefront w/ fieldstone base below

- Strategies:**
- wide sidewalk
  - building height
  - display windows

- Opportunities:**
- make building more vertical by emphasizing structural bays.
  - provide canopy for individual stores
  - restore #3742 facade to match neighbors
  - move metal conduit from facade
  - remove window AC from apartments & store transoms
  - remove inoperable weather station mounted on Fawcett
  - Street elevation.
  - provide coordinated signage



**#3738-48 Howard Street**  
Owner - Mary Whitlow et. al.

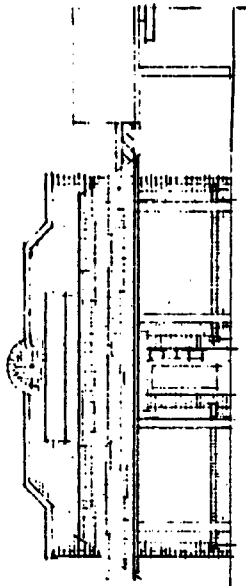


**Fawcett Street**

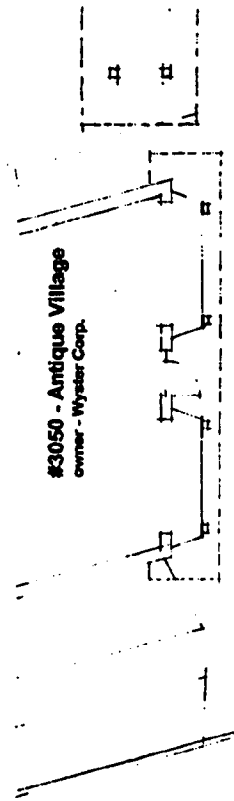
- Materials:**
- painted brick w/ plate glass windows
  - slate shingle canopy
  - wood lattice terrace

- Strategies:**
- street activity - sidewalk café
  - canopy and signage support 'Antique Village' image.
  - good scale and proportions.
  - brick detailing.
  - display windows

- Opportunities:**
- replace worn shingles on canopy w/ standing seam roofing
  - remove wood post, provide coordinated signage
  - provide new address sign



**#3050 - Antique Village**  
owner - Wyster Corp.



- REMOVE
- VERTICAL PARCH LOUVERS
- REMOVE PORTLAND CONCRETE
- REMOVE HINGED DOOR
- REPAIR/RESTORE FRONT PORCH

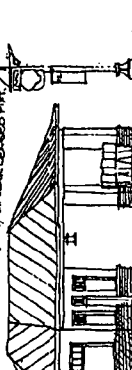
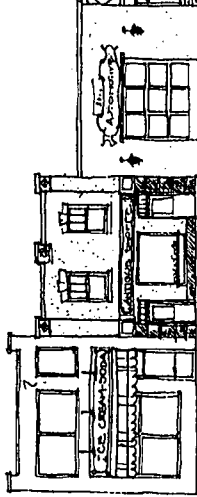
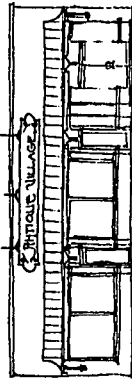
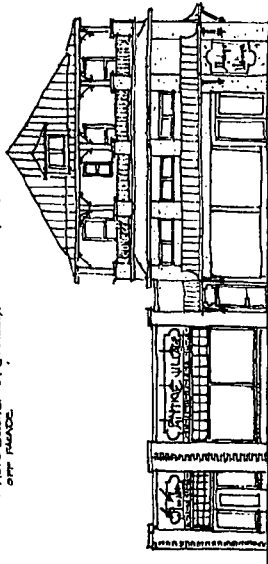
- UPPER FLOORS
- REMOVE EXISTING ROOFING
- REMOVE EXISTING TRUSS
- REMOVE EXISTING TRANSOM
- REMOVE EXISTING WINDOW
- REMOVE EXISTING DOOR
- REMOVE EXISTING PORCH

- REMOVE ARCH CASSETT
- REMOVE EXISTING TRANSOM
- REMOVE EXISTING WINDOW
- REMOVE EXISTING DOOR
- REMOVE EXISTING PORCH

- REMOVE
- REMOVE EXISTING ROOFING
- REMOVE EXISTING TRUSS
- REMOVE EXISTING WINDOW
- REMOVE EXISTING DOOR
- REMOVE EXISTING PORCH

- REMOVE
- REMOVE EXISTING ROOFING
- REMOVE EXISTING TRUSS
- REMOVE EXISTING WINDOW
- REMOVE EXISTING DOOR
- REMOVE EXISTING PORCH

- REMOVE
- REMOVE EXISTING ROOFING
- REMOVE EXISTING TRUSS
- REMOVE EXISTING WINDOW
- REMOVE EXISTING DOOR
- REMOVE EXISTING PORCH



#3058-ANTIQUE VILLAGE  
OWNER- WINTER CORP.

#3062-ANTIQUE VILLAGE  
OWNER- WINTER CORP.

#3072-6 ANTIQUE VILLAGE  
OWNER- WINTER CORP.

#3784 RUG STORE  
OWNER- CALVIN T. & F. H. HICKMAN SR.

#3786 ANTIQUE STORE  
OWNER- JOHN I. CAMPBELL

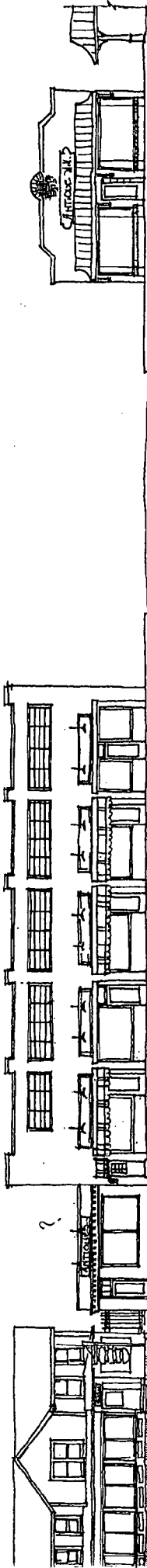
#3794 GAS STATION  
OWNER- ROBERT J. VAUGHAN

CHINESE WALKWAYS, BRICKS, WOOD  
X. FREEZE-DRIED SOIL  
OR CONCRETE CURB  
FLIGHT TO WALKWAY  
WALKING PLANTING BED.  
SIGNED WALKWAY PAINTED  
ON SOIL. (DON'T REMOVE  
PLANTING BED)  
REMOVE ROOFTOP SIGN  
LOCATE CAR METER.

• ADD INSULATED WALL  
CORNICE OVER WOOD  
WALKERS  
• PAINTED WOOD SIGN  
W/COGNATE LAMP  
• REMOVE TRAFFIC SIGN

• ADD CREATIONS TO  
FRONT TO EXPRESS  
BUILDING STRUCTURE.  
• PAINTED WOOD SIGN  
W/COGNATE LAMP  
• RETRACTIBLE CANVAS  
ANTHROPOMETRIC  
• ADD LIGHT &  
CANOPY TO LIGHT &  
ENTRY TO SECOND FLOOR.  
• REMOVE WOOD PAST  
• RUN CANOPY INSIDE BUILDING

• MOVE SIGN BELOW  
ORNAMENTAL BRICKWORK  
• PAINTED WOOD SIGN-NEW  
• CANOPY W/ SIGNAGE  
• REMOVE ORIGINAL  
BRICKWORK  
• REMOVE WOOD PAST



#30 - ANTIQUE STORE  
OWNER: VICKOR ASSOCIATES  
HALLPET INDUSTRIES

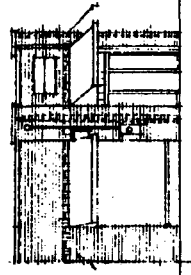
#1754 - ANTIQUE STORE  
OWNER: VICKOR ASSOCIATES  
HALLPET INDUSTRIES

#5738 - 48 HOWARD STREET  
OWNER: PATTY WILLOW ET AL.

FANCY STREET

#3050 - ANTIQUE VILLAGE  
OWNER: WYSTER CORP





**Materials:**

- aluminum awning

**Structures:**

- maintains street edge w/ visual mass
- creates pedestrian scale
- canopy supports "Antique Village" image.

**Opportunities:**

- provide connection between shops

**Materials:**

- tan brick
- plate glass windows
- aluminum awnings.

**Structures:**

- good scale and proportions.
- canopy and signage create "Antique Village" image.
- brick detailing.
- display windows

**Opportunities:**

- remove canopy and expose existing transom glass.
- remove boards, from front facade.
- provide coordinated signage
- replaces facade lighting w/ architectural fixtures
- move downspout & mailbox off front facade
- provide new address sign

**Materials:**

- asphalt shingled roof w/ dormers
- vertical louvers over painted horizontal siding @ 3" fl.
- stucco w/ "shingle" at street.
- plate glass windows
- shingle cedar canopy

**Structures:**

- height and visibility
- canopy and signage create theme for whole complex.

**Opportunities:**

- replace asphalt shingles w/ standing seam metal roof
- replace louvers on 3' fl. w/ porch
- Replace wood shingle on canopy w/ standing seam metal roof
- coordinate signage

**Materials:**

- tan brick facade w/ plate glass windows
- shingle canopy
- rough hewn wood post

**Structures:**

- canopy and signage create "Antique Village" image
- good pedestrian scale
- display windows

**Opportunities:**

- replace worn shingles on canopy w/ standing seam roofing
- remove wood post, upgrade fixtures for facade lighting
- provide coordinated signage
- provide new address sign

**Materials:**

- white brick w/ black grout alum. storefront door and window

**Structures:**

- good masonry proportions
- large interior

**Opportunities:**

- add second floor
- change building use, i.e. restaurant
- add scale to facade w/ canopy, facade lighting, change sign proportions to match facade
- remove distant alarm box
- provide new address sign

**Materials:**

- stucco 2<sup>nd</sup> floor w/ cedar shingles 1<sup>st</sup> floor
- vinyl windows w/ cedar canopy 2<sup>nd</sup> floor
- wood doors w/ transoms and plate glass window 1<sup>st</sup> floor

**Structures:**

- building height
- profile of cornice

**Opportunities:**

- Remove wood shingles
- add facade details i.e. cornice, lintels, quoins/plinths.
- consolidate entrances w/ new doors and display window
- add media to existing double hung windows
- move signs to safe height and coordinate w/ facade
- provide new address sign

**Materials:**

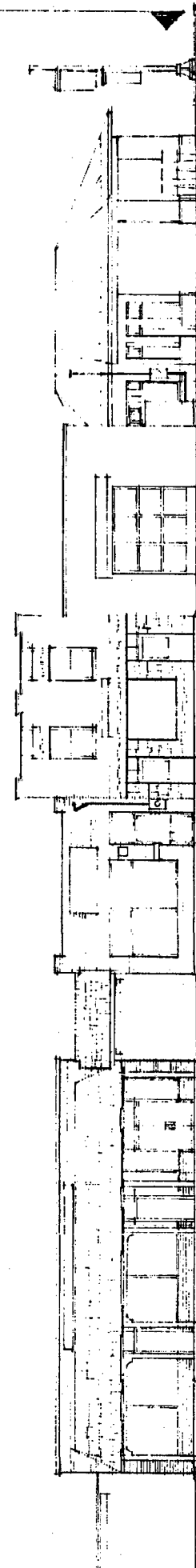
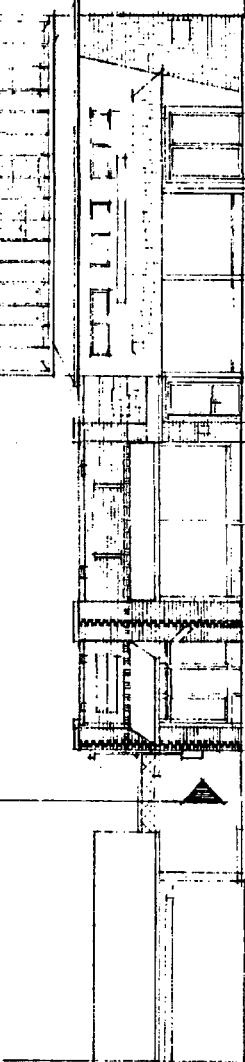
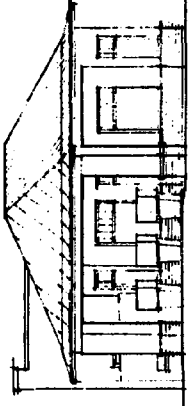
- standing seam metal roof - painted.
- stucco walls w/ brick base-painted
- wood doors and windows.
- coffered tin ceiling under canopy

**Structures:**

- landmark for Kensington
- good scale and massing
- strong historic character
- original building materials in good condition

**Opportunities:**

- paint w/ coordinated color scheme
- replace exterior lighting with architectural fixtures
- open transoms above windows and door
- more window machines.
- remove window A/C
- install price sign in
- Character with gas station.



**Driveway Structure**  
owner - Wyster Corp.

**#3058 - Antique Village**  
owner - Wyster Corp.

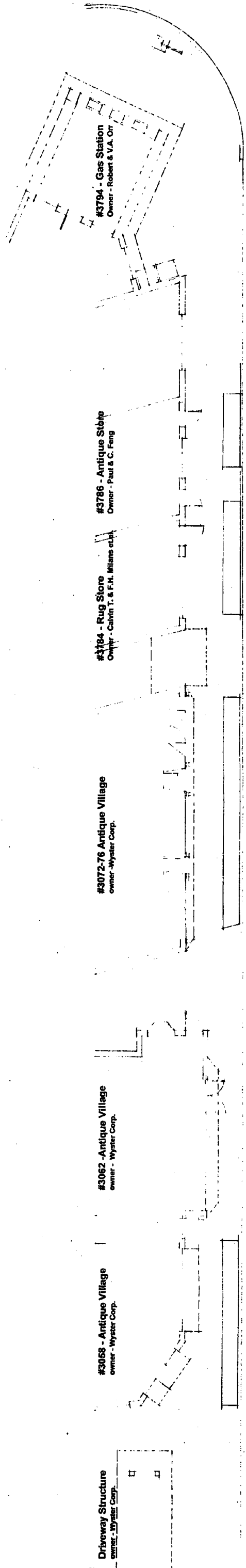
**#3062 - Antique Village**  
owner - Wyster Corp.

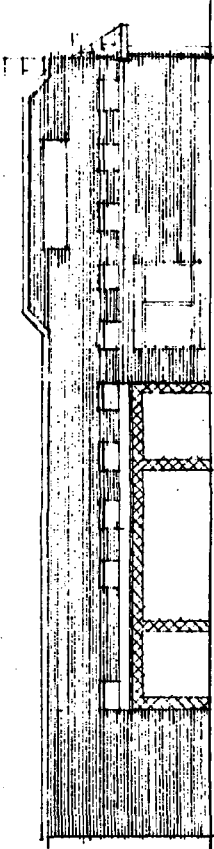
**#3072-76 Antique Village**  
owner - Wyster Corp.

**#1784 - Rug Store**  
Owner - Calvin T. & F.H. Milans et al

**#3786 - Antique Store**  
Owner - Paul & C. Feng

**#3794 - Gas Station**  
Owner - Robert & V.A. Orr

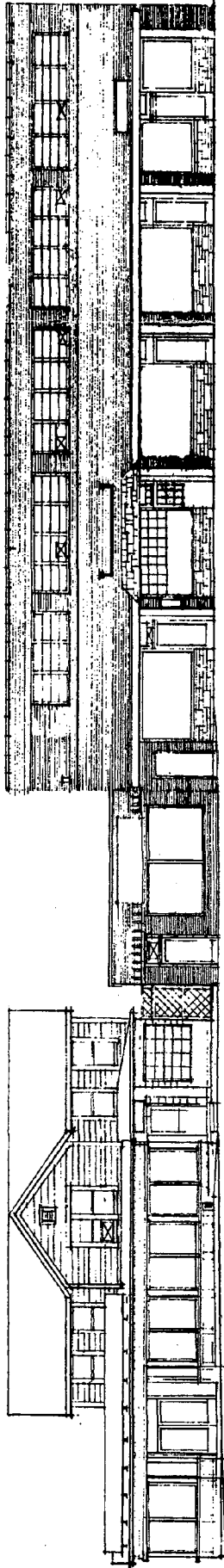




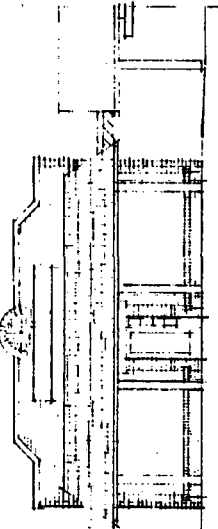
- Materials:**
- wood siding - painted
  - windows - wood double hung,
  - aluminum storefront - painted, and steel casement.
- Strengths:**
- strong historic image
  - garden
  - coordinated color scheme
- Opportunities:**
- build outside display/terrace to hide concrete curb
  - provide larger post for visually unsupported tenant sign.
  - move gas meter off sidewalk separate from adjoining brick building

- Materials:**
- brick facade w/ wood rafters set in brick
  - plate glass window
  - wood door
- Strengths:**
- wide sidewalk
  - display window
- Opportunities:**
- increase building mass with second floor
  - provide lighting and sign coordinated with proportions of facade
  - remove air conditioner from transom

- Materials:**
- brick facade
  - steel windows - 2" floor storefront w/ fieldstone base below
- Strengths:**
- wide sidewalk
  - building height
  - display windows
- Opportunities:**
- make building more vertical by emphasizing structural bays.
  - provide canopy for individual stores
  - restore #3742 facade to match neighbors
  - move metal conduit from facade
  - remove window AC from apartments & store transoms
  - remove inoperable weather station mounted on Fawcett Street elevation.
  - provide coordinated signage



- Materials:**
- painted brick w/ plate glass windows
  - shako shingle canopy
  - wood lattice terrace
- Strengths:**
- street activity - sidewalk café
  - canopy and signage support "Antique Village" image.
  - good scale and proportions.
  - brick detailing.
  - display windows
- Opportunities:**
- replace worn shingles on canopy w/ standing seam roofing
  - remove wood post.
  - provide coordinated signage
  - provide new address sign

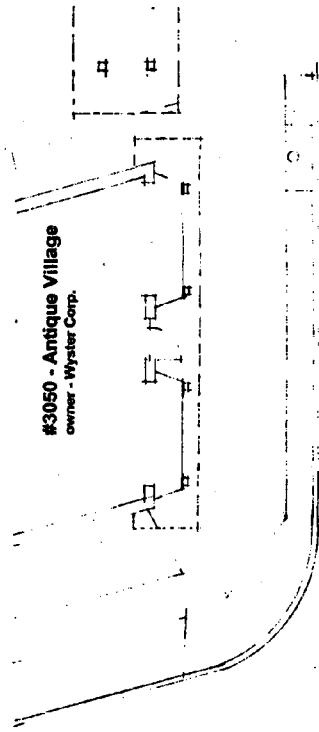


#3730 - Antique Store  
owner - Victor Associates, Walpoff Industries.

#3734 - Antique Store  
owner - Victor Associates, Walpoff Industries.

#3738-48 Howard Street  
Owner - Mary Whitlow st. art

Fawcett Street



- REMOVE:
  - VERTICAL PORCH LOUVERS
  - REMOVE FORMERSTONE GREYER
  - REMOVE HINGED COLUMNS
  - TREATMENT FROM FIRST FLOOR

- UPPER FLOORS:
  - REPAIRING SEAM ROOFING ON HIP ROOF
  - PORCH - SOLID ROOF W/ METAL RAILING & METAL BRACKETS @ ROOF

- LOWER FLOORS:
  - STUCCO FACADE W/ ARTICULATED PLASTERS
  - CANOPY W/ STANDING SEAM ROOFING (METAL BRACKETS)
  - PAINTED WOOD SIGN

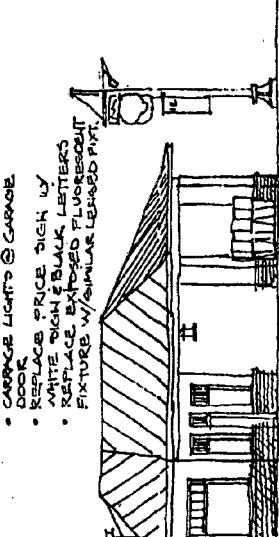
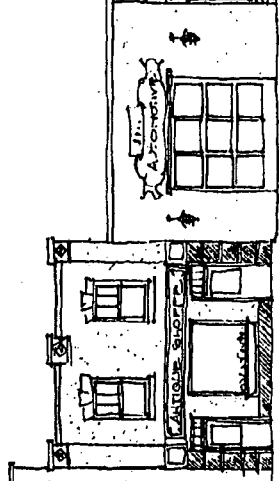
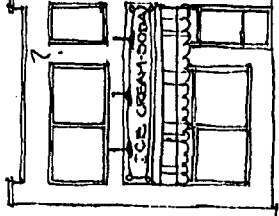
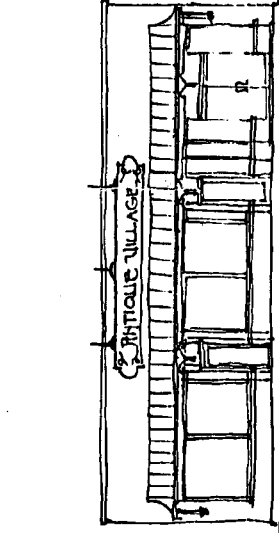
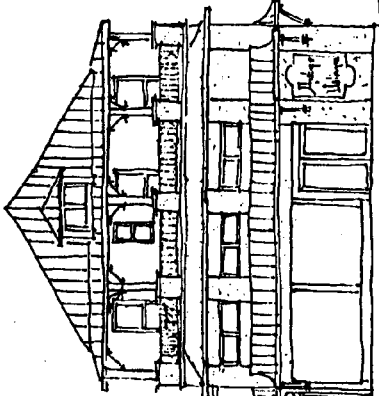
- REMOVE AUNT CANOPY WINDOWS
- OPEN EXISTING TRANSOM
- PAINTED WOOD SIGN W/ COOSENECK LAMPS
- MOVE DOWNSPOUT & MAILBOX OFF FACADE

- REBUILD CANOPY SIMILAR TO OTHER ANTIQUE VILLAGE
- CANOPY - STANDING SEAM ROOFING W/ METAL BRACKETS & VISABLE SUPPORT POST

- CANOPY W/ STANDING SEAM ROOFING & METAL BRACKETS
- WOOD PAINTED SIGN W/ COOSENECK LAMPS
- PORCH WITH SIGN HANGING FROM METAL BRACKETS

- BEHIND FLOOR APTN:
  - RETRACTABLE CANOPY AWNING
  - PAINTED WOOD SIGN
  - COOSENECK SIGN LIGHTING
  - REMOVE DISFUNKT ALARM BOX
- PACADE:
  - REMOVE SHINGLES
  - RE-STUCCO
- ADD CORNICE, ARTICULATED PLASTERS & BASE
- DIVIDED LIGHT WINDOWS W/ HEAD & SILL
- PAINTED WOOD SIGN
- RESTORE HISTORIC DOORS & STOREFRONT WINDOW
- PLANTER @ STOREFRONT

- ARCHITECTURAL FIXTURE UNDER CANOPY
- BRUSH - PAINTED METAL W/ SHAPED PROFILE
- SIGN LIGHTING - COOSENECK FIXTURES
- REMOVE SODA MACHINES
- WINDOW AC (VENTING INSIDE)
- PAINT SIGN
- CORNICHE LIGHTS @ GARAGE
- REPAIR
- REMOVE BRICE SIGN BY WHITE SIGN & BLACK LETTERS
- REPLACE PAINTED FLOURESBENT FIXTURE W/ SIMILAR LEASED FIX.



DRIVEWAY STRUCTURE  
OWNER - WYSTER CORP.

#3058 - ANTIQUE VILLAGE  
OWNER - WYSTER CORP.

#3062 - ANTIQUE VILLAGE  
OWNER - WYSTER CORP.

#3072-76 ANTIQUE VILLAGE  
OWNER - WYSTER CORP.

#3784 RUG STORE  
OWNER - CALVIN T. & F. HILLIARD ET AL.

#3786 ANTIQUE STORE  
OWNER - PAUL & CHERIE

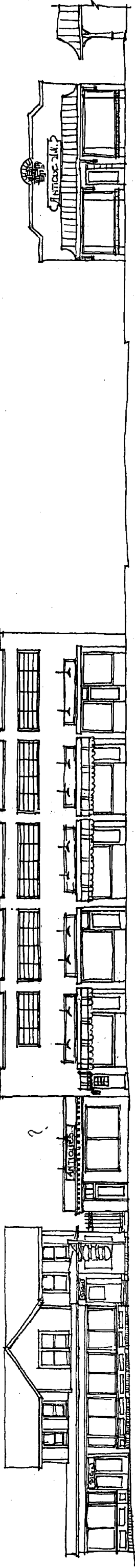
#3794 GAS STATION  
OWNER - ROBERT & VA. ORS.

- PROVIDE HANGING BRACKET/POST FOR PREHANGING SIGN
- FACE CONCRETE CORNER WITH BRICK TO MATCH HEIGHT & MATERIALS OF EXISTING PLANTING BED
- PROVIDED HANGING PAINTED WOOD SIGN @ BOTH ENTRANCES w/ CONCEALED LIGHTING
- REMOVE ROOFTOP SIGN
- RELOCATE GAS METER

- ADD ARCHITECTURAL CORNICE OVER WOOD WALKERS
- PAINTED WOOD SIGN w/ GOOSENECK LAMPS
- REMOVE TRANSOM A/C

- ADD CORRELATIONS TO PARAPET TO EXPRESS BUILDING STRUCTURAL GRID
- PAINTED WOOD SIGN w/ GOOSENECK LAMPS
- RETRACTABLE CANVAS AWNING @ EACH STORE
- HALF-LIGHT DOOR w/ CANOPY & LIGHT @ ENTRY TO SECOND FLOOR
- REMOVE WINDOW A/C
- RUN CONDUIT INSIDE BUILDING

- MOVE SIGN BELOW ORNAMENTAL BRICKWORK
- PAINTED WOOD SIGN - NEW
- CANOPY w/ STANDING SEAM ROOFING & METAL BRACKETS
- REMOVE WOOD POST



#3750 - ANTIQUE STORE  
OWNER: VICTOR ASSOCIATES  
WALDOFF INDUSTRIES

#3734 - ANTIQUE STORE  
OWNER: VICTOR ASSOCIATES  
WALDOFF INDUSTRIES

#5758 - 48 HOWARD STREET  
OWNER: MARY WHITLOW ET AL.

FAWCETT STREET

#3080 - ANTIQUE VILLAGE  
OWNER: WYSTER CORP.



Post-It® Fax Note	7671	Date	# of pages
To	Gwen	From	Marian
Co./Dept.	Wright	Co.	Hershenon
Phone #		Phone #	217-3647
Fax #	475-1307	Fax #	217 3060

COMMUNITY AFFAIRS

Elizabeth B. Davison  
Director

rch 3, 1997

Liling Tien  
P.E.L.A. Design, Inc.  
2204 Maryland Avenue  
Suite 300  
Baltimore, MD 21218

FAX: 410-366-7392

Dear Liling:

I presented the streetscape concept and the facade plans to the Historic Preservation Commission on February 26, 1996. The following is a summary of their comments along with some related comments and issues of the Revitalization Committee and mine:

- ◆ The need for a strong entry, the creation of a sense of place, and a strong streetscape with stronger continuity was stated. Of course, this is what we all want. The commissioners wanted more done in the design to accomplish this. They did not give specifics.
- ◆ One commissioner did not feel that low walls nor a metal fence (alone?) would provide that strong entry. Looking at Plan A and hearing that we had dropped the median concept, this commissioner was concerned about seeing parking immediately on Howard Avenue (south side). He felt what you would see at first was parking on the street and in the Safeway lot. He saw more value in planting than in parking. DHCA wishes to keep the on-street parking and soften the parking with appropriate plantings. Please review the Kensington Revitalization minutes from Wednesday, February 5. The committee liked the metal arch, if affordable, but wanted you to restudy the entry features.
- ◆ Another commissioner felt that uniformity in signage style, i. e., a common theme, perhaps with the use of goose neck lamps to illuminate the signs, would contribute to the sense of place. This should be explored. Some of the commissioners liked the idea of goose neck street lights also.
- ◆ One commissioner mentioned that all brick sidewalks were appropriate but that she realized cost was a factor. This commissioner also wanted the important historic buildings set off in some way. (Another commissioner felt that this would not contribute to streetscape continuity.) She wanted to see a visual connection with the north side of the train tracks by allowing for a view to Mizell's Lumber store on St. Paul Street. If this is possible, incorporate this idea. Additionally, she mentioned that raised planters were not used in the Victorian period.

**Division of Community Development**

Federal Programs, 301/217-3620, FAX 301/217-3653 • Planning and Commercial Revitalization, 301/217-3650, FAX 301/217-3060

51 Monroe Street • Rockville, Maryland 20850-2419

- ◆ It was mentioned that other paving materials should be looked at. The Revitalization has chosen the concept of concrete panels with brick outlines for you to develop.
- ◆ Another commissioner commented that Kensington is the only historic district in Montgomery County with a major commercial district. He did not see links in the designs to Kensington history. He wanted you to refer to A Picture History of Kensington. Do you feel the pictures you have gathered give you sufficient background on historic Kensington?
- ◆ The chairman of the commission, George Kousoulas, commented that Howard Avenue (east) presents an evolution of buildings over time. He said the newer buildings should be left to be what they are. "Don't Victorianize." As at the buildings at 3738-3748 Howard Avenue, do not use a sawtooth roof effect and awnings with scalloped valences on a 1950s (?) building. Use a more appropriate type of awning or overhang. It was stated that awnings were appropriate on Victorian buildings. Perhaps, the use of scallops is too cute for those buildings also.
- ◆ The use of standing seam roofing on the Antique Village properties was considered appropriate. However, endorsement will not be given until the commission reviews the actual designs as to their compatibility with the buildings.
- ◆ I asked if they would object to a story added to two of the one story buildings. The idea was not rejected. They would have to review the design.

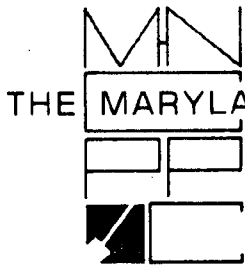
There was not a unanimous consensus on what was discussed but I think this letter conveys the tenor of the meeting.

Sincerely



Marian V. Hershenson  
Kensington Project Manager

cc: Suzanne Yopp  
Nikolaus Philipsen  
David Ashton  
Gwen Wright



THE MARYLAND-NATIONAL CAPITAL PARK AND PLANNING COMMISSION  
8787 Georgia Avenue • Silver Spring, Maryland 20910-3760

February 19, 1997

**MEMORANDUM**

TO: Historic Preservation Commission

FROM: Gwen Wright, Historic Preservation Coordinator *Gwen*

SUBJECT: Kensington Commercial Revitalization Project for Howard Avenue

---

Marian Herschensen, with the Montgomery County Department of Housing and Community Affairs, will be attending the February 26th HPC meeting to brief the Commission on an ongoing project - a commercial revitalization study of Howard Avenue in Kensington.

The area being studied - "Antique Row" - is entirely within the Kensington Historic District. Consultants working on the project have been provided with all pertinent information on the Kensington Historic District and on historic preservation regulations. Preservation staff has met directly with the consultants to reinforce historic preservation issues and concerns, and staff has attended several of the public meetings held in Kensington on this project.

The attached materials were prepared by the project consultants and have been distributed in the Kensington community. Please review the materials in preparation for the February 26th meeting. Ms. Herschensen will provide an update on the project and on plans for implementing some of the streetscape and design ideas that have been developed.

# P.E.L.A. DESIGN, INC.

2204 MARYLAND AVENUE, SUITE 300, BALTIMORE, MD 21218 TEL: 410-366-7300 FAX: 410-366-7392

## TRANSMITTAL

TO: Ms GYON M. WRIGHT  
HISTORIC PRESERVATION COMMISSION  
8787 GEORGIA AVE.

Date: 1/17/97

FROM: LILING TIEN

RE: KENSINGTON BUILDING DESIGN

WE ARE SUBMITTING TO YOU  Attached  Under separate Cover Via PRIORITY MAIL  
The following items:

Copies	Descriptions
1	BUILDING FACADE CONCEPT DESIGN

For Approval  For your use  As requested  For review and comment

### REMARKS:

PLEASE CALL AFTER YOU REVIEW THE DRAWINGS

SIGNED BY:



PLANNING, CIVIL ENGINEERING, LANDSCAPE ARCHITECTURE, URBAN DESIGN



AGENDA  
KENSINGTON REVITALIZATION COMMITTEE  
TUESDAY, JANUARY 14, 1997  
7:30 P. M.  
KENSINGTON TOWN OFFICES  
COUNCIL MEETING ROOM

1. Recommendation of the Signage Subcommittee on logo design - Helen Wilkes, Chairperson
2. Presentation of alternative streetscape concept plans for Howard Avenue East project area.

P.E.L.A. Design, Inc., a firm engaged in a planning, civil engineering, landscape architecture, and urban design practice, has been retained by Montgomery County to produce the contract documents necessary to build the Howard Avenue east streetscape project. Toward this end they will present two alternative concept plans which provide a framework for more detailed design. One of the plans is based on prior ideas suggested in the Kensington Business District Revitalization Program Report prepared by John Picard Associates. We welcome comments from the Town Council, Committee, residents, and business community. Concept layouts will be posted in the Council Meeting Room in the Town Hall on January 9 after 11 a.m.

Plan presentation - Liling Tien, P.E.L.A. Design, Inc.

Utility issues - Tim Lyng, P.E.L.A. Design, Inc.

Discussion

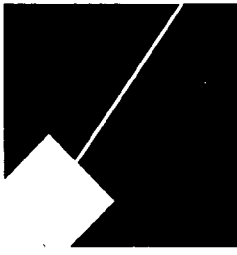
Next Steps

3. Adjourn 9:30

Questions may be addressed to Marian Hershenson, Kensington Commercial Revitalization Coordinator for Montgomery County at (301) 217-3647.

Ag2jan97

M-NCPPC




MONTGOMERY COUNTY DEPARTMENT OF PARK AND PLANNING

THE MARYLAND-NATIONAL CAPITAL  
PARK AND PLANNING COMMISSION

8787 Georgia Avenue  
Silver Spring, Maryland 20910-3760

MEMORANDUM

TO: Marion Hershenson  
Montgomery County DHCD

FROM:   
Robin D. Ziek, HPC Staff

SUBJECT: Replacement of bollards - Kensington Commercial Revitalization Project

DATE: April 28, 1998

---

Thank you for contacting the Historic Preservation Commission (HPC) with a request to consider the replacement of existing horse-head bollards with a new bollard design which is similar to the design of the Washington Globe street lights proposed for Howard Avenue.

As indicated in the drawings which you have provided to me, the replacement bollards will be used to bracket the existing narrow driveways entrances in order to protect the new street trees. As you note, there are already 3 existing bollards, with horseheads, which were put up by a private property owner for the same reason of protecting trees. You are requesting approval of a replacement of the three existing bollards with horseheads to the new design, as well as the installation of new bollards for the same reason. There will be a total of 8 bollards, according to the drawings which you have submitted.

Since you are replacing existing bollards, and the additional bollards are consistent with the new proposed streetscape design, this does not require approval of the full commission.

**Therefore, you may proceed with the bollard replacement and installation without filing for a Historic Area Work Permit. This letter serves as confirmation of this for your records.**

If you have any further questions, please do not hesitate to call me at (301)563-3400.



Montgomery County Government

FACSIMILE TRANSMISSION COVER SHEET

Date Sent: 4/27/98

FROM TO:

Robin Zick  
MC Historic Preservation  
Commission

Marian Hershenson

(301)

FAX: 217-

3060

TO FROM:

Fax Number: (301) 563-3412  
Marian Hershenson

~~Handwritten mark~~

Phone (301) 217-3647

Fax Number: (301) 217-~~3677~~ 3060

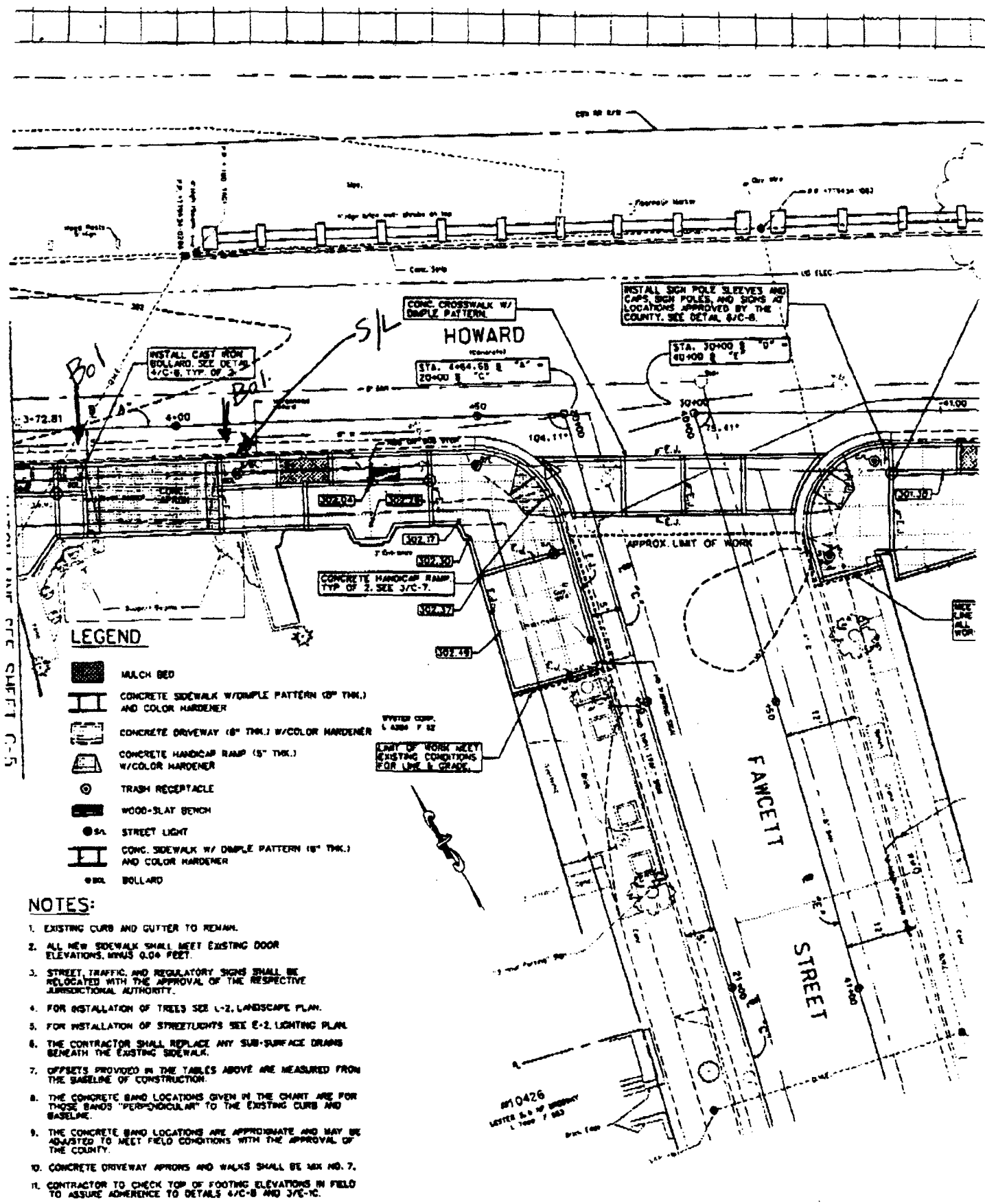
SUBJECT: Bollards / Kensington

Number of Pages Sent: Cover + 3










Comments: As we discussed, I request your opinion as to whether adding bollards to the approved streetscape design sufficiently changes the concept to require review and approval of the HPC.

Presently, there are 3 horsehead on pole bollards on the Howard Avenue segment between Armory and Faucett Avenues. There were 4 ~~one on west Kensington~~ bollards installed there to protect trees. Drivers were backing into driveways and damaging / knocking down trees. The plans show 9 bollards protecting lights or replacing the existing bollards which the owner wants reinstalled if we do not use new ones.

Department of Housing and Community Development  
Division of Commercial Revitalization



**LEGEND**

-  MULCH BED
-  CONCRETE SIDEWALK W/DIMPLE PATTERN (6" THK.) AND COLOR HARDENER
-  CONCRETE DRIVEWAY (6" THK.) W/COLOR HARDENER
-  CONCRETE HANDICAP RAMP (5" THK.) W/COLOR HARDENER
-  TRASH RECEPTACLE
-  WOOD-SLAT BENCH
-  STREET LIGHT
-  CONG. SIDEWALK W/ DMPLE PATTERN (6" THK.) AND COLOR HARDENER
-  BOLLARD

**NOTES:**

1. EXISTING CURB AND GUTTER TO REMAIN.
2. ALL NEW SIDEWALK SHALL MEET EXISTING DOOR ELEVATIONS, MINUS 0.04 FEET.
3. STREET TRAFFIC AND REGULATORY SIGNS SHALL BE RELOCATED WITH THE APPROVAL OF THE RESPECTIVE JURISDICTIONAL AUTHORITY.
4. FOR INSTALLATION OF TREES SEE L-2, LANDSCAPE PLAN.
5. FOR INSTALLATION OF STREETLIGHTS SEE E-2, LIGHTING PLAN.
6. THE CONTRACTOR SHALL REPLACE ANY SUB-SURFACE DRAINS BENEATH THE EXISTING SIDEWALK.
7. OFFSETS PROVIDED IN THE TABLES ABOVE ARE MEASURED FROM THE BASELINE OF CONSTRUCTION.
8. THE CONCRETE BAND LOCATIONS GIVEN IN THE CHART ARE FOR THOSE BANDS "PERPENDICULAR" TO THE EXISTING CURB AND BASELINE.
9. THE CONCRETE BAND LOCATIONS ARE APPROXIMATE AND MAY BE ADJUSTED TO MEET FIELD CONDITIONS WITH THE APPROVAL OF THE COUNTY.
10. CONCRETE DRIVEWAY APRONS AND WALKS SHALL BE MIX NO. 7.
11. CONTRACTOR TO CHECK TOP OF FOOTING ELEVATIONS IN FIELD TO ASSURE ADHERENCE TO DETAILS 67C-8 AND 37E-10.

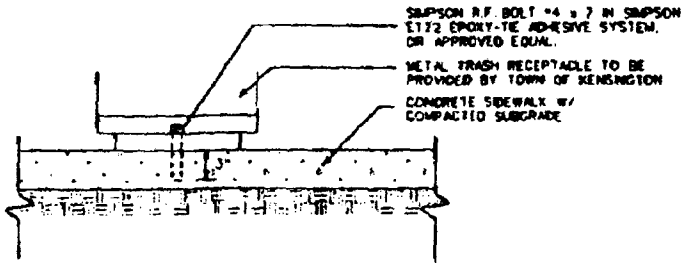
**E.L.A. DESIGN, INC.**  
ANIMAL SERVICES DIVISION  
 2204 MARYLAND AVE.

DEPARTMENT OF HOUSING & COMMUNITY AFFAIRS  
**MONTGOMERY COUNTY**  
 DIVISION OF COMMUNITY DEVELOPMENT

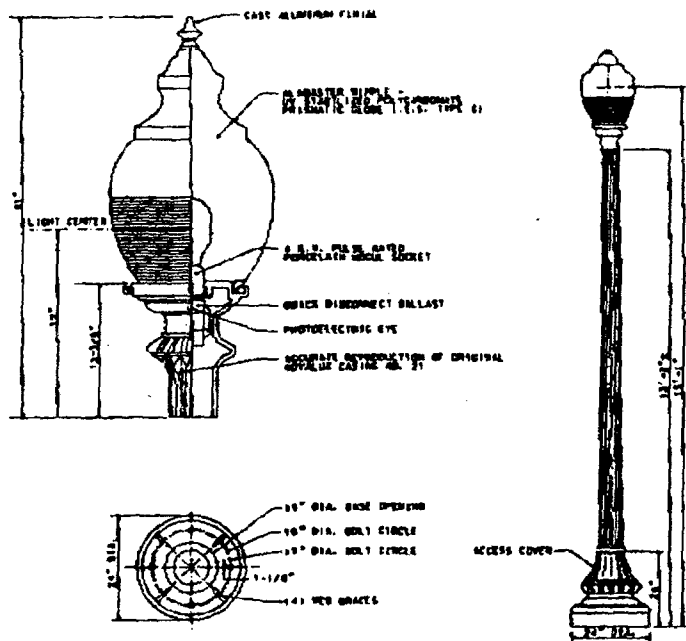
APPROVED \_\_\_\_\_  
 DESIGNED: TSH  
 DRAWN: TSH/JAH

**KENS HOWARD**  
 P.E.  
 800 N.W.

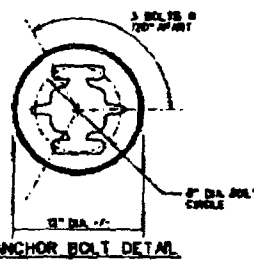
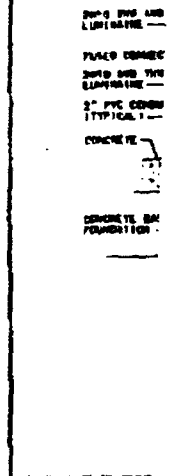




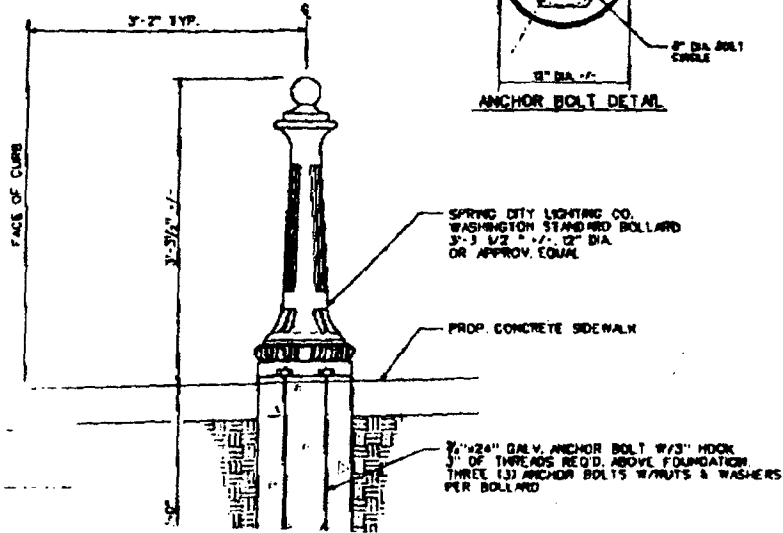
1 TRASH RECEPTACLE ANCHORING DETAIL  
 C-8 NOT TO SCALE



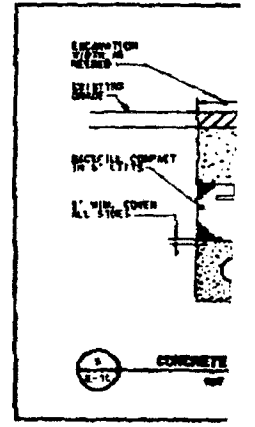
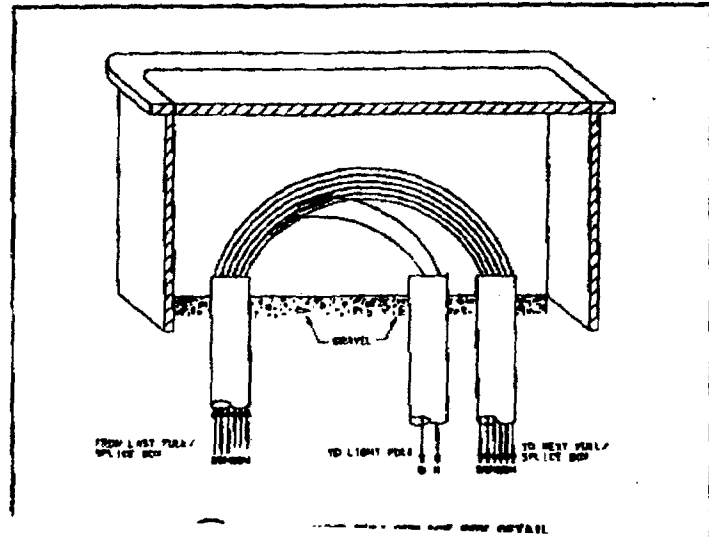
TYPE 'A' LIGHT FIXTURE & POST  
 NOT TO SCALE



ANCHOR BOLT DETAIL



3\"/>



CONCRETE

FROM : STEPHEN C. EASTHAM

PHONE NO. : 3019631187

Apr. 27 1998 03:54PM P1

301 340 3011

Apr 27.98

14:27 No.012 P.02

OBUILD DEVELOPMENT CORP

Estimating Standard Report  
PENNIFIELD LOCK HOUSE

1

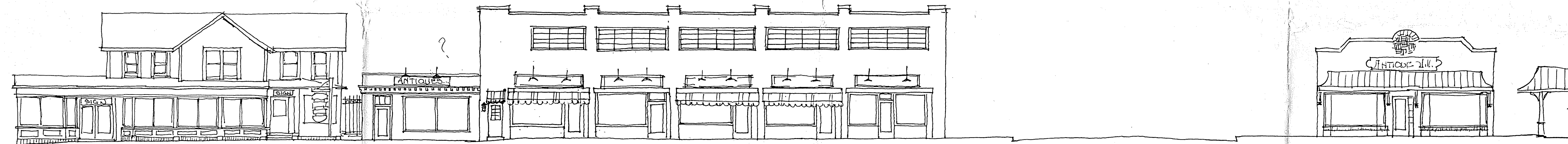
GROUP	DESCRIPTION	LABOR AMOUNT	MATRL AMOUNT	SUB AMOUNT	EQUIP AMOUNT	OTHER AMOUNT	TOTAL AMOUNT
1000	GENL/SETUP/MAINT	1,840				1,482	3,322
2000	ITEWK/BXCV/DEMO			1,281			1,281
3000	CONCRETE/GRAVEL			403			403
4000	MASONRY			2,300			2,300
5000	MTL/SUPPLY/STL		287				287
6000	WOOD/CARPENTRY	12,880	6,411				19,291
7000	THRL/MOIST/PROT			404			404
8000	DOORS/WINDOWS		2,819				2,819
9000	FINISHES			13,685			13,685
15000	MECHANICAL			6,326			6,326
16000	ELECTRICAL			4,945			4,945
17000	PUNCH-OUT WORK	1,288					1,288

- PROVIDED HANGING BRACKET/POST FOR FREESTANDING SIGN
- FACE CONCRETE CORBS WITH BRICK TO MATCH HEIGHT & MATERIALS OF EXISTING FLASHING BED.
- PROVIDED HANGING PAINTED WOOD SIGN @ BOTH ENTRIES W/ CONCEALED LIGHTING
- REMOVE ROOFTOP SIGN
- RELOCATE GAS METER

- ADD ARCHITECTURAL CORNICE OVER WOOD HALERS
- PAINTED WOOD SIGN W/ GOOSENECK LAMPS
- REMOVE TRANSOM A/C

- ADD CRENELATIONS TO PARAPET TO EXPRESS BUILDING STRUCTURAL GRID
- PAINTED WOOD SIGN W/ GOOSENECK LAMPS
- RETRACTABLE CANVAS AWNING @ EACH STORE
- HALF LIGHT DOOR W/ CANOPY & LIGHT @ ENTRY TO SECOND FLOOR
- REMOVE WINDOW A/C
- RUN CONDUIT INSIDE BUILDING

- MOVE SIGN BELOW ORNAMENTAL BRICKWORK
- PAINTED WOOD SIGN - NEW
- CANOPY W/ STANDING SEAM ROOFING & METAL BRACKETS
- REMOVE WOOD POST



#3730 - ANTIQUE STORE  
OWNER VICTOR ASSOCIATES  
WALPOFF INDUSTRIES

#3734 - ANTIQUE STORE  
OWNER VICTOR ASSOCIATES  
WALPOFF INDUSTRIES

#3738 - 48 HOWARD STREET  
OWNER MARY WHITLOW ET. AL.

FAWCETT STREET

#3050 - ANTIQUE VILLAGE  
OWNER WYSTER CORP.

Department of Housing and  
Community Development  
Division of Community Development  
51 Monroe Street, Suite 301  
Rockville, MD 20850

P.E.L.A. Design, Inc.

2204 Maryland Avenue, Suite 300  
Baltimore, MD 21218

ArchPlan Inc.  
Philipsen Architects  
429 N. Eulaw St. #2S  
Baltimore, Maryland  
21201

Phone: 410.685.2002 Fax: 410.685.2003

PROJECT NAME  
KENSINGTON FACADE  
CONCEPT DESIGN

DRAWING TITLE  
PROPOSED STREETScape  
ELEVATION

PROJ. NO. 960701

DATE 12.20.96

SCALE 1/4"=1'-0"

REVISIONS:

SHEET NUMBER:

A4



• REBUILD CANOPY  
SIMILAR TO OTHER  
ANTIQUE VILLAGE  
CANOPY - STANDING  
BEAM ROOFING W/  
METAL BRACKETS &  
VISIBLE SUPPORT  
POST

• REMOVE ALUM CANOPY  
• OPEN EXISTING TRANSOM  
WINDOWS  
• PAINTED WOOD SIGN W/  
GOOSENECK LAMPS  
• MOVE DOWNSPOUT & MAILBOX  
OFF FACADE.

REMOVE  
• VERTICAL PORCH LOUVERS  
• REMOVE FORM STONE CORNER  
• REMOVE MIRRORRED COLUMN  
TREATMENT FROM FIRST FLOOR

UPPER FLOORS  
• STANDING BEAM ROOFING  
ON HIP ROOF  
• PORCH - SOLID POST W/  
METAL RAILING & METAL  
BRACKETS @ ROOF

LOWER FLOORS  
• STUCCO FACADE W/  
ARTICULATED FILASTERS  
• CANOPY W/ STANDING BEAM  
ROOFING & METAL BRACKETS  
• PAINTED WOOD SIGN

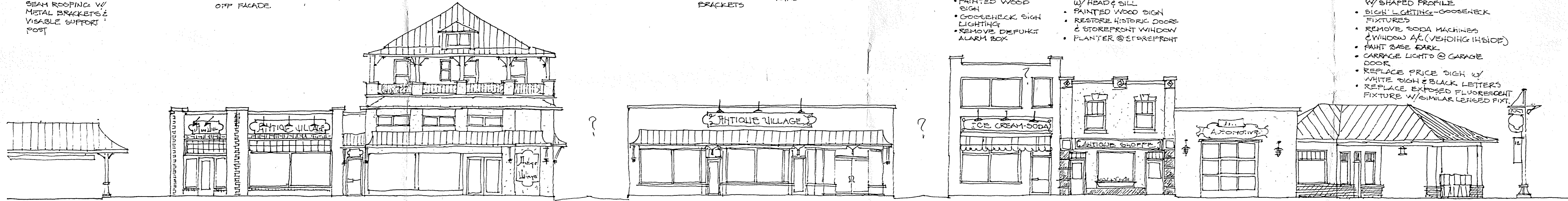
• CANOPY W/ STANDING  
BEAM ROOFING & METAL  
BRACKETS  
• WOOD PAINTED SIGN  
W/ GOOSENECK LAMPS  
• PEDESTRIAN SIGNS  
HANGING FROM METAL  
BRACKETS

• SECOND FLOOR ADDN  
• RETRACTABLE  
CANVAS AWNING  
• PAINTED WOOD  
SIGN  
• GOOSENECK SIGN  
LIGHTING  
• REMOVE DEFUNCT  
ALARM BOX

• FACADE -  
REMOVE SHINGLES  
RE-STUCCO

• ADD CORNICE, ARTICULATED  
FILASTERS & BASE  
• DIVIDED LIGHT WINDOWS  
W/ HEAD & SILL  
• PAINTED WOOD SIGN  
• RESTORE HISTORIC DOORS  
& STOREFRONT WINDOW  
• PLANTER @ STOREFRONT

• ARCHITECTURAL FIXTURE  
UNDER CANOPY  
• SIGN - PAINTED METAL  
W/ SHAPED PROFILE  
• SIGN LIGHTING - GOOSENECK  
FIXTURES  
• REMOVE SODA MACHINES  
& WINDOW AC (VENTING INSIDE)  
• PAINT BASE DARK  
• CARRIAGE LIGHTS @ GARAGE  
DOOR  
• REPLACE PRICE SIGN W/  
WHITE SIGN & BLACK LETTERS  
• REPLACE EXPOSED FLUORESCENT  
FIXTURE W/ SIMILAR LENSED FIXT.



DRIVEWAY STRUCTURE  
OWNER - WYSTER CORP.

#3058 - ANTIQUE VILLAGE  
OWNER - WYSTER CORP.

#3062 - ANTIQUE VILLAGE  
OWNER - WYSTER CORP.

#3072-76 ANTIQUE VILLAGE  
OWNER - WYSTER CORP.

#3784 RUG STORE  
OWNER - CALVIN T &  
F H MILANS ET AL.

#3786 ANTIQUE STORE  
OWNER - PAUL & CFEHG

#3794 GAS STATION  
OWNER - ROBERT & V.A. ORR

Department of Housing and  
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ArchPlan Inc.  
Philipsen Architects  
429 N. Eulaw St. #25  
Baltimore, Maryland  
21201  
Phone: 410.685.2002 Fax: 410.685.2203

PROJECT NAME  
KENSINGTON FACADE  
CONCEPT DESIGN

DRAWING TITLE  
PROPOSED STREETSCAPE  
ELEVATION

PROJ. NO. 960701 SHEET NUMBER:

DATE 12.20.96

SCALE 1/8"=1'-0"

REVISIONS:

A3

**Materials:**

- wood siding - painted
- windows - wood double hung, aluminum storefront - painted, and steel casement.

**Strengths:**

- strong historic image
- garden
- coordinated color scheme

**Opportunities:**

- build outside display/terrace to hide concrete curb
- provide larger post for visually unsupported tenant sign.
- move gas meter off sidewalk
- move lattice gate to visually separate from adjoining brick building

**Materials:**

- brick facade w/ wood nailers set in brick
- plate glass window
- wood door

**Strengths:**

- wide sidewalk
- display window

**Opportunities:**

- increase building mass with second floor
- provide lighting and sign coordinated with proportions of facade
- remove air conditioner from transom

**Materials:**

- brick facade
- steel windows - 2<sup>nd</sup> floor
- storefront w/ fieldstone base below

**Strengths:**

- wide sidewalk
- building height
- display windows

**Opportunities:**

- make building more vertical by emphasizing structural bays.
- provide canopy for individual stores
- restore #3742 facade to match neighbors
- move metal conduit from facade
- remove window AC from apartments & store transoms
- remove inoperable weather station mounted on Fawcett Street elevation.
- provide coordinated signage

**Materials:**

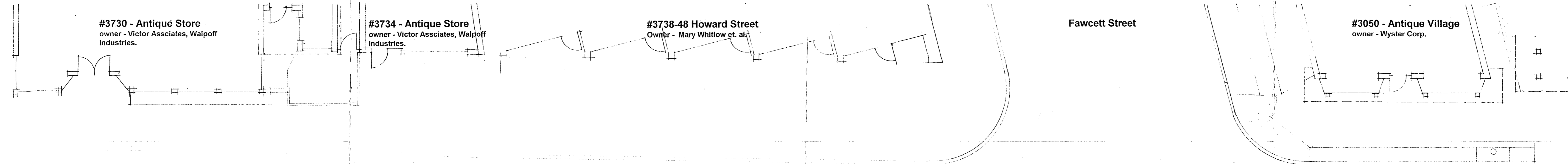
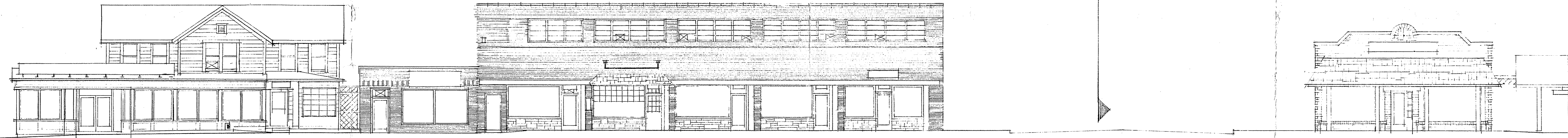
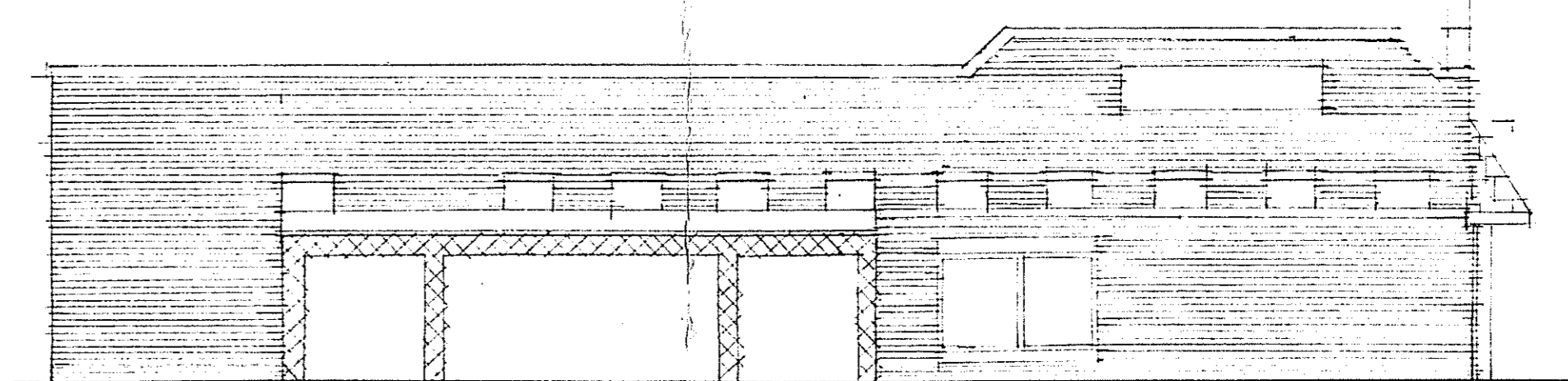
- painted brick w/ plate glass windows
- shake shingle canopy
- wood lattice terrace

**Strengths:**

- street activity - sidewalk café
- canopy and signage support "Antique Village" image.
- good scale and proportions.
- brick detailing.
- display windows

**Opportunities:**

- replace worn shingles on canopy w/ standing seam roofing
- remove wood post,
- provide coordinated signage
- provide new address sign



#3730 - Antique Store  
owner - Victor Associates, Walpoff Industries.

#3734 - Antique Store  
owner - Victor Associates, Walpoff Industries.

#3738-48 Howard Street  
Owner - Mary Whitlow et. al.

#3050 - Antique Village  
owner - Wyster Corp.

Fawcett Street

Department of Housing and  
Community Development  
Division of Community Development  
51 Monroe Street, Suite 301  
Rockville, MD 20850

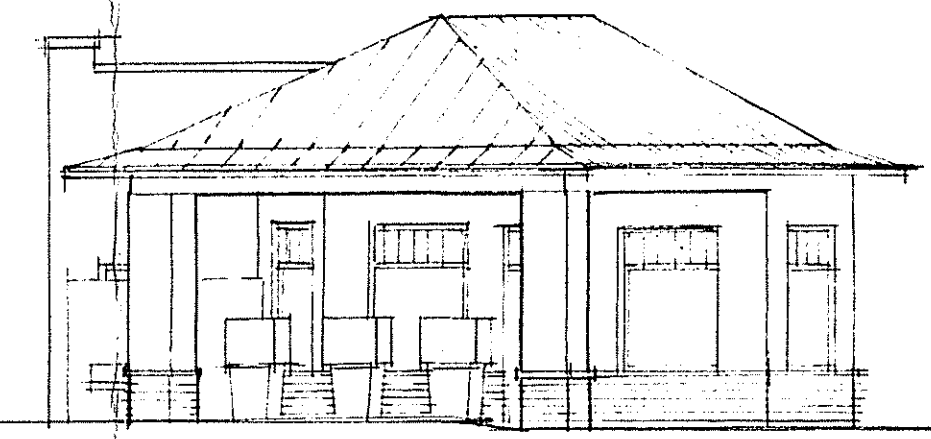
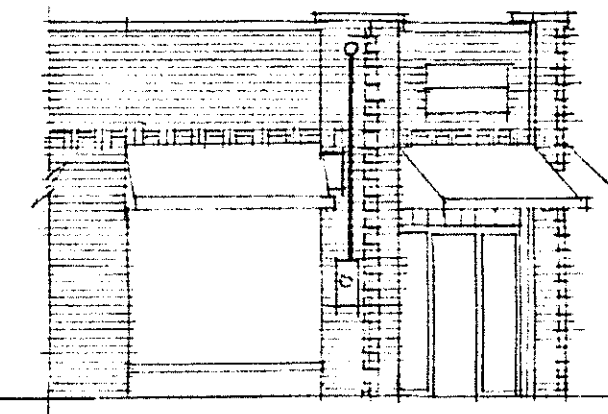
P.E.L.A. Design, Inc.  
2204 Maryland Avenue, Suite 300  
Baltimore, MD 21218

ArchPlan Inc.  
Philipsen Architects  
429 N. Eutaw St. #2S  
Baltimore, Maryland  
21201  
Phone: 410.685.2002 Fax: 410.685.2003

PROJECT NAME:  
KENSINGTON FACADE  
CONCEPT DESIGN

DRAWING TITLE:  
EXISTING STREETScape  
PLAN & ELEVATION

PROJ. NO. 960701	SHEET NUMBER: <b>A2</b>
DATE 12.20.96	
SCALE: 1/4"=1'-0"	
REVISIONS:	



- Materials:**
- aluminum awning
- Strengths:**
- maintains street edge w/ visual mass
  - creates pedestrian scale
  - canopy supports "Antique Village" image.
- Opportunities:**
- provide connection between shops

- Materials:**
- tan brick
  - plate glass windows
  - aluminum awnings.
- Strengths:**
- good scale and proportions.
  - canopy and signage create "Antique Village" image.
  - brick detailing.
  - display windows
- Opportunities:**
- remove canopy and expose existing transom glass.
  - remove boards, from front facade
  - provide coordinated signage
  - replace facade lighting w/ architectural fixtures
  - move downspout & mailbox off front facade
  - provide new address sign

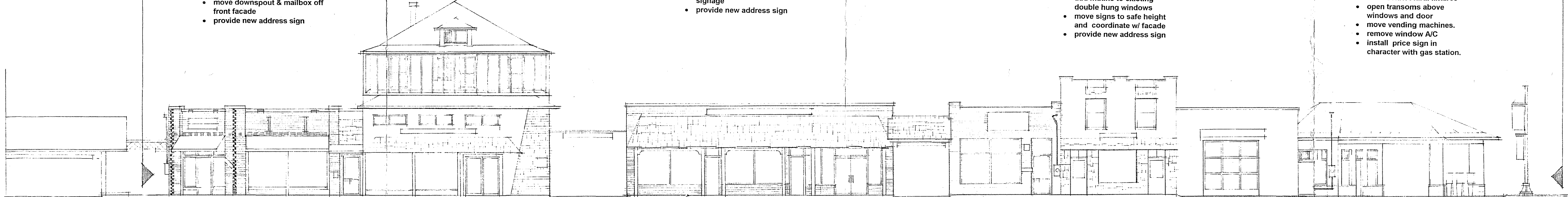
- Materials:**
- asphalt shingled roof w/ dormers
  - vertical louvers over painted horizontal siding @ 3<sup>rd</sup> fl.
  - stucco w/ 'fieldstone' at street.
  - plate glass windows
  - shake shingle cedar canopy
- Strengths:**
- height and visibility
  - canopy and signage create theme for whole complex
- Opportunities:**
- replace asphalt shingles w/ standing seam metal roof
  - replace louvers on 3<sup>rd</sup> fl. w/ porch
  - Replace wood shingle on canopy w/ standing seam metal roof
  - coordinate signage

- Materials:**
- tan brick facade w/ plate glass windows
  - shake shingle canopy
  - rough hewn wood post
- Strengths:**
- canopy and signage create "Antique Village" image
  - good pedestrian scale
  - display windows
- Opportunities:**
- replace worn shingles on canopy w/ standing seam roofing
  - remove wood post,
  - upgrade fixtures for facade lighting
  - provide coordinated signage
  - provide new address sign

- Materials:**
- white brick w/ black grout
  - alum. storefront door and window
- Strengths:**
- good masonry proportions
  - large interior
- Opportunities:**
- add second floor.
  - change building use, i.e. restaurant
  - add scale to facade w/ canopy, facade lighting.
  - change sign proportions to match facade
  - remove defunct alarm box
  - provide new address sign

- Materials:**
- stucco 2<sup>nd</sup> floor w/cedar shingles 1<sup>st</sup> floor
  - vinyl windows w/ cedar canopy 2<sup>nd</sup> floor
  - wood doors w/ transoms and plate glass window 1<sup>st</sup> floor
- Strengths:**
- building height.
  - profile of cornice
- Opportunities:**
- Remove wood shingles
  - add facade details i.e. cornice, lintels, quoins/pilasters.
  - consolidate entrances w/ new doors and display window
  - add mutins to existing double hung windows
  - move signs to safe height and coordinate w/ facade
  - provide new address sign

- Materials:**
- standing seam metal roof - painted.
  - stucco walls w/ brick base-painted
  - wood doors and windows.
  - coffered tin ceiling under canopy
- Strengths:**
- landmark for Kensington
  - good scale and massing
  - strong historic character
  - original building materials in good condition
- Opportunities:**
- paint w/ coordinated color scheme.
  - replace exterior lighting with architectural fixtures
  - open transoms above windows and door
  - move vending machines.
  - remove window A/C
  - install price sign in character with gas station.



Driveway Structure  
owner - Wyster Corp.

#3058 - Antique Village  
owner - Wyster Corp.

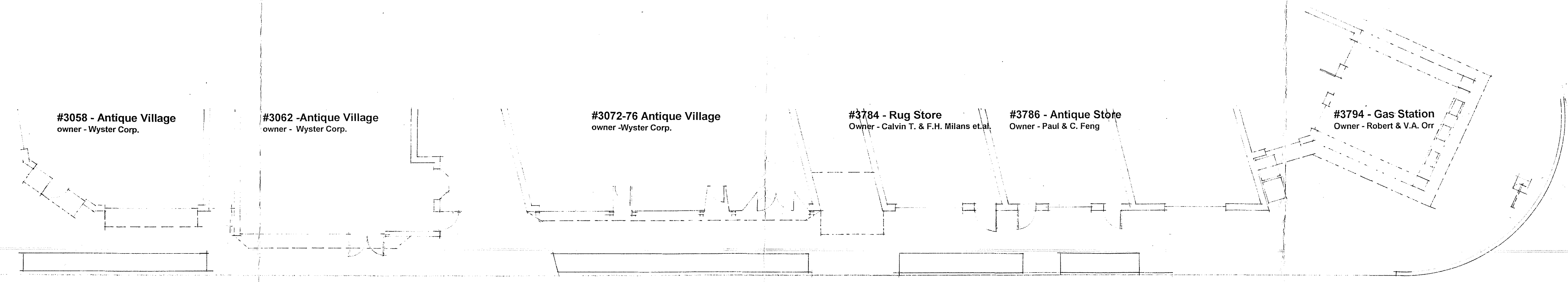
#3062 - Antique Village  
owner - Wyster Corp.

#3072-76 Antique Village  
owner -Wyster Corp.

#3784 - Rug Store  
Owner - Calvin T. & F.H. Milans et.al.

#3786 - Antique Store  
Owner - Paul & C. Feng

#3794 - Gas Station  
Owner - Robert & V.A. Orr

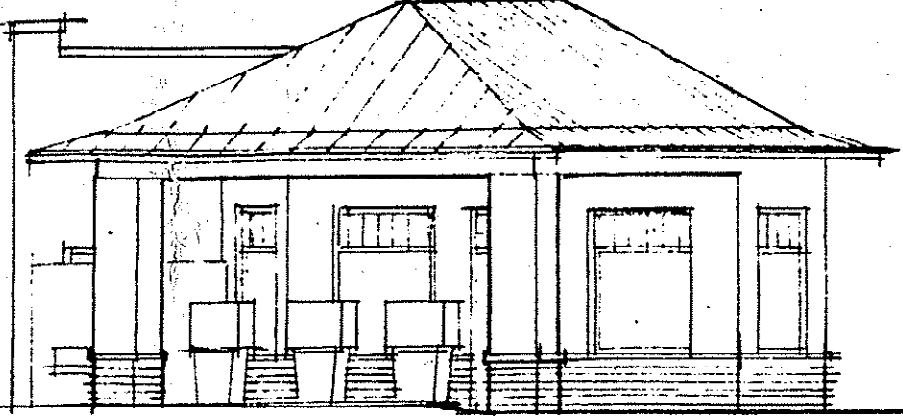
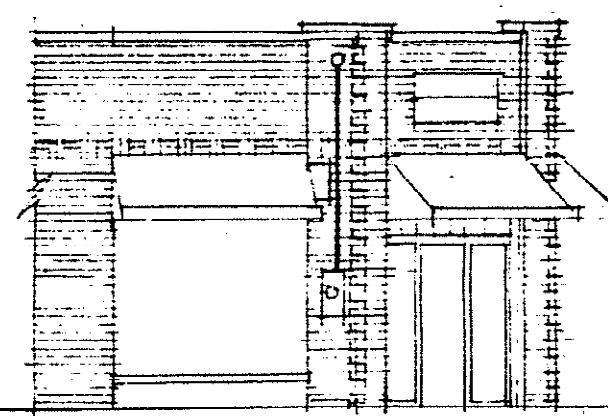


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21201  
Phone: 410.685.2002 Fax: 410.685.2003

PROJECT NAME: KENSINGTON FACADE CONCEPT DESIGN	
DRAWING TITLE: EXISTING STREETSCAPE PLAN & ELEVATION	
PROJ. NO. 960701	SHEET NUMBER: A1
DATE: 12.20.96	
SCALE: 1/4"=1'-0"	
REVISIONS:	



**Materials:**

- aluminum awning

**Strengths:**

- maintains street edge w/ visual mass
- creates pedestrian scale
- canopy supports "Antique Village" image.

**Opportunities:**

- provide connection between shops

**Materials:**

- tan brick
- plate glass windows
- aluminum awnings.

**Strengths:**

- good scale and proportions.
- canopy and signage create "Antique Village" image.
- brick detailing.
- display windows

**Opportunities:**

- remove canopy and expose existing transom glass.
- remove boards, from front facade
- provide coordinated signage
- replace facade lighting w/ architectural fixtures
- move downspout & mailbox off front facade
- provide new address sign

**Materials:**

- asphalt shingled roof w/ dormers
- vertical louvers over painted horizontal siding @ 3" fl.
- stucco w/ "fieldstone" at street.
- plate glass windows
- shake shingle cedar canopy

**Strengths:**

- height and visibility
- canopy and signage create theme for whole complex

**Opportunities:**

- replace asphalt shingles w/ standing seam metal roof
- replace louvers on 3" fl. w/ porch
- Replace wood shingle on canopy w/ standing seam metal roof
- coordinate signage

**Materials:**

- tan brick facade w/ plate glass windows
- shake shingle canopy
- rough hewn wood post

**Strengths:**

- canopy and signage create "Antique Village" image
- good pedestrian scale
- display windows

**Opportunities:**

- replace worn shingles on canopy w/ standing seam roofing
- remove wood post,
- upgrade fixtures for facade lighting
- provide coordinated signage
- provide new address sign

**Materials:**

- white brick w/ black grout
- alum. storefront door and window

**Strengths:**

- good masonry proportions
- large interior

**Opportunities:**

- add second floor.
- change building use, i.e. restaurant
- add scale to facade w/ canopy, facade lighting.
- change sign proportions to match facade
- remove defunct alarm box
- provide new address sign

**Materials:**

- stucco 2<sup>nd</sup> floor w/ cedar shingles 1<sup>st</sup> floor
- vinyl windows w/ cedar canopy 2<sup>nd</sup> floor
- wood doors w/ transoms and plate glass window 1<sup>st</sup> floor

**Strengths:**

- building height.
- profile of cornice

**Opportunities:**

- Remove wood shingles
- add facade details i.e. cornice, lintels, quoins/pilasters.
- consolidate entrances w/ new doors and display window
- add mutins to existing double hung windows
- move signs to safe height and coordinate w/ facade
- provide new address sign

**Materials:**

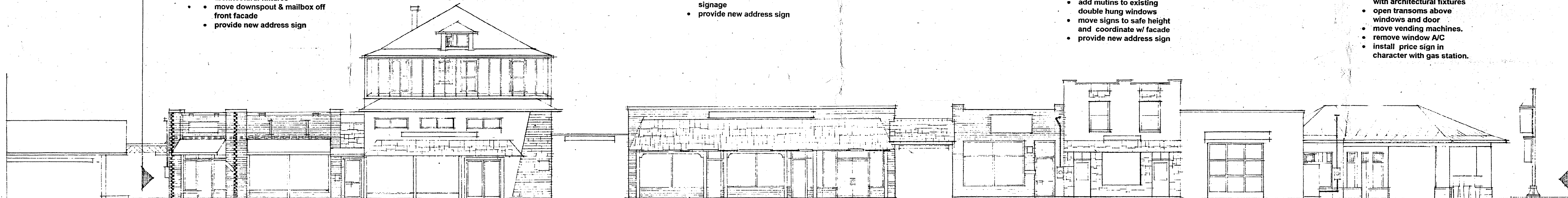
- standing seam metal roof - painted.
- stucco walls w/ brick base-painted
- wood doors and windows.
- coffered tin ceiling under canopy

**Strengths:**

- landmark for Kensington
- good scale and massing
- strong historic character
- original building materials in good condition

**Opportunities:**

- paint w/ coordinated color scheme.
- replace exterior lighting with architectural fixtures
- open transoms above windows and door
- move vending machines.
- remove window A/C
- install price sign in character with gas station.



Driveway Structure  
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owner - Wyster Corp.

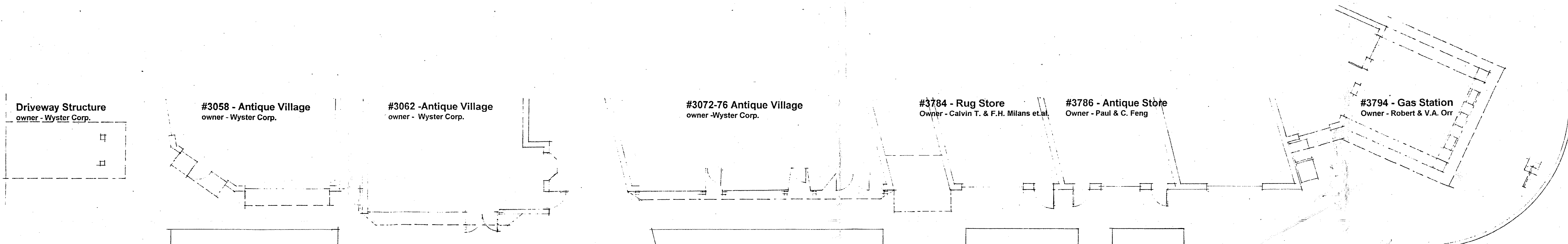
#3062 - Antique Village  
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#3072-76 Antique Village  
owner - Wyster Corp.

#3784 - Rug Store  
Owner - Calvin T. & F.H. Milans et al.

#3786 - Antique Store  
Owner - Paul & C. Feng

#3794 - Gas Station  
Owner - Robert & V.A. Orr



Department of Housing and  
Community Development  
Division of Community Development  
51 Monroe Street, Suite 301  
Rockville, MD 20850

P.E.L.A. Design, Inc.

2204 Maryland Avenue, Suite 300  
Baltimore, MD 21218

ArchPlan Inc.  
Philipsen Architects  
429 N. Eutaw St. #25  
Baltimore, Maryland  
21201

Phone: 410.685.2022 Fax: 410.685.2003

PROJECT NAME:  
KENSINGTON FACADE  
CONCEPT DESIGN

DRAWING TITLE:  
EXISTING STREETScape  
PLAN & ELEVATION

PROJ. NO. 960701 SHEET NUMBER:

DATE: 12.20.96

SCALE: 1/4"=1'-0"

REVISIONS:

A1

**Materials:**

- wood siding - painted
- windows - wood double hung, aluminum storefront - painted, and steel casement.

**Strengths:**

- strong historic image
- garden
- coordinated color scheme

**Opportunities:**

- build outside display/terrace to hide concrete curb
- provide larger post for visually unsupported tenant sign.
- move gas meter off sidewalk
- move lattice gate to visually separate from adjoining brick building

**Materials:**

- brick facade w/ wood nailers set in brick
- plate glass window
- wood door

**Strengths:**

- wide sidewalk
- display window

**Opportunities:**

- increase building mass with second floor
- provide lighting and sign coordinated with proportions of facade
- remove air conditioner from transom

**Materials:**

- brick facade
- steel windows - 2<sup>nd</sup> floor
- storefront w/ fieldstone base below

**Strengths:**

- wide sidewalk
- building height
- display windows

**Opportunities:**

- make building more vertical by emphasizing structural bays.
- provide canopy for individual stores
- restore #3742 facade to match neighbors
- move metal conduit from facade
- remove window AC from apartments & store transoms
- remove inoperable weather station mounted on Fawcett Street elevation.
- provide coordinated signage

**Materials:**

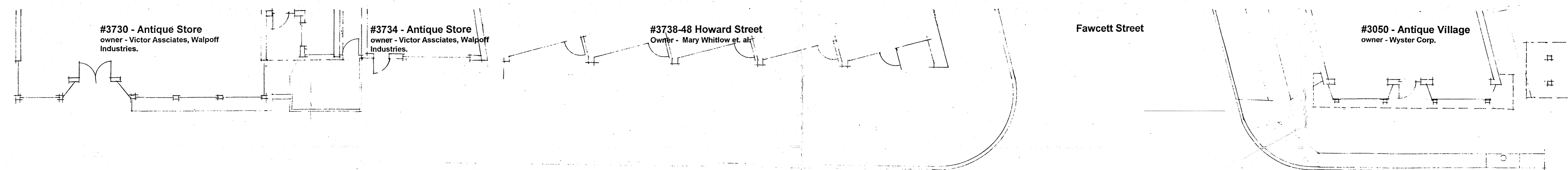
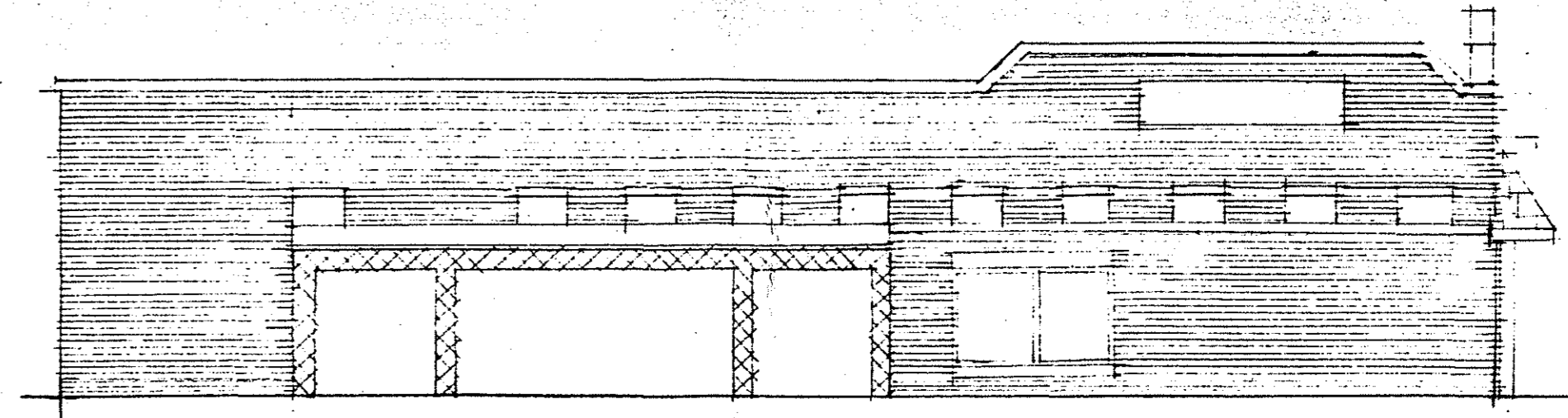
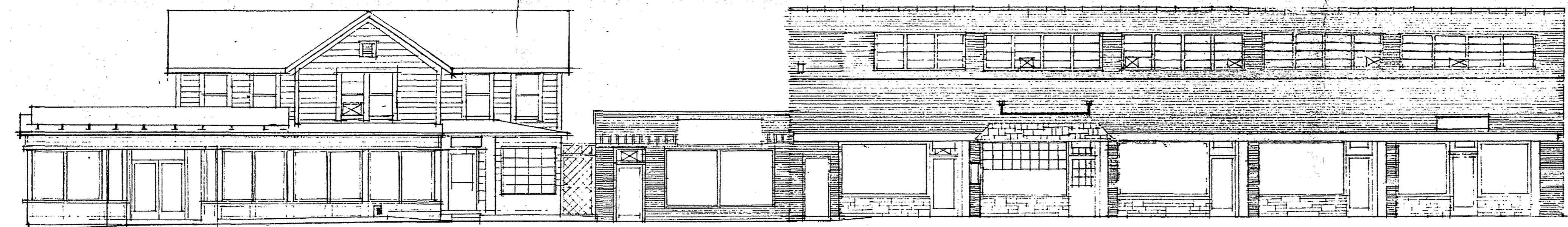
- painted brick w/ plate glass windows
- shake shingle canopy
- wood lattice terrace

**Strengths:**

- street activity - sidewalk café
- canopy and signage support "Antique Village" image.
- good scale and proportions.
- brick detailing.
- display windows

**Opportunities:**

- replace worn shingles on canopy w/ standing seam roofing
- remove wood post.
- provide coordinated signage
- provide new address sign



#3730 - Antique Store  
owner - Victor Associates, Walpoff Industries.

#3734 - Antique Store  
owner - Victor Associates, Walpoff Industries.

#3738-48 Howard Street  
Owner - Mary Whitlow et al

#3050 - Antique Village  
owner - Wyster Corp.

Fawcett Street

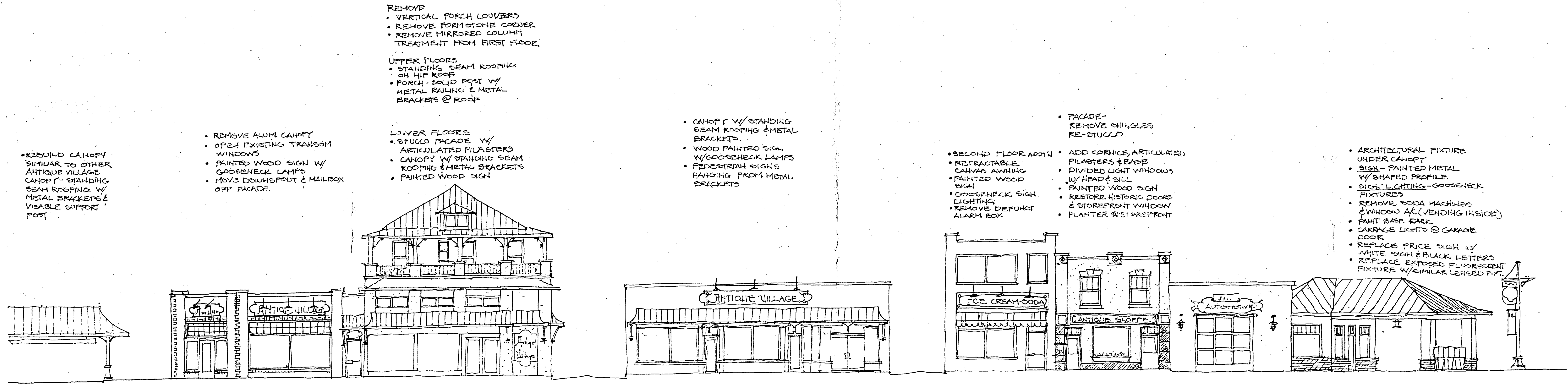
Department of Housing and Community Development  
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PROJECT NAME:  
KENSINGTON FACADE  
CONCEPT DESIGN  
DRAWING TITLE:  
EXISTING STREETSCAPE  
PLAN & ELEVATION

PROJ. NO. 980701	SHEET NUMBER: A2
DATE: 12.20.96	
SCALE: 1/4"=1'-0"	
REVISIONS:	



• REBUILD CANOPY SIMILAR TO OTHER ANTIQUE VILLAGE CANOPY • STANDING BEAM ROOFING W/ METAL BRACKETS & VISIBLE SUPPORT POST

• REMOVE ALUM CANOPY  
• OPEN EXISTING TRANSOM WINDOWS  
• PAINTED WOOD SIGN W/ GOOSENECK LAMPS  
• MOVE DOWNSPOUT & MAILBOX OFF FACADE

REMOVE  
• VERTICAL PORCH LOUVERS  
• REMOVE FORMSTONE CORNER  
• REMOVE MIRRORING COLUMN TREATMENT FROM FIRST FLOOR

UPPER FLOORS  
• STANDING BEAM ROOFING ON HIP ROOF  
• PORCH - SOLID POST W/ METAL RAILING & METAL BRACKETS @ ROOF

LOWER FLOORS  
• STUCCO FACADE W/ ARTICULATED PILASTERS  
• CANOPY W/ STANDING BEAM ROOFING & METAL BRACKETS  
• PAINTED WOOD SIGN

• CANOPY W/ STANDING BEAM ROOFING & METAL BRACKETS  
• WOOD PAINTED SIGN W/ GOOSENECK LAMPS  
• PEDESTRIAN SIGN HANGING FROM METAL BRACKETS

• SECOND FLOOR ADDN  
• REFRACTABLE CANVAS AWNING  
• PAINTED WOOD SIGN  
• GOOSENECK SIGN LIGHTING  
• REMOVE DEFUNCT ALARM BOX

• FACADE - REMOVE SHINGLES RE-STUCCO  
• ADD CORNICE, ARTICULATED PILASTERS & BASE  
• DIVIDED LIGHT WINDOWS W/ HEAD & SILL  
• PAINTED WOOD SIGN  
• RESTORE HISTORIC DOORS & STOREFRONT WINDOW  
• PLANTER @ STOREFRONT

• ARCHITECTURAL FIXTURE UNDER CANOPY  
• SIGN - PAINTED METAL W/ SHAPED PROFILE  
• SIGN - L GRILLAGE - GOOSENECK FIXTURES  
• REMOVE SODA MACHINES & WINDOW AC (VENDING INSIDE)  
• PAINT BASE DARK  
• CARRIAGE LIGHTS @ GARAGE DOOR  
• REPLACE PRICE SIGN W/ WHITE SIGN & BLACK LETTERS  
• REPLACE EXPOSED FLUORESCENT FIXTURE W/ SIMILAR LEGGED FIXTURE

DRIVEWAY STRUCTURE  
OWNER - WYSTER CORP.

#3058 - ANTIQUE VILLAGE  
OWNER - WYSTER CORP.

#3062 - ANTIQUE VILLAGE  
OWNER - WYSTER CORP.

#3072-76 ANTIQUE VILLAGE  
OWNER WYSTER CORP.

#3784 RJG STORE  
OWNER - CALVIN T & P.H. MILANO ET AL.

#3786 ANTIQUE STORE  
OWNER - PAUL & COPENG

#3794 GAS STATION  
OWNER ROBERT & V.A. ORR

Department of Housing and Community Development  
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21201  
Phone 410.685.2202 Fax 410.685.2203

PROJECT NAME  
KENSINGTON FACADE  
CONCEPT DESIGN

DRAWING TITLE  
PROPOSED STREETSCAPE  
ELEVATION

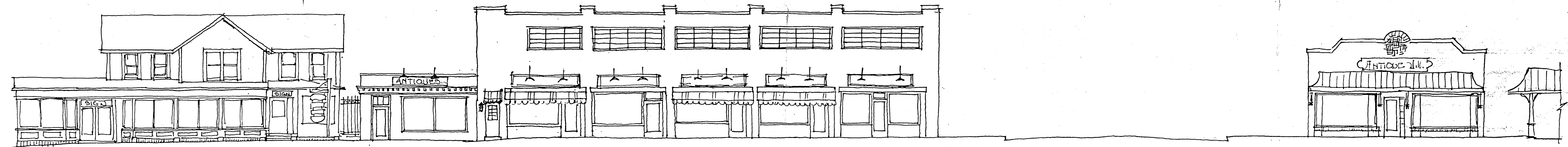
PROJ. NO.	960701	SHEET NUMBER	A3
DATE	12.20.96		
SCALE	1/8" = 1'-0"		
REVISIONS			

- PROVIDE HANGING BRACKET/POST FOR FREESTANDING SIGN
- FACE CONCRETE CURB WITH BRICK TO MATCH HEIGHT & MATERIALS OF EXISTING PLANTING BED.
- PROVIDED HANGING PAINTED WOOD SIGN @ BOTH ENTRIES W/ CONCEALED LIGHTING
- REMOVE ROOFTOP SIGN
- RELOCATE GAS METER

- ADD ARCHITECTURAL CORNICE OVER WOOD HALERS
- PAINTED WOOD SIGN W/ GOOSENECK LAMPS
- REMOVE TRANSOM A/C

- ADD CRENELATIONS TO PARAPET TO EXPRESS BUILDING STRUCTURAL GRID
- PAINTED WOOD SIGN W/ GOOSENECK LAMPS
- RETRACTABLE CANVAS AWNING @ EACH STORE
- HALF LIGHT DOOR W/ CANOPY & LIGHT @ ENTRY TO SECOND FLOOR
- REMOVE WINDOW A/C
- RUN CONDUIT INSIDE BUILDING

- MOVE SIGN BELOW ORNAMENTAL BRICKWORK
- PAINTED WOOD SIGN-NEW
- CANOPY W/ STANDING SEAM ROOFING & METAL BRACKETS
- REMOVE WOOD POST



#3730-ANTIQUE STORE.  
OWNER: VICTOR ASSOCIATES  
WALPOFF INDUSTRIES

#3734-ANTIQUE STORE  
OWNER: VICTOR ASSOCIATES  
WALPOFF INDUSTRIES

#3736-48 HOWARD STREET  
OWNER: MARY WHITLOW ET AL.

FAWCET STREET

#3050-ANTIQUE VILLAGE  
OWNER: WYSTER CORP.

Department of Housing and  
Community Development  
Division of Community Development  
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Baltimore, Maryland  
21201

Phone: 410.685.2022 Fax: 410.685.2023

PROJECT NAME  
KENSINGTON FACADE  
CONCEPT DESIGN

DRAWING TYPE  
PROPOSED STREETSCAPE  
ELEVATION

PROJ. NO. 980701 SHEET NUMBER:

DATE 12.20.96

SCALE 1/4"=1'-0"

REVISIONS:

A4



DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS

Douglas M. Duncan  
*County Executive*

June 3, 1997

Elizabeth B. Davison  
*Director*

Gwen Marcus Wright, Coordinator  
Historic Preservation Commission  
8787 Georgia Avenue  
Silver Spring, MD 20910

Subject: Kensington Commercial Area Market Analysis and Revitalization Strategy

Dear Gwen:

The Department of Housing and Community Affairs is pleased to provide you with the enclosed new publication Kensington Commercial Area Market Analysis and Revitalization Strategy. This report was prepared as part of the work program for the Kensington Revitalization Project. Also enclosed is an executive summary.

The report provides a description of existing conditions (recent market trends, business supply, competitive business supply) in the Kensington commercial area. It presents market opportunities and constraints. It recommends store types that would enhance the existing retail mix. The report also suggests revitalization strategies and translates them into an implementation plan with an annual work program.

The report is intended to give sharper focus to the revitalization effort in Kensington for the County, the Town, property owners and merchants. Additionally, it is hoped that the report will be a resource for property owners in selecting new tenants and to merchants in their quest to capture market share.

Should you have any questions or comments on this report, please contact me at (301) 217-3647.

Sincerely

Marian V. Hershenson, AICP  
Kensington Commercial Revitalization  
Project Manager

Enc.

**Division of Community Development**

Federal Programs, 301/217-3620, FAX 301/217-3653 • Planning and Commercial Revitalization, 301/217-3650, FAX 301/217-3060

51 Monroe Street • Rockville, Maryland 20850-2419



**KENSINGTON COMMERCIAL AREA  
MARKET ANALYSIS  
AND REVITALIZATION STRATEGY**

**EXECUTIVE SUMMARY**

**PREPARED FOR:**

**MONTGOMERY COUNTY  
DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS**

**PREPARED BY:  
BASILE BAUMANN PROST & ASSOCIATES, INC.**

**APRIL 1997**

## EXECUTIVE SUMMARY

The following items summarize the key findings and conclusions of the Kensington Commercial Area Market Analysis and Revitalization Strategy Report.

### BACKGROUND

- Basile Baumann Prost & Associates, Inc. (BBP Associates) has been engaged by Montgomery County Department of Housing and Community Affairs (DHCA) to prepare a market study that analyzes retail, service and office activity in the entire Kensington Commercial Area (KCA). BBP Associates also has been engaged to develop a commercial revitalization strategy to stabilize and revitalize the KCA.
- This report summarizes the existing conditions/trends, market opportunities and constraints and formulates a commercial revitalization strategy for the KCA.

### PURPOSE

- The purpose of the market analysis and revitalization strategy is:
  - to reinforce and augment the economic base of the KCA;
  - to strengthen the visual character of the KCA;
  - to respect and enhance the historic district;
  - to improve the pedestrian environment;
  - to improve traffic circulation;
  - to improve parking arrangements;
  - to develop an image for the KCA using consistent signage for directional and gateway signs and other means;
  - to encourage building rehabilitation and beautification;
  - to encourage the development of new businesses to complement and strengthen the unique antique market and related businesses that have a regional market; and
  - to encourage the development of businesses that are needed to strengthen the local retail market which serves the Town of Kensington and residents of surrounding communities.

**WORK COMPLETED**

- In preparing this report, BBP Associates:
  - reviewed background data;
  - conducted field surveys of the KCA and vicinity;
  - undertook a series of interviews, meetings, surveys and on-site visits;
  - evaluated real estate conditions, lease terms and development plans;
  - examined market conditions and trends;
  - identified market trade areas;
  - analyzed recent trends and future projections of population and household characteristics, expenditure patterns, retail sales;
  - formulated a revitalization strategy; and
  - prepared an implementation plan or action plan for an immediate (1997), near-term (1998-1999) and mid-term (2000-2005) time frame.

**EXISTING CONDITIONS**

- A series of interviews, meetings and surveys served to identify area goals, objectives, opportunities and constraints.
  - Business interviews highlighted both advantages and disadvantages of KCA as a business location.
  - The majority of businesses surveyed cited good access from other areas and a convenient location as the top two advantages.
  - Lack of parking, traffic congestion, lack of directory and directional signs and poor street signage represented the top disadvantages.
  - The main desires expressed by businesses were for better pedestrian and auto circulation and the need for a restaurant (possibly serving alcoholic beverages) to attract more customers.
- Several community meetings were held with representatives from the county and the town and with members of the residential and business communities. The attendees reiterated the conclusions gathered from the interviews and surveys with the main needs for Kensington's future as follows:

## **Basile Baumann Prost & Associates, Inc.**

- improved streetscape, including better signage (gateway, directional and directory) and pedestrian access to help improve the town image;
  - better advertising, marketing and promotion to help overall market recognition;
  - enhanced business and government cooperation;
  - more variety of stores while still enhancing the existing uses within the KCA;
  - better use of existing parking and possibly expanding parking; and
  - the need for a sit down restaurant, especially one allowed to serve alcohol.
- A survey was distributed to 600 households residing with the Town of Kensington and forty-three responses were received.
    - Over half of the respondents (56 percent) to resident surveys noted they are satisfied to very satisfied with the current retail offerings.
    - Resident respondents expressed a desire for selected small-scale complementary retail uses. In rank order these uses include a restaurant, bakery/cafe, variety store, Safeway improvements and a bookstore.
    - At present, the area residents utilize Kensington stores primarily to purchase groceries and personal services.
  - The community/business meetings, business interviews and business surveys also served to identify the areas market trends.
    - As a result of increasing competition throughout the region, retail sales (in current dollars not adjusted for inflation) in Kensington have remained steady or decreased slightly (exclusive of the Safeway). If sales were adjusted for inflation (i.e., in constant or “real” dollars) sales have actually declined. This has contributed to a weakness in lease rates and a diminished market image.
    - Kensington appears to be in a relatively “fragile” retail state. Although the area does not appear to be “broken,” revitalization efforts and marketing and merchandising are needed.

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- Revitalization will be required simply to maintain the competitive market position of Kensington within the Montgomery County retail market place.
- The office market outlook is good with relatively low vacancy rates and competitive lease rates.
- Limited vacant land constrains future expansion of office and retail space.

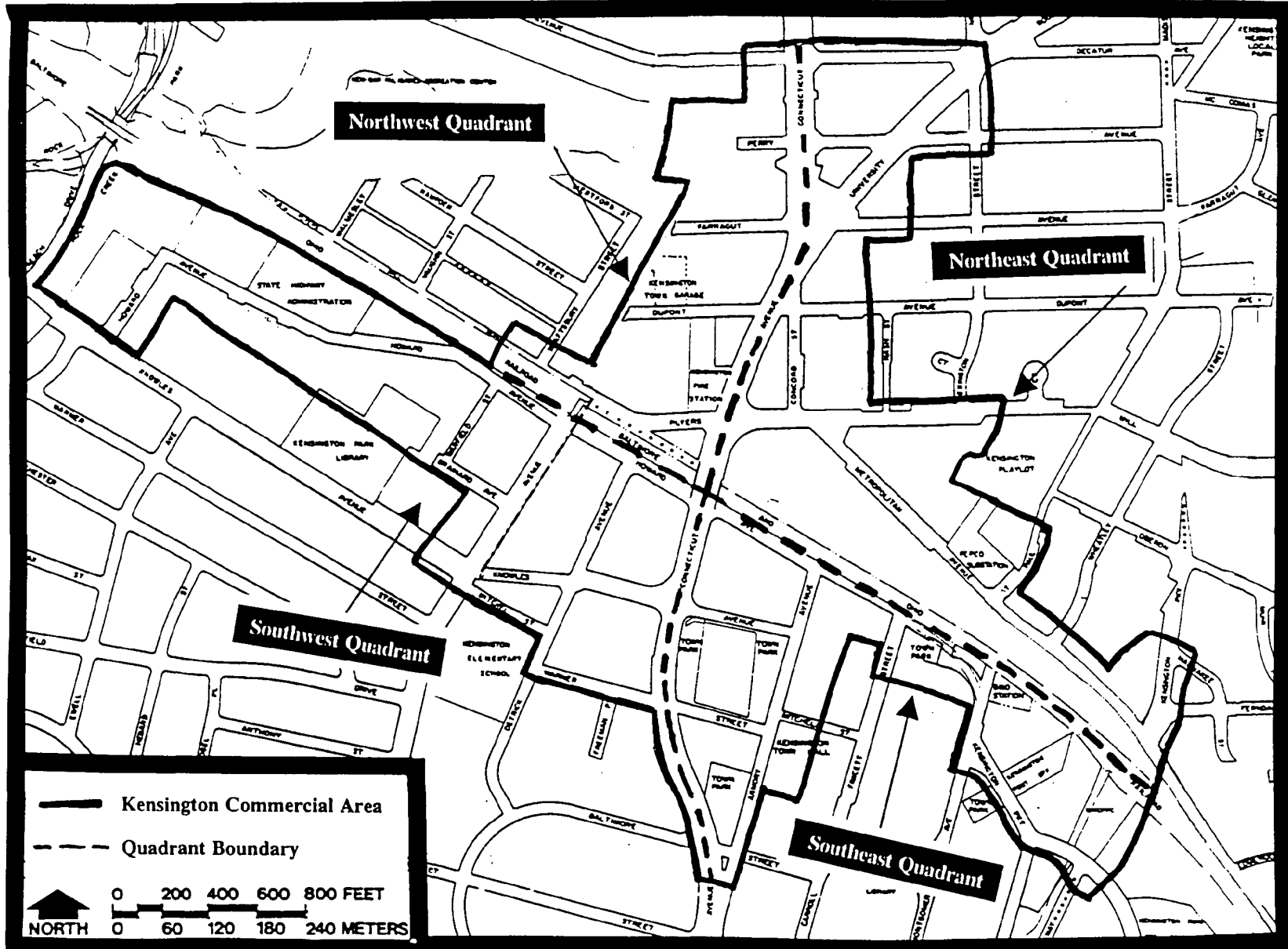
### **CURRENT PUBLIC/PRIVATE PLANS**

- There are no known plans in the Kensington area for large-scale redevelopment. However, there has been limited revitalization activity centered around the opening of Cafe Monet. The facade of the Kensington Shopping Center (Connecticut and Knowles Avenues) has been remodeled.
- There are also plans/proposals for Safeway improvements.
- Pending improvements at the Sunoco have been temporarily withdrawn.
- The design process is currently underway for proposed county funded streetscape improvements.
- The town is applying for designation under the state's Neighborhood Business Development Program that would make Kensington eligible for certain state grants and business loans.

### **EXISTING BUSINESS INVENTORY**

- The study area for this report is the KCA, as shown in Figure S-1. It includes all businesses located within the town as well as businesses located to the west of the town limits on Howard Avenue and to the north along Connecticut Avenue and University Boulevard from Perry to Decatur Avenues.
- The study area is divided into four quadrants separated east to west by Connecticut Avenue and north to south by the railroad tracks, with a special focus on the southeast quadrant along Howard Avenue (east).
- The existing business inventory in Kensington contains a variety of retail, personal and business service establishments.

FIGURE S-1  
 QAUDRANT IDENTIFICATION  
 KENSINGTON COMMERCIAL AREA



## **Basile Baumann Prost & Associates, Inc.**

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- Auto repair and personal services are also prevalent within Kensington.
- Based upon field surveys conducted by BBP Associates in the summer of 1996, there is a total of approximately 978,000 square feet of business inventory within the KCA, as shown in Table S-1.
- By category, there is approximately 266,000 square feet of retail uses; 613,000 square feet of office uses; 16,000 square feet of personal services; 58,000 square feet of auto repair services; and 25,000 square feet of miscellaneous (warehouse and industrial use included) space.
- From our field surveys, interviews and business surveys, the key competitors for KCA's retail trade depend greatly on the type of goods desired, for example:
  - neighborhood retail (e.g., food, drug, personal services) competition includes Chevy Chase, Bethesda and Wheaton;
  - comparison shoppers goods (e.g., apparel, furniture and home furnishings) competition includes White Flint Mall, Montgomery Mall, Rockville Pike and Wheaton Plaza;
  - specialty retail (e.g., restaurants) competition includes Bethesda, Chevy Chase, Wheaton and Washington, DC; and
  - principal antique competition includes Savage Mills, Ellicott City, Frederick, New Market and Old Town Alexandria.

### **MARKET AREAS**

- Through the community interviews and surveys, location of competing retail facilities and physical boundaries, three market trade areas were identified. The boundaries include:
  - The primary trade area (which is applicable mostly to neighborhood retail and personal services) is defined by a "walkshed" that which includes the entire town of Kensington (see Figure S-2).
  - The secondary trade area (which is applicable to most comparison shoppers goods) surrounds the town at an approximately a 1.5 to 2 mile radius. These boundaries include Randolph Road to the north, the Capital Beltway to the

**TABLE S-1  
TOTAL EXISTING BUSINESS INVENTORY  
FOR THE  
KENSINGTON COMMERCIAL AREA  
SUMMER, 1996**

<u>Business Type</u>	<u>Total Establishments</u>	<u>Estimated Square Feet</u>
<i>Retail Trade 1/</i>		
Building Materials & Supplies	4	80,000
Food & Drug Stores	8	43,500
Auto Dealers & Service Stations	11	18,500
Apparel & Accessories	7	6,250
Furniture & Home Furnishings	17	25,000
Eating & Drinking	12	13,800
Antiques	23	23,000
Miscellaneous Retail	<u>34</u>	<u>55,650</u>
<b>Total Occupied</b>	<b>116</b>	<b>265,700</b>
<i>Vacant</i>	<u>14</u>	<u>25,350</u>
<b>TOTAL RETAIL</b>	<b>130</b>	<b>291,050</b>
<i>Personal Services</i>	17	16,300
<i>Auto Repair Services</i>	27	57,700
<i>Business Services 2/</i>		
Professional Office Buildings		
-- Occupied		446,768
-- Vacant		29,532
-- <b>Total</b>	<b>15</b>	<b>476,300</b>
Other Offices	14	25,450
Business Services	41	90,650
Contractors	<u>11</u>	<u>20,100</u>
<b>TOTAL</b>	<b>81</b>	<b>612,500</b>
<b>GRAND TOTAL</b>	<b>255</b>	<b>977,550</b>

NOTE: The inventory does not include wholesale or industrial uses.

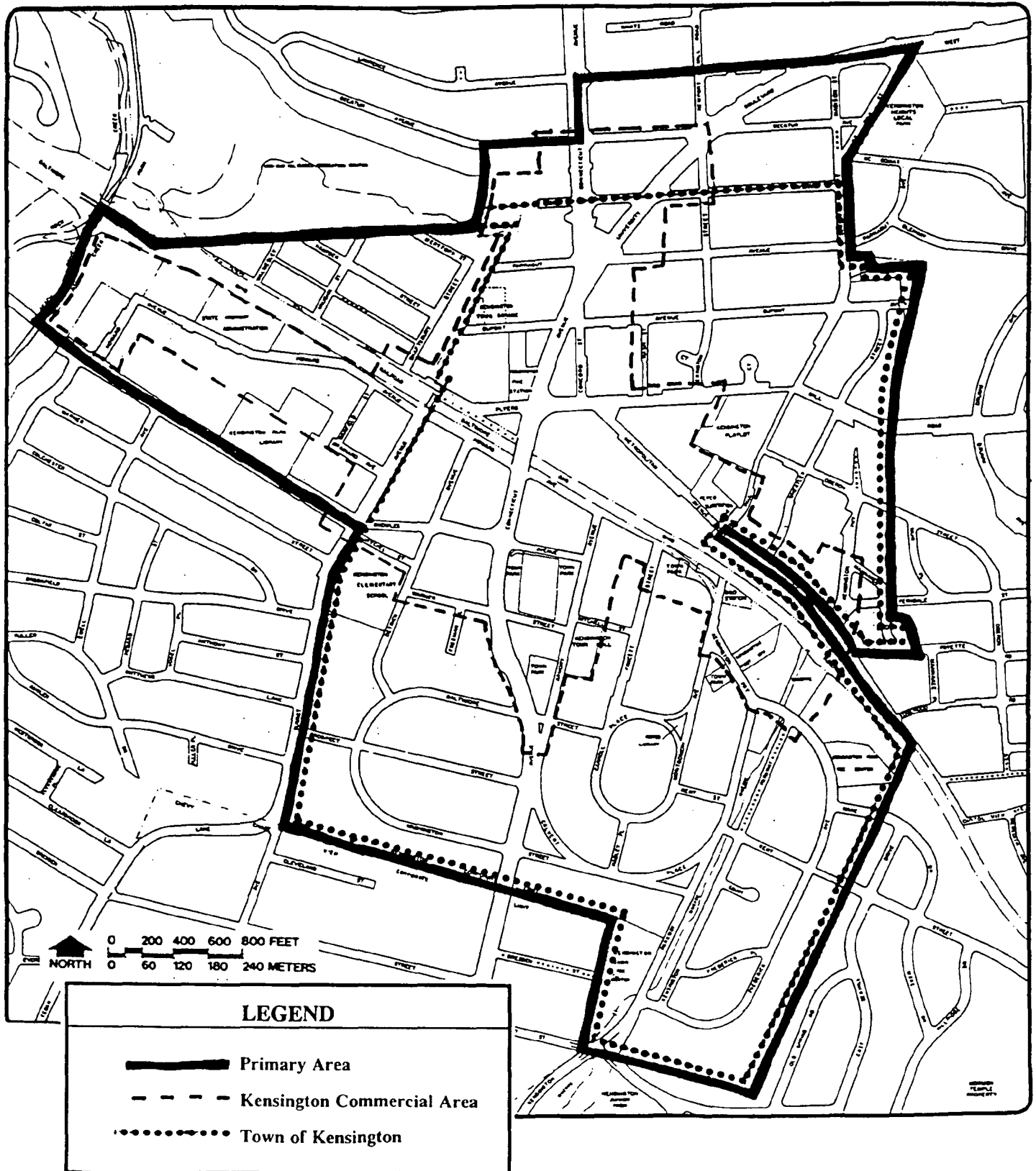
1/ Retail located on first floor.

2/ Business services located on multi-levels.

Source: Based on field surveys by Basile Baumann Prost & Associates, Inc.



FIGURE S-2  
PRIMARY TRADE AREA



south, Georgia Avenue to the east and Rockville Pike to the west (see Figure S-3).

- The larger tertiary area (which was derived from and applies primarily to antiques) includes both the primary and secondary trade areas but extends the boundaries approximately 3 miles to the east, 6 miles to the west and 2 miles to the south (see Figure S-4). The boundaries for this area include:
  - North Border: Glen Road (from Piney Meeting House Road) east to Falls Road; Falls Road south to Democracy Boulevard; Democracy Boulevard east to Old Georgetown Road; Old Georgetown road south to the Beltway; the Beltway east to Rockville Pike; Rockville Pike north to Randolph Road; Randolph Road east to New Hampshire Avenue.
  - East Border: New Hampshire Avenue south to Piney Branch Road.
  - South Border: Piney Branch Road west to Sligo Avenue; Sligo Avenue west to Georgia Avenue; Georgia Avenue south to the District of Columbia line; District of Columbia line west to Brookville Road; Brookville Road north to Bradley/Goldsboro Boulevard; Bradley/Goldsboro Boulevard west to McArthur Boulevard; McArthur Boulevard west to Falls Road.
  - West Border: Falls Road north to River Road; River Road west to Piney Meeting House Road; Piney Meeting House Road north to Glen Road.

#### ECONOMIC/DEMOGRAPHIC TRENDS

- The Washington Metropolitan Statistical Area (MSA) and Montgomery County have both continued to see a steady population growth between 1980 and 1995. However, Montgomery County is projected to maintain that growth pace until the year 2000 while the MSA is projected to decrease annually.
- The primary market area population has remained stable, growing at an annual rate of 0.8 percent between 1990 and 1995 and is projected to keep that pace through the year 2000 (see Table S-2).
- The secondary market area has remained relatively stable with a modest decrease in population between 1990 and 1995 (at an annual rate of 0.9 percent) and is projected to continue to decline by 0.6 percent per year through the year 2000.

FIGURE S-3  
SECONDARY TRADE AREA

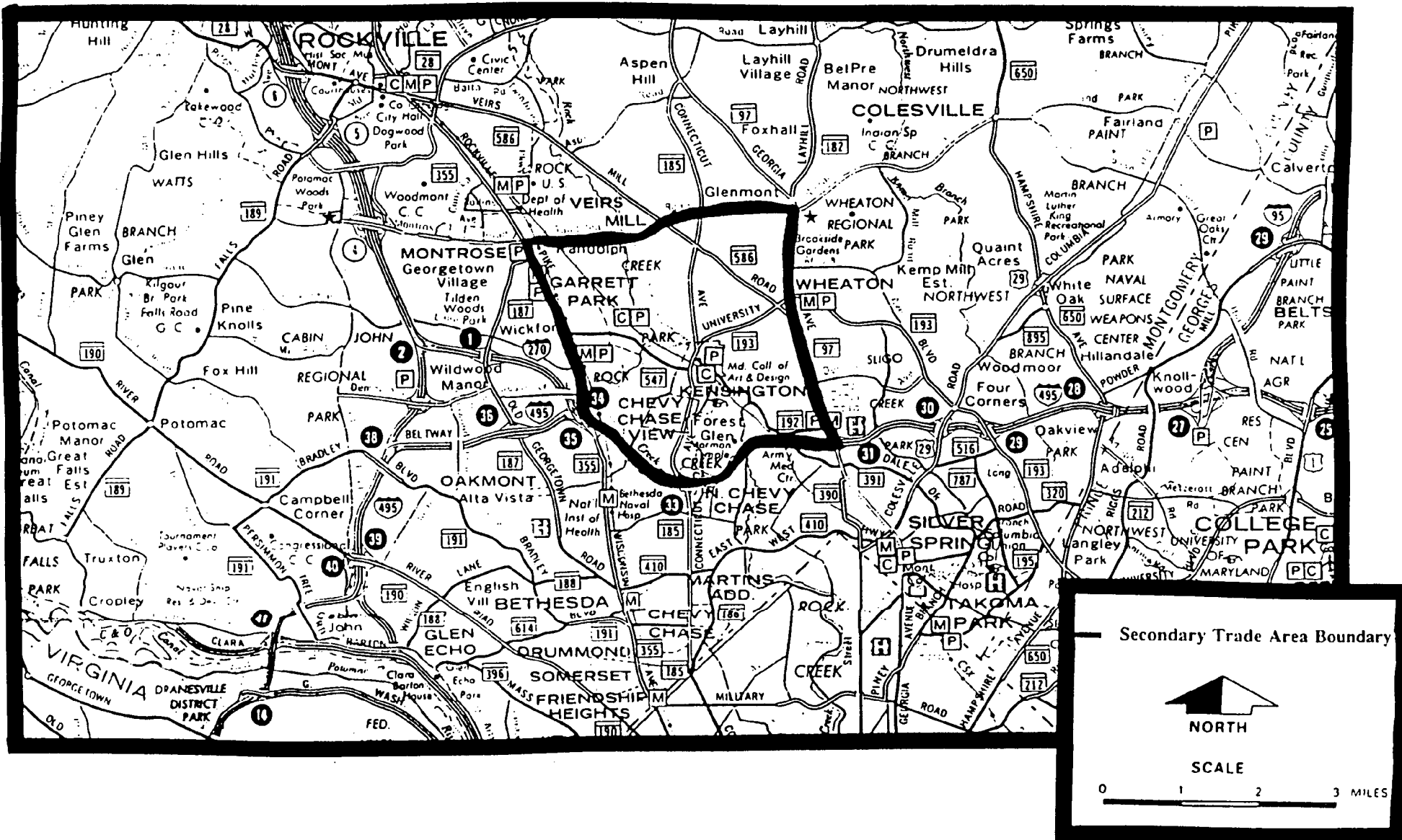
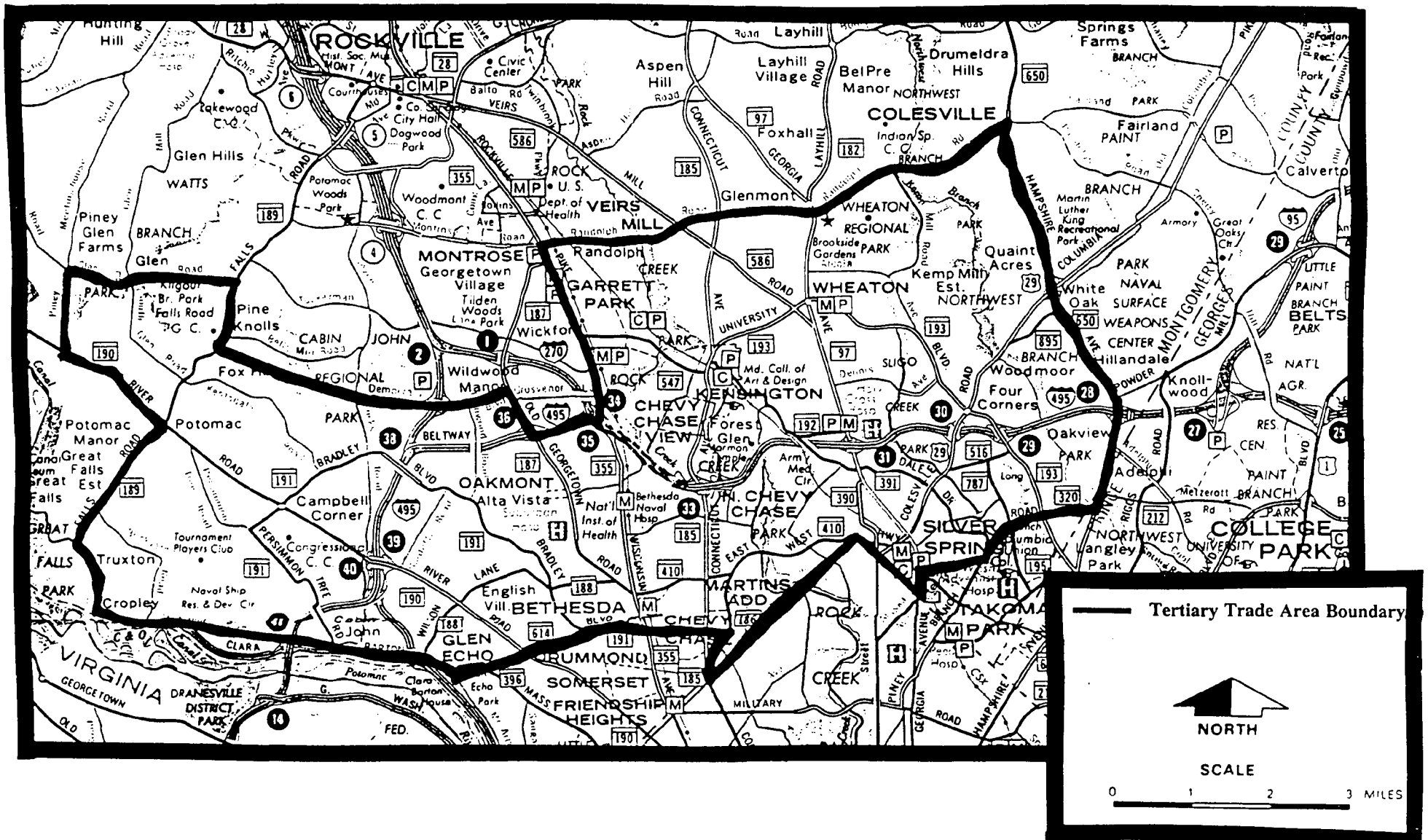


FIGURE S-4  
TERTIARY TRADE AREA



**TABLE S-2  
POPULATION TRENDS AND PROJECTIONS  
WASHINGTON MSA, MONTGOMERY COUNTY AND  
PRIMARY, SECONDARY AND TERTIARY TRADE AREAS  
1980, 1990, 1995 AND 2000**

<b>Area</b>	<b>1980</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>
Washington MSA	3,250,900	3,923,574	4,204,500	4,477,900
Montgomery County	579,055	757,027	810,217	859,235
Primary Area	1,827	1,713	1,782	1,857
Secondary Area	48,224	47,881	45,707	44,343
Tertiary Area	215,201	229,586	225,955	225,000

<b>Area</b>	<b>Annual Change</b>					
	<b>1980-1990</b>		<b>1990-1995</b>		<b>1995-2000</b>	
	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>
Washington MSA	67,267	2.1%	56,185	1.4%	54,680	1.3%
Montgomery County	17,797	3.1%	10,638	1.4%	9,804	1.2%
Primary Area	-11	-0.6%	14	0.8%	15	0.8%
Secondary Area	-34	-0.1%	-435	-0.9%	-273	-0.6%
Tertiary Area	1,439	0.7%	-726	-0.3%	-191	-0.1%

Source: Washington Council of Government; Claritas; Basile Baumann Prost & Associates, Inc.

## Basile Baumann Prost & Associates, Inc.

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- The tertiary market area also has remained relatively stable with modest decreases in population between 1990 and 1995 (at an annual rate of 0.3 percent) and is projected to decline slightly through the year 2000 at 0.1 percent per year.
- The median income of the primary area increased in current dollars (not adjusted for inflation) by 14.0 percent from \$49,145 to \$55,903 between 1990 to 1995 (see Table S-3).
- The highest 1995 median income is located within the tertiary area at \$60,338. That is slightly higher than the Montgomery County 1995 median income of \$60,163 and over \$4,000 higher than both the secondary and primary areas with \$56,584 and \$55,903, respectively.
- Other population characteristics include: the majority of people are white, non-Hispanics for all areas but particularly so in the primary market area (90 percent in the primary area versus 70.2 and 67.7 percent, respectively, in the secondary and tertiary areas).
- The primary area has a relatively high proportion of its population in the 65 years and over age group (25.0 percent versus 15.4 percent and 15.0 percent, respectively, for the secondary and tertiary areas).
- The primary market area has a significantly lower labor force participation rate of 59.9 percent vis-à-vis the secondary and tertiary trade areas, 74.7 and 72.8 percent, respectively.

### MARKET EVALUATION

- The primary area's total retail and personal service sales (1995) are estimated at \$71 million, an average of \$252 per square foot (see Table S-4).
- The majority of sales are made in food stores (\$19.3 million) and miscellaneous retail establishments (\$11.0 million). Average sales per square foot for food stores and miscellaneous retail are \$517 and \$198, respectively.
- The primary market captures approximately 4.0 percent of the retail expenditures of the secondary market area, and accounts for 17.4 percent of the retail sales and 19.0 percent of the retail establishments within the secondary area.

TABLE S-3  
HOUSEHOLD INCOME DISTRIBUTION  
MONTGOMERY COUNTY AND  
PRIMARY, SECONDARY AND TERTIARY TRADE AREAS  
1990 AND 1995  
(Current \$)

	1990		1995		Percent Change 1990-1995
	No.	%	No.	%	
<b>Montgomery County</b>					
Under \$10,000	12,066	4.3%	12,668	4.2%	5%
\$10,000 to \$19,999	18,967	6.7%	17,819	5.8%	-6%
\$20,000 to \$24,999	13,405	4.7%	12,683	4.2%	-5%
\$25,000 to \$34,999	31,817	11.3%	30,647	10.1%	-4%
\$35,000 to \$49,999	50,450	17.9%	47,574	15.6%	-6%
\$50,000 to \$74,999	69,545	24.6%	71,715	23.5%	3%
\$75,000 and Over	85,978	30.5%	111,659	36.6%	30%
<b>Median</b>	<b>\$54,163</b>		<b>\$60,163</b>		<b>11%</b>
<b>Primary Area</b>					
Under \$10,000	27	4.0%	30	4.2%	11%
\$10,000 to \$19,999	62	9.1%	54	7.6%	-13%
\$20,000 to \$24,999	43	6.3%	34	4.8%	-21%
\$25,000 to \$34,999	68	10.0%	69	9.7%	1%
\$35,000 to \$49,999	147	21.6%	123	17.3%	-16%
\$50,000 to \$74,999	136	20.0%	158	22.2%	16%
\$75,000 and Over	198	29.1%	245	34.4%	24%
<b>Median</b>	<b>\$49,145</b>		<b>\$55,903</b>		<b>14%</b>
<b>Secondary Area</b>					
Under \$10,000	733	4.0%	702	3.9%	-4%
\$10,000 to \$19,999	1,377	7.5%	1,197	6.7%	-13%
\$20,000 to \$24,999	9,977	54.2%	812	4.6%	-92%
\$25,000 to \$34,999	2,237	12.2%	2,001	11.2%	-11%
\$35,000 to \$49,999	3,527	19.2%	3,019	16.9%	-14%
\$50,000 to \$74,999	5,083	27.6%	4,423	24.8%	-13%
\$75,000 and Over	4,435	24.1%	5,606	31.5%	26%
<b>Median</b>	<b>\$51,269</b>		<b>\$56,584</b>		<b>10%</b>
<b>Tertiary Area</b>					
Under \$10,000	4,095	4.5%	3,980	4.4%	-3%
\$10,000 to \$19,999	6,821	7.5%	5,900	6.5%	-14%
\$20,000 to \$24,999	4,415	4.8%	4,170	4.6%	-6%
\$25,000 to \$34,999	10,232	11.2%	9,245	10.2%	-10%
\$35,000 to \$49,999	15,354	16.8%	13,513	14.9%	-12%
\$50,000 to \$74,999	20,865	22.9%	19,502	21.5%	-7%
\$75,000 and Over	29,483	32.3%	34,342	37.9%	16%
<b>Median</b>	<b>\$54,479</b>		<b>\$60,388</b>		<b>11%</b>

Source: Claritas; Basile Baumann Prost & Associates, Inc.

**TABLE S-4**  
**ESTIMATED RETAIL SALES PER SQUARE FEET**  
**PRIMARY TRADE AREA**  
**1995**

<b>Store Type</b>	<b>Number of Establishments</b>	<b>Estimated Square Feet</b>	<b>Estimated Sales</b>	<b>Estimated Sales/Square Feet</b>
Building Materials & Supplies	4	80,000	\$8,400,000	\$105
Food Stores	6	37,300	\$19,300,000	\$517
Drug Stores	2	6,200	\$3,700,000	\$597
Auto Dealers	1	2,500	\$2,300,000	\$920
Auto Supply & Service Stations	10	16,000	\$9,700,000	\$606
Apparel & Accessories	7	6,250	\$1,600,000	\$256
Furniture & Home Furnishings	17	25,000	\$5,800,000	\$232
Eating & Drinking	12	13,800	\$4,000,000	\$290
Antiques	23	23,000	\$3,200,000	\$139
Miscellaneous Retail	34	55,650	\$11,000,000	\$198
Personal Services	17	16,300	\$2,100,000	\$129
<b>TOTAL/AVERAGE</b>	<b>133</b>	<b>282,000</b>	<b>71,100,000</b>	<b>\$252</b>

Source: Claritas; Basile Baumann Prost & Associates, Inc.



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- Failure to initiate revitalization efforts would continue and accelerate the downward trend in retail sales. This could, in turn, destroy the fragile retail environment, further reducing the already small critical retail mass. Negative impacts on the KCA's retail including potential increased vacancies and disinvestment may also impact the surrounding residential area.
- Based on the market area's stable population and expenditure base and increased retail competition, revitalization efforts will be necessary just to stabilize and maintain current retail sales levels.
- Marketing objectives should focus on maintaining the existing specialty niche base of antiques and auto repairs while providing selected complementary retail offerings to enhance the capture rate of the primary market area's resident expenditures.
- Based upon implementation of a revitalization program, market projections were conducted with assumptions that ranged from maintaining to slightly expanding retail capture rates.
- Projections took into consideration differential capture rates, sales levels and sales per square foot productivity. A combination of increased sales volumes for existing stores and residual sales potential to support new stores was projected.
- Over the next five years, BBP Associates estimates that an additional 17,000 to 26,000 square feet of retail and service space could be supported in the KCA. This would result in average sales per square foot of approximately \$272 (see Tables S-5 and S-6).
- If sales increased as projected, and there was not any expansion of retail space, the increased sales would be absorbed by the existing retail inventory. Assuming no expansion in retail space over the next five years, the existing inventory sales per square foot productivity would rise from \$252 to \$289. Most likely, a combination of the new retail space and increased retail sales productivity would be achieved.
- Over the subsequent five-year period, an additional 14,000 to 27,000 square feet of retail could be supported generating average sales per square foot of approximately \$300.

**TABLE S-5  
SUPPORTABLE RETAIL SPACE  
WITH CONSTANT CAPTURE RATES  
KENSINGTON COMMERCIAL AREA  
1995 - 2000 and 2000 - 2005  
(Current \$)**

<b>1995</b>	
Sales	\$68,800,000
Square Footage	279,500
Sales/Square Feet	\$246

**1995 to 2000**

1995 Square Footage	279,500
2000 Sales/Square Feet for 1995 Inventory 1/	\$271
2000 Sales for 1995 Inventory	\$75,680,000
2000 Total Projected Sales 2/	\$80,727,600
Residual Sales Potential 1995 to 2000	\$5,047,600
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$298
Supportable Square Feet 1995 to 2000	16,900
Average Sales per 2000 Inventory	\$272

**2000 to 2005**

2000 Square Footage	296,400
2005 Sales/Square Feet for 2000 Inventory 4/	\$300
2005 Sales for 2000 Inventory	\$88,800,360
2000 Total Projected Sales 2/	\$93,295,100
Residual Sales Potential 1995 to 2000	\$4,494,740
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$330
Supportable Square Feet 2000 to 2005	13,600
Average Sales per 2005 Inventory	\$301

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE S-6**  
**SUPPORTABLE RETAIL SPACE**  
**WITH INCREASED CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	\$68,800,000
Square Footage	279,500
Sales/Square Feet	\$246

**1995 to 2000**

1995 Square Footage	279,500
2000 Sales/Square Feet for 1995 Inventory 1/	\$271
2000 Sales for 1995 Inventory	\$75,680,000
2000 Total Projected Sales 2/	\$83,510,600
Residual Sales Potential 1995 to 2000	\$7,830,600
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$298
Supportable Square Feet 1995 to 2000	26,300
Average Sales per 2000 Inventory	\$273

**2000 to 2005**

2000 Square Footage	305,800
2005 Sales/Square Feet for 2000 Inventory 4/	\$300
2005 Sales for 2000 Inventory	\$91,861,660
2000 Total Projected Sales 2/	\$100,751,700
Residual Sales Potential 1995 to 2000	\$8,890,040
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$330
Supportable Square Feet 2000 to 2005	26,900
Average Sales per 2005 Inventory	\$303

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

## **Basile Baumann Prost & Associates, Inc.**

- If all the projected sales volume increase over the next ten years were absorbed by the existing 1995 inventory, sales per square foot would equal an overall average of \$345. Once again, we perceive a combination of an increase in existing sales and modest additional space would likely be experienced.
- New supportable retail square footage and establishments, as shown in Table S-7, include:
  - eating and drinking space with a next five year potential of 2,800 to 4,200 square feet and a subsequent five year potential of an additional 800 to 3,400 square feet;
  - personal services with a next five year potential of 1,700 to 1,800 square feet and a subsequent five year potential of an additional 800 to 900 square feet;
  - antique and home furnishing space with a next five year potential of 2,100 to 3,300 square feet and a subsequent five year potential of an additional 1,800 to 3,300 square feet;
  - miscellaneous retail with a next five year potential of 2,800 to 10,700 square feet and a subsequent five year period potential of an additional 3,000 to 13,300 square feet;
  - food and drug stores with a next five year potential of 2,100 square feet and a subsequent five year potential of an additional 2000 square feet; and
  - building material and auto supply stores with a next five year potential of 500 square feet and a subsequent five year potential of an additional 400 square feet.
- In the near term it is likely that only one or two additional establishments each, of personal services, antique and home furnishings, and food and drug stores would be attracted to KCA. From two to five additional small miscellaneous retail, apparel and accessory stores are likely to be attracted. Overall, the estimated near-term new supportable square footage would translate into 7 to 17 additional establishments.
- Over the 2000 to 2005 period the estimated additional supportable square footage would be translated into 4 to 17 new establishments. The establishments would generally be in the approximately 1,000 to 3,000 square foot per establishment size range. Most of the new stores will be in the miscellaneous retail, apparel and accessory category. As shown in the table a limited of number of other store types would likely be developed.

**TABLE S-7**  
**RANGE OF NEW SUPPORTABLE RETAIL SQUARE FEET & ESTABLISHMENTS**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**

<b>Category</b>	<b>New Supportable Square Feet</b>		<b>Typical Store Size Square Feet *</b>	<b>Number of New Supportable Stores</b>	
	<b>1995 - 2000</b>	<b>2000 - 2005</b>		<b>1995 - 2000</b>	<b>2000 - 2005</b>
Eating & Drinking	2,800 - 4,200	800 - 3,400	1,200 - 2,800	2 - 3	0 - 2
Personal Services	1,700 - 1,800	800 - 900	500 - 1,300	1 - 3	0 - 1
Antiques & Home Furnishings	2,100 - 3,300	1,800 - 3,300	1,000 - 3,300	1 - 3	1 - 3
Misc. Retail & Apparel & Accessories	2,800 - 10,700	3,000 - 13,300	1,000 - 3,000	2 - 5	2 - 8
Food & Drug Stores	2,100	2,000	1,000 - 10,000	1 - 2	1 - 2
Building Material & Auto Supply	800	400	1,500 - 5,000	0 - 1	0 - 1

\* Based on typical ULI Neighborhood Center store type adjusted for the Town of Kensington.

Source: Urban Land Institute; Basile Baumann Prost & Associates, Inc.

**MARKET OPPORTUNITIES/CONSTRAINTS**

- Market opportunities for the KCA include:
  - convenient location to the Beltway;
  - unique, historic “small town” image;
  - affordable retail and office space;
  - specialty antique niche;
  - strong sense of community; and
  - a relatively affluent area.
  
- Market constraints for the KCA include:
  - significant commercial competition;
  - physical/housekeeping problems;
  - lack of directory and directional signage;
  - limited public parking availability;
  - poor access to the shopping areas;
  - major physical boundaries separating the shopping areas;
  - weak merchandising and marketing; and
  - prohibition of restaurants serving alcoholic beverages.

**REVITALIZATION STRATEGIES**

- As the study process evolved, the work effort changed from a prestudy presumption of specific physical redevelopment opportunity areas (as noted in part in the 1991 Revitalization Study - where only the public sector funded Armory Revitalization took place) to a focus primarily on marketing, merchandising, organizing and creating an action plan.
  
- The revitalization strategies for the KCA include:
  - focusing on neighborhood retail oriented to serve primary area residents (e.g. bakery, ice cream parlor);
  - focusing on small professional office opportunities;
  - coordinating merchandising and event programming;
  - enhancing and improving physical image and directory and directional signage;

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- maintaining and enhancing the specialized antique market niche, including a modest amount of complementary retail;
  - improving the interrelationship of the various businesses with the adjacent residential community;
  - modifying alcoholic beverage laws to facilitate sit-down restaurants; and
  - addressing the need for additional parking.
- 
- Revitalization in Kensington must emphasize the ability of the consumer to “discover” Kensington and the ability of Kensington to develop a special relationship with the consumer.
  - KCA businesses must offer personalized services to develop special relationships with a clientele that represents repeat customers from nearby locations. This should build on the particular strengths of KCA which are the existing strong antique market niche and the special small town character.
  - The revitalization approach must include directory and directional signage, physical improvements, and advertising to help the consumer “discover” Kensington.
  - Elements should include gateway directional signage to “lead” patrons from major thoroughfares (Connecticut and University Avenues) to the retail uses.
  - Detracting commercial signs should be removed where possible.
  - Strong marketing and merchandising activities to service, retain and expand the business and consumer base should also be included in the revitalization approach.
  - Revitalization efforts must address linkages among the individual commercial subareas as well as specific orientations and actions for each individual subarea. Overall activities must emphasize marketing and merchandising. KCA needs to be considered in its entirety as a singular unit rather than as a group of non-interrelated fractional business entities.
  - The overall elements of the revitalization strategies for Kensington include: physical improvements; signage; marketing and merchandising; retention and recruitment; and organization and management.

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- Physical improvements include the day-to-day maintenance and upkeep of the area. Once a project is complete a designated organization should develop a program that initiates housekeeping events on an annual basis.
- Physical improvements should convey the small town, special service image. This requires a unified design that takes advantage of the period architecture within Kensington, building upon the historic theme.
- Marketing and merchandising should include the following key elements:
  - know the competition;
  - improve service level;
  - promotions;
  - advertising;
  - public relations;
  - image enhancement; and
  - “niching” (developing specialized goods and services).
- Retention of existing businesses and recruitment of new businesses is another critical element of the revitalization program. To help recruit additional businesses the town and area retailers should work with the County Department of Economic Development (DED) to pursue business start-up loans and with local real estate brokers to promote the KCA. Retention and recruitment should also maximize any county financial incentives offered such as loan and facade easement programs and technical assistance from various organizations.
- The current Kensington Commercial Revitalization Committee primarily focuses on the Howard Avenue (east) efforts. Established by the town, it is a committee made up of merchants, property owners, residents and town officials. In order to facilitate an organization and management structure to manage the revitalization of the entire KCA, the Revitalization Committee needs to evolve into, or ultimately be complemented by, an overall coordinating agency - the “Revitalization/Steering Committee”.
- This Revitalization/Steering Committee needs to take the lead in creating a single coordinated focus for approval and implementation of a KCA wide revitalization plan. This does not mean the replacement of other organizations, but rather a central clearing



house or umbrella organization under which the various organizations can function and work together.

- The Revitalization/Steering Committee should be responsible for maintaining awareness of the project, providing needed resources, and facilitating communication between the county, town and community. The Revitalization/Steering Committee would have to manage and organize the planning process.
- The Revitalization/Steering Committee should be quite large, having representatives of all pertinent organizations and interests participating. A relatively small Executive Committee however, consisting of seven to nine persons should have overall day to day management responsibility. Membership in the Executive Committee would change over time as the prime functions and responsibilities of the organization change in accordance with the detailed work program.
- One of the Revitalization/Steering Committee's primary roles would be to serve as coordinator among the various voluntary groups. A "bottom up" grass roots (local merchants) organization that would be closer to the revitalization issues and the persons most directly impacted would be more effective than a "top down" approach (town/county) by an organization that has many other roles and responsibilities besides commercial revitalization.
- In either approach the Revitalization/Steering Committee will need, through a combination of membership dues, corporate/foundation contributions, county and town contributions, sufficient initial capitalization for approximately a two-year operational period.

#### **REVITALIZATION OPPORTUNITIES**

- At present, there is little vacant land in the KCA on which to sustain extensive new development. Any new commercial use will need to utilize the current space, with the possibility for modest expansion through infill.
- Any new retail should complement the current mix of tenants within the specific quadrants, as well as both the office and resident community.
- The office market should continue to attract a mix of small professional firms and business services.

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- Opportunities and target reuses have been identified for each of the four quadrants in the KCA.
- Howard Avenue, to the east of Connecticut Avenue, is known to many as the “heart” of Kensington and of this revitalization project. It is therefore necessary to maintain, enhance and complement the antique “niche” of the area as well as the area’s historic character.
- The town and county’s current program, which is being implemented, focuses on the Howard Avenue (east) area. The opportunities in this area are generally along Antique Row and the main roads leading to Antique Row.
- Specific recommended store types for the Howard Avenue (east) area are as follows:
  - Bedding & Accessories (SIC 571201);
  - Bedding & Linen (SIC 571905);
  - Retail Bakery (SIC 546100);
  - Ice-Cream (SIC 581202);
  - Cafe (SIC 581299);
  - Health/Specialty Food (SIC 549900);
  - China and Glass (SIC 571900);
  - Home Accessories (SIC 571900);
  - Gourmet Cookware (SIC 571900);
  - Decorative Accessories (SIC 571900);
  - Computer/Software (SIC 573400);
  - Musical Instruments (SIC 573600);
  - Hobby Shops (SIC 594599);
  - Cards and Gifts (SIC 594700);
  - Specialty Books (SIC 594200);
  - Antiques (SIC 594200);
  - Art Gallery (SIC 599999);
  - Arts and Crafts (SIC 599999);
  - Coin Shop (SIC 599900); and
  - Candle Shop (SIC 599999).
- Howard Avenue, to the west of Connecticut Avenue, is now seen as an area of warehouse antiques and auto-repair stores. This area attracts purposeful trip customers. The area is less attractive to pedestrian access and multipurpose cross shopping, as

there are no sidewalks or other pedestrian amenities. The area is in need of major physical improvements.

- BBP Associates recommends initial efforts be focused on Howard Avenue to the west of Summit Avenue. Accordingly, signage should be placed at the intersection of Howard and Summit Avenues to direct customers to the desired stores, as well coordinating signage located at those stores. The area needs streetscape improvements as well as façade improvements including better lighting for nighttime workers and visitors.
- In the Howard Avenue (west) area, primary opportunities are for rehabilitation, infill and remerchandising along Howard Avenue (west). A second opportunity would be for potential long-term redevelopment of the State Highway Administration (SHA) facility.
- Specific store types recommended for Howard Avenue (west) include:
  - Eating & Drinking (SIC 581200);
  - Fireplace and Wood Stoves and Accessories (SIC 571903);
  - Lighting and Lamps (SIC 571902);
  - Customized Furniture (SIC 571202); and
  - Radio, TV and Electronics (SIC 573100).
- Opportunities in the Metropolitan Avenue consist of streetscape and traffic highway improvements by the SHA; potential remerchandising and infill development of industrial areas along Metropolitan Avenue; reuse of industrial facilities located in the eastern portion of Metropolitan Avenue; potential redevelopment and reuse of the concrete plant; and possible construction of linkages at St. Paul Street between the Howard Avenue (east) and Metropolitan Avenue quadrants.
- The driving force for revitalization on Metropolitan Avenue is initially derived from efforts by area merchants and local citizens to have the Metropolitan Avenue area deemed a revitalization project by the SHA. The local merchants have been working closely with the SHA to fund proposed improvements that include new signalization, sidewalks, curbs, gutters, storm drainage and lighting. The initial phase of improvements will be focused towards reconstruction of the Metropolitan Avenue and Plyers Mill Road/Connecticut Avenue intersection.

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- Potential selected targeted uses for the Metropolitan and Plyers Mills Road area include:
  - Kitchen Cabinets (SIC 521100);
  - Fencing (SIC 521100);
  - Wood Flooring (SIC 521100);
  - Millwork (SIC 521100);
  - Paneling (SIC 521100);
  - Glass Stores (SIC 523100);
  - Paint Sores (SIC 523100);
  - Wall Covering Stores (SIC 523100);
  - Clothing Rental (SIC 529999);
  - Computer Photography (SIC 729999);
  - Costume Rental (SIC 729999);
  - Suite Rentals (SIC 529999);
  - Shopping Services (SIC 729999);
  - Tuxedo/Uniform Rental (SIC 729999); and
  - Wardrobe Service (SIC 729999).
  
- Connecticut Avenue is the main gateway leading into, out of and through Kensington providing potential customers direct access to other opportunity areas. However, it also acts as its own entity because it is a major thoroughfare which provides regional access for Kensington retail service/businesses. Connecticut Avenue also has the potential to attract regionally oriented tenants.
  
- Opportunity areas along the Connecticut Avenue portion of the study area include: potential visual improvements to service stations and remerchandising and enhancements to commercial activities on the west/inbound side of Connecticut Avenue. Utilization of existing vacancies is also possible. The basic thrust of these opportunities is to improve the physical image of Kensington and take advantage and intercept the significant through-traffic along Connecticut Avenue.
  
- Suggested targeted tenants for the Connecticut Avenue area include:
  - Restaurant - possible regional chain (SIC 581200);
  - Variety store (SIC 533100);
  - General Merchandise store (SIC 539900); and
  - Bookstore (SIC 594200).

**IMPLEMENTATION PLAN**

- The implementation plan includes: identification of goals and action objectives; plan elements for the immediate, near-term and mid-term time periods; a description of the public and private roles and responsibilities and identification of funding sources. The plan includes an identification of committed public and private funds and assumes commitment of county and town staff resources through FY 1999.
- Immediate actions are designed to be undertaken and initially implemented within a year (1997). These include physical improvements, marketing and merchandising and organizational activities.
  - A primary focus of the immediate actions is a series of activities aimed at enhancing the community's image. This includes, adopting and implementing this plan as well as the gateway/signage program.
  - Other immediate actions include: initiating a traffic and parking study, community fairs and events, developing an overall advertising and public relations campaign, the establishment of a single coordinating group (i.e., Revitalization/Steering Committee), and the formulation and promotion of volunteer programs to help with the revitalization effort, i.e., paint-up day.
  - In addition to preparing conceptual designs for the overall Kensington area, the action items include facade, streetscape and street lighting programs for Howard Avenue (east). These programs, funded in part by county capital improvement funds, are dependent upon approval of design schemes by all relevant parties, including the Historic Preservation Commission and Local Advisory Panel. Façade program implementation is also dependent upon property owners committing to improve their facades by executing a facade easement agreement with the county.
- Near-term actions are designed to build upon the momentum created by the successful initiation of the immediate actions. Near-term actions are planned to be undertaken during project years two through three (1998-1999).
  - Visible public sector actions, such as facade and streetscape improvements and other physical improvements, should be accomplished. Work should also begin on implementing the traffic and parking study recommendations.

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- The Revitalization/Steering Committee should evolve into a more formal entity.
- Various promotional programs, advertising and event planning should continue.
- Retention and recruitment should emphasize coordinating with the Montgomery County Department of Economic Development (DED) and area real estate brokers.
- In the first quarter of 1998 a request for bill in the legislature authorizing a referendum addressing alcoholic beverage reform in the Town of Kensington should be undertaken. A vote on alcoholic beverage reform is assumed to take place in the fall of 1998.
- An ongoing maintenance and housekeeping program should take place including identification of roles and responsibilities and the creation of an organized monitoring program.
- Building upon the revitalization efforts in the near-term, a series of mid-term actions representing larger-scale investments and improvements are proposed. The efforts are concentrated over a six-year term (2000 to 2005).
  - Mid-term action goals include continuation of the revitalization strategy, organizational structures, gateway/signage program, traffic and parking improvements, streetscape and façade improvements.
  - Ongoing code enforcement, clean up/paint up, advertising and public relations, event programs and business recruitment should take place.
  - Careful monitoring of alcoholic beverage legislation and area maintenance and housekeeping should be undertaken.
  - Building upon the earlier work program, exploration should begin of major redevelopment potential including the concrete plan site, State Highway Administration site and reuse of existing industrial buildings and auto repair facilities.
  - Exploration of physical linkages across the railroad track at St. Pauls should be further examined.

- Opportunities for mixed-use development including residential, office and retail should be evaluated.
- Based upon the experience of initial phases of the work program, potential circulation changes should be evaluated.
- The proposed implementation strategy for the Kensington Revitalization Plan will require a strong commitment from the local public and private sectors to encourage and assist in revitalization
  - In order to fund the management and implementation of the revitalization plan and the individual project elements, a public/private partnership is proposed. The overall funding strategy calls for maximizing private sector reinvestment and providing public sector support where appropriate.
  - A modestly funded public/private partnership with funding divided between the town, county, local merchants and outside funding sources is envisioned. An annual operating budget of \$50,000 to \$200,000 plus any capital expenditures is recommended. The first two-year county capital improvements are already committed and the private sector has indicated its willingness to make concomitant reinvestments. State and/or federal funding assistance should also be sought
  - A large number of the activities are proposed to be coordinated by the Revitalization/Steering Committee. The actual process of implementing the action plan will serve to refine and define roles and responsibilities. This will identify how the Revitalization/Steering Committee will coordinate the responsibilities among the various identified entities.
  - If needed, or desired, additional public/private sector funding for on-going maintenance and services could be sought through the implementation of a special taxing district such as an Urban District. The impacts of such a district and the level of required funds and concomitant tax rates must be evaluated, formulated and initiated by the locally based Revitalization/Steering Committee.

**KENSINGTON COMMERCIAL AREA  
MARKET ANALYSIS  
AND REVITALIZATION STRATEGY**

**FINAL REPORT**

**PREPARED FOR:**

**MONTGOMERY COUNTY  
DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS**

**PREPARED BY:**

**BASILE BAUMANN PROST & ASSOCIATES, INC.**

**APRIL 1997**



**Basile Baumann Prost & Associates, Inc.**

Public/Private Development Advisors

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April 11, 1997

Ms. Elizabeth B. Davison, Director  
Montgomery County, Maryland  
Department of Housing and Community Affairs  
51 Monroe Street  
Rockville, Maryland 20850-2419

Re: Letter of Transmittal for Kensington Commercial  
Area Market Analysis and Revitalization Strategy

Dear Ms. Davison:

On behalf of Basile Baumann Prost & Associates, Inc. (BBP Associates), we are most pleased to transmit to you our Final Report for the Kensington Commercial Area Market Analysis and Revitalization Strategy.

We are extremely pleased with the cooperative spirit that has developed as a result of the formulation of the Revitalization Strategy. The business community, town government, town residents and county, have come together in a spirit of cooperation to work for the betterment of the Kensington Commercial Area (KCA) and surrounding residential community.

The Revitalization Strategy details the opportunities and challenges facing the KCA. Cooperatively, the merchants, town residents and county have helped us to formulate a detailed implementation program. This program identifies a series of objectives and detailed action items to be undertaken over an immediate (1997), near-term (1998-1999), and mid-term (2000-2005) time frame. The plan and the cooperative spirit engendered by the revitalization process will serve as a blueprint for the revitalization of the KCA.

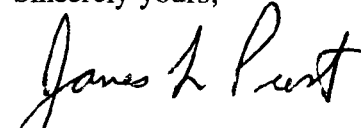
On behalf of BBP Associates, we would like to express our special thanks to you and your staff, including Marian Hershenson and Suzanne Yopp for their untiring dedication to the revitalization process. We would also like to express our thanks to Mayor Charles Stuart and Pat McAuley of the Town of Kensington. We would also like to thank the numerous merchants, property owners and residents who devoted special effort to formulating the Revitalization Strategy.

**Basile Baumann Prost & Associates, Inc.**

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We stand by to answer any questions you may have concerning the market analysis and revitalization strategy and look forward to seeing continuing progress as Kensington moves forward with revitalization.

Sincerely yours,

  
James L. Prost, AICP  
Principal

JLP:kw  
96006037  
Enclosure

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## I. INTRODUCTION

### A. PURPOSE

Basile Baumann Prost & Associates, Inc. (BBP Associates) has been engaged by Montgomery County Department of Housing and Community Affairs (DHCA) to prepare a market study for the Kensington Commercial Area (KCA). The study is part of the broader Kensington Revitalization Project undertaken by Montgomery County and the Town of Kensington.

The overall goals of the program are:

- To reinforce and augment the economic base of the KCA;
- To strengthen the visual character of the KCA;
- To respect and enhance the historic district;
- To improve the pedestrian environment;
- To improve traffic circulation;
- To improve parking arrangements;
- To develop an image for the KCA using consistent signage for directional and gateway signs and other means;
- To encourage building rehabilitation and beautification;
- To encourage the development of new businesses to complement and strengthen the unique antique market and related businesses that have a regional market; and,
- To encourage the development of businesses that are needed to strengthen the local retail market which serves the Town of Kensington and residents of surrounding communities.

The market study included in the revitalization process was to analyze retail, service and office activity for the entire KCA. The market study was also to focus, in particular, on Howard Avenue (east) as the "heart" of the KCA. The study also includes the development of a comprehensive economic strategy to stabilize and revitalize the KCA.

The purpose of this report is to summarize the existing conditions/trends, market opportunities/constraints and revitalization strategies for the KCA. The attached socio-economic, market analyses and revitalization elements are the conclusions for all phases of the project study. Comments by the County and its citizens in reviewing Phase I, Phase II and



Phase III preliminary reports and the draft final report have been incorporated into this final report.

**B. WORK COMPLETED**

In preparing this report, BBP Associates worked closely with Montgomery County and the Town of Kensington. Together, they conducted a series of community meetings, as well as surveys of both Town residents and area businesses. This was done to assure a clear understanding of project goals and objectives.

BBP Associates reviewed and evaluated existing available reports and background data to determine past conditions and trends. Recent trends and future projections of population, household characteristics, expenditure patterns, retail sales, lease terms, development plans and market conditions were evaluated.

A series of interviews were conducted with business owners and store managers, property owners and real estate leasing agents. The purpose of these surveys was to collect information on current market trends and development opportunities and constraints. Written surveys were also distributed to residents and businesses within the Town of Kensington. The purpose of the survey was to elicit further information on the needs and desires for the community and the advantages and disadvantages of Kensington as a business location.

A field survey of the KCA was conducted to determine the land use, building conditions, vacancies, and square footage of existing businesses. Three market trade areas were defined to establish the main areas of retail competition and the areas where the majority of customers reside.

Based on the conclusions gathered from the existing conditions, analysis of the resident and business surveys, and interviews and meetings BBP Associates identified revitalization strategies.

An implementation plan or action plan was formulated for an immediate (1997), near-term (1998-1999) and mid-term (2000-2005) time period. The plan consists of identification of various revitalization elements to be initiated as an immediate action, near-term and/or mid-term action. The potential funding sources and roles for relevant parties for each action are highlighted.

C. REPORT ORGANIZATION

This final report is organized into seven sections plus appendices. This brief Introduction (Section I) is followed by an Executive Summary (Section II). Section III contains a summary of the existing conditions and trends in the Town of Kensington. Section IV of the report contains an evaluation of the market opportunities and constraints, while Section V contains revitalization strategies. Section VI describes revitalization opportunities. Section VII concludes with the implementation plan. Attached Appendix One contains background socio-economic and market data and copies of business and resident survey forms. Appendix Two contains the detailed implementation strategy.

## **II. EXECUTIVE SUMMARY**

The following items summarize the key findings and conclusions of the Kensington Commercial Area Market Analysis and Revitalization Strategy Report.

### **BACKGROUND**

- Basile Baumann Prost & Associates, Inc. (BBP Associates) has been engaged by Montgomery County Department of Housing and Community Affairs (DHCA) to prepare a market study that analyzes retail, service and office activity in the entire Kensington Commercial Area (KCA). BBP Associates also has been engaged to develop a commercial revitalization strategy to stabilize and revitalize the KCA.
- This report summarizes the existing conditions/trends, market opportunities and constraints and formulates a commercial revitalization strategy for the KCA.

### **PURPOSE**

- The purpose of the market analysis and revitalization strategy is:
  - to reinforce and augment the economic base of the KCA;
  - to strengthen the visual character of the KCA;
  - to respect and enhance the historic district;
  - to improve the pedestrian environment;
  - to improve traffic circulation;
  - to improve parking arrangements;
  - to develop an image for the KCA using consistent signage for directional and gateway signs and other means;
  - to encourage building rehabilitation and beautification;
  - to encourage the development of new businesses to complement and strengthen the unique antique market and related businesses that have a regional market; and
  - to encourage the development of businesses that are needed to strengthen the local retail market which serves the Town of Kensington and residents of surrounding communities.

WORK COMPLETED

- In preparing this report, BBP Associates:
  - reviewed background data;
  - conducted field surveys of the KCA and vicinity;
  - undertook a series of interviews, meetings, surveys and on-site visits;
  - evaluated real estate conditions, lease terms and development plans;
  - examined market conditions and trends;
  - identified market trade areas;
  - analyzed recent trends and future projections of population and household characteristics, expenditure patterns, retail sales;
  - formulated a revitalization strategy; and
  - prepared an implementation plan or action plan for an immediate (1997), near-term (1998-1999) and mid-term (2000-2005) time frame.

EXISTING CONDITIONS

- A series of interviews, meetings and surveys served to identify area goals, objectives, opportunities and constraints.
  - Business interviews highlighted both advantages and disadvantages of KCA as a business location.
  - The majority of businesses surveyed cited good access from other areas and a convenient location as the top two advantages.
  - Lack of parking, traffic congestion, lack of directory and directional signs and poor street signage represented the top disadvantages.
  - The main desires expressed by businesses were for better pedestrian and auto circulation and the need for a restaurant (possibly serving alcoholic beverages) to attract more customers.
- Several community meetings were held with representatives from the county and the town and with members of the residential and business communities. The attendees reiterated the conclusions gathered from the interviews and surveys with the main needs for Kensington's future as follows:

- improved streetscape, including better signage (gateway, directional and directory) and pedestrian access to help improve the town image;
  - better advertising, marketing and promotion to help overall market recognition;
  - enhanced business and government cooperation;
  - more variety of stores while still enhancing the existing uses within the KCA;
  - better use of existing parking and possibly expanding parking; and
  - the need for a sit down restaurant, especially one allowed to serve alcohol.
- A survey was distributed to 600 households residing with the Town of Kensington and forty-three responses were received.
    - Over half of the respondents (56 percent) to resident surveys noted they are satisfied to very satisfied with the current retail offerings.
    - Resident respondents expressed a desire for selected small-scale complementary retail uses. In rank order these uses include a restaurant, bakery/cafe, variety store, Safeway improvements and a bookstore.
    - At present, the area residents utilize Kensington stores primarily to purchase groceries and personal services.
  - The community/business meetings, business interviews and business surveys also served to identify the areas market trends.
    - As a result of increasing competition throughout the region, retail sales (in current dollars not adjusted for inflation) in Kensington have remained steady or decreased slightly (exclusive of the Safeway). If sales were adjusted for inflation (i.e., in constant or “real” dollars) sales have actually declined. This has contributed to a weakness in lease rates and a diminished market image.
    - Kensington appears to be in a relatively “fragile” retail state. Although the area does not appear to be “broken,” revitalization efforts and marketing and merchandising are needed.

- Revitalization will be required simply to maintain the competitive market position of Kensington within the Montgomery County retail market place.
- The office market outlook is good with relatively low vacancy rates and competitive lease rates.
- Limited vacant land constrains future expansion of office and retail space.

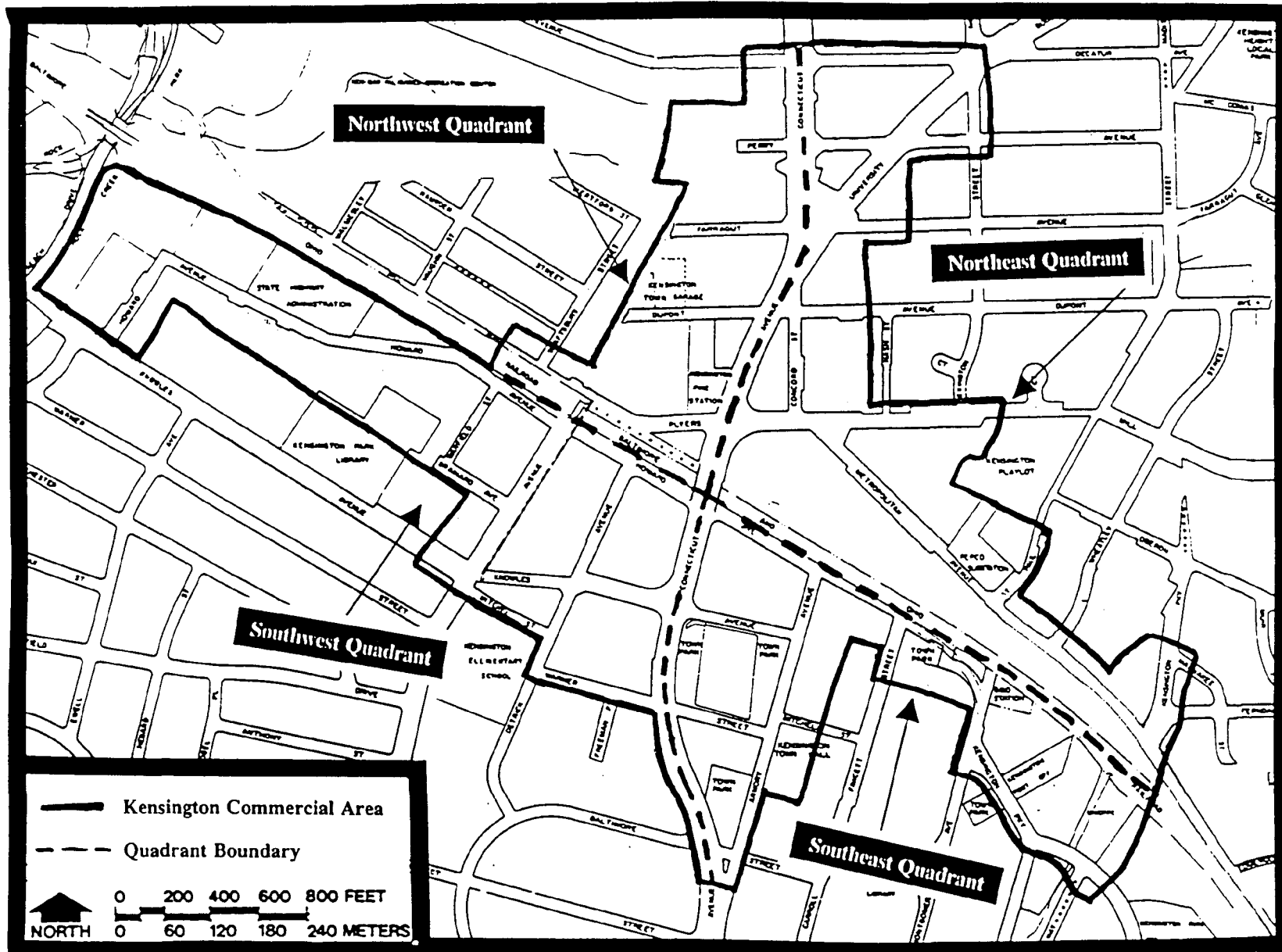
#### CURRENT PUBLIC/PRIVATE PLANS

- There are no known plans in the Kensington area for large-scale redevelopment. However, there has been limited revitalization activity centered around the opening of Cafe Monet. The facade of the Kensington Shopping Center (Connecticut and Knowles Avenues) has been remodeled.
- There are also plans/proposals for Safeway improvements.
- Pending improvements at the Sunoco have been temporarily withdrawn.
- The design process is currently underway for proposed county funded streetscape improvements.
- The town is applying for designation under the state's Neighborhood Business Development Program that would make Kensington eligible for certain state grants and business loans.

#### EXISTING BUSINESS INVENTORY

- The study area for this report is the KCA, as shown in Figure S-1. It includes all businesses located within the town as well as businesses located to the west of the town limits on Howard Avenue and to the north along Connecticut Avenue and University Boulevard from Perry to Decatur Avenues.
- The study area is divided into four quadrants separated east to west by Connecticut Avenue and north to south by the railroad tracks, with a special focus on the southeast quadrant along Howard Avenue (east).
- The existing business inventory in Kensington contains a variety of retail, personal and business service establishments.

FIGURE S-1  
 QAUDRANT IDENTIFICATION  
 KENSINGTON COMMERCIAL AREA



- Auto repair and personal services are also prevalent within Kensington.
- Based upon field surveys conducted by BBP Associates in the summer of 1996, there is a total of approximately 978,000 square feet of business inventory within the KCA, as shown in Table S-1.
- By category, there is approximately 266,000 square feet of retail uses; 613,000 square feet of office uses; 16,000 square feet of personal services; 58,000 square feet of auto repair services; and 25,000 square feet of miscellaneous (warehouse and industrial use included) space.
- From our field surveys, interviews and business surveys, the key competitors for KCA's retail trade depend greatly on the type of goods desired, for example:
  - neighborhood retail (e.g., food, drug, personal services) competition includes Chevy Chase, Bethesda and Wheaton;
  - comparison shoppers goods (e.g., apparel, furniture and home furnishings) competition includes White Flint Mall, Montgomery Mall, Rockville Pike and Wheaton Plaza;
  - specialty retail (e.g., restaurants) competition includes Bethesda, Chevy Chase, Wheaton and Washington, DC; and
  - principal antique competition includes Savage Mills, Ellicott City, Frederick, New Market and Old Town Alexandria.

#### MARKET AREAS

- Through the community interviews and surveys, location of competing retail facilities and physical boundaries, three market trade areas were identified. The boundaries include:
  - The primary trade area (which is applicable mostly to neighborhood retail and personal services) is defined by a "walkshed" that which includes the entire town of Kensington (see Figure S-2).
  - The secondary trade area (which is applicable to most comparison shoppers goods) surrounds the town at an approximately a 1.5 to 2 mile radius. These boundaries include Randolph Road to the north, the Capital Beltway to the



**TABLE S-1  
TOTAL EXISTING BUSINESS INVENTORY  
FOR THE  
KENSINGTON COMMERCIAL AREA  
SUMMER, 1996**

<u>Business Type</u>	<u>Total Establishments</u>	<u>Estimated Square Feet</u>
<i>Retail Trade 1/</i>		
Building Materials & Supplies	4	80,000
Food & Drug Stores	8	43,500
Auto Dealers & Service Stations	11	18,500
Apparel & Accessories	7	6,250
Furniture & Home Furnishings	17	25,000
Eating & Drinking	12	13,800
Antiques	23	23,000
Miscellaneous Retail	<u>34</u>	<u>55,650</u>
<b>Total Occupied</b>	<b>116</b>	<b>265,700</b>
<i>Vacant</i>	<u>14</u>	<u>25,350</u>
<b>TOTAL RETAIL</b>	<b>130</b>	<b>291,050</b>
<i>Personal Services</i>	17	16,300
<i>Auto Repair Services</i>	27	57,700
<i>Business Services 2/</i>		
Professional Office Buildings		
-- Occupied		446,768
-- Vacant		29,532
-- <i>Total</i>	<i>15</i>	<i>476,300</i>
Other Offices	14	25,450
Business Services	41	90,650
Contractors	11	20,100
<b>TOTAL</b>	<b>81</b>	<b>612,500</b>
<b>GRAND TOTAL</b>	<b>255</b>	<b>977,550</b>

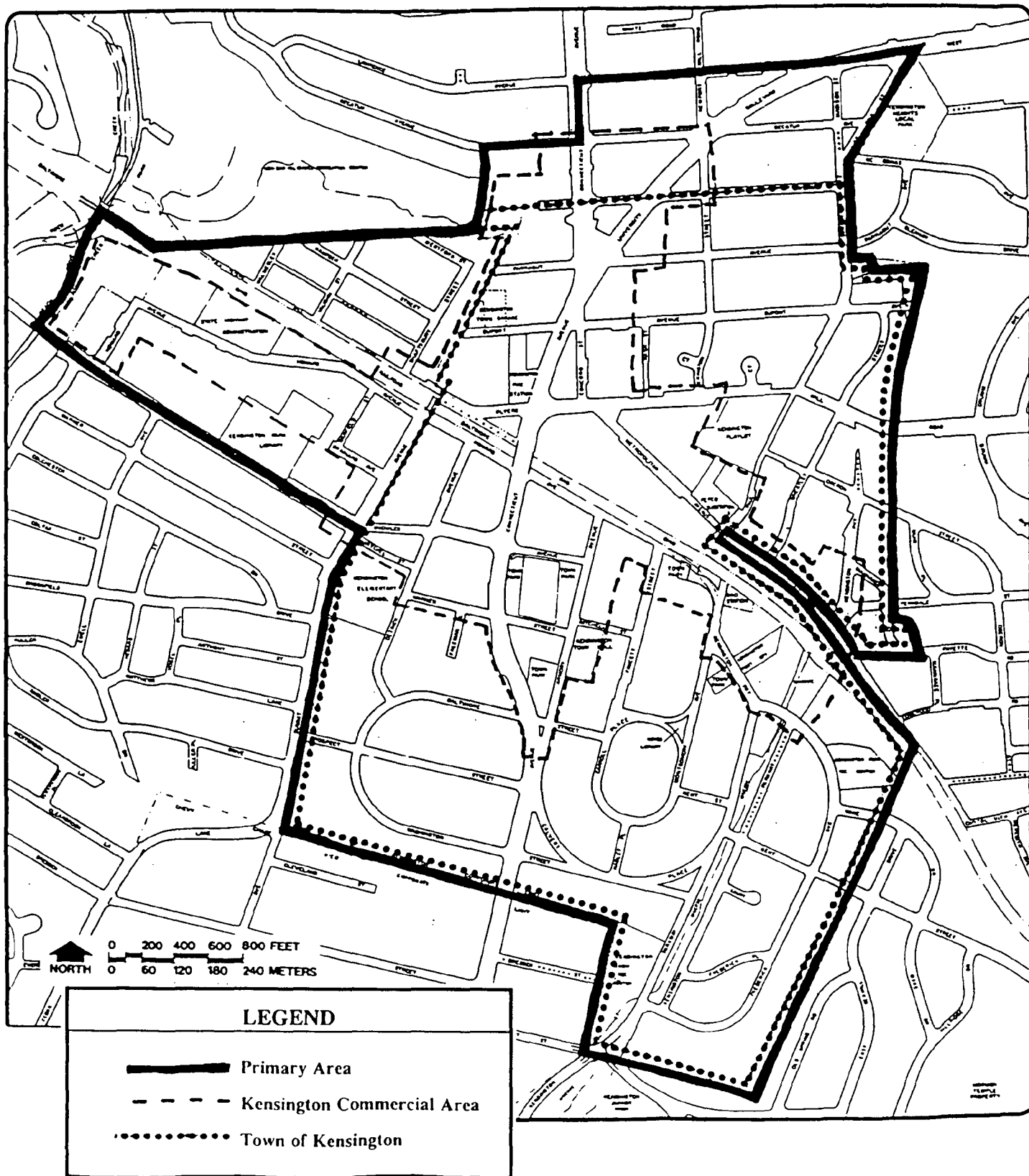
NOTE: The inventory does not include wholesale or industrial uses.

1/ Retail located on first floor.

2/ Business services located on multi-levels.

Source: Based on field surveys by Basile Baumann Prost & Associates, Inc.

FIGURE S-2  
PRIMARY TRADE AREA



south, Georgia Avenue to the east and Rockville Pike to the west (see Figure S-3).

- The larger tertiary area (which was derived from and applies primarily to antiques) includes both the primary and secondary trade areas but extends the boundaries approximately 3 miles to the east, 6 miles to the west and 2 miles to the south (see Figure S-4). The boundaries for this area include:
  - North Border: Glen Road (from Piney Meeting House Road) east to Falls Road; Falls Road south to Democracy Boulevard; Democracy Boulevard east to Old Georgetown Road; Old Georgetown road south to the Beltway; the Beltway east to Rockville Pike; Rockville Pike north to Randolph Road; Randolph Road east to New Hampshire Avenue.
  - East Border: New Hampshire Avenue south to Piney Branch Road.
  - South Border: Piney Branch Road west to Sligo Avenue; Sligo Avenue west to Georgia Avenue; Georgia Avenue south to the District of Columbia line; District of Columbia line west to Brookville Road; Brookville Road north to Bradley/Goldsboro Boulevard; Bradley/Goldsboro Boulevard west to McArthur Boulevard; McArthur Boulevard west to Falls Road.
  - West Border: Falls Road north to River Road; River Road west to Piney Meeting House Road; Piney Meeting House Road north to Glen Road.

#### ECONOMIC/DEMOGRAPHIC TRENDS

- The Washington Metropolitan Statistical Area (MSA) and Montgomery County have both continued to see a steady population growth between 1980 and 1995. However, Montgomery County is projected to maintain that growth pace until the year 2000 while the MSA is projected to decrease annually.
- The primary market area population has remained stable, growing at an annual rate of 0.8 percent between 1990 and 1995 and is projected to keep that pace through the year 2000 (see Table S-2).
- The secondary market area has remained relatively stable with a modest decrease in population between 1990 and 1995 (at an annual rate of 0.9 percent) and is projected to continue to decline by 0.6 percent per year through the year 2000.

FIGURE S-3  
SECONDARY TRADE AREA

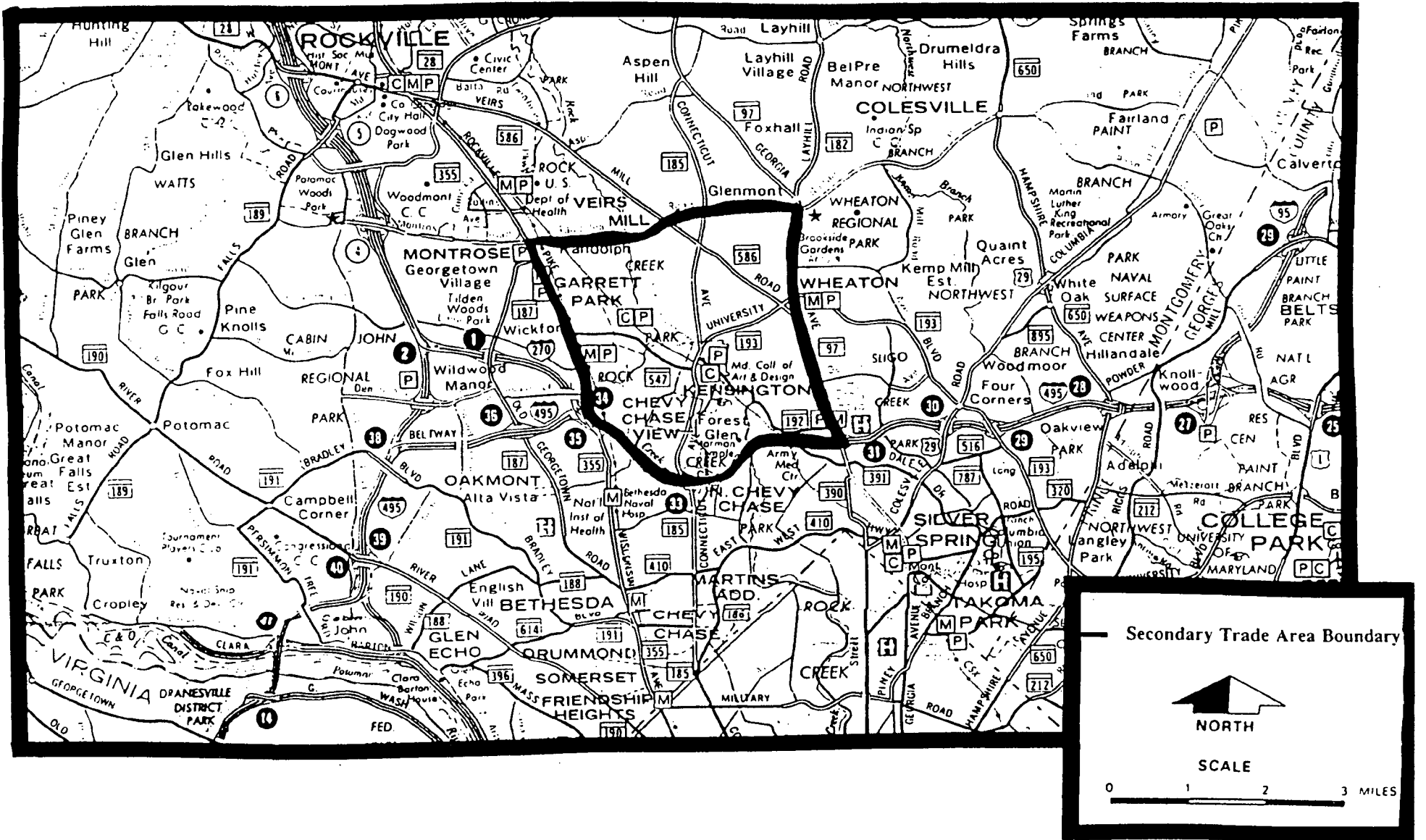
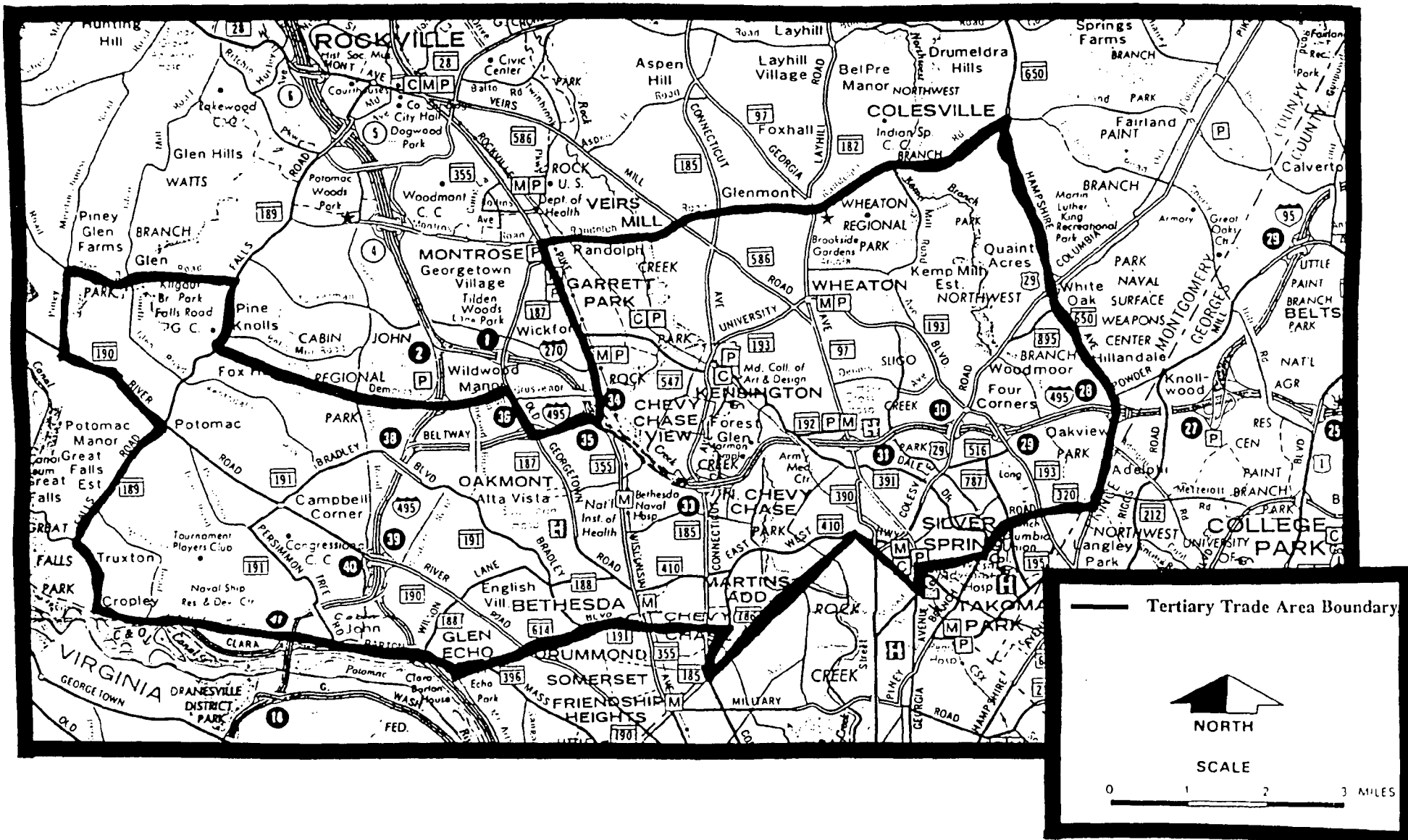


FIGURE S-4  
TERTIARY TRADE AREA



**TABLE S-2**  
**POPULATION TRENDS AND PROJECTIONS**  
**WASHINGTON MSA, MONTGOMERY COUNTY AND**  
**PRIMARY, SECONDARY AND TERTIARY TRADE AREAS**  
**1980, 1990, 1995 AND 2000**

<b>Area</b>	<b>1980</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>
Washington MSA	3,250,900	3,923,574	4,204,500	4,477,900
Montgomery County	579,055	757,027	810,217	859,235
Primary Area	1,827	1,713	1,782	1,857
Secondary Area	48,224	47,881	45,707	44,343
Tertiary Area	215,201	229,586	225,955	225,000

<b>Area</b>	<b>Annual Change</b>					
	<b>1980-1990</b>		<b>1990-1995</b>		<b>1995-2000</b>	
	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>
Washington MSA	67,267	2.1%	56,185	1.4%	54,680	1.3%
Montgomery County	17,797	3.1%	10,638	1.4%	9,804	1.2%
Primary Area	-11	-0.6%	14	0.8%	15	0.8%
Secondary Area	-34	-0.1%	-435	-0.9%	-273	-0.6%
Tertiary Area	1,439	0.7%	-726	-0.3%	-191	-0.1%

Source: Washington Council of Government; Claritas; Basile Baumann Prost & Associates, Inc.

- The tertiary market area also has remained relatively stable with modest decreases in population between 1990 and 1995 (at an annual rate of 0.3 percent) and is projected to decline slightly through the year 2000 at 0.1 percent per year.
- The median income of the primary area increased in current dollars (not adjusted for inflation) by 14.0 percent from \$49,145 to \$55,903 between 1990 to 1995 (see Table S-3).
- The highest 1995 median income is located within the tertiary area at \$60,338. That is slightly higher than the Montgomery County 1995 median income of \$60,163 and over \$4,000 higher than both the secondary and primary areas with \$56,584 and \$55,903, respectively.
- Other population characteristics include: the majority of people are white, non-Hispanics for all areas but particularly so in the primary market area (90 percent in the primary area versus 70.2 and 67.7 percent, respectively, in the secondary and tertiary areas).
- The primary area has a relatively high proportion of its population in the 65 years and over age group (25.0 percent versus 15.4 percent and 15.0 percent, respectively, for the secondary and tertiary areas).
- The primary market area has a significantly lower labor force participation rate of 59.9 percent vis-à-vis the secondary and tertiary trade areas, 74.7 and 72.8 percent, respectively.

#### MARKET EVALUATION

- The primary area's total retail and personal service sales (1995) are estimated at \$71 million, an average of \$252 per square foot (see Table S-4).
- The majority of sales are made in food stores (\$19.3 million) and miscellaneous retail establishments (\$11.0 million). Average sales per square foot for food stores and miscellaneous retail are \$517 and \$198, respectively.
- The primary market captures approximately 4.0 percent of the retail expenditures of the secondary market area, and accounts for 17.4 percent of the retail sales and 19.0 percent of the retail establishments within the secondary area.

TABLE S-3  
HOUSEHOLD INCOME DISTRIBUTION  
MONTGOMERY COUNTY AND  
PRIMARY, SECONDARY AND TERTIARY TRADE AREAS  
1990 AND 1995  
(Current \$)

	1990		1995		Percent Change 1990-1995
	No.	%	No.	%	
<b>Montgomery County</b>					
Under \$10,000	12,066	4.3%	12,668	4.2%	5%
\$10,000 to \$19,999	18,967	6.7%	17,819	5.8%	-6%
\$20,000 to \$24,999	13,405	4.7%	12,683	4.2%	-5%
\$25,000 to \$34,999	31,817	11.3%	30,647	10.1%	-4%
\$35,000 to \$49,999	50,450	17.9%	47,574	15.6%	-6%
\$50,000 to \$74,999	69,545	24.6%	71,715	23.5%	3%
\$75,000 and Over	85,978	30.5%	111,659	36.6%	30%
<b>Median</b>	<b>\$54,163</b>		<b>\$60,163</b>		<b>11%</b>
<b>Primary Area</b>					
Under \$10,000	27	4.0%	30	4.2%	11%
\$10,000 to \$19,999	62	9.1%	54	7.6%	-13%
\$20,000 to \$24,999	43	6.3%	34	4.8%	-21%
\$25,000 to \$34,999	68	10.0%	69	9.7%	1%
\$35,000 to \$49,999	147	21.6%	123	17.3%	-16%
\$50,000 to \$74,999	136	20.0%	158	22.2%	16%
\$75,000 and Over	198	29.1%	245	34.4%	24%
<b>Median</b>	<b>\$49,145</b>		<b>\$55,903</b>		<b>14%</b>
<b>Secondary Area</b>					
Under \$10,000	733	4.0%	702	3.9%	-4%
\$10,000 to \$19,999	1,377	7.5%	1,197	6.7%	-13%
\$20,000 to \$24,999	9,977	54.2%	812	4.6%	-92%
\$25,000 to \$34,999	2,237	12.2%	2,001	11.2%	-11%
\$35,000 to \$49,999	3,527	19.2%	3,019	16.9%	-14%
\$50,000 to \$74,999	5,083	27.6%	4,423	24.8%	-13%
\$75,000 and Over	4,435	24.1%	5,606	31.5%	26%
<b>Median</b>	<b>\$51,269</b>		<b>\$56,584</b>		<b>10%</b>
<b>Tertiary Area</b>					
Under \$10,000	4,095	4.5%	3,980	4.4%	-3%
\$10,000 to \$19,999	6,821	7.5%	5,900	6.5%	-14%
\$20,000 to \$24,999	4,415	4.8%	4,170	4.6%	-6%
\$25,000 to \$34,999	10,232	11.2%	9,245	10.2%	-10%
\$35,000 to \$49,999	15,354	16.8%	13,513	14.9%	-12%
\$50,000 to \$74,999	20,865	22.9%	19,502	21.5%	-7%
\$75,000 and Over	29,483	32.3%	34,342	37.9%	16%
<b>Median</b>	<b>\$54,479</b>		<b>\$60,388</b>		<b>11%</b>

Source: Claritas; Basile Baumann Prost & Associates, Inc.



**TABLE S-4**  
**ESTIMATED RETAIL SALES PER SQUARE FEET**  
**PRIMARY TRADE AREA**  
**1995**

<u>Store Type</u>	<u>Number of Establishments</u>	<u>Estimated Square Feet</u>	<u>Estimated Sales</u>	<u>Estimated Sales/Square Feet</u>
Building Materials & Supplies	4	80,000	\$8,400,000	\$105
Food Stores	6	37,300	\$19,300,000	\$517
Drug Stores	2	6,200	\$3,700,000	\$597
Auto Dealers	1	2,500	\$2,300,000	\$920
Auto Supply & Service Stations	10	16,000	\$9,700,000	\$606
Apparel & Accessories	7	6,250	\$1,600,000	\$256
Furniture & Home Furnishings	17	25,000	\$5,800,000	\$232
Eating & Drinking	12	13,800	\$4,000,000	\$290
Antiques	23	23,000	\$3,200,000	\$139
Miscellaneous Retail	34	55,650	\$11,000,000	\$198
Personal Services	17	16,300	\$2,100,000	\$129
<b>TOTAL/AVERAGE</b>	<b>133</b>	<b>282,000</b>	<b>71,100,000</b>	<b>\$252</b>

Source: Claritas; Basile Baumann Prost & Associates, Inc.

- Failure to initiate revitalization efforts would continue and accelerate the downward trend in retail sales. This could, in turn, destroy the fragile retail environment, further reducing the already small critical retail mass. Negative impacts on the KCA's retail including potential increased vacancies and disinvestment may also impact the surrounding residential area.
- Based on the market area's stable population and expenditure base and increased retail competition, revitalization efforts will be necessary just to stabilize and maintain current retail sales levels.
- Marketing objectives should focus on maintaining the existing specialty niche base of antiques and auto repairs while providing selected complementary retail offerings to enhance the capture rate of the primary market area's resident expenditures.
- Based upon implementation of a revitalization program, market projections were conducted with assumptions that ranged from maintaining to slightly expanding retail capture rates.
- Projections took into consideration differential capture rates, sales levels and sales per square foot productivity. A combination of increased sales volumes for existing stores and residual sales potential to support new stores was projected.
- Over the next five years, BBP Associates estimates that an additional 17,000 to 26,000 square feet of retail and service space could be supported in the KCA. This would result in average sales per square foot of approximately \$272 (see Tables S-5 and S-6).
- If sales increased as projected, and there was not any expansion of retail space, the increased sales would be absorbed by the existing retail inventory. Assuming no expansion in retail space over the next five years, the existing inventory sales per square foot productivity would rise from \$252 to \$289. Most likely, a combination of the new retail space and increased retail sales productivity would be achieved.
- Over the subsequent five-year period, an additional 14,000 to 27,000 square feet of retail could be supported generating average sales per square foot of approximately \$300.

**TABLE S-5  
SUPPORTABLE RETAIL SPACE  
WITH CONSTANT CAPTURE RATES  
KENSINGTON COMMERCIAL AREA  
1995 - 2000 and 2000 - 2005  
(Current \$)**

<b>1995</b>	
Sales	\$68,800,000
Square Footage	279,500
Sales/Square Feet	\$246

**1995 to 2000**

1995 Square Footage	279,500
2000 Sales/Square Feet for 1995 Inventory 1/	\$271
2000 Sales for 1995 Inventory	\$75,680,000
2000 Total Projected Sales 2/	\$80,727,600
Residual Sales Potential 1995 to 2000	\$5,047,600
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$298
Supportable Square Feet 1995 to 2000	16,900
Average Sales per 2000 Inventory	\$272

**2000 to 2005**

2000 Square Footage	296,400
2005 Sales/Square Feet for 2000 Inventory 4/	\$300
2005 Sales for 2000 Inventory	\$88,800,360
2000 Total Projected Sales 2/	\$93,295,100
Residual Sales Potential 1995 to 2000	\$4,494,740
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$330
Supportable Square Feet 2000 to 2005	13,600
Average Sales per 2005 Inventory	\$301

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE S-6**  
**SUPPORTABLE RETAIL SPACE**  
**WITH INCREASED CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	<b>\$68,800,000</b>
Square Footage	<b>279,500</b>
Sales/Square Feet	<b>\$246</b>

**1995 to 2000**

1995 Square Footage	279,500
2000 Sales/Square Feet for 1995 Inventory 1/	\$271
2000 Sales for 1995 Inventory	\$75,680,000
2000 Total Projected Sales 2/	\$83,510,600
Residual Sales Potential 1995 to 2000	\$7,830,600
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$298
Supportable Square Feet 1995 to 2000	<b>26,300</b>
Average Sales per 2000 Inventory	<b>\$273</b>

**2000 to 2005**

2000 Square Footage	305,800
2005 Sales/Square Feet for 2000 Inventory 4/	\$300
2005 Sales for 2000 Inventory	\$91,861,660
2000 Total Projected Sales 2/	\$100,751,700
Residual Sales Potential 1995 to 2000	\$8,890,040
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$330
Supportable Square Feet 2000 to 2005	<b>26,900</b>
Average Sales per 2005 Inventory	<b>\$303</b>

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

- If all the projected sales volume increase over the next ten years were absorbed by the existing 1995 inventory, sales per square foot would equal an overall average of \$345. Once again, we perceive a combination of an increase in existing sales and modest additional space would likely be experienced.
- New supportable retail square feet and establishments, as shown in Table S-7, include:
  - eating and drinking space with a next five year potential of 2,800 to 4,200 square feet and a subsequent five year potential of an additional 800 to 3,400 square feet;
  - personal services with a next five year potential of 1,700 to 1,800 square feet and a subsequent five year potential of an additional 800 to 900 square feet;
  - antique and home furnishing space with a next five year potential of 2,100 to 3,300 square feet and a subsequent five year potential of an additional 1,800 to 3,300 square feet;
  - miscellaneous retail with a next five year potential of 2,800 to 10,700 square feet and a subsequent five year period potential of an additional 3,000 to 13,300 square feet;
  - food and drug stores with a next five year potential of 2,100 square feet and a subsequent five year potential of an additional 2000 square feet; and
  - building material and auto supply stores with a next five year potential of 500 square feet and a subsequent five year potential of an additional 400 square feet.
- In the near term it is likely that only one or two additional establishments each, of personal services, antique and home furnishings, and food and drug stores would be attracted to KCA. From two to five additional small miscellaneous retail, apparel and accessory stores are likely to be attracted. Overall, the estimated near-term new supportable square footage would translate into 7 to 17 establishments.
- Over the 2000 to 2005 period the estimated additional supportable square footage would be translated into 4 to 17 new establishments. The establishments would generally be in the approximately 1,000 to 3,000 square foot per establishment size range. Most of the new stores will be in the miscellaneous retail, apparel and accessory category. As shown in the table a limited of number of other store types would likely be developed.

**TABLE S-7**  
**RANGE OF NEW SUPPORTABLE RETAIL SQUARE FEET & ESTABLISHMENTS**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**

<b>Category</b>	<b><u>New Supportable Square Feet</u></b>		<b>Typical Store Size</b>	<b>Number of New Supportable Stores</b>	
	<b><u>1995 - 2000</u></b>	<b><u>2000 - 2005</u></b>	<b><u>Square Feet *</u></b>	<b><u>1995 - 2000</u></b>	<b><u>2000 - 2005</u></b>
Eating & Drinking	2,800 - 4,200	800 - 3,400	1,200 - 2,800	2 - 3	0 - 2
Personal Services	1,700 - 1,800	800 - 900	500 - 1,300	1 - 3	0 - 1
Antiques & Home Furnishings	2,100 - 3,300	1,800 - 3,300	1,000 - 3,300	1 - 3	1 - 3
Misc. Retail & Apparel & Accessories	2,800 - 10,700	3,000 - 13,300	1,000 - 3,000	2 - 5	2 - 8
Food & Drug Stores	2,100	2,000	1,000 - 10,000	1 - 2	1 - 2
Building Material & Auto Supply	800	400	1,500 - 5,000	0 - 1	0 - 1

\* Based on typical ULI Neighborhood Center store type adjusted for the Town of Kensington.

Source: Urban Land Institute; Basile Baumann Prost & Associates, Inc.

**MARKET OPPORTUNITIES/CONSTRAINTS**

- Market opportunities for the KCA include:
  - convenient location to the Beltway;
  - unique, historic “small town” image;
  - affordable retail and office space;
  - specialty antique niche;
  - strong sense of community; and
  - a relatively affluent area.
  
- Market constraints for the KCA include:
  - significant commercial competition;
  - physical/housekeeping problems;
  - lack of directory and directional signage;
  - limited public parking availability;
  - poor access to the shopping areas;
  - major physical boundaries separating the shopping areas;
  - weak merchandising and marketing; and
  - prohibition of restaurants serving alcoholic beverages.

**REVITALIZATION STRATEGIES**

- As the study process evolved, the work effort changed from a prestudy presumption of specific physical redevelopment opportunity areas (as noted in part in the 1991 Revitalization Study - where only the public sector funded Armory Revitalization took place) to a focus primarily on marketing, merchandising, organizing and creating an action plan.
  
- The revitalization strategies for the KCA include:
  - focusing on neighborhood retail oriented to serve primary area residents (e.g. bakery, ice cream parlor);
  - focusing on small professional office opportunities;
  - coordinating merchandising and event programming;
  - enhancing and improving physical image and directory and directional signage;

- maintaining and enhancing the specialized antique market niche, including a modest amount of complementary retail;
  - improving the interrelationship of the various businesses with the adjacent residential community;
  - modifying alcoholic beverage laws to facilitate sit-down restaurants; and
  - addressing the need for additional parking.
- 
- Revitalization in Kensington must emphasize the ability of the consumer to “discover” Kensington and the ability of Kensington to develop a special relationship with the consumer.
  - KCA businesses must offer personalized services to develop special relationships with a clientele that represents repeat customers from nearby locations. This should build on the particular strengths of KCA which are the existing strong antique market niche and the special small town character.
  - The revitalization approach must include directory and directional signage, physical improvements, and advertising to help the consumer “discover” Kensington.
  - Elements should include gateway directional signage to “lead” patrons from major thoroughfares (Connecticut and University Avenues) to the retail uses.
  - Detracting commercial signs should be removed where possible.
  - Strong marketing and merchandising activities to service, retain and expand the business and consumer base should also be included in the revitalization approach.
  - Revitalization efforts must address linkages among the individual commercial subareas as well as specific orientations and actions for each individual subarea. Overall activities must emphasize marketing and merchandising. KCA needs to be considered in its entirety as a singular unit rather than as a group of non-interrelated fractional business entities.
  - The overall elements of the revitalization strategies for Kensington include: physical improvements; signage; marketing and merchandising; retention and recruitment; and organization and management.



- Physical improvements include the day-to-day maintenance and upkeep of the area. Once a project is complete a designated organization should develop a program that initiates housekeeping events on an annual basis.
- Physical improvements should convey the small town, special service image. This requires a unified design that takes advantage of the period architecture within Kensington, building upon the historic theme.
- Marketing and merchandising should include the following key elements:
  - know the competition;
  - improve service level;
  - promotions;
  - advertising;
  - public relations;
  - image enhancement; and
  - “niching” (developing specialized goods and services).
- Retention of existing businesses and recruitment of new businesses is another critical element of the revitalization program. To help recruit additional businesses the town and area retailers should work with the County Department of Economic Development (DED) to pursue business start-up loans and with local real estate brokers to promote the KCA. Retention and recruitment should also maximize any county financial incentives offered such as loan and facade easement programs and technical assistance from various organizations.
- The current Kensington Commercial Revitalization Committee primarily focuses on the Howard Avenue (east) efforts. Established by the town, it is a committee made up of merchants, property owners, residents and town officials. In order to facilitate an organization and management structure to manage the revitalization of the entire KCA, the Revitalization Committee needs to evolve into, or ultimately be complemented by, an overall coordinating agency--the “Revitalization/Steering Committee”.
- This Revitalization/Steering Committee needs to take the lead in creating a single coordinated focus for approval and implementation of a KCA wide revitalization plan. This does not mean the replacement of other organizations, but rather a central clearing

house or umbrella organization under which the various organizations can function and work together.

- The Revitalization/Steering Committee should be responsible for maintaining awareness of the project, providing needed resources, and facilitating communication between the county, town and community. The Revitalization/Steering Committee would have to manage and organize the planning process.
- The Revitalization/Steering Committee should be quite large, having representatives of all pertinent organizations and interests participating. A relatively small Executive Committee however, consisting of seven to nine persons should have overall day to day management responsibility. Membership in the Executive Committee would change over time as the prime functions and responsibilities of the organization change in accordance with the detailed work program.
- One of the Revitalization/Steering Committee's primary roles would be to serve as coordinator among the various voluntary groups. A "bottom up" grass roots (local merchants) organization that would be closer to the revitalization issues and the persons most directly impacted would be more effective than a "top down" approach (town/county) by an organization that has many other roles and responsibilities besides commercial revitalization.
- In either approach the Revitalization/Steering Committee will need, through a combination of membership dues, corporate/foundation contributions, county and town contributions, sufficient initial capitalization for approximately a two-year operational period.

#### REVITALIZATION OPPORTUNITIES

- At present, there is little vacant land in the KCA on which to sustain extensive new development. Any new commercial use will need to utilize the current space, with the possibility for modest expansion through infill.
- Any new retail should complement the current mix of tenants within the specific quadrants, as well as both the office and resident community.
- The office market should continue to attract a mix of small professional firms and business services.

- Opportunities and target reuses have been identified for each of the four quadrants in the KCA.
- Howard Avenue, to the east of Connecticut Avenue, is known to many as the “heart” of Kensington and of this revitalization project. It is therefore necessary to maintain, enhance and complement the antique “niche” of the area as well as the area’s historic character.
- The town and county’s current program, which is being implemented, focuses on the Howard Avenue (east) area. The opportunities in this area are generally along Antique Row and the main roads leading to Antique Row.
- Specific recommended store types for the Howard Avenue (east) area are as follows:
  - Bedding & Accessories (SIC 571201);
  - Bedding & Linen (SIC 571905);
  - Retail Bakery (SIC 546100);
  - Ice-Cream (SIC 581202);
  - Cafe (SIC 581299);
  - Health/Specialty Food (SIC 549900);
  - China and Glass (SIC 571900);
  - Home Accessories (SIC 571900);
  - Gourmet Cookware (SIC 571900);
  - Decorative Accessories (SIC 571900);
  - Computer/Software (SIC 573400);
  - Musical Instruments (SIC 573600);
  - Hobby Shops (SIC 594599);
  - Cards and Gifts (SIC 594700);
  - Specialty Books (SIC 594200);
  - Antiques (SIC 594200);
  - Art Gallery (SIC 599999);
  - Arts and Crafts (SIC 599999);
  - Coin Shop (SIC 599900); and
  - Candle Shop (SIC 599999).
- Howard Avenue, to the west of Connecticut Avenue, is now seen as an area of warehouse antiques and auto-repair stores. This area attracts purposeful trip customers. The area is less attractive to pedestrian access and multipurpose cross shopping, as

there are no sidewalks or other pedestrian amenities. The area is in need of major physical improvements.

- BBP Associates recommends initial efforts be focused on Howard Avenue to the west of Summit Avenue. Accordingly, signage should be placed at the intersection of Howard and Summit Avenues to direct customers to the desired stores, as well coordinating signage located at those stores. The area needs streetscape improvements as well as façade improvements including better lighting for nighttime workers and visitors.
- In the Howard Avenue (west) area, primary opportunities are for rehabilitation, infill and remerchandising along Howard Avenue (west). A second opportunity would be for potential long-term redevelopment of the State Highway Administration (SHA) facility.
- Specific store types recommended for Howard Avenue (west) include:
  - Eating & Drinking (SIC 581200);
  - Fireplace and Wood Stoves and Accessories (SIC 571903);
  - Lighting and Lamps (SIC 571902);
  - Customized Furniture (SIC 571202); and
  - Radio, TV and Electronics (SIC 573100).
- Opportunities in the Metropolitan Avenue consist of streetscape and traffic highway improvements by the SHA; potential remerchandising and infill development of industrial areas along Metropolitan Avenue; reuse of industrial facilities located in the eastern portion of Metropolitan Avenue; potential redevelopment and reuse of the concrete plant; and possible construction of linkages at St. Paul Street between the Howard Avenue (east) and Metropolitan Avenue quadrants.
- The driving force for revitalization on Metropolitan Avenue is initially derived from efforts by area merchants and local citizens to have the Metropolitan Avenue area deemed a revitalization project by the SHA. The local merchants have been working closely with the SHA to fund proposed improvements that include new signalization, sidewalks, curbs, gutters, storm drainage and lighting. The initial phase of improvements will be focused towards reconstruction of the Metropolitan Avenue and Plyers Mill Road/Connecticut Avenue intersection.

- Potential selected targeted uses for the Metropolitan and Plyers Mills Road area include:
  - Kitchen Cabinets (SIC 521100);
  - Fencing (SIC 521100);
  - Wood Flooring (SIC 521100);
  - Millwork (SIC 521100);
  - Paneling (SIC 521100);
  - Glass Stores (SIC 523100);
  - Paint Sores (SIC 523100);
  - Wall Covering Stores (SIC 523100);
  - Clothing Rental (SIC 529999);
  - Computer Photography (SIC 729999);
  - Costume Rental (SIC 729999);
  - Suite Rentals (SIC 529999);
  - Shopping Services (SIC 729999);
  - Tuxedo/Uniform Rental (SIC 729999); and
  - Wardrobe Service (SIC 729999).
  
- Connecticut Avenue is the main gateway leading into, out of and through Kensington providing potential customers direct access to other opportunity areas. However, it also acts as its own entity because it is a major thoroughfare which provides regional access for Kensington retail service/businesses.
  
- Connecticut Avenue also has the potential to attract regionally oriented tenants.
  
- Opportunity areas along the Connecticut Avenue portion of the study area include: potential visual improvements to service stations and remerchandising and enhancements to commercial activities on the west/inbound side of Connecticut Avenue. Utilization of existing vacancies is also possible. The basic thrust of these opportunities is to improve the physical image of Kensington and take advantage and intercept the significant through-traffic along Connecticut Avenue.
  
- Suggested targeted tenants for the Connecticut Avenue area include:
  - Restaurant - possible regional chain (SIC 581200);
  - Variety store (SIC 533100);
  - General Merchandise store (SIC 539900); and
  - Bookstore (SIC 594200).

**IMPLEMENTATION PLAN**

- The implementation plan includes: identification of goals and action objectives; plan elements for the immediate, near-term and mid-term time periods; a description of the public and private roles and responsibilities and identification of funding sources. The plan includes an identification of committed public and private funds and assumes commitment of county and town staff resources through FY 1999.
- Immediate actions are designed to be undertaken and initially implemented within a year (1997). These include physical improvements, marketing and merchandising and organizational activities.
  - A primary focus of the immediate actions is a series of activities aimed at enhancing the community's image. This includes, adopting and implementing this plan as well as the gateway/signage program.
  - Other immediate actions include: initiating a traffic and parking study, community fairs and events, developing an overall advertising and public relations campaign, the establishment of a single coordinating group (i.e., Revitalization/Steering Committee), and the formulation and promotion of volunteer programs to help with the revitalization effort, i.e., paint-up day.
  - In addition to preparing conceptual designs for the overall Kensington area, the action items include facade, streetscape and street lighting programs for Howard Avenue (east). These programs, funded in part by county capital improvement funds, are dependent upon approval of design schemes by all relevant parties, including the Historic Preservation Commission and Local Advisory Panel. Façade program implementation is also dependent upon property owners committing to improve their facades by executing a facade easement agreement with the county.
- Near-term actions are designed to build upon the momentum created by the successful initiation of the immediate actions. Near-term actions are planned to be undertaken during project years two through three (1998-1999).
  - Visible public sector actions, such as facade and streetscape improvements and other physical improvements, should be accomplished. Work should also begin on implementing the traffic and parking study recommendations.

- The Revitalization/Steering Committee should evolve into a more formal entity.
- Various promotional programs through advertising and event planning should continue.
- Retention and recruitment should emphasize coordinating with the Montgomery County Department of Economic Development (DED) and area real estate brokers.
- In the first quarter of 1998 request for bill in the legislature authorizing a referendum addressing alcoholic beverage reform in the Town of Kensington should be undertaken. A vote on alcoholic beverage reform is assumed to take place in the fall of 1998.
- An ongoing maintenance and housekeeping program should take place including identification of roles and responsibilities and the creation of an organized program.
- Building upon the revitalization efforts in the near-term, a series of mid-term actions representing larger-scale investments and improvements are proposed. The efforts are concentrated over a six-year term (2000 to 2005).
- Mid-term action goals include continuation of the revitalization strategy, organizational structures, gateway/signage program, traffic and parking improvements, streetscape improvements and façade improvements.
- Ongoing code enforcement, clean up/paint up, advertising and public relations, event programs and business recruitment should take place.
- Careful monitoring of alcoholic beverage legislation and area maintenance and housekeeping should be undertaken.
- Building upon the earlier work program, exploration should begin of a major redevelopment potential including the concrete plan site, State Highway Administration site and reuse of existing industrial buildings and auto repair facilities.
- Exploration of physical linkages across the railroad track at St. Pauls should be further examined.

- Opportunities for mixed-use development including residential office and retail should be evaluated.
- Based upon the experience of initial phases of the work program, potential circulation changes should be evaluated.
- The proposed implementation strategy for the Kensington Revitalization Plan will require a strong commitment from the local public and private sectors to encourage and assist in revitalization
  - A modestly funded public/private partnership with funding divided between the town, county, local merchants and outside funding sources is envisioned. An annual operating budget of \$50,000 to \$200,000 plus any capital expenditures is recommended. The first two year county capital improvements are already committed and the private sector had indicated their willingness to make concomitant reinvestment. State and/or federal funding assistance should also be sought
  - A large number of the activities are proposed to be coordinated by the Revitalization/Steering Committee. The actual process of implementing the action plan will serve to refine and define roles and responsibilities. This will identify how the Revitalization/Steering Committee will coordinate the responsibilities among the various identified entities.
  - In order to fund the management and implementation of the revitalization plan and the individual project elements, a public/private partnership is proposed. The overall funding strategy calls for maximizing private sector reinvestment and providing public sector support where appropriate.
- If needed, or desired, additional public/private sector funding for on-going maintenance and services could be sought through the implementation of a special taxing district such as an Urban District. The impacts of such a district and the level of required funds and concomitant tax rates must be evaluated, formulated and initiated by the local based Revitalization/Steering Committee.



### **III. EXISTING CONDITIONS**

This section contains a summary of existing conditions and trends in the Kensington Commercial Area (KCA). This analysis includes the results of field surveys, business interviews, project meetings and business and town resident surveys. These interviews, meetings and surveys, in combination with data analysis helped BBP Associates to identify and evaluate the recent market trends, existing Kensington business supply, competitive supply and development plans.

The purpose for conducting field surveys, interviews, meetings and the surveys was to determine the existing conditions and recent trends in the KCA. These trends were evaluated both from the perspective of the various local communities (merchants, property owners, residents and public officials) and that of BBP Associates.

Attitudes and perceptions of the various local communities define the market image of the KCA. Combined with a professional overview, this information serves as the basis for determining existing conditions and future opportunities and constraints.

BBP Associates tempered the information garnered from surveys, interviews and meetings with the local communities with its professional experience in other similar communities. BBP Associates estimated what the likely private sector and investor response would be to existing conditions in the KCA. The synthesis of local conditions and likely private sector responses serves as a basis for the identification of local area opportunities and constraints. The process of identifying opportunities and constraints was conducted in cooperation with the County Department of Housing and Community Affairs staff. This cooperative study process helped establish the key assumptions for formulation of revitalization approaches and strategies.

#### **A. COMMUNITY INTERVIEWS**

Personal interviews, project meetings, business and resident surveys were conducted to better understand the needs and desires of the community. The results are as follows:

##### **1. Business Interviews**

###### **Purpose/Approach**

In-depth interviews were conducted with area merchants and property owners either in person or through telephone conversations. Twenty-one merchants and ten property owners

were individually interviewed. This was in addition to merchants and property owner discussions during group meetings. The purpose of the interviews was to obtain an understanding of market conditions and the advantages and disadvantages of doing business in the KCA.

### Interview Results

For most of the non-antique merchants the customer base is derived mainly from Chevy Chase, Bethesda and Potomac. Antique storeowners cited areas to the west of Kensington, specifically Northern Virginia, as the primary base for their customers.

The merchants noted that business has been slow with sales down slightly for most respondents. The major disadvantages identified by merchants and property owners alike is the lack of sufficient parking and lack of signage directing people from Connecticut Avenue to the KCA. Concerns with traffic and access were also mentioned. Specifically, a traffic light at the intersection of Plyers Mill Road and Metropolitan Avenue was recommended.

Merchants also mentioned the desire for "something to be done" with the cement plant site on Metropolitan Avenue. Many merchants believe it is a detriment to business because of constant traffic generated by the large cement trucks, the deteriorating facade and the unkept lot conditions.

Both merchants and property owners emphasized the need for a first class restaurant in Kensington. Respondents noted, however, that without an alcoholic beverage license many restaurant operators would not be interested in Kensington.

The need for marketing and promotion was noted by the merchants interviewed. Specifically mentioned was the desire for a public relations person who would help advertise and market the business district. Merchants noted examples of ways to help promote the area including a shuttle bus or trolley linking nearby areas, standard hours and special events.

## 2. Project Meetings

### Purpose/Approach

Five community project meetings were held throughout this study process in order to allow for discussion of the project results and to elicit further information from the Kensington Revitalization Committee, residents, and the business community. The meetings were held in the evenings at the Town Hall with advance notification using various means such as through newspaper articles and notices delivered to Kensington businesses and residents.

*Meeting Results*

Various representatives from the county, town, resident and business communities were present at each meeting. The attendees reiterated the conclusions gathered from the interviews and surveys with the main needs for Kensington's future as follows:

- Improved streetscape, including better signage (gateway, directional and directory) and pedestrian access to help improve the town image;
- Better advertising, marketing and promotion to help overall market recognition;
- Enhanced business and government cooperation;
- More variety of stores while still enhancing the existing uses within the KCA;
- Better use of existing parking and possibly expanding parking; and,
- Need for a sit down restaurant, especially one allowed to serve alcohol.

The meetings were generally very supportive of the findings and conclusions presented by BBP Associates. The meetings appeared to have relatively balanced representation from the residential and business community with a slight bias towards the Howard Avenue (east) antique merchants. The meetings stressed a revitalization versus a redevelopment approach. The general thrust of the questions and discussions at the meetings was toward revitalization, building upon the existing base and strengthening and broadening the retail mix. The strongest theme appeared to be a need for more cooperation between the various merchant groups, the town and county, and the business and residential community.

Town residents also expressed an interest in having one or more restaurants. A possible change in Town of Kensington alcoholic beverage laws was recognized as a major issue. The residential community's concerns focused primarily on minor "house-keeping" issues. These housekeeping issues include building maintenance and the on-going need for clean-up/fix-up of buildings and surrounding property.

3. Business Surveys

Purpose/Approach

In July of 1996, approximately three hundred seventy surveys were distributed, by the County, to merchants within the KCA. The purpose of the survey was to determine the advantages and disadvantages of operating a business in Kensington and from where the majority of customers are derived. Seventy-four responses were returned. A copy of the survey instrument is included in Appendix 1, pages A-30 through A-40.

Characteristics of Respondents

Of those businesses which responded to the survey, the majority were categorized as: business service related (36 percent); antique dealers (19 percent); personal service related (14 percent); retail/wholesale trade (9 percent); and, auto-related (9 percent). The business "term of residency" ranged between 6 months to 50 years.

Advantages/Disadvantages

The majority of the respondents cited good access from other areas (77 percent) and convenient location for customers (58 percent) as the major advantages for businesses in Kensington. On the other hand, lack of parking (47 percent), traffic congestion (34 percent) and poor signage directing persons to businesses off Connecticut Avenue (26 percent) were cited as the major disadvantages of Kensington as a business location.

As for the importance public improvements would have on the business district, more public parking (32 percent) and better use of existing parking (27 percent) were ranked as most important while more crosswalks was rated least important (7 percent).

Location of Customers

The place of residence of customers was determined for selected store types:

- Business Service: This category includes professions such as real estate agent, doctor, lawyer and contractor. According to the survey, relatively high proportions of business service establishment customers live in the Chevy Chase/Bethesda area (8.5 percent) and Washington, DC (8.4 percent). Only 6.6 percent live in the Town of Kensington.

- Antique Dealers: This category includes any retail/wholesale store dealing in antiques. According to the survey, a relatively high proportion of their customers live in the Chevy Chase/Bethesda area (18.6 percent) and Northern Virginia (10.9 percent). Only 5.8 percent live in the Town of Kensington.
- Personal Service: This category includes services such as hair salons, dry cleaners and florists. According to the survey, a relatively high proportion of their customers live in the Wheaton/Silver Spring area (16.4 percent), the Town of Kensington (13.7 percent) and Washington, DC (9.7 percent).
- Retail/Wholesale: This category includes apparel and accessory stores, hardware stores, food stores, miscellaneous retail, etc. According to the survey, a relatively high proportion of their customers reside in the Town of Kensington (18.7 percent), Washington, DC (14.8 percent), Chevy Chase (13.2 percent) and Bethesda (13.1 percent).
- Auto-related: This category includes auto repair services, gas stations and auto dealers. According to the survey, a relatively high proportion of their customers live in other parts of Montgomery County (11.4 percent) and the outer Kensington zip code area (10.7 percent). Only 6.7 percent reside within the Town of Kensington.

### Conclusions

The findings of the business survey should not be seen as necessarily statistically significant due to the relatively small number of responses (74 out of over 370 business surveys distributed) and the disproportionately high response from business services which reflect only 32 percent of the store types in BBP Associates' inventory. However, information can be gleaned from the above analysis and personal interviews.

The majority of businesses consider Kensington to be a relatively good location although there are accessibility and visibility problems. Lack of sufficient cooperative and targeted marketing and promotion is another perceived problem. An average of 10.3 percent and 9.5 percent of customers reside within the Town of Kensington and the remainder of the Kensington zip code area, respectively. Other customers reside in the Chevy Chase/Bethesda area (11.4 percent) and the Wheaton/Silver Spring area (9.1 percent).

The responses from the survey initiated by the County and the BBP Associates' interviews, were skewed toward the Howard Avenue (east) the Antique Row rather than to the general Kensington merchant. The emphasis on the Antique Row and the antique "niche," reflect marketing and merchandising to a broad regional community and not the more local orientation of the non-antique merchants. This indicates the need to develop a multi-pronged marketing and merchandising approach: first, emphasizing the strong antique "niche" and reaching out to a larger regional community; and second, establishing a stronger relationship with the surrounding residential community.

From the BBP Associates perspective and experience, many merchants appear to be marginally satisfied with the current level of business. Most merchants are, however, extremely concerned with business trends. The viability of existing business is fragile. Businesses are facing declining sales, narrow margins, increased costs of doing business and aggressive competition. Without significant revitalization action by both the public and private sectors the KCA is seriously threatened.

The critical need identified in the interview and survey process is for a revitalization program that emphasizes marketing and merchandising, and cooperation between the merchant community and the town. Without a revitalization program sales volumes and lease rates will experience increasing downward pressure. A weak business community could, in turn, have a negative impact on the surrounding residential community.

#### 4. Resident Surveys

##### Purpose/Approach

In May 1996, surveys were hand delivered to six-hundred (600) households in the Town of Kensington in order to evaluate current shopping patterns and to determine the level of satisfaction with retail offerings and what retail services are lacking in the commercial area. Forty-three responses were received. A copy of the residential survey instrument is contained in Appendix 1, page A-29.

##### Characteristics of Respondents

The respondents ranged in age from 34 to 83 years (the median age of the respondents was 46). Respondents had lived in the Town of Kensington for anywhere from one year or less (less than 7 percent of the respondents) to 53 years. Almost one-fourth of the respondents have lived in Kensington for 30 years or more. The average length of town residency across all respondents was 13 years. A relatively even distribution of household types was

represented with 28 percent living alone, 30 percent with no children, and 42 percent having families with children presently living at home.

Level of Satisfaction

Several questions in the survey centered around retail activity in Kensington. One question asked the respondents to qualify their satisfaction with the retail and service offerings within Kensington. Respondents were fairly evenly split in their responses with their opinions clustering "toward the middle". The results were as follows:

- Approximately 56 percent indicated that they were either "very satisfied" or "satisfied" with current offerings.
- About 44 percent stated that they were "dissatisfied" with the current retail and service businesses.

By cross-tabulating responses, BBP Associates found that household type was independent of the satisfaction level of the respondent (i.e., did not vary by household type).

Desired Store Types

Another question gave town residents the opportunity to cite particular store types and/or types of improvements that they felt would enhance the KCA. The top three desired uses were as follows:

1. Restaurants: The need for more restaurants in town topped the list with almost 75 percent of all responses desiring restaurants. Of the citations that called specifically for a restaurant, 38 percent volunteered the desire for an establishment serving beer and wine. The Garrett Park Inn in Garrett Park and La Ferme in Chevy Chase were mentioned as models for the type of restaurant that is desired.
2. Bakery/Cafe: The need for a bakery/cafe was the second most popular citation with approximately 26 percent of the total responses. (The need for the bakery/cafe may be addressed to a certain extent by the recent opening of Cafe Monet.)
3. Variety Store: Third in popularity was a variety store, which was cited by 23 percent of the respondents. The variety store was popular particularly among retirees, who provided 70 percent of the citations. Mr. Victor's Kensington

Department Store and Bruce's Variety in Bethesda were mentioned as models for the type of variety store desired.

The desire for modernization of the Safeway and for a book store came in fourth and fifth in popularity with 14 and 12 percent of the total respondents, respectively. Others receiving mentions were a bed and breakfast, a record/music store, a kitchen supply store, a large single-screen cinema, card shops and a gift shop. Nine percent of the respondents also mentioned the need for infrastructure improvements, specifically the need for more parking and pedestrian improvements.

### Current Shopping Patterns

Survey results indicated that stores in the KCA offering either day-to-day services (i.e., personal services) or neighborhood retail (e.g., food and drug), draw much more strongly from the Town of Kensington resident base than do the antique stores and the few other establishments that offer specialty items (e.g., apparel, restaurant). When respondents were asked where they would usually purchase the following types of goods and services, the results were as follows:

- Groceries: Approximately 88 percent of the respondents indicated shopping for groceries in the Town of Kensington.

The Kensington Safeway was mentioned by 48 percent of all respondents. Only 19 percent did not list the Kensington Safeway as a store at which groceries are usually bought.

The Kensington Market (which has closed since the survey) received the second highest proportion of responses (19 percent). Additional responses (12 percent) mentioned other food stores in Kensington. Only 14 percent of respondents did not mention a Kensington food store at all in their response to the question.

Other grocery stores mentioned most frequently by respondents were as follows: the Fresh Fields in Rockville (14 percent); and the Wheaton and Rockville Giants (12 percent each).

- Restaurants: Forty-two percent of the respondents refer to patronizing a restaurant in the Kensington area, in particular, the China Gourmet.



A frequent destination outside the town appears to be Bethesda, mentioned by 40 percent of the total respondents. The District of Columbia, Rockville, and Wheaton were mentioned approximately 16 percent each, as frequent restaurant destinations. The Garrett Park Cafe in Garrett Park and La Ferme in Chevy Chase are specific restaurants that were mentioned most frequently on the survey.

- Apparel: Most Town of Kensington residents shop for clothing outside the Kensington area. Of the respondents, 95 percent mentioned either Montgomery Mall, Wheaton Plaza or White Flint Mall as a frequent destination when purchasing clothing. Particular clothing stores in Kensington (e.g. Bonjour Kids, Crow Pye, etc.) were mentioned by 21 percent of the respondents.
- Personal Services: Survey results indicate that service businesses in the KCA are frequently utilized by Town of Kensington residents. Approximately 70 percent of the respondents referred to a service in Kensington. Approximately 44 percent of the respondents mentioned only businesses in Kensington by name and 7 percent specifically stated "All Kensington" for this category.

When respondents went out of the immediate area for personal services, it was almost exclusively to particular hair stylists in Bethesda, Rockville, or Wheaton.

- Gifts, Books, Entertainment: Survey results suggest that Town of Kensington residents are not averse to shopping at Kensington stores that offer these types of goods and services, but they often have to go elsewhere to meet their needs. Approximately 55 percent of all respondents mentioned at least one store in Kensington that they typically shop at for gifts, books, entertainment, etc. Zero respondents listed only stores in Kensington.

### Conclusions

Residents' opinions appear to offer a qualified endorsement to selected new store types in the town (restaurants, bakery/café, variety store). Change (i.e. improvement) in the town's retail mix would be very welcome if the balance between residential and commercial use is maintained. Additional retail is desired, but new retail and services must not come at the price of reduced residential quality of life.

As for particular uses, there appears to be a "clarion call" for more restaurants. The desired character of that restaurant, however, did not come through clearly in responses. In

any case, it will be difficult to attract a quality restaurant to the area without the ability to serve alcohol. Therefore, the liquor license issue will have to be addressed carefully.

Town of Kensington residents use Kensington retail and service offerings primarily for grocery shopping and personal service needs. This is not a surprising result as these types of stores (excluding Antique Row) comprise the vast majority of the current offerings, and homeowners typically buy such items near their home.

Bethesda appears to be a very popular alternative for Kensingtonians who are eating out. The nearby malls are the prime destination for clothing and gifts/books/ entertainment needs. However, the number of local establishments mentioned by respondents for both of these categories is encouraging.

The Town of Kensington residential surveys tend to indicate a diverse but generally older and less mobile population within the Town of Kensington. This population has varied opinions of the retail mix within Kensington. There appears to be a clear desire for more restaurant/cafe type operations and nostalgic desire of many of the older residents for an old-fashioned variety store.

Although the sample is relatively small and does not necessarily represent a statistically significant sample, BBP Associates deems the findings not inconsistent with other localities.

It appears that the Town of Kensington residents are generally ambivalent to the retail mix and do not desire any significant change other than potential small, local serving, eating and drinking facilities. There is a "nostalgic" call for community-oriented grocery and personal service needs and a variety store. There were no discernable residential attitudes, either positive or negative, with regard to the Antique Row.

In general, based on the data derived and experience in other areas, the residential community is generally supportive of the status quo with minor changes to provide community oriented facilities. The Town of Kensington residents appear to be generally ambivalent and not concerned, either positively or negatively, about the significant antique "niche" which is established in Kensington. Town residents are more important as they help determine town policy. They are less significant in providing support for KCA retail uses (see pages 32 and 37).

#### B. RECENT MARKET TRENDS

Through the various interviews with area merchants and real estate leasing agents, recent market conditions were identified and evaluated.

1. Office Trends

The office market outlook is positive in suburban Maryland with net absorption at its highest in three years. Vacancy rates are down to approximately 11 to 12 percent. Specifically, Montgomery County's leasing activity is rising due to the large number of businesses relocating from Washington, DC. Office growth has been approximately 200,000 to 250,000 square feet annually. Detailed information on the office market outlook is found on page 35 and 36.

Within Kensington, there is a broad office market consisting of several very large users and multiple small users serving the local population and local businesses. Two of the largest office complexes are owned by Kaiser Permanente and another by The Bakery, Confectionery and Tobacco Workers International Union, which is now leasing space to various small, private professional firms. These office buildings enjoy a relatively low vacancy rate. Other buildings such as the WRIT building and the Concord building lease to a variety of business services and contractors and are scattered throughout the area. Lease rates remain competitive with the surrounding areas. However, there is limited vacant land in Kensington which constrains future expansion of the office market.

While Kensington is perceived as a retail center, it has significantly more office than retail space (over twice the office than retail space). The expansion of Kaiser Permanente and the leasing of space in major single purpose office buildings has expanded the area's importance as an office center. With the growing number of very small business firms, and the excellent location afforded by Kensington, opportunities for modest expansion of office space may exist. Additional amenities and continued enhancement of the special small town environment may further enhance office potential.

The growing competitive office market may make ground floor space in Kensington more attractive to small-scale office uses. This has implications that may adversely impact the fragile retail mix that already exists in Kensington. This is particularly true if continuing competitive retail pressures allow small-scale office uses to "outbid" commercial establishments. Without a retail revitalization program office rents may be greater than retail rents. This would result in a reduction in the amount of retail space. Further reduction in the retail mix could affect the area's critical mass and exacerbate negative pressures on retail space.

## 2. Retail Trends

Although commercial activity is on an upswing within suburban Maryland, retail sales (in current dollars not adjusted for inflation) in Kensington have remained steady or decreased slightly and are relatively "flat," (exclusive of the Safeway). If sales were adjusted for inflation (i.e., constant or "real" dollars) sales have actually declined. Increased retail competition in the vicinity has impacted Kensington retail sales and caused commercial lease rates to drop.

Due to the physical barriers presented by Connecticut Avenue and the rail line, there seems to be not one but four separate Kensingtons which creates a fragmented business structure. Customers from beyond Kensington tend to make purposeful trips to their desired business without "crossing over" and shopping the numerous other retail establishments. Town of Kensington residents tend to utilize Kensington stores primarily for convenience goods and personal services. Also, the lack of perceived quality restaurants is seen by many as impinging on the ability to attract customers.

Based upon BBP Associates interviews, the market surveys and various field observations, combined with experience in similar retail revitalization areas, we concur with the basic assumptions stated by the merchants that retail sales are flat to declining. Given the significant expansion in regional retail activity, particularly expansion and enhanced marketing of other antique centers, as well as the growth of "big box" value oriented retail on Rockville Pike, the ability of the Kensington merchants to maintain retail sales to the levels they have is a compliment to their marketing and merchandising efforts.

In an ever increasingly competitive retail climate, the need to coordinate marketing and merchandising efforts among the relatively small and geographically divided businesses must be emphasized. Kensington appears to be in a relatively fragile retail state. Although the area does not appear to be "broken," more aggressive revitalization efforts and marketing and merchandising are needed. This will be required just to maintain and possibly to improve the competitive market position of Kensington within the overall Montgomery County retail market place.

## 3. Light Industrial

There is limited light industrial space in Kensington, although much of the auto related uses are industrial in character. Major industrial type uses include a concrete plant, a Pepco Substation, a State Highway Administration facility and general contractor space. Near term attrition of selected small industrial type users may create infill opportunities. Longer-term

replacement of major facilities such as the SHA or the concrete plant may create future redevelopment sites. There are no known plans for conversion of any of these facilities.

**C. EXISTING BUSINESS SUPPLY**

The focus of this study is the KCA. It includes all businesses located within the Town of Kensington as well as businesses located to the west of the Town limits on Howard Avenue and to the north along Connecticut Avenue and University Boulevard from Perry to Decatur Avenues. Attached Figure 1 displays the boundaries of the KCA.

In the summer of 1996 BBP Associates undertook field surveys and first floor retail data collection of all types of existing businesses and current vacant space. Square footage and number of establishments are based upon field observations and measuring of base maps. As shown in Table 1, there is a variety of retail, personal services and business services located throughout the KCA. For the purpose of this analysis, the KCA was divided into four quadrants that are separated east to west by Connecticut Avenue and north to south by the railroad tracks (see Figure 1). Also the businesses were allocated into five categories: retail trade, business services, personal services, auto repair services and vacant.

The greatest proportion of retail trade space is located in the northeast quadrant with approximately 117,000 total square feet (including 8,000 vacant square feet) and 38 establishments. The southwest quadrant has 37 retail establishments with 79,000 total square feet of retail trade space (including 3,000 vacant square feet). The southeast quadrant has 48 establishments in 74,000 total square feet of retail trade space (including 1,400 vacant square feet). The northwest quadrant only contains a total of approximately 21,000 square feet and 7 establishments (including 13,000 square feet of vacant space).

The majority of business services, which include professional and medical offices, both vacant and occupied, contractors and other business services are located within the northeast and northwest quadrants with approximately 225,000 total square feet (including 12,500 vacant square feet) and 153,000 total square feet (including 2,200 vacant square feet), respectively. The preponderance of personal services are located in the northeast quadrant with over 7,200 occupied square feet. The majority of auto repair services are located in the northwest quadrant with almost 32,000 occupied square feet.

For the entire KCA there is almost 978,000 square feet of business inventory (see Table 2). The majority of that square footage, or almost 613,000 square feet, is designated as business services. Retail trade constitutes approximately 116 establishments with almost 266,000 square feet of space. The next largest amount of space is occupied by auto repair services with 27 establishments and almost 58,000 square feet of space. Personal services

**FIGURE 1**  
**QUADRANT IDENTIFICATION**  
**KENSINGTON COMMERCIAL AREA**

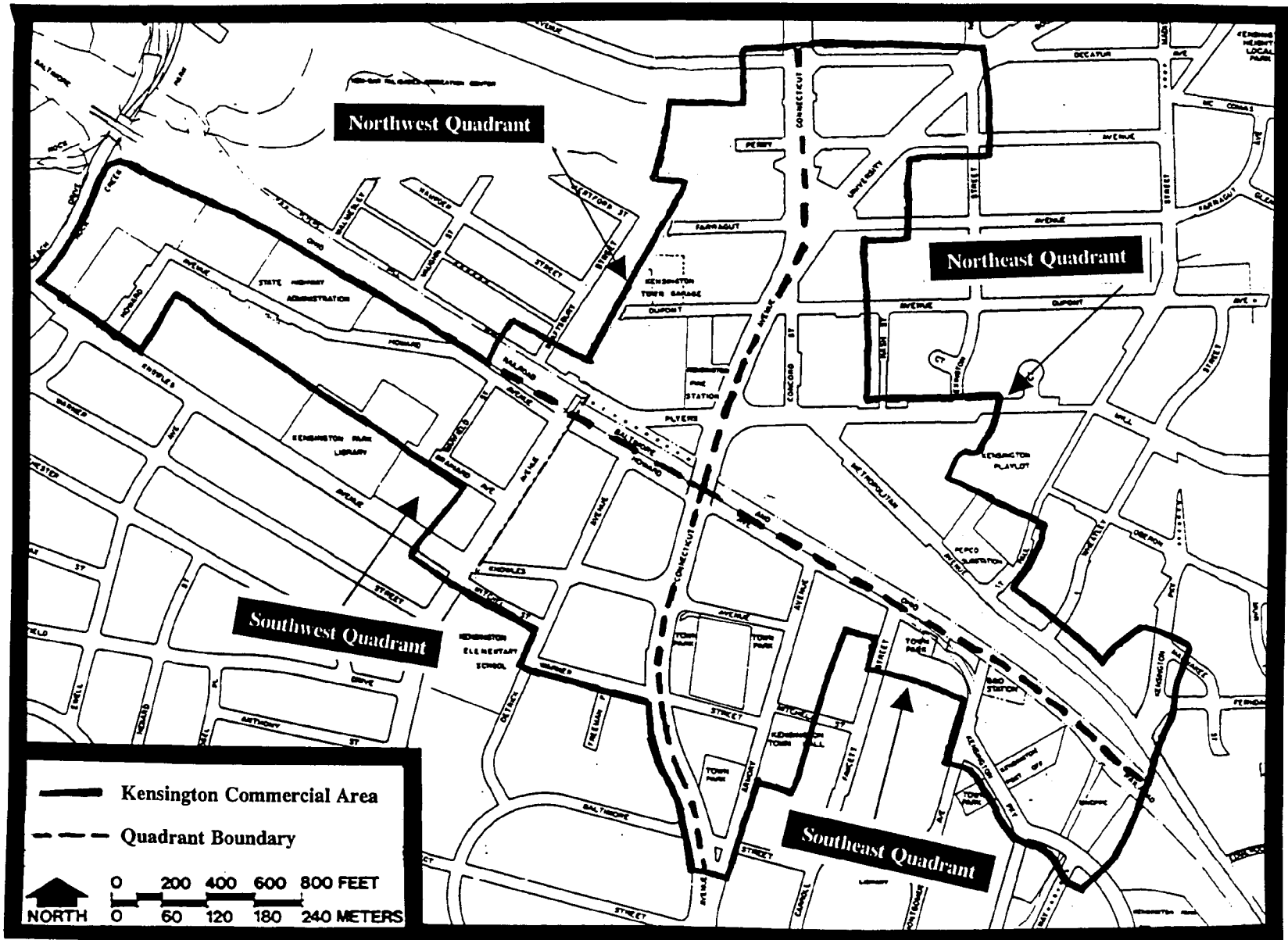


TABLE 1  
EXISTING BUSINESS INVENTORY BY QUADRANT  
FOR THE  
KENSINGTON COMMERCIAL AREA  
SUMMER, 1996

Business Type	Northwest Quadrant (#1)		Northeast Quadrant (#2)		Southwest Quadrant (#3)		Southeast Quadrant (#4)	
	No. of Est.	Est. SF	No. of Est.	Est. SF	No. of Est.	Est. SF	No. of Est.	Est. SF
<i>Retail Trade 1/</i>								
Building Materials & Supplies	0	0	2	55,000	1	17,500	1	7,500
Food & Drug Stores	0	0	4	17,600	2	3,500	2	22,400
Auto Dealers & Service Stations	1	2,000	5	9,000	3	4,000	2	3,500
Apparel & Accessories	0	0	4	3,850	0	0	3	2,400
Furniture & Home Furnishings	0	0	4	8,500	8	13,250	5	3,250
Eating & Drinking	1	2,400	7	8,050	2	1,150	2	2,200
Antiques	3	3,650	5	4,150	4	2,850	11	12,350
Miscellaneous Retail	0	0	2	2,800	13	33,750	19	19,100
<b>Total Occupied</b>	<b>5</b>	<b>8,050</b>	<b>33</b>	<b>108,950</b>	<b>33</b>	<b>76,000</b>	<b>45</b>	<b>72,700</b>
<i>Vacant</i>	<b>2</b>	<b>13,000</b>	<b>5</b>	<b>7,950</b>	<b>4</b>	<b>3,000</b>	<b>3</b>	<b>1,400</b>
<b>TOTAL RETAIL</b>	<b>7</b>	<b>21,050</b>	<b>38</b>	<b>116,900</b>	<b>37</b>	<b>79,000</b>	<b>48</b>	<b>74,100</b>
<i>Personal Services</i>	2	1,800	7	7,200	2	2,150	6	5,150
<i>Auto Repair Services</i>	10	31,700	2	7,250	15	18,750	0	0
<i>Business Services 2/</i>								
Professional Office Buildings								
-- Occupied		132,450		143,520		92,598		78,200
-- Vacant		2,200		12,480		8,052		6,800
-- Total	<b>4</b>	<b>134,650</b>	<b>6</b>	<b>156,000</b>	<b>3</b>	<b>100,650</b>	<b>2</b>	<b>85,000</b>
Other Offices	4	4,000	6	17,800	1	750	3	2,900
Business Services	4	4,000	12	44,850	20	38,650	5	3,150
Contractors	2	10,000	4	6,750	5	3,350	0	0
<b>TOTAL</b>	<b>14</b>	<b>152,650</b>	<b>28</b>	<b>225,400</b>	<b>29</b>	<b>143,400</b>	<b>10</b>	<b>91,050</b>
<b>GRAND TOTAL</b>	<b>33</b>	<b>207,200</b>	<b>75</b>	<b>356,750</b>	<b>83</b>	<b>243,300</b>	<b>64</b>	<b>170,300</b>

NOTE: The inventory does not include wholesale or industrial uses.

1/ Retail located on first floor.

2/ Business services located on multi-levels.

Source: Based on field surveys by Basile Baumann Prost & Associates, Inc.

TABLE 2  
TOTAL EXISTING BUSINESS INVENTORY  
FOR THE  
KENSINGTON COMMERCIAL AREA  
SUMMER, 1996

<b>Business Type</b>	<b>Total Establishments</b>	<b>Estimated Square Feet</b>
<i>Retail Trade 1/</i>		
Building Materials & Supplies	4	80,000
Food & Drug Stores	8	43,500
Auto Dealers & Service Stations	11	18,500
Apparel & Accessories	7	6,250
Furniture & Home Furnishings	17	25,000
Eating & Drinking	12	13,800
Antiques	23	23,000
Miscellaneous Retail	<u>34</u>	<u>55,650</u>
<b>Total Occupied</b>	<b>116</b>	<b>265,700</b>
<i>Vacant</i>	<u>14</u>	<u>25,350</u>
<b>TOTAL RETAIL</b>	<b>130</b>	<b>291,050</b>
 <i>Personal Services</i>	 17	 16,300
<i>Auto Repair Services</i>	27	57,700
 <i>Business Services 2/</i>		
Professional Office Buildings		
-- Occupied		446,768
-- Vacant		29,532
-- <i>Total</i>	<b>15</b>	<b>476,300</b>
Other Offices	14	25,450
Business Services	41	90,650
Contractors	<u>11</u>	<u>20,100</u>
<b>TOTAL</b>	<b>81</b>	<b>612,500</b>
 <b>GRAND TOTAL</b>	 <b>255</b>	 <b>977,550</b>

NOTE: The inventory does not include wholesale or industrial uses.

1/ Retail located on first floor.

2/ Business services located on multi-levels.

Source: Based on field surveys by Basile Baumann Prost & Associates, Inc.



constitute over 16,000 square feet of space within 17 stores. As of the summer of 1996, there are over 25,000 square feet of vacant ground floor space within the KCA (excluding an additional 29,500 square feet of vacant space located within professional office buildings).

BBP Associates has prepared the first detailed and accurate inventory of square footage, by use type and by quadrant within the KCA. The square footage inventory is based upon detailed field surveys of space use during the summer of 1996 and the classification of retail types. As evidenced in BBP Associates' field surveys the KCA is as much an office concentration (446,000 occupied square feet) as a retail center (266,000 occupied square feet). The significant physical boundaries of the rail line and Connecticut Avenue tend to further limit the critical mass created by this retail inventory.

The area has a strong concentration of antique and home furnishing establishments followed by a significant contingent of auto repair services. There is no single concentration of vacant space on the ground floor as vacant space is generally scattered throughout the area. The mix of uses is quite "eclectic" and does not reflect a typical mix of uses which may be found in a neighborhood or community center. As such, Kensington provides special concentrations of antique and auto repair uses and a variety of highly specialized stores attracting purposeful trips.

BBP Associates has attempted to make a comparison with the 1990 retail inventory conducted by John Pickard Associates. The methodologies and classifications of the Pickard study are not known so a direct comparison is not possible. The Pickard study did not provide information on vacant space. The BBP Associates survey has fourteen less establishments within the KCA than the Pickard survey and at the same time had identified fourteen ground floor vacancies.

According to the Pickard retail survey there were 129 retail trade establishments and 18 personal service store types in 1990. Compared with the above 1996 retail supply, there is one less personal service and 13 less retail establishments within the KCA. With the exception of miscellaneous retail which was surveyed as increasing by 10 stores and building material stores which was surveyed as increasing by one store, all types saw a reduction in number of establishments between the 1990 and 1996 surveys. Antique shops saw the largest difference, 37 stores in 1990 and 23 in 1996. This difference may be due to methodological or classification differences. The difference in the remaining store types fluctuated by only one or two stores.

This decrease in the total number of establishments from the 1990 to the 1996 survey may be accounted for by the 14 ground floor vacancies determined by the latest survey (the 1990 survey did not include vacancies) or by previous retail space converting to business

service or office space. In the case of antique stores, as verified through interviews and meetings, many of the antique stores began to offer a variety of new merchandise which may have caused them to be reclassified between the 1990 and 1996 surveys.

Table 3 contains a comparison of the Kensington retail mix with that of a typical community shopping center as identified by the Urban Land Institute. Kensington contains approximately 307,000 square feet versus 180,000 square feet for the average community shopping center. The orientation of the Kensington toward miscellaneous retail and antiques; and, away from apparel, food and drug stores, and building materials and supplies is evidenced. Kensington's vacancy rate is approximately equivalent to that experienced in the typical community center. Kensington stores, with the exception of building materials and supplies, are significantly smaller in square footage than that the typical community center.

Kensington's commercial sales however, are approximately \$30 per square foot higher than experienced by median sales levels of a typical community center. This is reflective in part by the smaller average store size and highly productive (sales per square foot) food and drug stores, auto dealers and service stations. While only 25 percent of the space in the typical community shopping center has sales per square feet under \$200 an estimated 61 percent of the occupied space in Kensington is estimated to have sales under \$200 per square foot.

There is very limited vacant land area in the KCA. The largest concentration of vacant and/or underutilized land include the concrete plant site and industrial uses along Metropolitan Avenue and industrial uses and the State Highway Administration facility along Howard Avenue (west).

#### D. EXISTING COMPETITIVE SUPPLY

Selected retail concentrations within Montgomery County are shown in Figure 2. Some of these compete directly with Kensington. The major key competitors for general retail, or comparison shoppers goods, (apparel, furniture and home furnishings) are the major retail centers of White Flint (Market Key 104) and Montgomery Mall (Market Key 61) and the Rockville Pike Corridor (Market Keys 25, 26, 27, 31, 32, 70, 71, 72, 80, 85, 90, 96 and 107). The neighborhood (e.g., food, drug, personal services) and specialty retail space in Kensington compete with Chevy Chase (Market Key 18), Bethesda (Market Keys 1, 7, 8, 9, 92, 93 and 108), and Wheaton (Market Keys 101, 102 and 103). The specialty retail (restaurants) sees competition from Wheaton (Market Keys 101, 102 and 103) and Washington, DC. The antique market tends to attract customers from longer distances and is, therefore, competitive with areas such as Frederick, New Market, Leesburg and Old Town

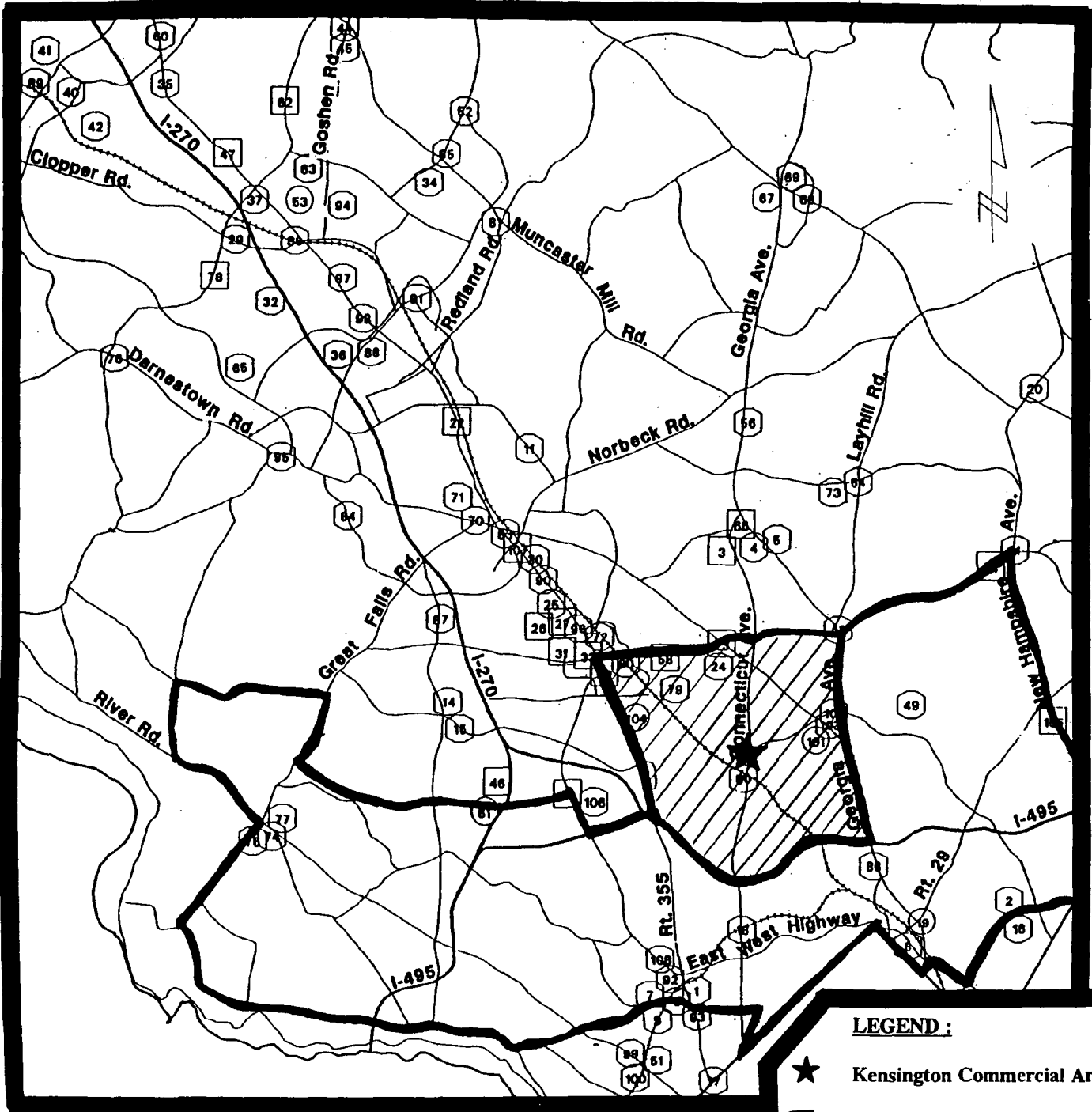
**TABLE 3  
COMPARISON OF KENSINGTON RETAIL MIX  
TO TYPICAL RETAIL MIX OF NORTHEAST COMMUNITY CENTERS  
1995**

Store Type	Kensington				Typical Community Center			
	% Distribution		Average	Estimated	% Distribution		Average	Median
	Establishments	Square Feet	Store SF	Sales/SF	Establishments	Square Feet	Store SF	Sales/SF
Building Materials & Supplies	3%	26%	20,000	\$105	1%	13%	5,000	\$161
Food & Drug Stores	5%	14%	7,300	\$529	8%	45%	17,400	\$418
Auto Dealers & Service Stations	7%	6%	2,000	\$649	1%	12%	4,700	\$193
Apparel & Accessories	5%	2%	900	\$256	17%	8%	2,900	\$206
Furniture & Home Furnishings	12%	8%	1,500	\$232	7%	8%	3,000	\$227
Eating & Drinking	8%	4%	1,200	\$290	16%	5%	2,000	\$295
Antiques	16%	7%	1,000	\$139	N/A	N/A	N/A	N/A
Miscellaneous Retail	23%	18%	1,600	\$198	22%	5%	2,000	\$218
Personal Services	12%	5%	1,000	\$129	19%	4%	1,300	\$230
Vacant	10%	8%	1,800	\$0	9%	N/A	N/A	N/A
<b>TOTAL/AVERAGE</b>	<b>100%</b>	<b>100%</b>	<b>307,350</b>	<b>\$252</b>	<b>100%</b>	<b>100%</b>	<b>180,000</b>	<b>\$226</b>

**TOTAL/AVERAGE**

Source: Urban Land Institute (1994 dollars adjusted to 1995 dollars); Basile Baumann Prost & Associates, Inc.

**FIGURE 2**  
**MONTGOMERY COUNTY RETAIL FACILITIES**  
**JULY 1993**



**LEGEND :**

- ★ Kensington Commercial Area
- ▨ Secondary Trade Area
- Tertiary Trade Area
- Regional Center
- Community Center
- Neighborhood Center

\*\* Note: Legend continued on next page

LEGEND  
FIGURE 2  
MONTGOMERY COUNTY RETAIL FACILITIES  
JULY 1993

Map #	Name	Street	Gross Leasible Square Feet	Map #	Name	Street	Gross Leasible Square Feet
1.	Air Rights Center	Wisconsin Ave.	76,346	55.	Laytons Village Shopping Ctr.	Olney Laytonsville Rd.	25,253
2.	Arliss Street Shopping Center	Arliss St.	47,838	56.	Leisureworld Plaza	International Dr.	110,530
3.	Aspen Hill	Connecticut Ave.	200,000	57.	Little Falls Mall	Sangamore Rd.	151,000
4.	Aspen Manor Shopping Ctr. I	Georgia Ave.	41,052	58.	Loehmann's Plaza	Randolph Rd.	100,777
5.	Aspen Manor Shopping Ctr. II	Georgia Ave.	44,928	59.	Mid-Pike Shopping Center	Rockville Pike	309,914
6.	Bethesda Avenue Row	Bethesda Ave.	33,069	60.	Middlebrooke Square Shpg Ctr.	Middlebrook Rd.	30,000
7.	Bethesda Avenue Row West	Arlington Rd.	37,848	61.	Montgomery Mall	Democracy Blvd.	1,600,000
8.	Blair Park Plaza	East-West Hwy.	60,000	62.	Montgomery Village Mall	Mont. Village Ave.	170,330
9.	Bradley Blvd. Shopping Center	Bradley Blvd.	55,382	63.	Montgomery Village Off-Price Ctr	Lost Knife Rd.	117,346
10.	Briggs Chaney	Columbia Pike	191,000	64.	Montrose Shopping Center	Randolph Rd.	143,025
11.	Burgandy Park Shopping Center	E. Gude Dr.	60,338	65.	Muddy Branch Square Shpg Ctr.	Muddy Branch Rd.	888,493
12.	Burtonsville Crossing	Columbia Pike	129,746	66.	Northgate Shopping Center	Georgia Ave.	275,000
13.	Burtonsville Shopping Center	Old Columbia Pike	49,420	67.	Olney Shopping Center	Olney Laytonsville Rd.	53,701
14.	Cabin John Mall	Seven Locks rd.	78,276	68.	Olney Town Center	Spartan Dr.	98,848
15.	Cabin John Shopping Center	Tuckerman Ln.	139,234	69.	Olney Village Mart	Village Mart Dr.	140,000
16.	Central Square Shopping Center	Piney Branch Rd.	37,464	70.	One Stop Shopping Center I	N. Washington St.	34,155
17.	Chevy Chase Center	Wisconsin Cir.	64,161	71.	One Stop Shopping Center II	N. Washington St.	82,110
18.	Chevy Chase Lake Shopping Ctr.	Connecticut Ave.	64,421	72.	Pike Center	Rockville Pike	72,091
19.	City Place	Colesville Rd.	275,000	73.	Plaza Del Mercado	Bel Pre Rd.	94,884
20.	Cloverly Center	New Hampshire Ave.	28,066	74.	Potomac Place Shopping Center	River Rd.	79,107
21.	Colesville Center	Colesville Rd.	85,000	75.	Potomac Promenade	Falls Rd.	87,980
22.	College Plaza	Frederick Rd.	106,139	76.	Potomac Valley Shopping Center	Darnestown Rd.	106,000
23.	Colonial Shopping Center	Veirs Mill Rd.	97,836	77.	Potomac Village Pl. and Shping.	River Rd.	34,552
24.	Colonial Veirs Mill Village	Randolph Rd.	157,000	78.	Quince Orchard Plaza	Quince Orchard Rd.	128,141
25.	Congressional North	Rockville Pike	69,128	79.	Randolph Hills Shopping Center	Boiling Point Rd.	71,116
26.	Congressional Plaza	Congressional Ln.	222,546	80.	Randolph Shopping Center	Nebel St.	80,516
27.	Congressional South	Rockville Pike	56,706	81.	Redmill Shopping Center	Muncaster Mill Rd.	46,806
28.	Damascus Center	Main St.	139,496	82.	Ridgeview Centre	Ridge Rd.	92,500
29.	Diamond Square Center	Bureau Dr.	76,759	83.	Ritchie Center	Rockville Pike	54,000
30.	Edmonston Crossing	Rockville Pike	35,432	84.	Rockshire Village Center	Wootton Pkwy.	51,862
31.	Federal Plaza Shopping Center	E. Jefferson St.	244,888	85.	Route 124 Plaza	Woodfield Rd.	26,400
32.	Festival at muddy Branch	Muddy Branch Rd.	188,777	86.	Seminary Place	Georgia Ave.	42,538
33.	Flagship Center	Rockville Pike	354,327	87.	Seven Locks Plaza	Seven Locks Rd.	48,146
34.	Flower Hill Shopping Center	Flower Hill Way	93,840	88.	Shady Grove Center	Shady Grove Rd.	108,579
35.	Fox Chapel Center	N. Frederick Rd.	115,000	89.	Sugarloaf Centre	Wisteria Dr.	118,525
36.	Gaither Center	Luanne Dr.	37,520	90.	Talbot Center	Rockville Pike	39,116
37.	Gaithersburg Square	N. Frederick Ave.	152,678	91.	The Grove	Crabbs Branch Way	90,000
38.	Gaithersburg Plaza	N. Frederick Ave.	64,930	92.	The Shoppes of Bethesda	Elm St.	36,618
39.	Georgetown Square	Old Georgetown Rd.	118,553	93.	The Shops of Chevy Chase	Wisconsin Ave.	50,500
40.	Germantown Center	Wisteria Dr.	27,000	94.	The Summit	Girard St.	46,850
41.	Germantown Commons Shpg Ctr.	Middlebrook Rd.	176,821	95.	Travilah Square Shopping Center	Darnestown Rd.	45,314
42.	Germantown Square Shpg Ctr.	Wisteria Dr.	106,414	96.	Twinbrook Shopping Center	Rockville Pike	68,336
43.	Glenmont Shopping Center	Georgia Ave.	93,000	97.	Walnut Center	S. Frederick Ave.	25,212
44.	Goshen Crossing Shopping Ctr.	Goshen Rd.	78,456	98.	Walnut Hill Shopping Center	Frederick Rd.	98,057
45.	Goshen Plaza	Rothbury Dr.	45,513	99.	Westwood Center II	Ridgefield Rd.	54,226
46.	Hechinger Square Bethesda	Westlake Terr.	94,557	100.	Westwood Shopping Center	Westbard Ave.	100,588
47.	Hechinger Station	N. Frederick Ave.	87,019	101.	Wheaton Plaza Shopping Center	Veirs Mill Rd.	1,100,000
48.	Hillandale Shopping Center	New Hampshire Ave.	175,808	102.	Wheaton Shopping Center	Georgia Ave.	47,309
49.	Kemp Mill Shopping Center	Arcola Ave.	79,000	103.	Wheaton Station	Grandview Ave.	35,352
50.	Kensington Shopping Center	Connecticut Ave.	41,948	104.	White Flint Mall	Rockville Pike	900,672
51.	Kenwood Station Shopping Ctr.	River Rd.	29,742	105.	White Oak Shopping Center	New Hampshire Ave.	452,565
52.	Kolb Center	Airpark rd.	29,905	106.	Wildwood Shopping Center	Old Georgetown Rd.	81,925
53.	Lakeforest Shopping Center	Russell Ave.	1,100,000	107.	Wintergreen Plaza	Rockville Pike	146,321
54.	Layhill Shopping Center	Layhill Rd.	40,000	108.	Woodmount Corner	Old Georgetown Rd.	54,629

\* Bolded Centers are located within the Primary, Secondary and/or Tertiary Trade Areas.

Alexandria. Specifically, a major antique center that competes with Kensington is Savage Mills.

Kensington is at a significant competitive disadvantage vis-à-vis the other localities because of a lack of critical mass and a balkanization of the mass that does exist because of significant physical barriers. Kensington stores also possess significantly less visibility than its retail competition which offer more convenient parking than the KCA. Commercial uses more visible along Connecticut Avenue and University Avenue represent a relatively small portion of the retail activities within the KCA. Howard Avenue (east and west) and Metropolitan Avenue suffer from lack of visibility and a relatively small concentration of retail activities. The need is to capitalize on the strategic location, unique environment and ambiance that Kensington can present. This will help to overcome the lack of critical mass and visibility. This highlights the need for streetscape features that emphasize entryway points for each quadrant, signage, parking, marketing and merchandising and/or a larger dependency on a more immediate local population base.

E. DEVELOPMENT PLANS/PROPOSALS

Although there are no known plans for any large-scale redevelopment within Kensington, there are the recent openings such as the Cafe Monet. There is also the planned renovation of Safeway and the proposed improvements to the Sunoco at Connecticut and Metropolitan Avenues, which have been temporarily withdrawn. Pending also are the streetscape improvements and upgrading of the physical image. There is also the potential for reuse of existing vacant buildings. Additionally, property owners along the planned streetscape improvements have expressed interest in reinvesting in their facades.

Based upon BBP Associates' experience, the relatively limited number of development plans and proposals reflect the uncertainty of the market support, the lack of available sites and the indeterminate nature of support for revitalization. This has important implications and in our opinion, highlights the need to create a consensus as to the type and scale of retail activities that are possible. An on-going organization and implementation structure is also desirable to help facilitate improvements and serve as a "champion" to encourage more reinvestment within the community.

#### **IV. MARKET OPPORTUNITIES AND CONSTRAINTS**

This section summarizes the opportunities and constraints for the KCA by identifying the areas which supply the majority of customers. From the various surveys/interviews, three market trade areas were identified. The economic/demographic characteristics of each were analyzed. A market evaluation was conducted to estimate the retail sales and expenditure trends along with the commercial area's capture rate of market area demand.

##### **A. MARKET AREA IDENTIFICATION**

In order to identify the trade areas which have a direct impact on the businesses within the KCA, several factors were studied. These factors included interviews and surveys with store owners and managers (see Appendix 1, pages A-30 through A-40), buying patterns delineated from the resident surveys (see Appendix 1, page A-29), location of competing retail facilities (see Appendix 1, page A-1), physical boundaries in relation to available data on consumer expenditure patterns, estimated drive time and the like. These factors were combined by store type, such as neighborhood retail, comparison shoppers goods and antiques to determine approximate trade areas.

Based on interview and survey results, the primary trade area for neighborhood retail consists of a large "walkshed" which approximates the Town of Kensington. This is the area from which neighborhood retail uses derive an important proportion of their demand. As noted subsequently in this section the primary area accounts for approximately 10 percent of the overall sales within the KCA.

The secondary trade area for neighborhood retail, as well as the primary trade area for comparison shoppers, was determined to constitute a "driveshed" of an approximately 1.5 to 2 mile radius from the intersection of Connecticut and Howard Avenues. This is the area from which neighborhood retail uses derive most of the sales not generated from the primary trade area. This is also the area from which comparison shoppers goods derive most of all their sales.

The larger tertiary trade area was determined to be similar to the primary market area for antiques. This was defined from interviews and detailed sales data provided from selected antique stores. This includes areas such as Silver Spring to the east, Potomac to the west and Chevy Chase and Bethesda to the south and west. All boundaries were reviewed and confirmed with Montgomery County DHCA.

As shown in Figure 3, the primary trade area is defined as the Town of Kensington and several properties outside the Town limits but within the KCA. The secondary trade area surrounds the Town at an approximately 1.5 to 2 mile radius (see Figure 4). These boundaries include Randolph Road to the north, the Capital Beltway to the south, Georgia Avenue to the east and Rockville Pike to the west.

The larger tertiary area includes both the primary and secondary trade areas but extends approximately 3 miles to the east, 6 miles to the west and 2 miles to the south, as shown in Figure 5. This area was primarily defined from interviews with and data provided by antique establishment representatives. The boundaries for this area include:

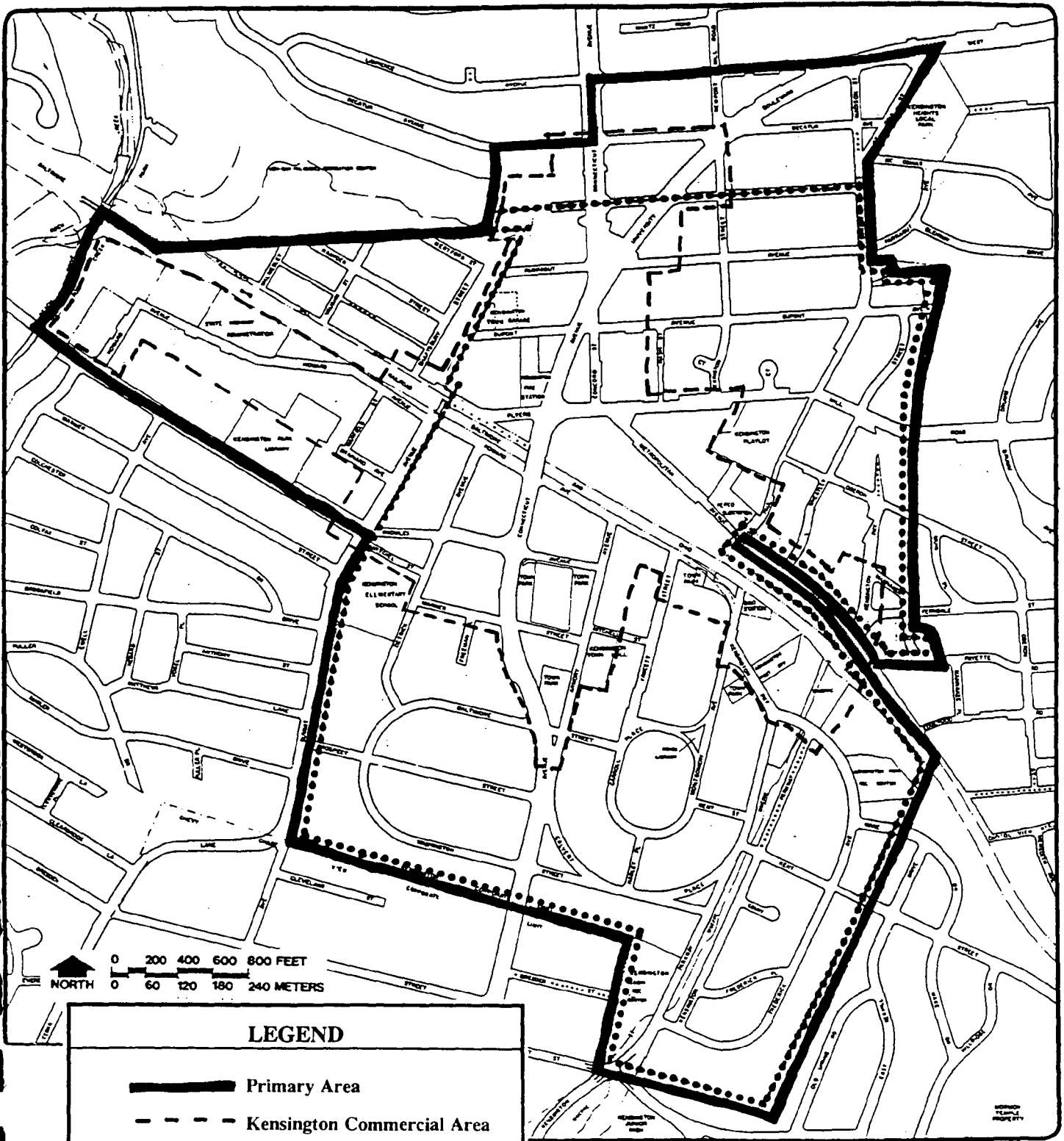
- North Border: Glen Road (from Piney Meeting House Road) east to Falls Road; Falls Road south to Democracy Boulevard; Democracy Boulevard east to Old Georgetown Road; Old Georgetown Road south to the Beltway; the Beltway east to Rockville Pike; Rockville Pike north to Randolph Road; Randolph Road east to New Hampshire Avenue.
- East Border: New Hampshire Avenue south to Piney Branch Road.
- South Border: Piney Branch Road west to Sligo Avenue; Sligo Avenue west to Georgia Avenue; Georgia Avenue south to the District of Columbia line; District of Columbia line west to Brookville Road; Brookville Road north to Bradley/Goldsboro Boulevard; Bradley/Goldsboro Boulevard west to McArthur Boulevard; McArthur Boulevard west to Falls Road.
- West Border: Falls Road north to River Road; River Road west to Piney Meeting House Road; Piney Meeting House Road north to Glen Road.

The primary and secondary areas reflect those trade areas for non-antique stores. The relatively small size of the primary and secondary area results from the highly competitive commercial environment within Montgomery County. The relatively small size of the Kensington retail inventory, the strong orientation to a single specialty use (antiques) and the divided nature of the retail inventory because of the rail road and major thoroughfares all tend to limit the size of the primary and secondary trade areas. The constrained geographic area of the primary and secondary market is ameliorated somewhat by the high density and relatively high incomes within the market place.

The relatively constrained primary and secondary trade area, however, highlights the importance of providing a high level of services and amenities for the consumers who must



FIGURE 3  
PRIMARY TRADE AREA



**LEGEND**

- Primary Area
- Kensington Commercial Area
- Town of Kensington

FIGURE 4  
SECONDARY TRADE AREA

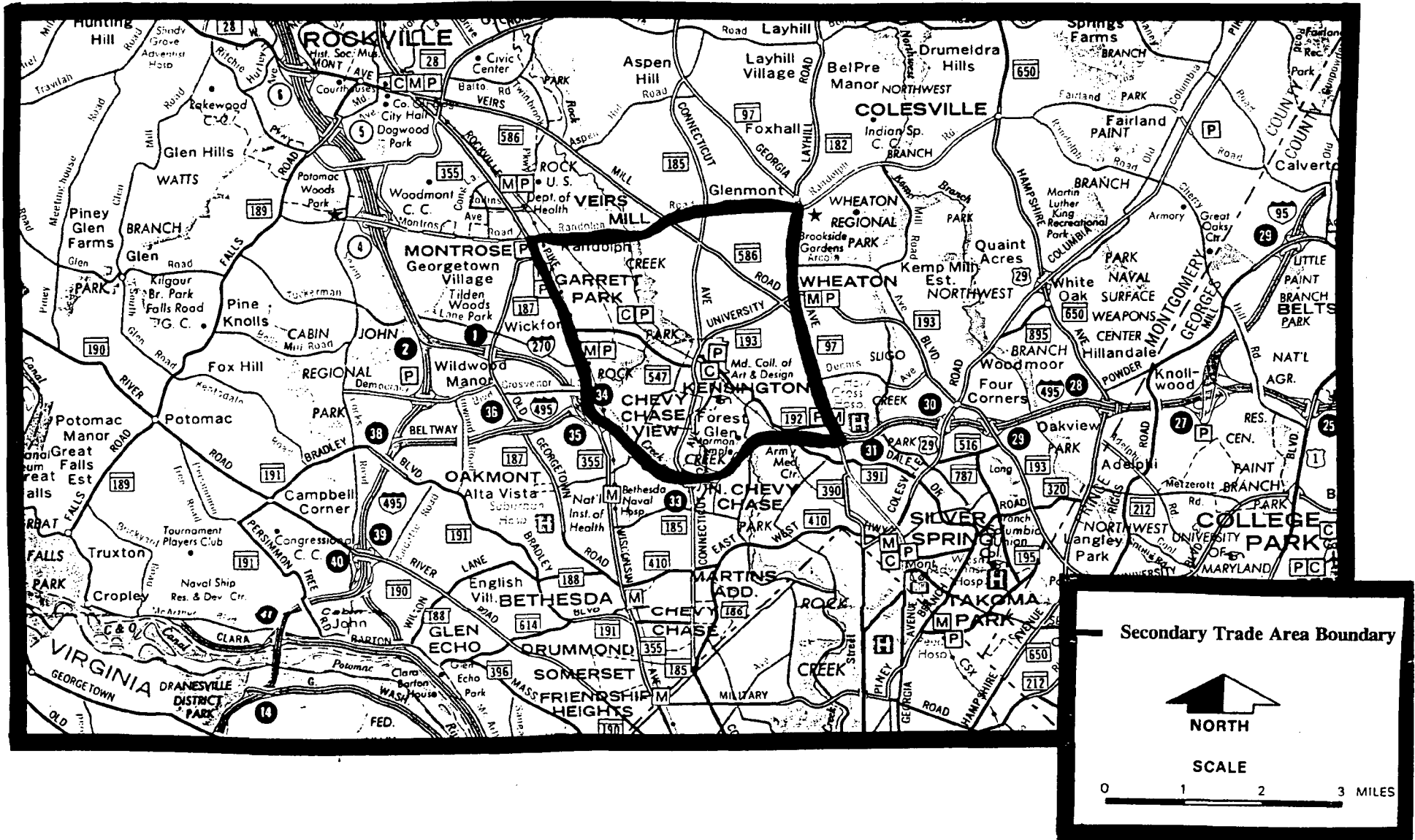
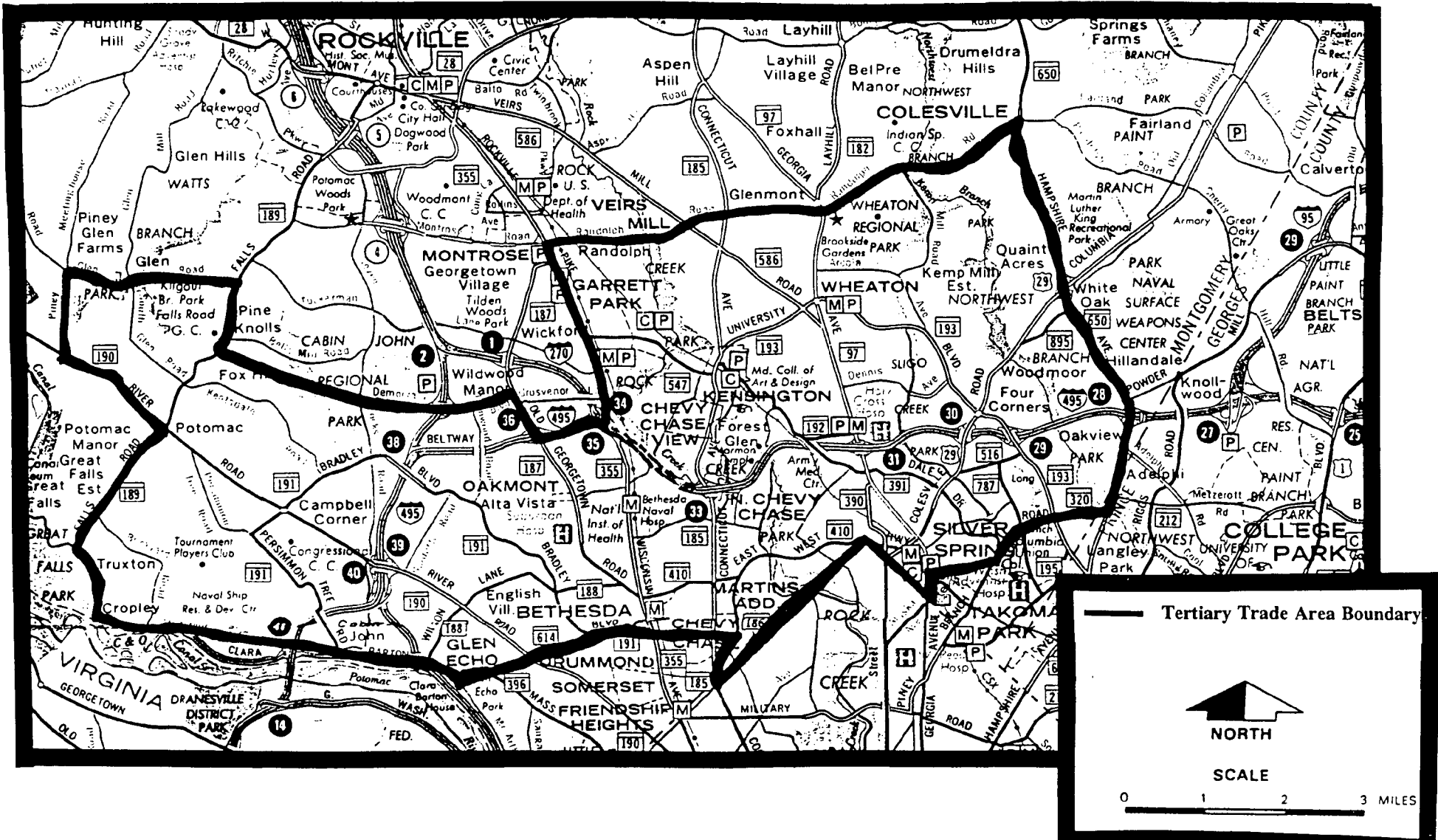


FIGURE 5  
TERTIARY TRADE AREA



represent a large proportion of repeat clientele. Enhancing the interrelationships between the surrounding residential community and the Kensington business community is also important given the limited nature of the market place.

The tertiary trade area was defined in large measure by information provided by selected antique establishments and reflects the more widely distributed market place for these specialty uses. Information derived from interviews, surveys and data, highlight the need to target this large geographic area potentially through special mailings and broader community oriented events.

**B. ECONOMIC/DEMOGRAPHIC ANALYSIS**

Since the 1980s both the Washington Metropolitan Statistical Area (MSA) and Montgomery County have continued to see a steady population and household growth (see Tables 4 and 5 and Appendix 1, pages A-25 through A-28). However, the pace of growth of the population is expected to decrease in the MSA as more people leave the inner Beltway area for more suburban locations within Montgomery County.

The market areas have seen a fluctuation of population growth and decline since the 1980s. The primary market area population has grown at an annual rate of 0.8 percent between 1990 and 1995 and is projected to maintain that pace through the year 2000. The secondary and tertiary market areas have both remained relatively stable with a modest decrease in population between 1990 and 1995 at an annual rate of 0.9 and 0.3 percent, respectively. Both areas are projected to decrease in population through the year 2000 with the secondary market area declining by 0.6 percent per year and the tertiary market area declining slightly at 0.1 percent per year. This decline in the secondary and tertiary trade area population reflects the relatively slow replacement of older households by younger families.

As shown in Table 6, the primary trade area has the highest proportion of people that are white non-Hispanic. The primary trade area is 90.0 percent white non-Hispanic versus 70.2 and 67.7 percent in the secondary and tertiary trade areas, respectively. The highest percentage of the population by age group within the primary trade area, 25.0 percent, is 65 years and over. The highest percentage by age group of Montgomery County population, 21.4 percent and of the secondary and tertiary trade area populations, 20.9 and 22.5 percent, respectively, are between 45 and 64 years of age. The primary trade area has 21.4 percent of its population between the ages of 45 and 64. The secondary and tertiary trade areas have 15.4 and 15.0 percent of their population, respectively, 65 years and older. This high percentage of elderly in the primary trade area suggests a larger percentage of the population with more free time. This is confirmed by the low, 59.9 percent, labor force participation rate for the primary trade area. Detailed demographic information on the primary trade area is

**TABLE 4**  
**POPULATION TRENDS AND PROJECTIONS**  
**WASHINGTON MSA, MONTGOMERY COUNTY AND**  
**PRIMARY, SECONDARY AND TERTIARY TRADE AREAS**  
**1980, 1990, 1995 AND 2000**

<b>Area</b>	<b>1980</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>
Washington MSA	3,250,900	3,923,574	4,204,500	4,477,900
Montgomery County	579,055	757,027	810,217	859,235
Primary Area	1,827	1,713	1,782	1,857
Secondary Area	48,224	47,881	45,707	44,343
Tertiary Area	215,201	229,586	225,955	225,000

<b>Area</b>	<b>Annual Change</b>					
	<b>1980-1990</b>		<b>1990-1995</b>		<b>1995-2000</b>	
	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>
Washington MSA	67,267	2.1%	56,185	1.4%	54,680	1.3%
Montgomery County	17,797	3.1%	10,638	1.4%	9,804	1.2%
Primary Area	-11	-0.6%	14	0.8%	15	0.8%
Secondary Area	-34	-0.1%	-435	-0.9%	-273	-0.6%
Tertiary Area	1,439	0.7%	-726	-0.3%	-191	-0.1%

Source: Washington Council of Government; Claritas; Basile Baumann Prost & Associates, Inc.

**TABLE 5**  
**HOUSEHOLD TRENDS AND PROJECTIONS**  
**WASHINGTON MSA, MONTGOMERY COUNTY AND**  
**PRIMARY, SECONDARY AND TERTIARY TRADE AREAS**  
**1980, 1990, 1995 AND 2000**

<b>Area</b>	<b>1980</b>	<b>1990</b>	<b>1995</b>	<b>2000</b>
Washington MSA	1,112,158	1,459,619	N/A	N/A
Montgomery County	207,200	282,228	304,765	327,501
Primary Area	701	681	713	751
Secondary Area	17,335	18,393	17,816	17,583
Tertiary Area	82,326	91,269	90,648	91,360

<b>Area</b>	<b>Annual Change</b>					
	<b>1980-1990</b>		<b>1990-1995</b>		<b>1995-2000</b>	
	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>
Washington MSA	34,746	3.1%	N/A		N/A	
Montgomery County	7,503	3.6%	4,507	1.6%	4,547	1.5%
Primary Area	-2	-0.3%	6	0.9%	8	1.1%
Secondary Area	106	0.6%	-115	-0.6%	-47	-0.3%
Tertiary Area	894	1.1%	-124	-0.1%	142	0.2%

Source: Washington Council of Government; Claritas; Basile Baumann Prost & Associates, Inc.

**TABLE 6**  
**SELECTED POPULATION CHARACTERISTICS**  
**MONTGOMERY COUNTY AND**  
**PRIMARY, SECONDARY AND TERTIARY TRADE AREAS**  
**1990, 1995**

<b>Characteristics</b>	<b>Montgomery County</b>		<b>Primary Area</b>		<b>Secondary Area</b>		<b>Tertiary Area</b>	
	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>
<i>1995 Population By Age</i>								
Under 15 years	165,711	20.7%	284	15.9%	8,007	17.5%	38,819	17.2%
15 to 24 years	93,205	11.6%	148	8.3%	4,563	10.0%	24,022	10.6%
25 to 34 years	144,113	18.0%	218	12.2%	8,040	17.6%	37,715	16.7%
35 to 44 years	151,556	18.9%	305	17.1%	8,503	18.6%	40,715	18.0%
45 to 64 years	171,379	21.4%	381	21.4%	9,533	20.9%	50,864	22.5%
Over 65 years	84,393	10.5%	446	25.0%	7,055	15.4%	33,821	15.0%
Median Age (in years)	35.1		43.0		37.5		38.0	
<i>1995 Population By Race</i>								
White (not Hispanic)	553,156	69.0%	1,604	90.0%	32,082	70.2%	152,744	67.6%
Black (not Hispanic)	102,612	12.8%	44	2.5%	4,254	9.3%	28,994	12.8%
Asian (not Hispanic)	79,944	10.0%	58	3.3%	3,953	8.6%	19,587	8.7%
All Other	2,888	0.4%	5	0.3%	172	0.4%	802	0.4%
Hispanic Origin	71,617	8.9%	71	4.0%	5,248	11.5%	23,827	10.5%
<i>1990 Households By Type</i>								
Male no Wife no Child	5,256	1.9%	13	1.9%	420	2.3%	1,831	2.0%
Female no Husband no Child	13,016	4.6%	29	4.3%	1,054	5.7%	4,670	5.1%
Married Couple Family	166,026	58.8%	395	58.0%	13,078	70.6%	49,979	54.5%
Other Family HH w/ Child	16,224	5.7%	13	1.9%	884	4.8%	4,199	4.6%
Non-Family	82,381	29.2%	223	32.7%	5,778	31.2%	31,014	33.8%

Source: Claritas; Basile Baumann Prost & Associates, Inc.

found in Appendix 1, pages A-2 through A-10. Detailed demographic information on the secondary and tertiary trade areas is found in Appendix 1, pages A-13 through A-20.

Average household size has declined annually for Montgomery County and the three trade areas since the 1980s. The median household income for these areas has increased in current dollars between 1990 and 1995 (see Table 7). The median income of the primary area increased by 14 percent from \$49,145 to \$55,903. Median income in the secondary and tertiary trade areas increased between 10 and 11 percent, respectively. The highest median income is located within the tertiary trade area and is \$60,338. This is slightly higher than the Montgomery County median income of \$60,163 and over \$4,000 higher than both the secondary and primary trade areas with median income of \$56,584 and \$55,903, respectively.

The demographic data for the primary market area indicates the generally homogeneous and more elderly characteristics of the population. This more elderly population has a high proportion of retirees and a slightly lower median income. This population also appears to have a relatively high-accumulated wealth. This implies the need to target this more elderly population in terms of a high level of services and specialized merchandise types. Available leisure time indicates opportunities for restaurants/cafes, specialized bookstores, arts and crafts and the like.

C. MARKET EVALUATION

An evaluation was undertaken for both the office market and retail market in the KCA, as summarized below.

1. Office Market

Based on employment projections by selected Traffic Analysis Zones (the smallest available areas for which employment projections by the cooperative regional forecast system are undertaken), as supplemented by interviews with leasing agents, current office trends and future office employment were evaluated.

As shown in Table 8, office employment for Montgomery County increased by 1,180 persons (0.5 percent) per year between 1990 and 1995. A rate of increase of 2.2 percent per year is projected from 1995 to 2000 as more firms tend to leave Washington, DC for the Maryland Suburbs. The numbers reflect the consensus opinion of the Regional Council of Governments and the Maryland National Capital Park and Planning Commission (MNCPPC) economists. The primary trade area office employment increased annually between 1990 and 1995 by approximately 100 persons or 4.9 percent.



**TABLE 7**  
**HOUSEHOLD INCOME DISTRIBUTION**  
**MONTGOMERY COUNTY AND**  
**PRIMARY, SECONDARY AND TERTIARY TRADE AREAS**  
**1990 AND 1995**  
**(Current \$)**

	1990		1995		Percent Change 1990-1995
	No.	%	No.	%	
<b>Montgomery County</b>					
Under \$10,000	12,066	4.3%	12,668	4.2%	5%
\$10,000 to \$19,999	18,967	6.7%	17,819	5.8%	-6%
\$20,000 to \$24,999	13,405	4.7%	12,683	4.2%	-5%
\$25,000 to \$34,999	31,817	11.3%	30,647	10.1%	-4%
\$35,000 to \$49,999	50,450	17.9%	47,574	15.6%	-6%
\$50,000 to \$74,999	69,545	24.6%	71,715	23.5%	3%
\$75,000 and Over	85,978	30.5%	111,659	36.6%	30%
<b>Median</b>	<b>\$54,163</b>		<b>\$60,163</b>		<b>11%</b>
<b>Primary Area</b>					
Under \$10,000	27	4.0%	30	4.2%	11%
\$10,000 to \$19,999	62	9.1%	54	7.6%	-13%
\$20,000 to \$24,999	43	6.3%	34	4.8%	-21%
\$25,000 to \$34,999	68	10.0%	69	9.7%	1%
\$35,000 to \$49,999	147	21.6%	123	17.3%	-16%
\$50,000 to \$74,999	136	20.0%	158	22.2%	16%
\$75,000 and Over	198	29.1%	245	34.4%	24%
<b>Median</b>	<b>\$49,145</b>		<b>\$55,903</b>		<b>14%</b>
<b>Secondary Area</b>					
Under \$10,000	733	4.0%	702	3.9%	-4%
\$10,000 to \$19,999	1,377	7.5%	1,197	6.7%	-13%
\$20,000 to \$24,999	9,977	54.2%	812	4.6%	-92%
\$25,000 to \$34,999	2,237	12.2%	2,001	11.2%	-11%
\$35,000 to \$49,999	3,527	19.2%	3,019	16.9%	-14%
\$50,000 to \$74,999	5,083	27.6%	4,423	24.8%	-13%
\$75,000 and Over	4,435	24.1%	5,606	31.5%	26%
<b>Median</b>	<b>\$51,269</b>		<b>\$56,584</b>		<b>10%</b>
<b>Tertiary Area</b>					
Under \$10,000	4,095	4.5%	3,980	4.4%	-3%
\$10,000 to \$19,999	6,821	7.5%	5,900	6.5%	-14%
\$20,000 to \$24,999	4,415	4.8%	4,170	4.6%	-6%
\$25,000 to \$34,999	10,232	11.2%	9,245	10.2%	-10%
\$35,000 to \$49,999	15,354	16.8%	13,513	14.9%	-12%
\$50,000 to \$74,999	20,865	22.9%	19,502	21.5%	-7%
\$75,000 and Over	29,483	32.3%	34,342	37.9%	16%
<b>Median</b>	<b>\$54,479</b>		<b>\$60,388</b>		<b>11%</b>

Source: Claritas; Basile Baumann Prost & Associates, Inc.

**TABLE 8  
AT-PLACE EMPLOYMENT \*  
MONTGOMERY COUNTY,  
PRIMARY AND SECONDARY TRADE AREAS  
1990, 1995, 2000 AND 2005**

	<b>1990</b>	<b>1995</b>	<b>2000</b>	<b>2005</b>
<i>Montgomery County</i>				
-- Office	255,543	261,445	290,688	321,100
-- Retail	88,302	91,881	96,254	101,997
-- Industrial	42,309	42,387	77,394	66,465
<i>Primary Area</i>				
-- Office	2,118	2,637	2,743	2,900
-- Retail	1,538	1,387	1,397	1,415
-- Industrial	1,419	1,321	1,331	1,350
<i>Secondary Area</i>				
-- Office	12,067	15,421	15,799	16,689
-- Retail	14,746	14,530	14,638	15,071
-- Industrial	3,941	4,725	4,841	4,947

	<b>Average Annual Change</b>					
	<b>1990 - 1995</b>		<b>1995 - 2000</b>		<b>2000 - 2005</b>	
	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>
<i>Montgomery County</i>						
-- Office	1,180	0.5%	5,849	2.2%	3,041	1.0%
-- Retail	716	0.8%	875	1.0%	574	0.6%
-- Industrial	16	0.0%	7,001	16.5%	-1,093	-1.4%
<i>Primary Area</i>						
-- Office	104	4.9%	21	0.8%	16	0.6%
-- Retail	-30	-2.0%	2	0.1%	2	0.1%
-- Industrial	-20	-1.4%	2	0.2%	2	0.1%
<i>Secondary Area</i>						
-- Office	671	5.6%	76	0.5%	89	0.6%
-- Retail	-43	-0.3%	22	0.1%	43	0.3%
-- Industrial	157	4.0%	23	0.5%	11	0.2%

\* "At-Place Employment" is defined as persons who work within the designated areas, regardless of where they live.

Source: Maryland - National Capital Park and Planning Commission; Basile Baumann Prost & Associates, Inc.

The increase in the primary area employment was due primarily to regional market forces reflected mainly by the construction of the Kaiser Permanente building on Connecticut Avenue. Local population based office demand is reflected in part by small private firms leasing office space within the Bakery, Confectionery and Tobacco Workers International Union complex and other area buildings such as the WRIT and Concord buildings. The primary trade area is expected to continue growth of at place employment though the year 2005.

The growth in the office market and projected office employment combined with relatively little available land indicates opportunities for infill office space. The generally highly skilled and professionally oriented residential population and increased numbers of small business establishments create opportunities for enhanced office utilization and/or commercial activities supportive of these office uses. This could include additional business service establishments, office supplies, restaurants, etc.

## 2. Retail Market

As shown in Table 9 total 1995 retail sales for the KCA are estimated at \$71 million, for an average of \$252 per square foot. Supplemental information on primary trade area retail sales is found in Appendix 1, pages A-11 and A-12. A significant proportion of sales are generated by food stores (\$19.3 million) and miscellaneous retail (\$11.1 million). The total retail sales for the secondary and tertiary trade areas are \$610 million and \$1.7 billion, respectively (see Table 10 and Appendix 1, pages A-21 and A-22).

As shown in Table 11 there are approximately 116 ground floor retail establishments within the primary trade area and 610 within the secondary trade area. Antique stores and auto related stores are concentrated in the primary trade area. Antique stores and auto related stores constitute 47.9 and 33.3 percent respectively of these types of establishments within the secondary area. Overall, the primary area accounts for 19.0 percent of the establishments within the secondary trade area.

The primary trade area residents spend a total of approximately \$13.6 million in all retail stores. The secondary area residents spend \$343.6 million (see Table 12). Total primary area expenditures are relatively modest compared to those of the secondary area.

The data on retail establishments, sales and expenditures within the primary and secondary area highlight the concentration of retail establishments within the very narrow Kensington market area. In proportional terms the primary trade area has about 16 percent of the sales of the secondary area and only 4 percent of the expenditures of the secondary trade

**TABLE 9**  
**ESTIMATED RETAIL SALES PER SQUARE FOOT**  
**PRIMARY TRADE AREA**  
**1995**

<b>Store Type</b>	<b>Number of Establishments</b>	<b>Estimated Square Feet</b>	<b>Estimated Sales</b>	<b>Estimated Sales/Square Feet</b>
Building Materials & Supplies	4	80,000	\$8,400,000	\$105
Food Stores	6	37,300	\$19,300,000	\$517
Drug Stores	2	6,200	\$3,700,000	\$597
Auto Dealers	1	2,500	\$2,300,000	\$920
Auto Supply & Service Stations	10	16,000	\$9,700,000	\$606
Apparel & Accessories	7	6,250	\$1,600,000	\$256
Furniture & Home Furnishings	17	25,000	\$5,800,000	\$232
Eating & Drinking	12	13,800	\$4,000,000	\$290
Antiques	23	23,000	\$3,200,000	\$139
Miscellaneous Retail	34	55,650	\$11,000,000	\$198
Personal Services	17	<u>16,300</u>	<u>\$2,100,000</u>	\$129
<b>TOTAL/AVERAGE</b>	<b>133</b>	<b>282,000</b>	<b>71,100,000</b>	<b>\$252</b>

Source: Claritas; Basile Baumann Prost & Associates, Inc.

**TABLE 10**  
**COMPARATIVE RETAIL SALES BY SELECTED STORE TYPE**  
**PRIMARY, SECONDARY AND TERTIARY TRADE AREAS**  
**1995**

<b>Selected Store Type</b>	<b>Primary Area</b>	<b>Secondary Area</b>	<b>Tertiary Area</b>
<b><i>Building Materials ( SIC 52)</i></b>			
Building Materials & Supply	\$7,300,000	\$19,700,000	\$61,300,000
Hardware Stores	\$0	\$1,000,000	\$11,600,000
Retail Nursery/ Lawn & Garden	<u>\$1,100,000</u>	<u>\$1,300,000</u>	<u>\$3,700,000</u>
Subtotal	<b>\$8,400,000</b>	<b>\$22,000,000</b>	<b>\$76,600,000</b>
<b><i>Department Stores (SIC 531)</i></b>			
	<b>\$0</b>	<b>\$99,900,000</b>	<b>\$201,700,000</b>
<b><i>Food (SIC 54) &amp; Drug (SIC 591) Stores</i></b>			
Food Stores	\$19,300,000	\$86,600,000	\$197,500,000
Drug and Proprietary Stores	<u>\$3,700,000</u>	<u>\$9,200,000</u>	<u>\$60,300,000</u>
Subtotal	<b>\$23,000,000</b>	<b>\$95,800,000</b>	<b>\$257,800,000</b>
<b><i>Auto Dealers &amp; Gas Stations (SIC 55)</i></b>			
Auto Dealers	\$2,300,000	\$135,300,000	\$413,100,000
Auto Supply Stores	\$2,100,000	\$10,500,000	\$28,800,000
Gasoline/ Service Stations	<u>\$7,600,000</u>	<u>\$17,800,000</u>	<u>\$98,200,000</u>
Subtotal	<b>\$12,000,000</b>	<b>\$163,600,000</b>	<b>\$540,100,000</b>
<b><i>Apparel &amp; Accessory Stores (SIC 56)</i></b>			
Apparel Stores	\$1,600,000	\$42,300,000	\$101,600,000
Shoe Stores	\$0	<u>\$11,300,000</u>	<u>\$22,800,000</u>
Subtotal	<b>\$1,600,000</b>	<b>\$53,600,000</b>	<b>\$124,400,000</b>
<b><i>Furniture &amp; Home Furnishings (SIC 57)</i></b>			
Furniture	\$700,000	\$10,800,000	\$27,800,000
Home Furnishings	\$900,000	\$11,400,000	\$29,800,000
HH Appliances	\$500,000	\$1,900,000	\$13,400,000
Radio/TV/Electronics	<u>\$3,700,000</u>	<u>\$17,800,000</u>	<u>\$61,300,000</u>
Subtotal	<b>\$5,800,000</b>	<b>\$41,900,000</b>	<b>\$132,300,000</b>
<b><i>Eating &amp; Drinking Places (SIC 58)</i></b>			
Eating Places	\$4,000,000	\$40,500,000	\$183,000,000
Drinking Places	\$0	\$0	<u>\$900,000</u>
Subtotal	<b>\$4,000,000</b>	<b>\$40,500,000</b>	<b>\$183,900,000</b>
<b><i>Antiques (SIC 5932)</i></b>			
	<b>\$3,200,000</b>	<b>\$7,200,000</b>	<b>\$9,800,000</b>
<b><i>Miscellaneous Retail (SIC 59)</i></b>			
	<b>\$11,000,000</b>	<b>\$85,500,000</b>	<b>\$217,400,000</b>
<b>GRAND TOTAL</b>	<b>\$69,000,000</b>	<b>\$610,000,000</b>	<b>\$1,744,000,000</b>

Source: Claritas; Basile Baumann Prost & Associates, Inc.

**TABLE 11**  
**TOTAL SELECTED RETAIL ESTABLISHMENTS**  
**PRIMARY, SECONDARY AND TERTIARY TRADE AREAS**  
**1995**

<b>Store Type</b>	<b>Number of Establishments</b>			<b>Percent of Primary Area</b>	
	<b>Primary</b>	<b>Secondary</b>	<b>Tertiary</b>	<b>Secondary</b>	<b>Tertiary</b>
Building Materials & Supplies	4	22	64	18.2%	6.3%
Department Stores	0	10	22	0.0%	0.0%
Food & Drug Stores	8	53	199	15.1%	4.0%
Auto Dealers & Service Stations	11	33	124	33.3%	8.9%
Apparel & Accessories	7	88	245	8.0%	2.9%
Furniture & Home Furnishings 1/	17	99	339	17.2%	5.0%
Eating & Drinking	12	98	443	12.2%	2.7%
Antiques	23	48	59	47.9%	39.0%
Miscellaneous Retail	34	159	531	21.4%	6.4%
<b>TOTAL/AVERAGE</b>	<b>116</b>	<b>610</b>	<b>2,026</b>	<b>19.0%</b>	<b>5.7%</b>

Source: Claritas, Basile Baumann Prost & Associates, Inc.

**TABLE 12**  
**ESTIMATED EXPENDITURES FOR SELECTED RETAIL STORE TYPES**  
**PRIMARY AND SECONDARY TRADE AREAS**  
**1995**

	<b>Primary</b>	<b>Secondary</b>
Number of Households	713	17,816
Median Household Income	\$55,903	\$56,584
Aggregated Income	\$39,858,839	\$1,008,100,544

<b>Store Type</b>	<b>Expenditure by Store Type</b>			
	<b>No.</b>	<b>%</b>	<b>No.</b>	<b>%</b>
Building Materials & Supplies	\$395,000	1.0%	\$10,606,000	1.1%
Department Stores	\$1,696,000	4.3%	\$42,583,000	4.2%
Food Stores	\$3,070,000	7.7%	\$77,011,000	7.6%
Drug Stores	\$634,000	1.6%	\$15,226,000	1.5%
Auto Supply & Service Stations	\$1,680,000	4.2%	\$43,192,000	4.3%
Apparel & Accessories	\$813,000	2.0%	\$20,472,000	2.0%
Furniture & Home Furnishings	\$706,000	1.8%	\$18,245,000	1.8%
Eating & Drinking	\$1,984,000	5.0%	\$48,767,000	4.8%
Antiques	\$399,000	1.0%	\$10,081,000	1.0%
Miscellaneous Retail	\$1,794,000	4.5%	\$45,365,000	4.5%
Personal Services	\$478,000	1.2%	\$12,097,000	1.2%
<b>TOTAL</b>	<b>\$13,649,000</b>	<b>34.2%</b>	<b>\$343,645,000</b>	<b>34.1%</b>

Source: Claritas; Basile Baumann Prost & Associates, Inc.

area. While the primary trade area has relatively small buying power vis-a-vie the secondary trade area, retail sales are significantly more concentrated within the primary trade area.

In order to project future retail sales and supportable retail square footage in the KCA, BBP Associates undertook an extensive analysis of existing retail sales, capture rates of primary and secondary market area residents expenditures and proportion of sales by market source (e.g., percent of purchases made by primary and second market area residents). This analysis was derived from interviews with businesses, business surveys, an evaluation of retail expenditures by location, an analysis of retail sales by source, and an examination of competitive retail facilities.

Table 13 shows the current estimated retail sales in the KCA and the distribution of retail sales by store type and market source.

Based on similar expenditure information from Claritas, Inc. (a national data information service utilized by both demographers and retail store operators) and confirmed by responses to the resident surveys estimated expenditure patterns were established. As shown in Table 13, of the total \$68.8 million in sales of the selected stores, 9.6 percent, or \$6.6 million in purchases, is made by primary market area residents; 54.2 percent, or \$37.3 million by secondary market area residents; and 36 percent of sales are derived from persons residing outside the primary and secondary trade areas. The majority of antique sales (87 percent), apparel and accessories store sales (78 percent) and miscellaneous retail store sales (50 percent) are made to persons who reside outside the primary and secondary trade area boundaries. The relatively small portion of KCA sales that are supported by primary area residents highlights the need to market to the secondary market area and beyond in order to maintain the multiple and diverse KCA businesses.

Although only a small percentage of sales in the commercial area retail stores are made to primary area residents these stores capture almost half (48.6 percent) of the retail expenditures of primary area residents, as shown in Table 14. On the other hand, while the majority of sales made in area stores are derived from secondary area residents the local stores only captured 10.9 percent of the retail and personal services expenditures of secondary trade area residents. Hence, in order to increase sales the stores need to improve marketing and merchandising and their relative attractiveness in order to capture a higher percentage of both the primary area and secondary area resident expenditures.

Based upon this detailed information on sales inflow and outflow retail establishments in Kensington tend to constitute two unique types. Antiques, apparel and accessories and miscellaneous retail stores tend to serve a broader regional market place. Other establishments, such as food stores, are very much dependent upon primary trade area resident



TABLE 13  
 ESTIMATED KENSINGTON RETAIL SALES FOR SELECTED STORE TYPES  
 BY MARKET SOURCE  
 1995

Store Type	Total Sales	Distribution of Sales By Source					
		Primary Area Residents		Secondary Area Residents		Other Area Residents	
		Amount	%	Amount	%	Amount	%
Building Materials & Supplies	\$8,400,000	\$336,000	4.0%	\$3,864,000	46.0%	\$4,200,000	50.0%
Food Stores	\$19,300,000	\$2,316,000	12.0%	\$14,475,000	75.0%	\$2,509,000	13.0%
Drug Stores	\$3,700,000	\$407,000	11.0%	\$3,034,000	82.0%	\$259,000	7.0%
Auto Supply & Service Stations	\$9,700,000	\$1,455,000	15.0%	\$3,443,500	35.5%	\$4,801,500	49.5%
Apparel & Accessories	\$1,600,000	\$112,000	7.0%	\$240,000	15.0%	\$1,248,000	78.0%
Furniture & Home Furnishings	\$5,800,000	\$290,000	5.0%	\$2,900,000	50.0%	\$2,610,000	45.0%
Eating & Drinking	\$4,000,000	\$600,000	15.0%	\$2,680,000	67.0%	\$720,000	18.0%
Antiques	\$3,200,000	\$192,000	6.0%	\$224,000	7.0%	\$2,784,000	87.0%
Miscellaneous Retail	\$11,000,000	\$550,000	5.0%	\$4,950,000	45.0%	\$5,500,000	50.0%
Personal Services	\$2,100,000	\$378,000	18.0%	\$1,512,000	72.0%	\$210,000	10.0%
<b>TOTAL/AVERAGE</b>	<b>\$68,800,000</b>	<b>\$6,636,000</b>	<b>9.6%</b>	<b>\$37,322,500</b>	<b>54.2%</b>	<b>\$24,841,500</b>	<b>36.1%</b>

NOTE: For the purposes of this analysis, sales made to the secondary area do not include sales made to primary area residents and the tertiary area is combined with sales made to other areas.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE 14**  
**ESTIMATED MARKET CAPTURE RATE**  
**FOR SELECTED STORE TYPES**  
**BY MARKET SOURCE**  
**1995**

<b>Store Type</b>	<b>Primary Area</b>	<b>Secondary Area</b>
Building Materials & Supplies	85.1%	37.8%
Food Stores	75.4%	19.6%
Drug Stores	64.2%	20.8%
Auto Supply & Service Stations	86.6%	8.3%
Apparel & Accessories	13.8%	1.2%
Furniture & Home Furnishings	41.1%	16.5%
Eating & Drinking	30.2%	5.7%
Antiques	48.1%	2.2%
Miscellaneous Retail	30.7%	10.9%
Personal Services	79.1%	12.5%
<b>AVERAGE</b>	<b>48.6%</b>	<b>10.9%</b>

Source: Basile Baumann Prost & Associates, Inc.

sales and capture a high proportion of retail expenditures of primary area residents. The market capture rate from the secondary trade area however is relatively low. This indicates the need to provide a variety of retail marketing, merchandising and improvement approaches to enhance secondary market area capture rates for neighborhood oriented stores.

Selected establishments will need to have targeted marketing and specific events to attract a larger proportion of sales from a broader geographically based community. Improved gateway and directional signage is necessary to direct potential clients to establishments. Additional parking areas to serve these potential patrons should also be addressed. Retail establishments need to forge a strong relationship with the surrounding residential area, particularly persons residing within the primary and secondary market areas. Their clientele targeting, merchandising and programming should reflect the special demographic characteristics (more elderly) of the surrounding population and emphasize community-oriented events, promotions and marketing to enhance residential support for KCA businesses.

D. CONCLUSIONS

1. Office Market

As discussed in the preceding sections, based on information from various data sources, and interviews with area realtors, merchants and leasing agents, there has been a significant increase in the office employment of the primary area since 1990. This increase is projected to continue at an increasing rate annually through the year 2005. As shown in Table 15, with an estimated 200 square feet per employee and projected employment growth, Kensington could support an additional 21,200 square feet of office space through 2000 and an additional 31,400 square feet through 2005.

With a relatively low office vacancy rate of 8 percent, or 30,240 square feet of office, the increased demand for office space could fill those current vacancies within the office buildings plus support additional square footage of in-fill office space. Without a large tract of vacant land, it is unlikely that a major new office complex would be built within the commercial area.

The level of office demand, the characteristics of Kensington, and the lack of significant land resources would create opportunities for small infill development which could compete for scarce land resources with retail activity. Similarly, small professional office space uses could compete to occupy ground floor space now devoted to retail uses. This potential conversion to office use stems from the fragile existing retail market conditions and the downward pressure on retail sales volumes and lease rates. This could further negatively

**TABLE 15**  
**SUPPORTABLE OFFICE SQUARE FOOTAGE**  
**PRIMARY MARKET AREA**  
**2000 AND 2005**

	<u>1995 - 2000</u>	<u>2000 - 2005</u>
Net New Employment	106	157
Average Square Feet per Employee	200	200
<b>Total Additional Square Feet</b>	<b>21,200</b>	<b>31,400</b>

Source: Basile Baumann Prost & Associates, Inc.

impact the level of retail activity by having office use outbid retail activity further reducing the critical mass of retail uses.

In the longer-term it may be possible to satisfy this office space demand by capturing a major single purpose user such as the Bakery, Confectionery and Tobacco Workers International Union, Kaiser Permanente or a major accounting or professional service firm. This could serve as an anchor tenant for a major project such as redevelopment of the concrete plant site on Metropolitan Avenue or redevelopment of State Highway Administration properties on Howard Avenue (west). This would represent a more long-term opportunity and could require a change in the area sector plan and a full addressing of parking and circulation issues.

## 2. Retail Market by Store Type

The commercial establishments need to capitalize on the market characteristics of the primary and secondary market areas including above average median income and the high percentage of older population which possesses higher disposable income and more significant leisure time. The KCA also has several specialized market opportunities such as the convenient location to the Beltway; unique, historic small town image; affordable retail and office space; specialty antique niche; and, a strong sense of community. All of these factors need to be better promoted.

Projections of future sales were conducted by evaluating trends in retail sales capture rates and sales by market source. BBP Associates projected growth in retail sales taking into consideration changes in population, households, household income and retail expenditures (see Table 16). BBP Associates first assumed the KCA can maintain its capture rate of primary market area residents and the proportion of sales by market source (the percentage of sales generated by residents of the various trade areas).

As shown in Table 17 maintenance of capture rates would allow retail sales to increase from approximately \$68.8 million in 1995 to \$80.7 million by the year 2000 and \$93.3 million by the year 2005. These figures are in current dollars not adjusted for inflation. The estimated 3 percent average annual increase in retail sales from maintenance of current capture rates essentially mirrors the increase due to inflation (i.e., flat retail sales in constant or "real" dollar term adjusted for inflation). Revitalization activities are required to maintain sales volumes in constant or "real" dollars adjusted for inflation.

Secondly, as shown in Table 18, BBP Associates projected retail sales assuming that modest increases in capture rates of primary area resident expenditures are achieved for apparel and miscellaneous retail, and relatively more significant increases in market capture

**TABLE 16**  
**ESTIMATED FUTURE PRIMARY TRADE AREA EXPENDITURES**  
**2000 AND 2005**  
**(Current \$)**

	<u>2000</u>	<u>2005</u>
Number of Households	751	789
Median Household Income	\$61,493	\$67,643
Aggregated Income	\$46,181,468	\$53,370,035

<u>Store Type</u>	<u>Expenditure by Store Type</u>			
	<u>2000</u>		<u>2005</u>	
	<u>No.</u>	<u>%</u>	<u>No.</u>	<u>%</u>
Building Materials & Supplies	\$461,800	1.0%	\$533,700	1.0%
Department Stores	\$1,985,800	4.3%	\$2,294,900	4.3%
Food Stores	\$3,556,000	7.7%	\$4,109,500	7.7%
Drug Stores	\$738,900	1.6%	\$853,900	1.6%
Auto Supply & Service Stations	\$1,939,600	4.2%	\$2,241,500	4.2%
Apparel & Accessories	\$923,600	2.0%	\$1,067,400	2.0%
Furniture & Home Furnishings	\$831,300	1.8%	\$960,700	1.8%
Eating & Drinking	\$2,309,100	5.0%	\$2,668,500	5.0%
Antiques	\$461,800	1.0%	\$533,700	1.0%
Miscellaneous Retail	\$2,078,200	4.5%	\$2,401,700	4.5%
Personal Services	<u>\$554,200</u>	<u>1.2%</u>	<u>\$640,400</u>	<u>1.2%</u>
<b>TOTAL</b>	<b>\$15,840,300</b>	<b>34.3%</b>	<b>\$18,305,901</b>	<b>34.3%</b>

Source: Claritas, Basile Baumann Prost & Associates, Inc.

TABLE 17  
**ESTIMATED RETAIL SALES PROJECTIONS FOR THE COMMERCIAL AREA  
 FROM CONSTANT CAPTURE RATES**  
 2000 and 2005  
 (Current \$)

Store Type	Primary Area Capture Rate	2000	2005	Percent of Sales To Primary Area Residents	Percent of Sales To Residents Outside Primary Area	Estimated Total Sales (2000)	Estimated Total Sales (2005)
		Captured Primary Area Expenditures	Captured Primary Area Expenditures				
Building Materials & Supplies	85.1%	\$392,800	\$454,000	4.0%	96.0%	\$9,820,000	\$11,350,000
Food Stores	75.4%	\$2,682,600	\$3,100,200	12.0%	88.0%	\$22,355,000	\$25,835,000
Drug Stores	64.2%	\$474,300	\$548,200	11.0%	89.0%	\$4,311,800	\$4,983,600
Auto Supply & Service Stations	86.6%	\$1,679,800	\$1,941,300	15.0%	85.0%	\$11,198,700	\$12,942,000
Apparel & Accessories	13.8%	\$127,200	\$147,000	7.0%	93.0%	\$1,817,100	\$2,100,000
Furniture & Home Furnishings	41.1%	\$341,500	\$394,600	5.0%	95.0%	\$6,830,000	\$7,892,000
Eating & Drinking	30.2%	\$698,300	\$807,000	13.0%	87.0%	\$5,371,500	\$6,207,700
Antiques	48.1%	\$222,200	\$256,800	6.0%	94.0%	\$3,703,300	\$4,280,000
Miscellaneous Retail	30.7%	\$637,100	\$736,300	5.0%	95.0%	\$12,742,000	\$14,726,000
Personal Services	79.1%	\$438,300	\$506,400	17.0%	83.0%	\$2,578,200	\$2,978,800
<b>AVERAGE</b>	<b>48.6%</b>	<b>\$7,255,800</b>	<b>\$8,385,400</b>	<b>9.0%</b>	<b>91.0%</b>	<b>\$80,727,600</b>	<b>\$93,295,100</b>

Source: Basile Baumann Prost & Associates, Inc.

TABLE 18  
 ESTIMATED RETAIL SALES PROJECTIONS FOR THE COMMERCIAL AREA  
 FROM INCREASED CAPTURE RATES  
 2000 and 2005  
 (current \$)

Store Type	1996	2000	2005	2000	2005	2000		2005		Estimated	Estimated
	Primary Area Capture Rate	Increased Primary Area Capture Rate	Increased Primary Area Capture Rate	Increased Capture Primary Area Expenditures	Increased Capture Primary Area Expenditures	Percent of Sales To Primary Area Residents	Percent of Sales To Residents Outside Primary Area	Percent of Sales To Primary Area Residents	Percent of Sales To Residents Outside Primary Area	Total Sales (2000)	Total Sales (2005)
Building Materials & Supplies	85.1 %	85.1 %	85.1 %	\$392,800	\$454,000	4.0 %	96.0 %	4.0 %	96.0 %	\$9,820,000	\$11,350,000
Food Stores	75.4 %	75.4 %	75.4 %	\$2,682,600	\$3,100,200	12.0 %	88.0 %	12.0 %	88.0 %	\$22,355,000	\$25,835,000
Drug Stores	64.2 %	64.2 %	64.2 %	\$474,300	\$548,200	11.0 %	89.0 %	11.0 %	89.0 %	\$4,311,800	\$4,983,600
Auto Supply & Service Stations	86.6 %	86.6 %	86.6 %	\$1,679,800	\$1,941,300	15.0 %	85.0 %	15.0 %	85.0 %	\$11,198,700	\$12,942,000
Apparel & Accessories	13.8 %	14.0 %	15.0 %	\$129,300	\$160,100	7.5 %	92.5 %	8.0 %	92.0 %	\$1,724,000	\$2,001,300
Furniture & Home Furnishings	41.1 %	41.1 %	41.1 %	\$341,500	\$394,600	5.0 %	95.0 %	5.0 %	95.0 %	\$6,830,000	\$7,892,000
Eating & Drinking	30.2 %	33.0 %	35.0 %	\$762,000	\$934,000	13.0 %	87.0 %	12.0 %	88.0 %	\$5,861,500	\$7,783,300
Antiques	48.1 %	48.1 %	48.1 %	\$222,200	\$256,800	5.5 %	94.5 %	5.0 %	95.0 %	\$4,040,000	\$5,136,000
Miscellaneous Retail	30.7 %	32.0 %	33.0 %	\$665,000	\$792,600	4.5 %	95.5 %	4.0 %	96.0 %	\$14,777,800	\$19,815,000
Personal Services	79.1 %	79.5 %	80.0 %	\$440,600	\$512,300	17.0 %	83.0 %	17.0 %	83.0 %	\$2,591,800	\$3,013,500
<b>TOTAL/AVERAGE</b>	<b>48.6 %</b>	<b>49.2 %</b>	<b>57.4 %</b>	<b>\$7,790,100</b>	<b>\$9,094,100</b>	<b>9.3 %</b>	<b>90.7 %</b>	<b>9.0 %</b>	<b>91.0 %</b>	<b>\$83,510,600</b>	<b>\$100,751,700</b>

Source: Basile Baumann Prost & Associates, Inc.



rates of eating and drinking expenditures. BBP Associates perceives these store types are underserved and offer the best opportunities for enhancing market capture rates. From 1995 to 2005 the apparel and accessories market capture rate is expected to increase from 13.8 to 15.0 percent, the miscellaneous retail capture rate from 30.7 to 33.0 percent and the eating and drinking capture rate from 30.2 to 35.0 percent.

These capture rates assume the institution of a commercial revitalization program focused on the targeted uses (apparel, miscellaneous retail, and eating and drinking) identified in the preceding paragraph and an increased emphasis upon serving primary market area residents. Differential market capture rate assumptions could be made based upon alternative retail revitalization approaches. This revitalization approach of capturing increased primary market area resident expenditures, however, is assumed most likely to achieve success given the results of our surveys, interviews and data analysis.

Based upon these enhanced capture rates, current dollar (not adjusted for inflation) sales are expected to advance from approximately \$68.8 million in 1995 to \$83.5 million in 2000, reaching \$100.8 million by 2005.

The market capture rate assumptions are based upon an on-going revitalization program. As noted previously, BBP Associates perceives the retail uses in Kensington to be extremely fragile given an ever increasing competitive environment. With relatively flat growth in population and households most of the gain in retail sales will reflect increases in area incomes. Capturing primary and secondary trade area resident expenditures is a key element in maintaining and modestly expanding the current dollar retail expenditures in the KCA.

Given the demographic characteristics of the primary and secondary trade area population, particular potentials are eating and drinking places, apparel and miscellaneous retail sales. Continuing to successfully market within the broader market areas for antiques and other comparison goods will require providing complementary uses to build upon the historic small town image and character of Kensington. This will also require improving Kensington's visibility in the market place through marketing and merchandising, event programming, physical design and streetscape highlighting entry features and gateway and directional signage. Providing complementary retail uses (e.g., eating and drinking) will enhance the retail shopping experience, time of stay and frequency of retail visits. This will in turn increase potentials for antique sales.

In Tables 19 through 30, BBP Associates translated supportable retail space under the two scenarios (maintaining and increasing capture rates) into supportable square footage. The analysis estimates the proportion of sales which will be captured by the existing retail

**TABLE 19**  
**SUPPORTABLE RETAIL SPACE**  
**WITH CONSTANT CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	\$68,800,000
Square Footage	279,500
Sales/Square Feet	\$246

**1995 to 2000**

1995 Square Footage	279,500
2000 Sales/Square Feet for 1995 Inventory 1/	\$271
2000 Sales for 1995 Inventory	\$75,680,000
2000 Total Projected Sales 2/	\$80,727,600
Residual Sales Potential 1995 to 2000	\$5,047,600
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$298
<b>Supportable Square Feet 1995 to 2000</b>	<b>16,900</b>
<b>Average Sales per 2000 Inventory</b>	<b>\$272</b>

**2000 to 2005**

2000 Square Footage	296,400
2005 Sales/Square Feet for 2000 Inventory 4/	\$300
2005 Sales for 2000 Inventory	\$88,800,360
2000 Total Projected Sales 2/	\$93,295,100
Residual Sales Potential 1995 to 2000	\$4,494,740
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$330
<b>Supportable Square Feet 2000 to 2005</b>	<b>13,600</b>
<b>Average Sales per 2005 Inventory</b>	<b>\$301</b>

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

inventory assuming modest sales per square foot increases and measures the residual sales potential available to support newly occupied space (both vacant and new).

As shown in Table 19 under a maintenance of capture rate scenario an estimated almost 17,000 square feet of additional space would be supported from 1995 to 2000. A subsequent 13,600 square feet of space demand is generated over the 1995 to 2005 period. Essentially this represents a potential to fill existing vacant retail space within the KCA and/or provide for modest expansion in commercial space.

Modestly increasing capture rates (as shown in Table 20) advances the supportable additional square footage over the 1995 to 2000 period to approximately 26,300 square feet. An additional 26,900 feet is supportable over the 2000 to 2005 period. This represents an accelerated potential to fill vacant space and/or provide modest expansion.

Tables 21 and 22 show the estimated range of supportable eating and drinking space both with constant and increased capture rates. Over the 1995 to 2000 period a range of approximately 2,800 to 4,200 square feet of additional eating and drinking space is supportable. This is based upon the previous projections of sales volumes by differential capture rates and assuming that the incremental sales would result both in increased sales to existing establishments and the development of new establishments from new sales not captured by the existing stores.

If the projected sales volumes were all captured by existing stores and there is no expansion in the inventory of eating and drinking space, sales per square foot in the Year 2000 would range from approximately \$389 to \$425. Projections for the 2000 to 2005 period have also been prepared. Under constant capture rates 800 square feet of additional supportable square footage is envisioned over the 2000 to 2005 period. Under expanded capture rates BBP Associates estimates an additional approximately 3,400 square feet of supportable eating and drinking space.

Table 23 displays the projected supportable square footage for food and drug store space. For analysis purposes BBP Associates has not assumed that the already high capture rates could be increased. Based upon constant capture rates an estimated 2,100 square feet of food and drug store space will be supported over the 1995 to 2000 period. An additional 2,100 square feet is supportable over the 2000 to 2005 period. This analysis assumes that a portion of the increased sales projected is captured by existing stores. It would be possible for existing stores to capture all of the increment in sales with a 5 percent higher sales per square foot volume.

**TABLE 20**  
**SUPPORTABLE RETAIL SPACE**  
**WITH INCREASED CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	\$68,800,000
Square Footage	279,500
Sales/Square Feet	\$246

**1995 to 2000**

1995 Square Footage	279,500
2000 Sales/Square Feet for 1995 Inventory 1/	\$271
2000 Sales for 1995 Inventory	\$75,680,000
2000 Total Projected Sales 2/	\$83,510,600
Residual Sales Potential 1995 to 2000	\$7,830,600
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$298
<b>Supportable Square Feet 1995 to 2000</b>	<b>26,300</b>
<b>Average Sales per 2000 Inventory</b>	<b>\$273</b>

**2000 to 2005**

2000 Square Footage	305,800
2005 Sales/Square Feet for 2000 Inventory 4/	\$300
2005 Sales for 2000 Inventory	\$91,861,660
2000 Total Projected Sales 2/	\$100,751,700
Residual Sales Potential 1995 to 2000	\$8,890,040
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$330
<b>Supportable Square Feet 2000 to 2005</b>	<b>26,900</b>
<b>Average Sales per 2005 Inventory</b>	<b>\$303</b>

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE 21**  
**SUPPORTABLE EATING & DRINKING SPACE**  
**WITH CONSTANT CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	\$4,000,000
Square Footage	13,800
Sales/Square Feet	\$290

**1995 to 2000**

1995 Square Footage	13,800
2000 Sales/Square Feet for 1995 Inventory 1/	\$319
2000 Sales for 1995 Inventory	\$4,400,000
2000 Total Projected Sales 2/	\$5,371,500
Residual Sales Potential 1995 to 2000	\$971,500
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$351
<b>Supportable Square Feet 1995 to 2000</b>	<b>2,800</b>
<b>Average Sales per 2000 Inventory</b>	<b>\$324</b>

**2000 to 2005**

2000 Square Footage	16,600
2005 Sales/Square Feet for 2000 Inventory 4/	\$356
2005 Sales for 2000 Inventory	\$5,908,650
2000 Total Projected Sales 2/	\$6,207,700
Residual Sales Potential 1995 to 2000	\$299,050
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$392
<b>Supportable Square Feet 2000 to 2005</b>	<b>800</b>
<b>Average Sales per 2005 Inventory</b>	<b>\$357</b>

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE 22**  
**SUPPORTABLE EATING & DRINKING SPACE**  
**WITH INCREASED CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
<b>Sales</b>	<b>\$4,000,000</b>
<b>Square Footage</b>	<b>13,800</b>
<b>Sales/Square Feet</b>	<b>\$290</b>

**1995 to 2000**

1995 Square Footage	13,800
2000 Sales/Square Feet for 1995 Inventory 1/	\$319
2000 Sales for 1995 Inventory	\$4,400,000
2000 Total Projected Sales 2/	\$5,861,500
Residual Sales Potential 1995 to 2000	\$1,461,500
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$351
<b>Supportable Square Feet 1995 to 2000</b>	<b>4,200</b>
<b>Average Sales per 2000 Inventory</b>	<b>\$326</b>

**2000 to 2005**

2000 Square Footage	18,000
2005 Sales/Square Feet for 2000 Inventory 4/	\$358
2005 Sales for 2000 Inventory	\$6,447,650
2000 Total Projected Sales 2/	\$7,783,300
Residual Sales Potential 1995 to 2000	\$1,335,650
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$394
<b>Supportable Square Feet 2000 to 2005</b>	<b>3,400</b>
<b>Average Sales per 2005 Inventory</b>	<b>\$364</b>

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE 23**  
**SUPPORTABLE FOOD & DRUG STORE SPACE**  
**WITH CONSTANT CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	\$23,000,000
Square Footage	43,500
Sales/Square Feet	\$529

**1995 to 2000**

1995 Square Footage	43,500
2000 Sales/Square Feet for 1995 Inventory 1/	\$582
2000 Sales for 1995 Inventory	\$25,300,000
2000 Total Projected Sales 2/	\$26,666,800
Residual Sales Potential 1995 to 2000	\$1,366,800
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$640
Supportable Square Feet 1995 to 2000	2,100
Average Sales per 2000 Inventory	\$585

**2000 to 2005**

2000 Square Footage	45,600
2005 Sales/Square Feet for 2000 Inventory 4/	\$643
2005 Sales for 2000 Inventory	\$29,333,480
2000 Total Projected Sales 2/	\$30,818,600
Residual Sales Potential 1995 to 2000	\$1,485,120
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$708
Supportable Square Feet 2000 to 2005	2,100
Average Sales per 2005 Inventory	\$646

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

Tables 24 and 25 display BBP Associates' projected supportable square footage for personal service uses. A modest increment of approximately 1,700 to 1,800 square feet is projected in the first five-year increment. An additional 800 to 900 square feet is projected over the second five-year increment. This assumes that a portion of the incremental sales volume is captured by existing stores. It would be possible for existing stores to capture all the increase in sales and there would be no expansion of personal services space.

As shown in Tables 26 and 27 supportable square footage for antiques and home furnishing space has been projected based both on constant and increased capture rates. Over the first five-year increment 2,100 to 3,300 square feet is projected. A subsequent increase of 1,800 to 3,300 square feet is projected over the 2000 to 2005 period.

The largest potential increment in supportable square footage by category group is for miscellaneous retail, apparel and accessory stores assuming an expansion of capture rates. As shown in Table 28 over the 1995 to 2000 period under an existing capture rate an additional 2,800 square feet is supportable. Modest increases in capture rates, however, could support approximately 10,700 square feet of additional miscellaneous retail, apparel and accessories space (see Table 29). Over the second five-year increment a range of an additional 3,000 square feet with constant capture rates and an additional 13,300 square feet with expanded capture rates are estimated.

These estimates reflect the general under-representation of miscellaneous retail, apparel and accessory space in the KCA and the opportunities to capture significant dollars available within the marketplace. This orientation would be based on uses that would encourage significant cross shopping to complement the current antique stores. Emphasis would likely be on specialty and special interest items such as hobby, art gallery, arts and crafts, cards and gifts, candle shops, decorative accessories, stationery, jewelry, specialized home accessories, and the like.

The area already has a strong building material and auto supply inventory experiencing extremely high capture rates. Maintenance of existing capture rates would generate limited additional supportable square feet. Approximately 800 square feet is projected over the 1995 to 2000 period. An additional 400 square feet is projected from 2000 to 2005, as shown in Table 30. This level of increment would probably be captured by the existing inventory.

### 3. Projected Number of Establishments

Table 31 summarizes the range of new supportable retail square footage and establishments within the KCA. Based upon the previous supportable square footage projections the new supportable square foot demand by store type has been translated into the



**TABLE 24**  
**SUPPORTABLE PERSONAL SERVICE SPACE**  
**WITH CONSTANT CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	<b>\$2,100,000</b>
Square Footage	<b>16,300</b>
Sales/Square Feet	<b>\$129</b>

**1995 to 2000**

1995 Square Footage	16,300
2000 Sales/Square Feet for 1995 Inventory 1/	\$142
2000 Sales for 1995 Inventory	\$2,310,000
2000 Total Projected Sales 2/	\$2,578,200
Residual Sales Potential 1995 to 2000	\$268,200
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$156
Supportable Square Feet 1995 to 2000	1,700
Average Sales per 2000 Inventory	\$143

**2000 to 2005**

2000 Square Footage	18,000
2005 Sales/Square Feet for 2000 Inventory 4/	\$158
2005 Sales for 2000 Inventory	\$2,836,020
2000 Total Projected Sales 2/	\$2,978,800
Residual Sales Potential 1995 to 2000	\$142,780
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$173
Supportable Square Feet 2000 to 2005	800
Average Sales per 2005 Inventory	\$158

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE 25**  
**SUPPORTABLE PERSONAL SERVICE SPACE**  
**WITH INCREASED CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	\$2,100,000
Square Footage	16,300
Sales/Square Feet	\$129

**1995 to 2000**

1995 Square Footage	16,300
2000 Sales/Square Feet for 1995 Inventory 1/	\$142
2000 Sales for 1995 Inventory	\$2,310,000
2000 Total Projected Sales 2/	\$2,591,800
Residual Sales Potential 1995 to 2000	\$281,800
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$156
<b>Supportable Square Feet 1995 to 2000</b>	<b>1,800</b>
<b>Average Sales per 2000 Inventory</b>	<b>\$143</b>

**2000 to 2005**

2000 Square Footage	18,100
2005 Sales/Square Feet for 2000 Inventory 4/	\$158
2005 Sales for 2000 Inventory	\$2,850,980
2000 Total Projected Sales 2/	\$3,013,500
Residual Sales Potential 1995 to 2000	\$162,520
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$173
<b>Supportable Square Feet 2000 to 2005</b>	<b>900</b>
<b>Average Sales per 2005 Inventory</b>	<b>\$159</b>

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE 26**  
**SUPPORTABLE ANTIQUES AND**  
**HOME FURNISHINGS SPACE**  
**WITH CONSTANT CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	\$9,000,000
Square Footage	36,800
Sales/Square Feet	\$245

**1995 to 2000**

1995 Square Footage	36,800
2000 Sales/Square Feet for 1995 Inventory 1/	\$269
2000 Sales for 1995 Inventory	\$9,900,000
2000 Total Projected Sales 2/	\$10,533,300
Residual Sales Potential 1995 to 2000	\$633,300
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$296
<b>Supportable Square Feet 1995 to 2000</b>	<b>2,100</b>
<b>Average Sales per 2000 Inventory</b>	<b>\$271</b>

**2000 to 2005**

2000 Square Footage	38,900
2005 Sales/Square Feet for 2000 Inventory 4/	\$298
2005 Sales for 2000 Inventory	\$11,586,630
2000 Total Projected Sales 2/	\$12,172,000
Residual Sales Potential 1995 to 2000	\$585,370
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$328
<b>Supportable Square Feet 2000 to 2005</b>	<b>1,800</b>
<b>Average Sales per 2005 Inventory</b>	<b>\$299</b>

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE 27**  
**SUPPORTABLE ANTIQUES AND**  
**HOME FURNISHINGS SPACE**  
**WITH INCREASED CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	<b>\$9,000,000</b>
Square Footage	<b>36,800</b>
Sales/Square Feet	<b>\$245</b>

**1995 to 2000**

1995 Square Footage	36,800
2000 Sales/Square Feet for 1995 Inventory 1/	\$269
2000 Sales for 1995 Inventory	\$9,900,000
2000 Total Projected Sales 2/	\$10,870,000
Residual Sales Potential 1995 to 2000	\$970,000
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$296
Supportable Square Feet 1995 to 2000	3,300
Average Sales per 2000 Inventory	\$271

**2000 to 2005**

2000 Square Footage	40,100
2005 Sales/Square Feet for 2000 Inventory 4/	\$298
2005 Sales for 2000 Inventory	\$11,957,000
2000 Total Projected Sales 2/	\$13,028,000
Residual Sales Potential 1995 to 2000	\$1,071,000
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$328
Supportable Square Feet 2000 to 2005	3,300
Average Sales per 2005 Inventory	\$300

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE 28**  
**SUPPORTABLE MISCELLANEOUS RETAIL**  
**AND APPAREL & ACCESSORIES SPACE**  
**WITH CONSTANT CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	\$12,600,000
Square Footage	61,900
Sales/Square Feet	\$204

**1995 to 2000**

1995 Square Footage	61,900
2000 Sales/Square Feet for 1995 Inventory 1/	\$224
2000 Sales for 1995 Inventory	\$13,860,000
2000 Total Projected Sales 2/	\$14,559,100
Residual Sales Potential 1995 to 2000	\$699,100
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$246
<b>Supportable Square Feet 1995 to 2000</b>	<b>2,800</b>
<b>Average Sales per 2000 Inventory</b>	<b>\$225</b>

**2000 to 2005**

2000 Square Footage	64,700
2005 Sales/Square Feet for 2000 Inventory 4/	\$248
2005 Sales for 2000 Inventory	\$16,015,010
2000 Total Projected Sales 2/	\$16,826,000
Residual Sales Potential 1995 to 2000	\$810,990
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$272
<b>Supportable Square Feet 2000 to 2005</b>	<b>3,000</b>
<b>Average Sales per 2005 Inventory</b>	<b>\$249</b>

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE 29**  
**SUPPORTABLE MISCELLANEOUS RETAIL**  
**AND APPAREL & ACCESSORIES SPACE**  
**WITH INCREASED CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	\$12,600,000
Square Footage	61,900
Sales/Square Feet	\$204

**1995 to 2000**

1995 Square Footage	61,900
2000 Sales/Square Feet for 1995 Inventory 1/	\$224
2000 Sales for 1995 Inventory	\$13,860,000
2000 Total Projected Sales 2/	\$16,501,800
Residual Sales Potential 1995 to 2000	\$2,641,800
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$246
Supportable Square Feet 1995 to 2000	10,700
Average Sales per 2000 Inventory	\$227

**2000 to 2005**

2000 Square Footage	72,600
2005 Sales/Square Feet for 2000 Inventory 4/	\$250
2005 Sales for 2000 Inventory	\$18,151,980
2000 Total Projected Sales 2/	\$21,816,300
Residual Sales Potential 1995 to 2000	\$3,664,320
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$275
Supportable Square Feet 2000 to 2005	13,300
Average Sales per 2005 Inventory	\$254

1/ 1995 sales per square feet increased by 2% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 2% annually.

4/ Average 2000 sales per square feet increased by 2% annually.

5/ New 2000 sales per square feet increased 2% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE 30**  
**SUPPORTABLE BUILDING & MATERIAL**  
**AND AUTO SUPPLY SPACE**  
**WITH CONSTANT CAPTURE RATES**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**  
**(Current \$)**

<b>1995</b>	
Sales	<b>\$18,100,000</b>
Square Footage	<b>96,000</b>
Sales/Square Feet	<b>\$189</b>

**1995 to 2000**

1995 Square Footage	96,000
2000 Sales/Square Feet for 1995 Inventory 1/	\$217
2000 Sales for 1995 Inventory	\$20,815,000
2000 Total Projected Sales 2/	\$21,018,700
Residual Sales Potential 1995 to 2000	\$203,700
2000 Sales/SF of new (1995 -2000) Inventory 3/	\$249
<b>Supportable Square Feet 1995 to 2000</b>	<b>800</b>
<b>Average Sales per 2000 Inventory</b>	<b>\$217</b>

**2000 to 2005**

2000 Square Footage	96,800
2005 Sales/Square Feet for 2000 Inventory 4/	\$250
2005 Sales for 2000 Inventory	\$24,171,505
2000 Total Projected Sales 2/	\$24,292,000
Residual Sales Potential 1995 to 2000	\$120,495
2000 Sales/SF of new (1995 -2000) Inventory 5/	\$287
<b>Supportable Square Feet 2000 to 2005</b>	<b>400</b>
<b>Average Sales per 2005 Inventory</b>	<b>\$250</b>

1/ 1995 sales per square feet increased by 3% annually.

2/ See Table 16

3/ New 1995 sales per square feet increased 3% annually.

4/ Average 2000 sales per square feet increased by 3% annually.

5/ New 2000 sales per square feet increased 3% annually.

Source: Basile Baumann Prost & Associates, Inc.

**TABLE 31**  
**RANGE OF NEW SUPPORTABLE RETAIL SQUARE FEET & ESTABLISHMENTS**  
**KENSINGTON COMMERCIAL AREA**  
**1995 - 2000 and 2000 - 2005**

<b>Category</b>	<b>New Supportable Square Feet</b>		<b>Typical Store Size</b>	<b>Number of New Supportable Stores</b>	
	<b>1995 - 2000</b>	<b>2000 - 2005</b>	<b>Square Feet *</b>	<b>1995 - 2000</b>	<b>2000 - 2005</b>
Eating & Drinking	2,800 - 4,200	800 - 3,400	1,200 - 2,800	2 - 3	0 - 2
Personal Services	1,700 - 1,800	800 - 900	500 - 1,300	1 - 3	0 - 1
Antiques & Home Furnishings	2,100 - 3,300	1,800 - 3,300	1,000 - 3,300	1 - 3	1 - 3
Misc. Retail & Apparel & Accessories	2,800 - 10,700	3,000 - 13,300	1,000 - 3,000	2 - 5	2 - 8
Food & Drug Stores	2,100	2,000	1,000 - 10,000	1 - 2	1 - 2
Building Material & Auto Supply	800	400	1,500 - 5,000	0 - 1	0 - 1

\* Based on typical ULI Neighborhood Center store type adjusted for the Town of Kensington.

Source: Urban Land Institute; Basile Baumann Prost & Associates, Inc.



number of new supportable stores. This takes into consideration the likely store sizes that would be experienced in the KCA. Store sizes are based upon the current typical store sizes within the KCA, the range of square footage by store types typically found in a neighborhood shopping center and BBP Associates' understanding of the types of stores which would be most likely developed within the KCA.

For example, an estimated 2,800 to 4,200 square feet of new eating and drinking space is estimated supportable in the KCA over the near term. BBP Associates furthermore estimates that the typical size of these eating and drinking establishments would be relatively small ranging from 1,200 to 2,800 square feet. This would translate into two to three new eating and drinking establishments within the KCA.

Similarly, the miscellaneous retail and apparel and accessories supportable square footage of 2,800 to 10,700 square feet will be translated into two to five additional stores at a typical store size of 1,000 to 3,000 square feet. In the near term it is likely that only one or two additional personal services establishment, antique and home furnishings and food and drug stores would be attracted to KCA. Overall, the estimated near-term new supportable square footage would translate in 7 to 17 establishments.

Over the 2000 to 2005 period the estimated supportable square feet would be translated into 4 to 17 establishments. The establishments would generally be in the approximately 1,000 to 3,000 square foot per establishment size range. Most of the new stores will be in the miscellaneous retail, apparel and accessory category. As shown in the table a limited of number of other store types would likely be developed.

As noted previously, much of the incremental supportable square footage would likely be translated into additional sales volumes in existing stores or modest expansion of existing facilities. Many of the incremental square footage projections by store type are marginal in terms of supporting any additional new stores (e.g., building materials and/or auto supplies).

In summary, the existing occupied 133 retail and personal service stores are projected to only modestly expand by 11 to 34 establishments by the year 2005. BBP Associates envisions the KCA continuing to be made up of a series of small stores in keeping with the existing characteristics of the area.

#### 4. Summary

A successful commercial revitalization program can maintain and modestly expand retail space within the KCA. This would represent a combination of reduction in existing relatively modest vacancies and infill in selected locations. There is also an

opportunity to enhance the productivity of existing retail operations. The implications are a reinforcement not a change in the current retail characteristics of the KCA. Given the extremely competitive nature of the Montgomery County retail environment this implies combining marketing and merchandising efforts with an improved physical environment.

A more cooperative organizational structure to facilitate marketing and merchandising efforts and to enhance interrelationships with the surrounding residential community may be a key element. In the mid-term a means to link the various retail uses within the four quadrants through marketing, merchandising and functional activities should be considered. In the longer-term physical improvements to link all quadrants could also serve to enhance the critical mass and market image of the KCA within the Montgomery County market place.

In summary, BBP Associates see the need to maintain existing capture rates in order to maintain the viability of the area and reduce vacancies. Modest increases in capture rates focusing on primary and secondary market area residents could create opportunities for an additional 10,000 to 20,000 square feet of retail space which could complement and enhance the existing retail inventory and still provide for increases in sales to existing businesses.

In order to compete with the region's strong retail environment, the KCA needs to focus on capturing a higher percentage of both the primary and secondary trade area expenditures. With better marketing and promotions and a more attractive physical image it will be possible to slightly increase the capture rate from both market areas. With the opening of the Cafe Monet and pending development plans such as the Safeway improvements and the rehabilitation of building facades capture rates could increase.

Failure to initiate revitalization efforts would continue and accelerate the downward trend in retail sales. This could in turn destroy the already fragile retail environment further reducing the already small critical retail mass. Negative impacts on the KCA with potential increased vacancies and disinvestment may also impinge adversely on the surrounding residential area. Given this potential downward spiral it may be necessary to increase residential real estate property taxes to maintain the current level town government services.

## **V. REVITALIZATION STRATEGIES**

This section contains proposed revitalization strategies to effectuate market opportunities. Based upon our market analysis and a series of in-depth interviews and meetings with the business community the focus of revitalization efforts in the KCA should emphasize marketing and merchandising, retention and recruitment, organization and management, as well as physical improvements.

This focus evolved from the work process. Initially, the presumption was, in part, to address redevelopment in specific opportunity areas as was noted in the 1991 revitalization effort. Only one of those proposed 1991 projects, however, the publicly funded Armory rehabilitation took place. Furthermore the KCA has experienced a decline in retail sales. In BBP Associates' professional opinion revitalization in the KCA must now focus on marketing and merchandising not on redevelopment projects.

KCA businesses must offer personalized services to develop special relationships with a clientele that represents repeat customers from nearby locations. This should build on the particular strengths of KCA which are the existing strong antique market niche and the special small town character. This should allow the commercial area to serve and in turn to be patronized by the local community. This will also allow the reinforcement of the specialized regional antique market niche.

Elements should include gateway directional signage to "lead" patrons from major thoroughfares (Connecticut and University Avenues) to the retail uses and detracting commercial signs should be removed where possible. Targeted advertising to help shoppers discover Kensington and marketing and merchandising activities to service, retain and expand the business and consumer base should also be emphasized. This will also require continued physical improvements and maintenance of the physical environment. This will require a strong organizational and management structure. Parking capacity will have to be addressed in order to expand the customer base.

Revitalization efforts must address linkages among the individual commercial subareas as well as specific orientations and actions for each individual subarea. Overall activities must emphasize marketing and merchandising. KCA needs to be considered in its entirety as a singular unit rather than as a group of non-interrelated fractional business entities.

Based upon BBP Associates' experience revitalization efforts must include a professionally staffed local organization that can coordinate the disparate "communities" (town and county government, residential interests, property owners, merchants associations

such as the Kensington Business District Association (KBDA) and involved merchants in each of the four quadrants).

Over time the plan can include more costly physical linkages between the four quadrants. In the near-term the program must include a series of concentrated, focused efforts primarily consisting of physical improvements within each of the four quadrants.

Finally, a specific game plan must be developed to help focus the current ongoing and expanded program. A designated entity should work with the various communities (businesses, property owners, town residents, town government, county government and state government) to see this game plan implemented. This game plan or action plan should identify the various roles and responsibilities of these groups, delineate specific action items in a defined time frame and identify financing and funding sources.

A. REVITALIZATION ELEMENTS

This section delineates the overall elements of the revitalization strategy for the KCA. These elements - physical improvements, signage, marketing and merchandising, retention and recruitment, organization and management - are designed to encourage shopping throughout the area by both residents and non-residents alike. The elements are also designed to encourage investment and reinvestment in the commercial area. A discussion of these elements is followed by an identification of area opportunities and by a summary work program which is detailed in Appendix 2.

1. Physical Improvements

A major aspect of the revitalization strategy is physical improvements to the area. The county, town and local merchants have already taken important first steps to address physical conditions. As stated in the previous sections good physical image conveys a positive message and helps to retain and recruit businesses. Continued physical improvements that will add to the ambiance of the KCA involve adopting a coordinated, unified design for each quadrant. This will include facade and streetscape improvements and improving the efficiency of available and expanded parking. These can be accomplished through public programs and private investment.

Physical improvements include the day-to-day maintenance and upkeep of the areas. Once a project is complete a designated organization should develop a program that initiates housekeeping events on an annual basis (see detailed organization and management section). This could include volunteers from the area to undertake these activities. Area business and community volunteers should also participate in clean-up activities.

The county has engaged a design consultant to address specific physical improvement elements. The county's design consultant will initially concentrate on the entry feature design for Howard Avenue (east), for which a capital improvement budget has been approved. The design consultant will also identify other Kensington entry features. This is very important as it will serve to establish the character and design image for remaining quadrants within the KCA. It is important that the physical improvements convey the small town, special service image. This requires a unified design that takes advantage of the period architecture within Kensington, building upon the historic theme.

The town will be hiring a parking consultant to address parking supply and demand issues. The retail inventory and market demand projections in this report will be important inputs into the parking analysis. Improved parking will be a key element of any revitalization program. Detailed requirements and recommendations will be established from the parking study.

## 2. Signage

The KCA needs both directional and directory signs to help potential customers locate the retail establishments and business services within the commercial area. The county is currently working with a graphic arts design consultant to establish a unified design program to represent the KCA. These designs are for incorporation into the gateway signs. The gateway signs will be placed on Connecticut Avenue, in both directions, to welcome visitors to the KCA. Individual quadrant signs and trail blazing signs will then direct customers to commercial areas and parking. The quality of overall KCA signage should be enhanced and detracting commercial signs should be removed where possible.

A specific color and logo will be established as the official design for the KCA. Therefore, the signs will be comprehensive in design and the graphic can then be used throughout, on KCA letterhead, advertisements, etc.

The purpose of the signage is to make individuals aware of the KCA quadrants and the various types of goods and services offered. Furthermore, the coordinated and unified theme, which is being developed, will strengthen the image of the area. This will help unify the area and present a critical mass of retail activities, despite the physical divisions. Signage is a relatively easily implementable means of gaining support and recognition for the KCA. It will also start the various commercial areas thinking as a single entity.

3. Marketing and Merchandising

While the KCA merchants have generally been utilizing good business practices this has been primarily on an individual firm basis or conducted by one of the many KCA business organizations. There has generally not been a single KCA wide focus specifically targeted to marketing and merchandising.

Given BBP Associates' understanding of the KCA, one of the major elements of a revitalization program should be overall coordinated marketing and merchandising. By determining a customer's wants and needs and how to satisfy those needs, businesses are able to keep customers happy and prevent them from going to the competition. According to the Technical Assistance Research Program Institute in Washington, DC for every complaint that management receives 26 more disenchanted customers will never make it back to the store. The majority of consumers desire quick checkout, consistent prices, knowledgeable sales assistance, quality merchandise, convenience and in-stock merchandise.

In order to determine how to fully satisfy the customer, KCA merchants should: conduct in-store interviews; conduct telephone or mail surveys; provide self-addressed, postage-paid comment cards at the check-out area; and place a suggestion box at the check-out or entrance/exit to the store.

As noted in the market evaluations there are two distinct retail markets being served by the KCA. The antique uses and other specialized retail facilities serve a broader regional market. Many of these merchant types are already keeping track of clientele by zip code. A more coordinated identification of customer locations could be maintained (such as requesting customers provide their address to receive discount coupons and information on sales).

Other retailers in the KCA sell primarily to people who reside in the immediate surrounding areas. These merchants need to understand the particular characteristics and needs of this significant repeat clientele. The demographic information contained in this report (see Appendix 1, pages A-2 through A-28) should serve as an initial understanding of the characteristics and desires of this clientele. Retailers must create marketing and merchandising that address area residents' needs. Targeted marketing and merchandising geared to Kensington area residents will help make merchant part of the community and strengthen the interrelationship between businesses and the surrounding residential community.

a. Know the Competition:

Retailers should also understand the competition better in order to provide better services to their customers. This can be done by shopping the competition identified in this

report and paying close attention to price, merchandise variety, ambiance, employee attitude and service. Retailers should also analyze the competitors advertisements to find out how often they advertise and what goods they showcase. Once a retailer knows what they are up against, they can respond accordingly by increasing the level of services and merchandise.

The antique segment of the community should evaluate competitive facilities, such as Savage Mills and New Market for their merchandise depth and marketing procedures. Similarly, non-antique dealers should be aware of the services that are offered both in localized competitive areas such as Wheaton and big box or value oriented retailers along Rockville Pike. Merchants must be aware of pricing in the market place in order to offer a fair, not necessarily lower price. Emphasis in the KCA will be on providing more ambiance and service than is now currently available at most competitive facilities.

b. Improve Service Level:

Examples of better business practices retailers can use to better compete are: improve the service level by greeting customers and making them feel welcome and at home; creating pleasant surprises such as small giveaways; expand value added services such as home delivery and special ordering privileges; focus advertising on competitive advantages by letting your customers know what your store offers in terms of merchandise and services that the competition does not offer; and increase the breadth and depth of merchandise selection to go beyond what the competition carries in certain departments.

With a large number of repeat clientele, KCA merchants and their employees should be instructed to learn individual customers names and greet them as friends and loyal customers. Extra added services need to be examined. Regularly surveying customers and determining zip code location, and, what they previously purchased should be standard practice. Providing customers on the mailing list with special sales and promotions should be undertaken. Learning what organizations or institutions clients belong to will allow for targeted marketing through these organizations.

c. Promotions:

Retailers should also offer their customers special in-store promotions. The KCA already has four to six events per year (events are discussed in the action plan). Promotions need to be integrated into the events. Events need to be coordinated among quadrants and offer new and different activities. Examples of typical promotions include: product demonstrations to show a customer how to handle a new product, fashion shows with local clubs to model new merchandise, special time or day promotions for senior citizens, prize

drawings for every \$50 spent in the store, contests, free samples, merchandise trade-ins, gifts with purchases and special prices for certain products when purchased together, etc.

The promotions should be varied and oriented to residents of the primary and secondary market areas that make up the bulk of clientele, particularly for non-antique stores. Tie-ins with local clubs and schools, such as promotions with the local Parent/Student Teachers Association and senior citizen groups, should also be part of the promotion efforts.

d. Advertising:

Another critical component of such an integrated marketing plan is advertising. Retailers in the KCA need to develop a sound advertising, public relations and direct mail plan. This can be accomplished through the use of print, radio and television to increase store traffic. Effectively using the media to report positively on the revitalization program and the businesses efforts should be emphasized. This will involve cooperating and providing information of interest. Retailers should also establish contacts with the local news media and send press releases to inform them of upcoming in-store events, such as open houses, tent sales, product demonstration or the store's involvement in a charity and/or community activity.

The tracking of clientele will help create and maintain a database of customer information that can be used for direct mail advertising. Each individual retailer also needs to track the response to their advertisements to determine which forms of media and which advertisements work best.

Given the cost of print advertising in the Washington market, the most appropriate means of advertising will likely be combined/joint advertising of major events and promotions in local newspapers (e.g., Montgomery County Journal, Gazette Newspapers). Press releases could be issued to help achieve free advertising. Articles could also be placed in other local publications such as the Wheaton-Kensington Chamber of Commerce Community Guide and the KBDA Directory and Community Guide. Joint advertising efforts between the KBDA, the various merchant associations, the Kensington-Wheaton Chamber of Commerce and the Town of Kensington should be carried out. Advertising should be focused on major events and promotions to maximize potential impacts in this costly medium.

The most cost-effective advertising strategy for individual businesses is a direct mail campaign. Direct mail enables retailers to target a specific demographic market that is well suited to the store and its merchandise. This would include the primary and secondary areas for the non-antiques stores and the tertiary area for antique stores. One example of a direct mail technique is to send cards to customers offering a 20 percent discount on a purchase during their birthday or anniversary month or distribute flyers announcing an up-coming sale.



Retailers should ask customers to bring in the flyer or post card they received in the mail and track the number of mailings redeemed versus the number mailed. By doing so they can measure the redemption rate.

e. Customer Monitoring:

No matter what type of marketing strategy merchants implement, individual retailers must monitor customer traffic based on the type of medium used. For every advertisement placed, include a message that asks customers to mention the advertisement when they come in.

Customer monitoring will be one of the key elements in building customer loyalty within the primary and secondary trade areas. Developing mailing lists that ask customers about their satisfaction and interests is very important. Simple thank you cards to customers upon purchase, with information on upcoming promotions and activities with redeemable coupons, will be a good means to monitor the effectiveness of various marketing and merchandising efforts.

f. Public Relations:

Public relations is a key factor in the marketing strategy. Along with advertising and direct mail, good relations with the surrounding community can reinforce the store's image. Good public relations is free advertising and can increase customer awareness. Some examples of a good public relations campaign with a community-oriented strategy include: sponsoring classes to educate or entertain the community, sponsoring charity or community events, and writing a column for the local newspaper, such as an article on household hints, product safety tips and hot new fashions. Better relationships need to be maintained with the local media including contacts beyond the local reporter to the editor and publisher level.

Various community oriented events should continue as a key element of a public relations program. Continued work such as KBDA's efforts with the volunteer fire department, local churches, schools and other charitable organizations will be vital. Volunteering to provide goods, services and demonstrations at church and other community events should be standard practice for KCA businesses. Inviting senior citizens to discussions and product demonstrations are important aspects of improving interrelationships between the merchants and the surrounding residents.

g. Image Enhancement:

Image is another important asset for retailers and a critical part of the marketing and merchandising strategy. A store's image, incorporating its unique attributes and level of customer devotion, separates the retailer from the competition. The principal elements that determine a retailer's image are price, selection, quality, service and location. The external look and internal ambiance of the store are also important.

To develop and refine an image, retailers must determine the message they want to convey. Demonstrating that customers are important is a key ingredient of any image. Therefore retailers need to constantly communicate with their customers and listen and respond to them. Several ways in which to communicate a store's image include: visual merchandising by displaying merchandise in a way that customers know what is carried; advertising the unique merchandise and services offered; depth and breadth of merchandise; store design, such as matching exterior and interior designs and displays with merchandising offerings; store signs to let customers know what is offered in terms of products and services; employee attire, attitude and behavior; price; direct mail or catalogue; service level; civic and charitable activities; and public relations.

Much of the emphasis on area image is the physical condition of the establishments and how they maintain the area surrounding their stores. Particular efforts should be made on improving the cleanliness and housekeeping around the establishments and the major thoroughfares within the KCA. Merchant sponsorships of special displays and landscaping are important aspects of image enhancement. Continuation of and expansion of various events designed to enhance the area's image, such as May Day flower displays, special holiday lighting, Fourth of July patriotic displays, fall harvest displays and the like should be undertaken. These events, however, should be coordinated throughout the entire KCA. Merchants should try to tie-in with local organization activities, be it a church picnic, a holiday event, a senior citizen outing or the like. The merchants should sponsor and interface with community organizations, reinforcing the old town sense of community image.

The image created through retailers' level of service is very important to business. By offering and promoting these value added services, retailers will establish a loyal customer base. Given the nature of the antique dealers, special classes and product education should be sponsored both within stores and within local churches and organizations. Other businesses could stress specialized services such as special ordering, area delivery, gift wrapping, assistance in assembly, follow-up product demonstrations, follow-up educational classes, special mailings, etc. Be it special classes on certain period antiques, or just a follow-up post card that it is time for your oil change and service, all businesses in the KCA should be known for specialized service and merchants who care and provide a differential level of service.

h. "Niching": Redevelopment and Tenant Mix

Next to customers and marketing, merchandising is also a critical business practice. Retailers must have good quality, selection, service and price. By targeting a market segment with the unique mix of merchandise or services and establishing a set of pricing parameters that meets customers wants, retailers can compete with their larger counterparts. When retailers offer selective merchandise, they create a certain "niche".

Niching represents the single best opportunity for retailers to distinguish themselves. By offering something that their trade area perceives as unique, either in products or services, retailers can set themselves apart from their larger competitors. Niching is a major merchandising opportunity for small store retailers and affords greater price flexibility. Successful retailers define themselves through at least one of the following elements: marketing, selection, quality, service, price and fashion. To carve the right niche for customers, retailers must target specific markets, increase selection, improve quality, offer friendly knowledgeable service and emphasize price integrity.

Whether the niche is specialized services or antique merchandise not found elsewhere in the immediate market place, a level of friendliness and service that harkens to America's past is vital. It is important that the KCA collectively create a specialized niche. The physical nature of Kensington, the older well established merchants, the older relatively affluent client base, all reinforce the opportunities of developing unique niches, both in terms of product and service.

The niching approach is reflected in the identification of opportunity areas. Howard Avenue (east) is the historic heart of Kensington focusing on a mixture of antiques and emphasizing small scale rehabilitation with an historic theme. The antique niche is envisioned to be supplemented with a complementary tenant mix of specialty shoppers goods (e.g., jewelry, gifts, decorative accessories, arts and crafts, hobby shops, fancy lace and linen, special interest stores, etc.) which will further marketing of the antiques. In order to further enhance the niche several cafes, ice cream stores and similar small scale eating and drinking establishments are proposed to reinforce retail activities. Orientation should be on price levels and merchandise characteristics that are mutually reinforcing. For example, high quality and higher priced merchandise should be offered. A vast array of price levels and merchandise quality will dilute the market image and detract from creating a market niche.

Similarly, on Howard Avenue (west) orientation should be to complement the significant furniture and home furnishings stores and miscellaneous retail uses. Selected uses could take advantage of the significant spendable income of the customers who patronize auto

repair establishments. Offering food service could, for example, extend their length of stay and capture more of their spendable income. This could represent minor infill and potential conversion of selected auto-related uses to focus on providing convenience eating (deli, lunch, light sandwich shops). Additional establishments could cater to the furniture and home furnishings orientation (lighting and lamps, accessories, customized furniture, radio, television and electronics, etc.). This most likely will represent a combination of adaptive reuse of industrial and auto-related facilities and minor infill.

Metropolitan Avenue and Plyers Mills Road present an opportunity for reuse by converting industrial uses to more retail uses over time. This would likely represent more personal and business service type uses that would be special destination attractions (e.g., existing vacuum cleaning repair, crafts, outfitting store, florist, computer sales/rentals/repairs, auto and truck rental, lumber and hardware and others). A pedestrian environment and critical mass of a special market niche will be more difficult to establish along Metropolitan Avenue. This stems from the discontinuous nature of the retail uses and large non-pedestrian oriented uses such as the lumber yard, truck rental and electric substation.

Connecticut Avenue represents a more regional niche. Given the income of the area and the significant traffic volumes along Connecticut Avenue there is an opportunity to service the larger general public with more upscale retail attractions that are indicative of the income levels of the area. Opportunities to improve retail facades along Connecticut Avenue should be emphasized. Types of uses that could be attracted would be a more regional, sit-down restaurant (particularly with a change in alcoholic beverage laws), as well as carry-out type facilities such as Boston Market. Connecticut Avenue retailers would operate more or less independently of the special niches such as antiques along Howard Avenue (east), larger item home furnishing oriented antiques and auto repair along Howard Avenue (west), and business and personal services along Metropolitan Avenue.

#### 4. Retention and Recruitment

Retention of existing businesses and recruitment of new businesses is another critical element of the revitalization program. The town, existing business organizations such as the KBDA and the area businesses need to cooperate with each other and with the county to ensure successful revitalization of the KCA. In order to retain the current retailers, the concerned groups and organizations (e.g., KBDA) should coordinate with the County's Department of Housing and Community Affairs (DHCA) to help initiate needed physical improvements. Once the improvements such as signage and facade renovation are complete, the KCA will be in a better position to attract new commercial interests.

To help recruit additional businesses the town and area retailers should work with the County Department of Economic Development (DED) to pursue business start-up loans and with local real estate brokers to promote the KCA. They should also maximize any county financial incentives offered such as loan and facade easement programs and obtain technical assistance from various organizations. The assistance can come through Montgomery County, Chambers of Commerce and the Small Business Administration. Existing and emerging state programs such as the Neighborhood Business Development Program and the Governor's Smart Growth Program should also be pursued by the town. The town should also explore alcoholic beverage reform to allow alcohol to be served in eating establishments in order to attract interested regional restaurants.

Kensington should also capitalize on its small town historic theme when recruiting new businesses. The current atmosphere of the commercial area is not conducive to big-box, franchise retail store types, with the exception of a possible restaurant chain, so all retail recruitment activities should be focused on attracting small scale shops. KCA's competitive advantage is its small town charm. With the exception of the Connecticut Avenue corridor attracting anchor type stores would be extremely difficult and counter-productive. The attraction of the KCA is its special character which would not be reinforced with traditional anchor type stores. Targeted KCA stores should offer unique quality and merchandise that is compatible with the eclectic nature of the existing small store types. Office recruitment should also be geared towards small, professional firms and businesses services.

Recruitment tools for helping attract new businesses to Kensington should include both individual and coordinated efforts through business groups such as the KBDA. One of the least expensive and most productive forms of recruiting businesses is to advertise. Individual property owners should advertise their vacant space through for lease signs, specifically created signs, in the vacant store windows and through trade publications related to the store types you wish to attract (i.e. if you are looking to lease space to another antique store, you would advertise in an antique trade publication).

Individual owners should also know their target market relying on data developed in this study (see Table 31). Chapter VI Revitalization Opportunities identifies specific store types. Owners should identify all prospective target tenant types by canvassing area markets, following advertising in local newspapers and by looking in the yellow pages. Once the prospective tenants are identified, the owner should call to see if they are interested in leasing space. If the store declines the invitation, the owner should follow-up with a letter describing the property, its location and a contact name and number for future reference. The owner should also retain the store's name and contact's name for future prospects. An initial screening process should be undertaken by reviewing Dunn and Bradstreet Reports and contacting business, financial and vender references.

Coordinated recruitment should involve the county, town, property owners and local businesses, business organizations and focus on the advertisement and promotion of the entire KCA. Publicity releases, such as an advertisement dedicated to describing the attributes of KCA should be placed in local and trade publications.

A brochure, or "brag" sheet, describing Kensington's historic image, community atmosphere, location, market, etc. should also be completed. The brochure should be available to real estate brokers, business organizations and chambers of commerce to be distributed to interested tenants.

Another, less obvious recruitment tool, is for the county or town to conduct "How To" meetings. The county or town could invite a speaker to address the aspects of operating a small business and invite local businesses as well as businesses from the surrounding communities. After the meeting, give each attendee a brochure on KCA with a listing of the property owners and current vacant space. This recruitment tool needs to be low key with the main focus on the speaker.

The local business entity (see following section) should develop and distribute information on available space within the KCA; the targeted retail uses sought; general rental terms and conditions; and available market support and other community incentives, and organizational structures that would attract and support businesses within the area. Key local merchant contacts who can provide background information and help market and merchandise the retail opportunities within Kensington should be identified.

The local business entity, public sector representative, merchants and property owners should call upon other merchants, institutions and property owners to respond to their concerns and to assure retention of proper and desirable retail uses. These "peer-to-peer" calls can identify concerns such as security, lighting, maintenance, code enforcement and the like. Quick response to business concerns on the part of the local business organization, the town and the county will be a key element in attracting and retaining desirable business types.

Specific store types, which are identified in the next section, should also be targeted. A rifle approach to specifically targeting individual store types, should be sought rather than providing a shotgun approach of generic store types. Continued monitoring of the success of various store types will be necessary to determine the appropriateness of the changes and modifications in store mix. The basic objective in the improved retail mix is compatible stores, which will enhance cross-shopping. This will encourage individuals who visit Kensington for their retail and service needs to make purchases in more than one establishment. This will serve to expand the expenditures made in the KCA by individuals

already visiting Kensington. Increasing the amount of cross-shopping will also increase the frequency of visits made, further enhancing retail sales.

#### 5. Organization and Management

There is a large number of interests and organizations within the KCA. Local residents, property owners, businesses within each of the four quadrants, county, town, Kensington Business District Association, Wheaton-Kensington Chamber of Commerce, Old Town Kensington Merchants' Association, West Howard Avenue Antique Dealers Association, merchants along Connecticut Avenue, various auto and service station dealers and business services located within the office facilities all need to participate in the commercial revitalization process.

The current Kensington Commercial Revitalization Committee primarily focuses on the Howard Avenue (east) efforts. Established by the town, it is a committee made up of merchants, property owners, residents and town officials. In order to facilitate an organization and management structure to manage the revitalization of the entire KCA, the Revitalization Committee needs to evolve into, or ultimately be complemented by, an overall coordinating agency which we have dubbed the "Revitalization/Steering Committee".

This Revitalization/Steering Committee needs to take the lead in creating a single coordinated focus for approval and implementation of a KCA wide revitalization plan. This does not mean the replacement of other organizations, but rather a central clearing house or umbrella organization under which the various organizations can function and work together. In order to create a focus for revitalization plan approval and implementation, the town, business and residential communities of Kensington need to establish a permanent, professionally staffed entity responsible for coordination and management of the planning and implementation process.

The Revitalization/Steering Committee should be responsible for maintaining awareness of the project, providing needed resources, contacts and facilitating communication between the county, town and community. The Revitalization/Steering Committee would have to manage and organize the planning process. The ongoing Kensington revitalization planning process and the proposed implementation plan require a continuous, permanent and area wide commitment. This will build on the current two year (through FY 1999) effort in the Howard Avenue (east) area. It is necessary to devote significant effort toward coordinating, managing and encouraging plan implementation. As noted in the detailed work program in the Appendix, numerous participating individuals, committees and organizations must be managed and coordinated if essential elements of the program implementation are to be achieved.

Therefore, an effective organization which would have responsibility for the planning and implementation process is strongly recommended.

The Revitalization/Steering Committee should select representatives from each of the organizations and in many cases have the existing organizations play a key role in project implementation. The Revitalization/Steering Committee however, would act as the coordinating entity for revitalization. This organization should provide a means for building upon the Memorandum of Understanding between the county and town. This would further define the responsibilities between the town, county and existing business organizations. This central coordinating entity would have as its prime function commercial revitalization.

Over time a more formal and unified organization with sufficient powers and capabilities to continue the planning process and to facilitate and encourage cooperation among the various groups may be desired. The creation of a separate, formal, quasi-public entity may be required to serve as coordinator, planner and negotiator of the plan and its implementation. Furthermore, creation of this separate, specific, formalized entity will enhance the timing and accelerate the implementation of the process. This will create sufficient strength, interest and membership to operate a professionally staffed organization. Professional staff is not a question of cost. In our experience the entity cannot afford not to be professionally staffed.

The overall Revitalization/Steering Committee should be quite large, having representatives of all pertinent organizations and interests participating. A relatively small Executive Committee however, consisting of seven to nine persons should have overall day to day management responsibility. Membership in the Executive Committee would change over time as the prime functions and responsibilities of the organization change in accordance with the detailed work program. The Executive Committee would coordinate among the various other organizations with those entities remaining responsible for their direct area of interest. The Revitalization/Steering Committee is a coordinating council that should have permanent staff supported by the various organizations. The role of the Revitalization/Steering Committee is to make sure that the plans are followed and implemented. Specific responsibilities for day to day implementation for various plan elements would, as appropriate, remain with the public and private sector and other Kensington organizations.

One of the Revitalization/Steering Committee's primary roles would be to serve as coordinator among the various voluntary groups. A "bottom up" grass roots (local merchants) organization that would be closer to the revitalization issues and the persons most directly impacted would be more effective than a "top down" approach (town/county) by an organization that has many other roles and responsibilities besides commercial revitalization.



The Revitalization/Steering Committee would also act as a facilitator undertaking necessary marketing and technical assistance. Major functions would be liaison and coordination. This would involve bringing together the various diverse groups and acting as a "broker" among various interests. The entity would help provide necessary technical services and support to the various voluntary organizations.

The Revitalization/Steering Committee could also serve as a catalyst for implementation of the plan (as outlined in the action plan). This could include such activities as coordinating implementation activities including project funding. Type of activities could include: preparing various public/private agreements; securing necessary approvals from property owners, neighborhood organizations and public entities; and undertaking any necessary detailed, technical analysis.

An important aspect of an effective organization is providing required staffing and funding support. There are two approaches for staffing of the entity which should be explored. One would be the creation of a resident staff responsible for organizational management, planning and implementation activities. Another approach would be to enter into contracted staff services either for an interim period or for a more extended period of time in order to provide immediate professional staff capabilities, maintain the project momentum and develop internal staff capabilities.

In either approach the Revitalization/Steering Committee will need through a combination of membership dues, corporate/foundation contributions, county and town contributions, sufficient initial capitalization for approximately a two-year operational period. In BBP Associates' experience similar organizations in other localities of approximately equivalent size to the KCA have operated with annual budgets generally ranging from \$50,000 to \$200,000. This initial capitalization is necessary for non-recoverable administrative costs and normal operating expenses.

Initial costs could be funded through a combination of membership fees, tax-deductible contributions, foundation grants, government grants and county, town and institutional contracts. Given the current amount of occupied retail space, a membership fee of \$.21 per square foot alone, would raise approximately \$60,000 per year. This would average approximately \$187 per month for the average business in the KCA about one-third of the median common area charge in a community shopping center. This combined with other funds (additional non-retail use fees, corporate/foundation contributions, public grants, fund raising events, etc.) would initially fund the Revitalization/Steering Committee. A public/private funding partnership between the merchants, state and local government and outside funding sources (contributions, grants and fund raising events) is envisioned.

There are a number of successful models for the Revitalization/Steering Committee. BBP Associates would point to successful models it helped create such as the Pikesville Community Growth Corporation (Pikesville, Maryland), Highland Neighborhood Development (Shreveport, Louisiana), Midtown Corridor (Cleveland, Ohio) and North Fort Myers Community Redevelopment (Lee County, Florida). The key elements of success appear to be the grass roots nature of the organizations and the spirit of cooperation between diverse communities and the public and private sectors.

#### 6. Potential Commercial Revitalization Resources

A variety of resources are available to assist the Revitalization/Steering Committee in its commercial revitalization efforts. Particularly noteworthy would be the assistance and linkages to the Maryland Downtown Development Association and the National Historic Trust Main Street Program. These organizations can provide guidance and technical assistance, as well as peer group review.

The Montgomery County Department of Economic Development provides a broad range of services including business retention and development, strategic planning, special projects and marketing and preservation programs. The department can assist in locational services, small business development, development expediting, financial assistance and employee training and recruitment.

The Maryland Department of Business and Economic Development can assist with business development and locational assistance. The department provides counseling, technical assistance and apprenticeship and training programs. The department also assists in financing through the Maryland Industrial Development Finance Authority (MIDFA) which provides conventional and tax exempt loan guarantees and revenue bonds.

The Maryland Small Business Development Financing Agency (MSBFA) provides direct bonds and bond guarantees. The department's Equity Participation Investment Program includes The Challenge Investment Program, Enterprise Investment Fund and the Maryland Venture Capital Trust for Franchises.

The Montgomery County Bankers' Small Business Loan Fund, Inc., provides financing and professional business counseling to small businesses. They provide loans to businesses that may not be able to obtain traditional financing. They generally provide smaller loans, less than \$50,000 with extended monthly payments.

The Maryland Small Business Development Center provides a variety of consulting services, low cost training courses, business planning and data base information in partnership

with the Maryland Department of Business and Economic Development and the U.S. Small Business Administration.

The Mid-Atlantic Business Finance Company is a certified development company authorized by the SBA to provide existing small businesses with SBA Section 504, long-term below market rate financing.

The Suburban Washington Small Business Development Center is part of a nationwide network of small business technical assistance providers offering consulting, business planning and management and technical assistance. This assistance includes low cost courses and seminars on small business topics, market information and strategies and access to a network of resources through Montgomery Community College and the University of Maryland Technology Extension Service.

The Revitalization/Strategy Committee should work closely with the county, state and available small business networkers to provide the necessary technical and financial assistance to move forward with the revitalization program.

## **VI. REVITALIZATION OPPORTUNITIES**

This section identifies the initial revitalization opportunities for the Town of Kensington. This includes the recommended approach for enhancing the retail mix and the key opportunity areas for redevelopment in each individual quadrant.

### **A. REUSE**

At present, there is little vacant land in the KCA on which to sustain extensive new development. Any new commercial use will need to utilize the current space, with the possibility for modest expansion through infill. Any new retail should complement the current mix of tenants within the specific quadrants, as well as both the office and resident community. The office market should continue to attract a mix of small professional firms and business services.

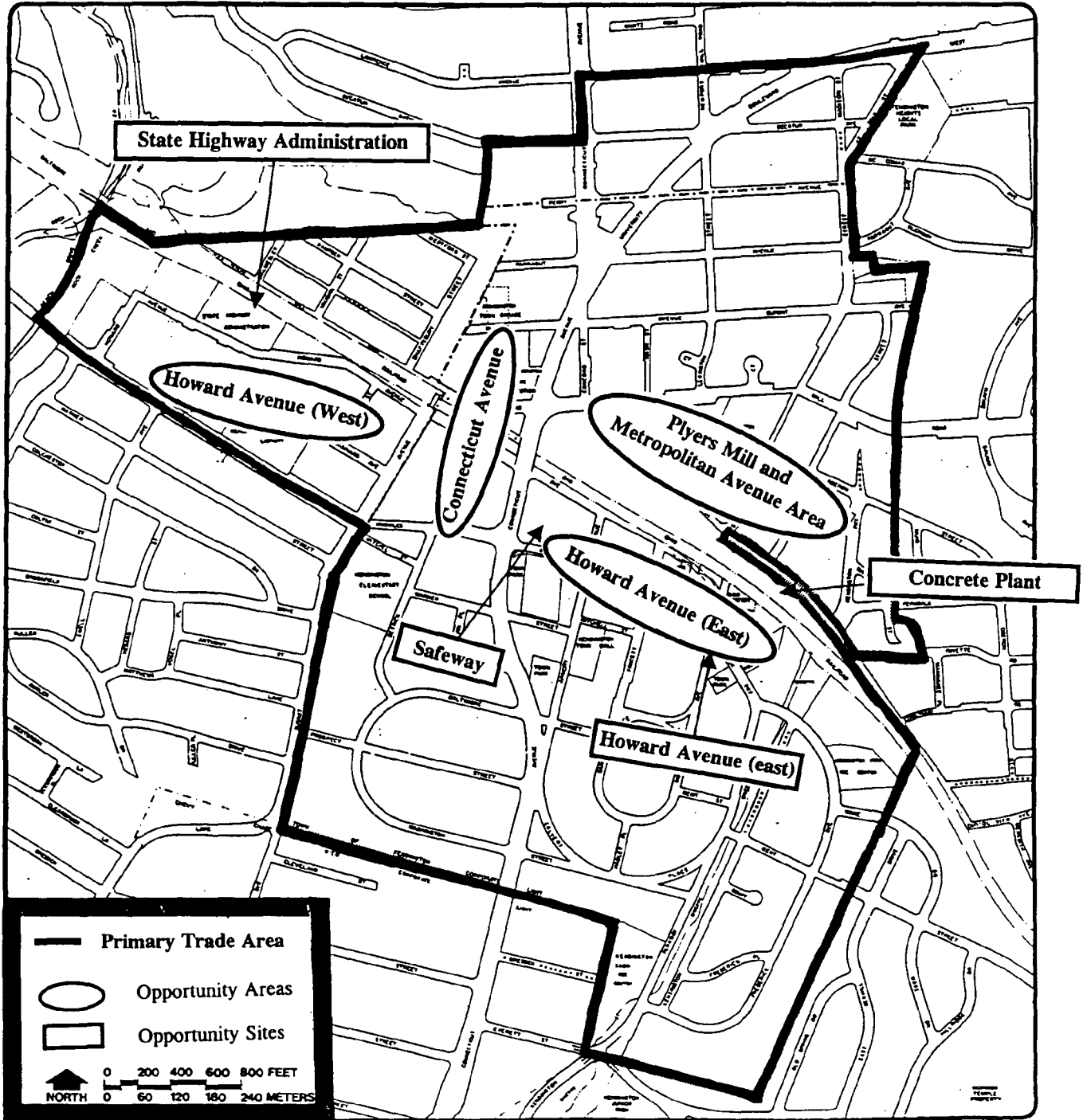
Since there will be limited new construction in the near future, the new retail uses need to locate primarily in the existing buildings. Building facade improvements should be made throughout the commercial area in order to attract new tenants. Access and parking will also need to be addressed to account for any new establishments added to the current mix.

Future opportunities should also take into account the possibility of redeveloping the land on which the cement plant is now located on Metropolitan Avenue and the SHA lot on Howard Avenue (west). This could include opportunities for additional retail, office space or a new parking lot to handle future parking needs. In either case, any new development should maintain the historic atmosphere of Kensington. In particular, the cement plant site should capitalize on the historic train station theme. This would require redevelopment of this parcel to maintain a historic design scheme and provide for linkages across the tracks.

### **B. OPPORTUNITY AREAS**

Based upon the market evaluation, BBP Associates has been asked to identify concentrated locations or key opportunity areas for reducing vacancies and providing moderate scale expansion and in-fill. All interested parties - County, Town, real estate brokers, tenants and property owners, will need to work together to facilitate revitalization and attract new businesses to Kensington. Areas described below (see Figure 6) have the opportunity and need for revitalization.

FIGURE 6  
OPPORTUNITY AREAS



1. Howard Avenue (east)

Howard Avenue, to the east of Connecticut Avenue, is known to many as the "heart" of Kensington and of this revitalization project. It is therefore necessary to maintain, enhance and complement the antique "niche" of the area as well as its historic character. In order to attract more customers to this area, several improvements need to be initially concentrated within a defined, focused opportunity area.

This represents an area of concentrated facade and streetscape improvements. This also represents the area where opportunities exist for concentrating and remerchandizing activities to support "Antique Row". Minor infill could take place in this opportunity area. The potential improvements and expansion to the Safeway represent a potential opportunity which would serve to reinforce Kensington as a community service area in terms of food and other everyday needs. Potential revitalization and/or infill connecting Safeway expansion with Howard Avenue (east) Antique Row could take place along Howard Avenue (east) near any Safeway expansion.

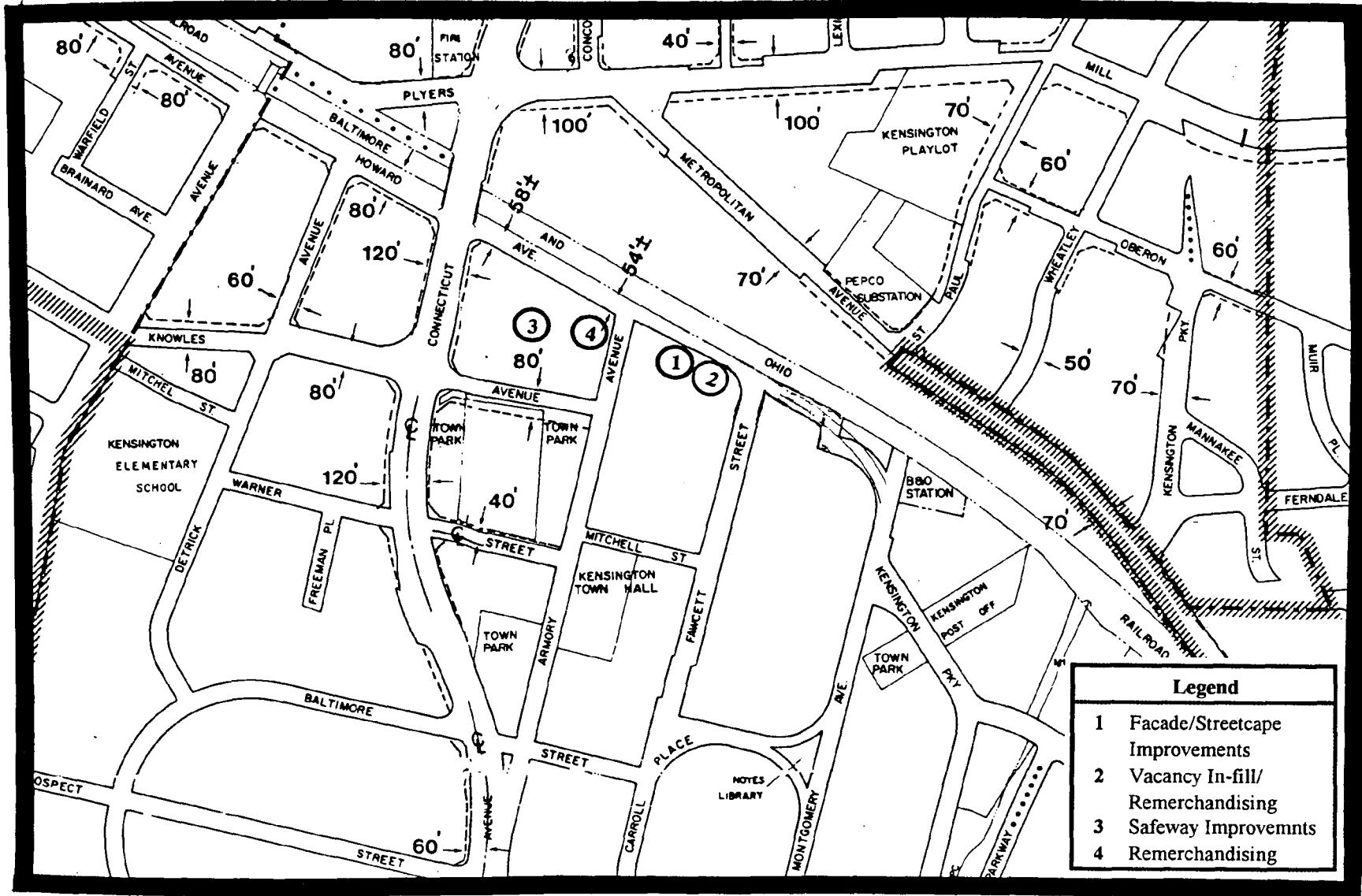
Howard Avenue (east) is located within the southeast quadrant. Based upon the BBP Associates field survey there are approximately forty-eight (48) ground floor retail establishments with approximately 74,000 square feet of retail space in this quadrant. The majority of stores are antique stores or miscellaneous retail store types.

The town and county's current program, which is being implemented, focuses on the Howard Avenue (east) this area. The opportunities in this area are generally along Antique Row and the main roads leading to Antique Row. These roads include Knowles Avenue to Armory Avenue to Howard Avenue (east). Signage needs to be placed at Connecticut Avenue and Knowles Avenue, Knowles Avenue and Armory Avenue and Connecticut Avenue and Howard Avenue to direct traffic towards Howard Avenue (east). Streetscape and facade improvements should be made throughout this opportunity area.

It may also be necessary to paint the backs of the buildings on Metropolitan Avenue that can be seen from Howard Avenue (east) in order to give an all-around aesthetically pleasing atmosphere. This painting should be a cooperatively and financially shared effort of merchants and property owners in the Howard Avenue (east) and Metropolitan Avenue/Plyers Mills Road areas. This project is an excellent candidate as part of the paint up/clean up program contained in the work program (see Appendix 2).

As shown in Figure 7 most of the planned improvements for the Howard Avenue (east) area should be concentrated on the south side of Howard Avenue between Armory Avenue and Fawcett Street. The prime focus will be on remerchandising and more efficient utilization of

**FIGURE 7  
HOWARD AVENUE EAST  
OPPORTUNITY AREAS**



existing space. Depending on the timing of potential Safeway improvements additional remerchandising and infill could occur. Continued maintenance and upkeep of the area needs to be emphasized.

There are presently (Summer 1996) 3 vacancies on Howard Avenue (east) which are scattered between several antique stores and the Safeway. These stores provide the area with an opportunity for attracting complementary uses. The current uses are compatible with an array of shoppers and convenience goods such as apparel and accessories, home furnishings, and food stores and these uses should be encouraged.

“Principals of Compatibility” consider the amount of cross shopping made between various store types. Increased cross-shopping and more compatible stores have been documented to proportionally increase overall retail sales. The goal is to identify and target specific store types with a high probability of cross shopping in order to optimize the increase in sales by all store types. Given the relatively small amount of additional space available and the relatively stagnant growth in area population and incomes, strengthening cross shopping and retail compatibility will be critical revitalization elements.

Based on these factors and the previous surveys, BBP Associates has determined the following selected targeted uses (by six digit Standard Industrial Classification - SIC) to be focused upon as compatible and complementary to the existing uses on Howard Avenue (east).

The SIC manual generally does not provide detailed definitions below the three or at most four digit classification level. The primary focus of the Howard Avenue (east) area will be on home furniture, furnishings and equipment stores. These include retail establishments selling goods used for furnishing the home. The focus would be on specialized types of furniture stores such as bedding, customer cabinet work, custom furniture, outdoor furniture and the like.

Miscellaneous home furnishing stores (SIC 5719) could include retail sales of miscellaneous home furnishings such as china, glassware, metal ware, bedding and linens, lamps and shades, mirrors and pitchers, window treatments, etc.

Miscellaneous shoppers goods stores could include hobby, toy and game shops which would sell toys, games, hobby, crafts, gifts, coins, stamps, autographs, ceramics, craft kits, etc. Gift, novelty and souvenir shops could include balloon shops, curio shops, gift shops, greeting and card shops, novelty shops and souvenir stores.

A variety of retail store types not elsewhere classified (SIC 599) could be attracted. Miscellaneous retail stores not elsewhere classified include but are not limited to artist



supplies, autograph stores, banner shops, candle shops, coin shops, flag shops, gem stones, picture frames, religious goods, rock and stone specimens, etc.

Specific recommended store types for the Howard Avenue (east) area are as follows:

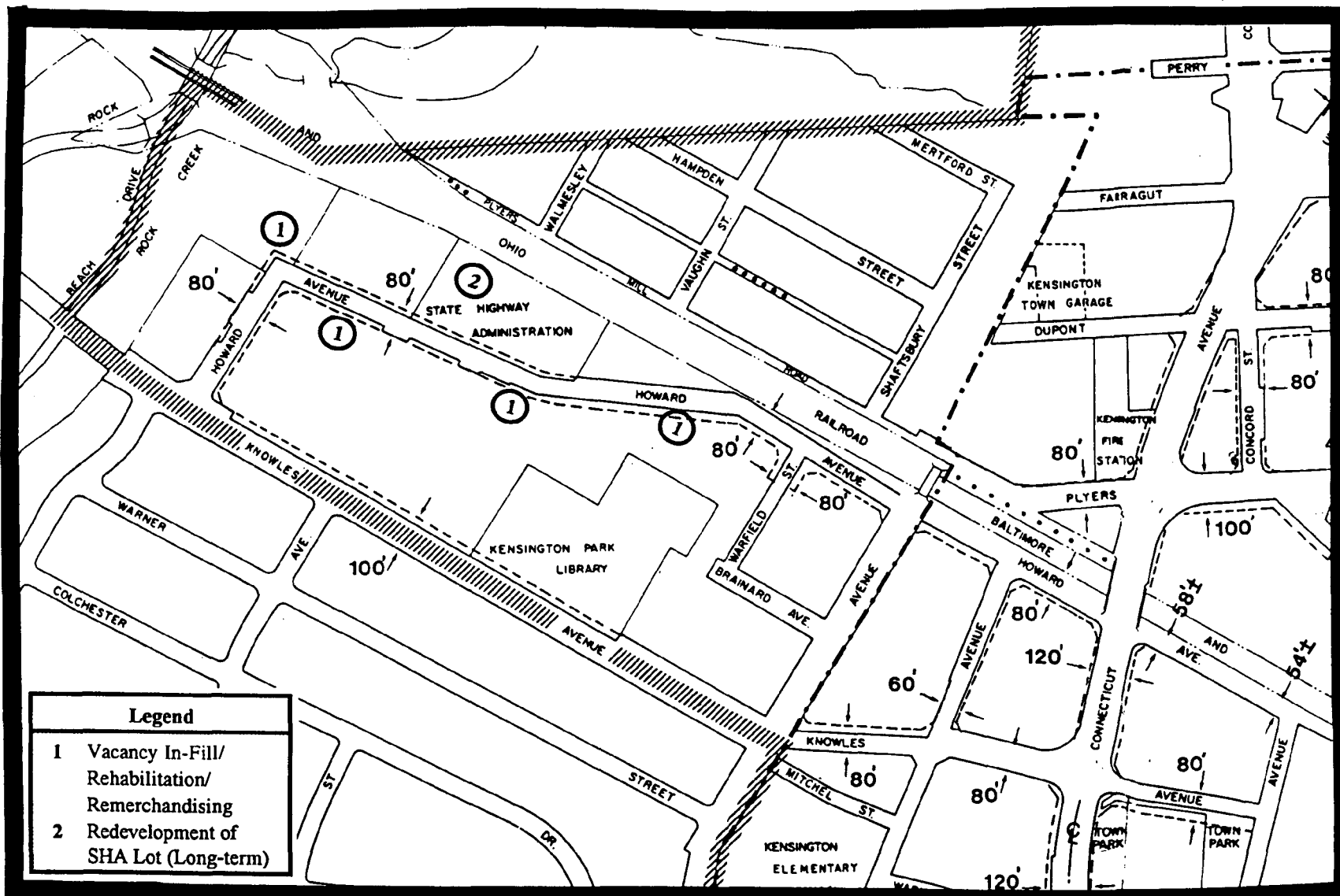
- Bedding & Accessories (SIC 571201);
- Bedding & Linen (SIC 571905);
- Retail Bakery (SIC 546100);
- Ice-Cream (SIC 581202);
- Cafe (SIC 581299);
- Health/Specialty Food (SIC 549900);
- China and Glass (SIC 571900);
- Home Accessories (SIC 571900);
- Gourmet Cookware (SIC 571900);
- Decorative Accessories (SIC 571900);
- Computer/Software (SIC 573400);
- Musical Instruments (SIC 573600);
- Hobby Shops (SIC 594599);
- Cards and Gifts (SIC 594700);
- Specialty Books (SIC 594200);
- Antiques (SIC 594200);
- Art Gallery (SIC 599999);
- Arts and Crafts (SIC 599999);
- Coin Shop (SIC 599900); and
- Candle Shop (SIC 599999).

2. Howard Avenue (west)

Howard Avenue, to the west of Connecticut Avenue, is now seen as an area of warehouse antiques, and auto-repair stores. This area attracts purposeful trip customers. The area is less attractive to pedestrian access and multipurpose cross shopping, as there are no sidewalks or other pedestrian amenities. The area is in need of major physical improvements.

Based upon the BBP Associates field survey, there is approximately 79,000 square feet of ground retail space within thirty-three (33) stores. The majority of retail stores are furniture and home furnishings and miscellaneous retail. There is also a large amount of auto repair services (18,750 square feet) located within the quadrant.

FIGURE 8  
 HOWARD AVENUE WEST  
 OPPORTUNITY AREAS



BBP Associates recommends initial efforts be focused on Howard Avenue to the west of Summit Avenue. Accordingly, signage should be placed at the intersection of Howard and Summit Avenues to direct customers to the desired stores, as well as coordinating signage located at those stores. The area needs streetscape improvements as well as façade improvements including better lighting for nighttime workers and visitors.

In the Howard Avenue (west) area, primary opportunities are for rehabilitation, infill and remerchandising along Howard Avenue (west). A second opportunity would be for potential long-term redevelopment of the State Highway Administration facility.

Figure 8 displays the Howard Avenue (west) area. In general the opportunities are primarily for the improvement to the existing facilities mostly located along the south side of Howard Avenue, west of Warfield Street. A major opportunity may be the redevelopment of the State Highway Administration facility.

At present (Summer 1996), there are 3 vacancies on Howard Avenue west. Given the characteristics of the area and retail compatibility principles, there is opportunity for in-fill and conversion with home furnishings and eating and drinking establishments to complement and support the existing uses. There is also the opportunity for non-retail in-fill such as professional office and business services.

Based on the above conclusions and previous surveys, BBP Associates has determined the following focused/targeted uses (by six digit Standard Industrial Classification - SIC) to be compatible and complementary to the existing uses on Howard Avenue (west).

As noted previously the SIC manual does not provide detailed definitions of store types below the three and four digit level. The orientation of additional establishments and remerchandising along Howard Avenue (west) would be toward miscellaneous home furnishings such as stores (SIC 5719). This consists of establishments primarily engaged in the retail sale of miscellaneous home furnishing as china, glassware and metal ware for kitchen and table use; bedding and linens; lamps and shades; mirrors and pictures; and window treatments. Opportunities for customized furniture stores and eating and drinking establishment to provide service to existing Howard Avenue (west) inventory are also recommended.

Specific store types recommended for Howard Avenue (west) include:

- Eating & Drinking (SIC 581200);
- Fireplace and Wood Stoves and Accessories (SIC 571903);

- Lighting and Lamps (SIC 571902);
- Customized Furniture (SIC 571202); and
- Radio, TV and Electronics (SIC 573100).

### 3. Metropolitan Avenue/Plyers Mills Road

Metropolitan Avenue is adjacent to the railroad tracks located within the northeast quadrant. Based upon the BBP Associates field survey, there are approximately thirty-eight (38) retail establishments located within approximately 117,000 square feet of retail space. The majority of the space is devoted to building materials and supplies. Other uses concentrated in this area include food stores, furniture and home furnishing stores (including antiques), eating and drinking places, auto dealers and service stations

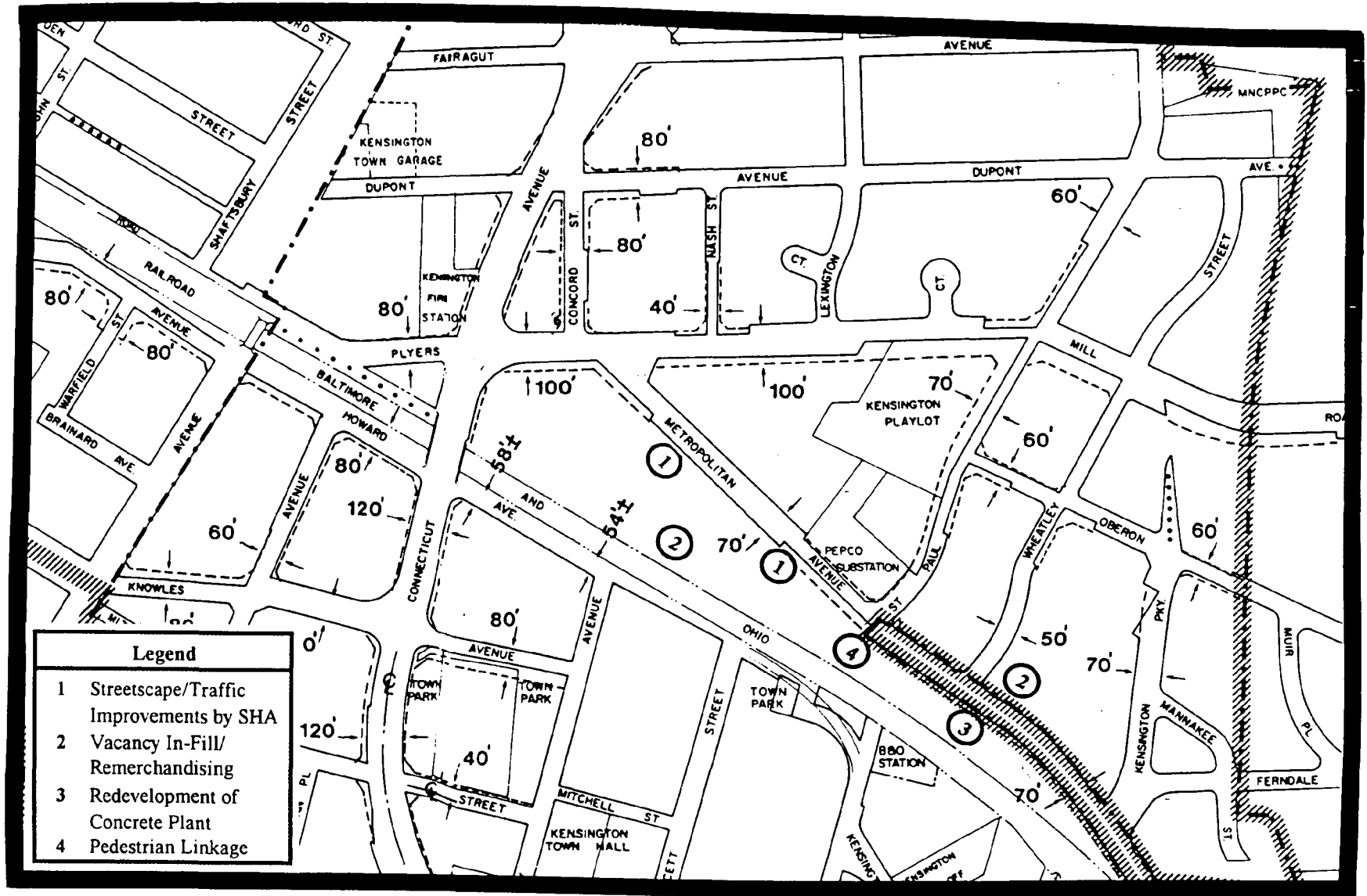
Opportunities in the Metropolitan Avenue area consist of streetscape and traffic highway improvements by the SHA; potential remerchandising and infill development of industrial areas along Metropolitan Avenue; reuse of industrial facilities located in the eastern portion of Metropolitan Avenue; potential redevelopment and reuse of the concrete plant located highly visible and directly across the B&O rail station; and possible construction of linkages at St. Paul Street between the Howard Avenue (east) and Metropolitan Avenue (see Figure 9).

The driving force for revitalization on Metropolitan Avenue is initially from efforts by area merchants and local citizens to have the Metropolitan Avenue area deemed as a revitalization project by the SHA. The local merchants have been working closely with the SHA to fund proposed improvements that include new signalization, sidewalks, curbs, gutters, storm drainage and lighting. The initial phase of improvements will be towards reconstruction of the Metropolitan Avenue and Plyers Mill Road/Connecticut Avenue intersection.

An important element that created the impetus for these efforts is the planned improvement to one of the two gas stations along Connecticut Avenue. These improvements need to be coordinated with other efforts to illustrate how local area merchants can independently take the lead and at the same time coordinate improvement efforts through the overall Revitalization/Steering Committee.

Two gas stations provide the entrance to the corridor from Connecticut Avenue. These gas stations need to improve their appearance to enhance the area's entryway and not deter customers from coming to Metropolitan Avenue. Overhead signs on Connecticut Avenue should be provided directing potential customers to this area. The south side of Metropolitan needs continuous sidewalks, curbs and gutters and improved lighting. There is also the need

FIGURE 9  
 METROPOLITAN AVENUE  
 OPPORTUNITY AREAS



for streetscape amenities such as new sidewalks, curbs, gutters, lighting, landscaping and directional signage. Streetscape should be conducted in conjunction with facade improvements throughout the corridor.

Current area vacancies are located to the east of St. Paul Street near current industrial and auto-type uses. There is potential for continued industrial uses and possible office conversions. However, that area of Metropolitan is somewhat isolated by the discontinuation of retail uses and by dominant industrial type uses (concrete plant and PEPCO substation). This area is likely to have a longer term revitalization perspective. Improved pedestrian linkage would require sidewalks and a more continuous retail presence along the sidewalks.

Opportunity area activities along Metropolitan Avenue and Plyers Mill Road concentrate on improving gateway treatment assuring that any service station improvements would be in keeping with the proposed design improvements undertaken in conjunction with the State Highway Administration. The south side of Metropolitan Avenue between Plyers Mill Road and the lumber yard offers opportunities for infilling and remerchandising as noted below. Potential reutilization of industrial uses west of Wheatley Street should be contemplated along with redevelopment of the site now occupied by the concrete plant. A key element will be providing improved linkages to the Howard Avenue (east) area most likely in the vicinity of St. Paul.

As noted previously the SIC manual does not provide detailed information concerning description of store types below the three and four digit level. It is envisioned that orientation of new and remerchandised establishments in the Metropolitan Avenue area would be geared toward lumbers and other building material dealers; paint, glass and wallpaper stores; and miscellaneous personal services. Lumber and other building material dealers would include establishments specializing in millwork and hardware sold to the general public.

Potential selected targeted uses for the Metropolitan Avenue and Plyers Mills Road include:

- Kitchen cabinets (SIC 521100);
- Fencing (SIC 521100);
- Wood Flooring (SIC 521100);
- Millwork (SIC 521200);
- Paneling (SIC 521100);
- Glass Stores (SIC 523100);
- Paint Sores (SIC 523100);
- Wall covering stores (SIC 523100);

- Clothing Rental (SIC 529999);
- Computer Photography (SIC 729999);
- Costume Rental (SIC 729999);
- Suite Rentals (SIC 529999);
- Shopping Services (SIC 729999);
- Tuxedo/Uniform Rental (SIC 729999); and
- Wardrobe Service (SIC 729999).

#### 4. Connecticut Avenue

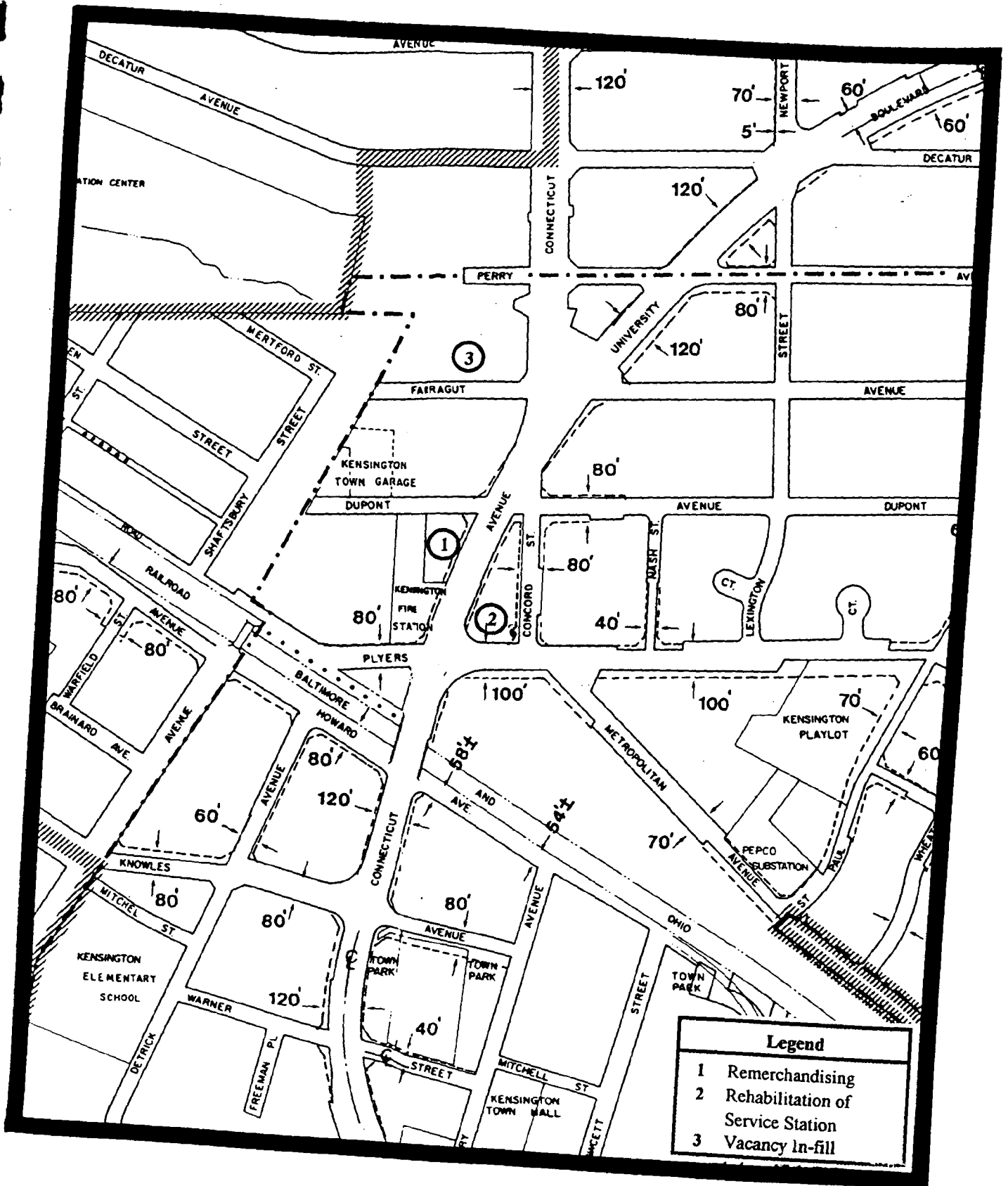
Connecticut Avenue is the main gateway leading into, out of and through Kensington providing potential customers direct access to other opportunity areas. However, it also acts as its own entity because it is a major thoroughfare which provides regional access for Kensington retail service/businesses and it has the potential to attract regionally oriented tenants.

Opportunity areas along the Connecticut Avenue portion of the study area include: potential visual improvements to service stations, and remerchandising and enhancements to commercial activities on the west/inbound side of Connecticut Avenue. Utilization of existing vacancies is also possible. The basic thrust of these opportunities is to improve the physical image of Kensington and take advantage and intercept the significant through-traffic along Connecticut Avenue.

In order create an overall Kensington retail image to attract and direct potential customers to all portions of the commercial area, gateway signage needs to be placed at the north and south entrances to Kensington as proposed by the town and county. Possible areas for the signs are the intersection of Armory and Connecticut Avenues and the intersection of Connecticut Avenue and University Boulevard. As previously mentioned, there also need to be signs at the intersections of Connecticut and Knowles and on Connecticut Avenue for Metropolitan Avenue. Modest streetscape and facade improvements should be undertaken in the future.

Figure 10 displays the potential opportunity areas along Connecticut Avenue. More immediate opportunities exist in terms of infilling of vacancies and remerchandising of selected establishments. Quality rehabilitation of service stations will do much to enhance the image of KCA along Connecticut Avenue. In the longer term there may be opportunities to completely remerchandise selected stores for more regional oriented facilities such as restaurant, general merchandise or bookstore. No known major changes of retail use anticipated at this time

FIGURE 10  
CONNECTICUT AVENUE  
OPPORTUNITY AREAS





along Connecticut Avenue. The primary focus would be on streetscape and façade improvements and directional signage to other areas within the KCA.

Because of its possible attraction to more regionally oriented businesses, and the larger potential vacant spaces located to the north of the railroad tracks, Connecticut Avenue could accommodate a number of uses. As noted before the SIC manual does not provide detailed specifics on description of store types below the three and four digit classifications. It is envisioned that restaurant types to be included would be oriented toward carry out facilities such as a Boston Market. A variety store would be oriented towards low and popular price ranges and is not envisioned as carrying a complete line of merchandise or being departmentalized.

Suggested targeted tenants for the Connecticut Avenue area include:

- Restaurant - possible regional chain (SIC 581200);
- Variety store (SIC 533100);
- General Merchandise store (SIC 539900); and
- Bookstore (SIC 594200).

## **VII. IMPLEMENTATION PLAN**

Based upon the identified opportunity areas presented in the previous chapter, BBP Associates has detailed an implementation/action plan for achieving revitalization of the KCA. The implementation plan includes the identification of goals and actions of the plan elements for the immediate, near-term and mid-term time periods. In addition, BBP Associates has preliminarily identified possible funding sources with an emphasis on private sector investments. BBP Associates has also identified the potential roles and responsibilities of the various public and private entities. The action plan is detailed, but illustrative. We envision the program elements being refined over time as the implementation entity undertakes a larger role and as the results of the initial actions and other unanticipated factors evolve.

Appendix 2 contains a detailed description of the annual work program for the implementation plan. The action plan contains twenty distinct goals for the revitalization area. For each goal, a series of sequential actions is identified. Each action has a geographic reference. The Revitalization/Steering Committee should utilize the work program goals and action items to establish specific quantifiable objectives by which to measure progress on an annual basis. This annual performance audit would serve to refine and reprogram the implementation plan as appropriate. The work program is viewed as a guide with the details to be established by the project participants.

The key responsibilities for implementing each action item are also identified. Responsibilities are allocated among the county, town, state, Revitalization/Steering Committee, business community, residential community, property owners and other relevant parties. Similarly, potential funding sources are identified for each action area.

For each action item both responsible and relevant parties have been identified. Responsible parties are the primary agents for implementing the action. Responsible parties are accountable for achieving the goal through the identified action. Relevant parties have a significant bearing in implementing the action. Relevant parties have a traceable, significant and logical connection to achieving the identified goal through the delineated action. Relevant parties however, are not answerable for the identified action.

A series of thirteen goals is addressed in the first year immediate action work program. The thirteen goals are accompanied by over forty action items, which are organized on a quarter-by-quarter basis for subarea with responsibilities and funding sources identified (see Appendix 2, pages A-41 through A-48).

Similarly, for near-term activities programmed for 1998 and 1999, twelve goals and approximately forty actions are identified, also on a quarter-by-quarter basis by geographic area with responsibilities and funding sources delineated (see Appendix 2, pages A-49 through A-65). A series of twenty mid-term actions programmed for the years 2000 to 2005, are also delineated with initial actions, target areas, responsibilities and funding sources identified (see Appendix 2, pages A-65 through A-67).

A. ACTION PLAN

Immediate actions are designed to be undertaken and initially implemented within a year (1997). These actions are generally aimed at stabilizing the area and setting the stage and momentum for more major and more difficult revitalization efforts. Immediate actions are designed to create a positive market image. These actions should involve high-impact, low-cost efforts with a high probability of success.

Near-term actions are designed to build upon the momentum created by the successful initiation of the immediate actions. Near-term actions are planned to be undertaken during project years two through three (1998 and 1999). These actions are designed to build upon the immediate actions and begin the process of revitalization with larger, more costly and more difficult actions. These near-term actions build upon the stabilization engendered by the immediate actions and start the revitalization/improvement efforts with a series of small, bite size revitalization efforts.

Finally, building upon the initial revitalization efforts in the near term, a series of mid-term actions representing larger-scale investments and improvements are proposed. The efforts are concentrated over the longer term (years four through ten). These efforts likewise build upon the successes created in the earlier timeframe. These represent more major reinvestment actions and are designed to continue the revitalization efforts and continue the stabilization of the Kensington area.

The following paragraphs briefly summarize the illustrative action plan items.

1. Immediate-Term (1997)

A primary focus of the immediate actions is a series of activities aimed at enhancing the community's image. This includes, of course, adopting and implementing this plan as well as the gateway/signage program. Other immediate actions include: initiating a traffic and parking study, community fairs and events, developing an overall advertising and public relations campaign, the establishment of a single coordinating group (i.e., Revitalization/Steering

Committee), and the formulation and promotion of volunteer programs to help with the revitalization effort, e.g., paint-up day.

The immediate term (1997) implementation work program is displayed in Appendix 2, pages A-41 through A-48. The immediate term action program contains 12 key goals. The first goal is to review and approve the overall revitalization strategy. This goal would be followed by organizational development including the formulation of the Revitalization/Steering Committee. Major goals and activities for the first year include gateway/signage program, streetscape improvements, façade improvements, code enforcement, clean up/paint up program, advertising/public relations, events planning, business recruitment and reform of alcoholic beverage legislation.

Seven action items are included under the goal of implementing the revitalization strategy. These include reviewing, refining and improving the strategy. Formal adoption of the strategy and initiation and monitoring of activities are envisioned to take place throughout the calendar year.

The Revitalization/Steering Committee should define its mission statement, delineate its members and establish liaison with other groups. Action items also include preparing bylaws and establishing various committees. A key item will be raising necessary funds to initiate the Revitalization/Steering Committee's work program.

The gateway/signage program will be a key element of the immediate action plan. A groundbreaking event is envisioned to take place this year.

Necessary traffic and parking studies are planned to be initiated in 1997. Streetscape and façade improvement concept plans are to be approved and overall priorities established. Actual physical improvement should begin for the Howard Avenue (east) area.

Initial code enforcement, clean up/paint up program events, advertising and public relations campaigns and events should be undertaken. The recruitment program should be formulated and options for addressing alcoholic beverage legislation reform should be identified.

In addition to preparing conceptual designs for the overall Kensington area, the action items include facade, streetscape and street lighting programs for Howard Avenue (east). These programs, funded in part by county capital improvement funds, are dependent upon approval of design schemes by all relevant parties, including the Historic Preservation Commission with advice from the Local Advisory Panel. Façade program implementation is

also dependent upon property owners committing to improve their facades by executing a facade easement agreement with the county.

2. Near-Term Actions (1998, 1999)

In general, near-term actions would build upon the momentum created by the immediate actions and would occur between 1998 and 1999. Many of these actions would represent creation and initiation of organizational recommendations including professional staffing of the revitalization entity.

Visible public sector actions, such as facade and streetscape improvements and other physical improvements, should be accomplished. Work would also begin on implementing the traffic and parking study recommendations. The Revitalization/Steering Committee would evolve into a more formal entity. Various promotional programs through advertising and event planning would continue. Retention and recruitment would emphasize coordinating with the Montgomery County Department of Economic Development (DED) and area real estate brokers.

Near term actions to be conducted over the 1998 through 1999 period are detailed in Appendix 2, pages A-49 through A-64. Goals include continuing to monitor the overall revitalization strategy and initial implementation of traffic and parking recommendations. Ongoing streetscape and façade improvements as well as code enforcement, clean up/paint up programs and advertising and public relations should be undertaken. A continuous series of events promoting the area should be undertaken. The business recruitment program should be initiated including the seeking of compatible uses.

In the first quarter of 1998 a request for bill in the state legislature addressing alcoholic beverage reform in the Town of Kensington should be undertaken. A vote on alcoholic beverage reform is assumed to take place in the Town in the fall of 1998.

Ongoing maintenance and housekeeping program should take place including identification of roles and responsibilities and the creation of an organized maintenance program.

3. Mid-Term Actions (2000 - 2005)

Mid-term actions are designed to build further upon momentum created in earlier time frames. General actions are oriented towards developing a long-term plan by revisiting the market analysis and revitalization strategy and by undertaking new resident and business surveys. Major improvement projects, specifically addressing traffic, transportation and

infrastructure concerns should also be investigated. In order to continue to maintain and enhance the quality of the environment, streetscape and sidewalk maintenance, should be undertaken.

Mid-term actions to be undertaken in calendar years 2000 to 2005 are delineated in Appendix 2, pages A-65 through A-67. This includes addressing 18 separate goals. Mid-term action goals include continuation of the revitalization strategy, organizational structures, gateway/signage program, traffic and parking improvements, streetscape improvements and façade improvements. Ongoing code enforcement, clean up/paint up, advertising and public relations, event programs and business recruitment should take place. Careful monitoring of the implementation of the alcoholic beverage legislation and area maintenance and housekeeping should be undertaken.

Building upon the earlier work program, exploration would begin of a major redevelopment potentials including the concrete plan site, SHA site and reuse of existing industrial buildings and auto repair facilities. Exploration of physical linkages across the railroad track at St. Pauls would be further explored. Opportunities for mixed-use development including residential, office and retail should be evaluated. Based upon the experience of initial phases of the work program, potential traffic circulation changes should be evaluated.

**B. ROLES AND RESPONSIBILITIES**

The proposed implementation strategy for the Kensington Revitalization Plan will require a strong commitment from the local public and private sectors to encourage and assist in revitalization. Although each entity will have separate roles, the action plan will also require coordination of several responsibilities. As stated earlier, to aid in this "joint" effort, a Revitalization/Steering Committee which will have the responsibility for implementing development is recommended.

For this plan, the public sector is defined as primarily Montgomery County and the Town of Kensington. Their major roles include funding any necessary additional studies as well as providing necessary capital funding assistance. It should be noted that the Town of Kensington has extremely limited funds for revitalization and may need to obtain funding elsewhere. The state and federal government could play a role in providing some of this funding support. The town and county will also have the responsibility of initiating physical improvements such as improved signage and facade enhancement. They should provide technical assistance to community businesses where possible and offer economic development incentives to help recruit additional commercial interests.

The private sector is defined as the commercial and residential community of Kensington. Their responsibilities include organizing and implementing a coordinated advertising and public relations campaign, marketing and merchandising strategy and events programming. In addition, the area merchants should continuously undertake customer surveys and provide training and incentives to their employees. Property owners should also have the responsibility of maintaining the facade improvements for which the County has purchased easements. Business and residents should be involved in cooperative activities for their mutual benefit (i.e., street fairs, charity events, clean-up, security, etc.).

A large number of the activities are proposed to be coordinated by the Revitalization/Steering Committee. The actual process of implementing the action plan should serve to refine the definition of roles and responsibilities. This should tend to identify how the Revitalization/Steering Committee will coordinate the responsibilities among the various identified entities. The thrust of the program is to have the Revitalization/Steering Committee coordinate activities with the appropriate entities, which should be based within each individual subarea.

C. FUNDING

In order to fund the management and implementation of the revitalization plan and the individual project elements, a public/private partnership is proposed. The overall funding strategy calls for maximizing private sector reinvestment and providing public sector support where appropriate. The initial phases of the revitalization project, however, would require initial public sector funding to start or "seed" the revitalization effort through the necessary investment in organization structure and public sector improvements.

These upfront public investments should over time create significant spin-off/leverage and matching funds by attracting private sector investments. The approach is to seek funding from a large number of outside sources to help set the stage for major private sector reinvestment within the KCA.

A county capital improvements program to assist in revitalization runs through fiscal year 1999. The currently committed public sector funds are for capital improvement project in the Howard Avenue (east) area. It also assumed there is an ongoing financial commitment on the part of both the county and town to provide necessary staff support at least through the immediate and near-term action program.

BBP Associates proposes a small role for the county and town to provide seed funding for the Revitalization/Steering Committee. This further assumes the Revitalization/Steering Committee should also be generating its own administrative and operating funds through dues,

grants and other arrangements. This initial investment (and any future investment) by the county and town should require matching private sector investment.

A modestly funded public/private partnership with funding divided between the town, county, local merchants, property owners and outside funding sources is envisioned. As noted previously an annual operating budget of \$50,000 to \$200,000 plus capital expenditure is recommended. The first two-year county capital improvement funds are already committed and the private sector had indicated its willingness to make concomitant reinvestments. State and/or federal funding assistance should also be sought.

If needed, or desired, additional public/private sector funding for on-going maintenance and services could be sought through the implementation of special taxing districts such as an Urban District. The impacts of this and the level of required funds and concomitant tax rates must be evaluated, formulated and initiated by the local based Revitalization/Steering Committee. The Revitalization/Steering Committee should be in position to determine the need for such a mechanism and to garner the necessary support from its members. The members, in essence, would be asking the county to tax them to support Urban District Services.

A supplemental tool related to capital investment for projected specific activities is a development district, which would "authorize the County to provide financing, refinancing and reimbursements for the cost of infrastructure improvements necessary for a new development or redevelopment by creating development districts in which special assessments, special taxes, or both, may be levied." The newly adopted county enabling legislation provides the district should largely consist of undeveloped or underdeveloped land. In order to create a development district, a petition must be signed by at least 80 percent of the owners of real property and the owners of at least 80 percent of the value of the real property located in the proposed development district. A public hearing must be held.

If a development district is passed, any property which is fully developed before the district is created is exempt from any special assessment. However, the owner of this exempt property which is later developed more intensively and benefits from any development attributable to infrastructure improvements financed by the district, must pay appropriate fees associated with the district.

This new County legislation is not designed for the near-term operating needs of Kensington, which could more readily be met by an urban district. The development district would, however, be an excellent tool for selected projects. For example, the redevelopment of the concrete plant along Metropolitan Avenue or eventual redevelopment of the SHA facility on Howard Avenue (west) are potential district candidates. These represent undeveloped or



underdeveloped properties. With a limited number of property owners it would be relatively easy to create such a development district whose revitalization improvements (if allowed sufficient intensity) could financially support the development district infrastructure which would in turn support the redevelopment project. Infrastructure would consist of roadway and streetscape improvements as well as parking necessary to support the new projects. This could include for example linkages across the rail tracks supported by financing based on the value of new development on the concrete plant parcel.

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**APPENDIX 1**

**APPENDIX TABLE**  
**MONTGOMERY COUNTY SHOPPING CENTER DIRECTORY**  
**MAP AND SQUARE FOOT INDEX TABLE**

1. Air Rights Center	7315 Wisconsin	Ave.	55. Laytons Village Shopping Center	6820 Olney Laytonsville Rd.
2. Artiss Street Shopping Center	8750 Artiss	St.	56. Leisureworld Plaza	3801 International Dr.
3. Aspen Hill	13515 Connecticut	Ave.	57. Little Falls Mall	4701 Sangamore Rd.
4. Aspen Manor Shopping Center I	13700 Georgia	Ave.	58. Lochmann's Plaza	5200 Randolph Rd.
5. Aspen Manor Shopping Center II	13623 Georgia	Ave.	59. Mid-Pike Shopping Center	11800 Rockville Pike
6. Bethesda Avenue Row	4820 Bethesda	Ave.	60. Middlebrook Square Shopping Center	11500 Middlebrook Rd.
7. Bethesda Avenue Row West	7100 Arlington	Rd.	61. Montgomery Mall	7101 Democracy Blvd.
8. Blair Park Plaza	1280 East-West	Hwy.	62. Montgomery Village Center	19214 Mont. Village Ave.
9. Bradley Blvd. Shopping Center	5001 Bradley	Blvd	63. Montgomery Village Off-Price Center	9653 Lost Knife Rd.
10. Briggs Chaney	13800 Columbia	Pike	64. Montrose Shopping Center	100 Randolph Rd.
11. Burgundy Park Shopping Center	1300 E. Gude	Dr.	65. Muddy Branch Square Shopping Center	800 Muddy Branch Rd.
12. Burtonsville Crossing	15791 Columbia	Pike	66. Northgate Shopping Center	13838 Georgia Ave.
13. Burtonsville Shopping Center	15600 Old Columbia	Pike	67. Olney Shopping Center	3400 Olney Laytonsville Rd.
14. Cabin John Mall	11325 Seven Locks	Rd.	68. Olney Town Center	18101 Spartan Dr.
15. Cabin John Shopping Center	7955 Tuckerman	Ln.	69. Olney Village Mart	18300 Village Mart Dr.
16. Central Square Shopping Center	8541 Piny Branch	Rd.	70. One Stop Shopping Center I	12 N. Washington St.
17. Chevy Chase Center	35 Wisconsin	Cir.	71. One Stop Shopping Center II	225 N. Washington St.
18. Chevy Chase Lake Shopping Center	8531 Connecticut	Ave.	72. Pike Center	12101 Rockville Pike
19. City Place	8661 Colersville	Rd.	73. Plaza Del Mercado	2200 Bel Pre Rd.
20. Cloverly Center	15509 New Hampshire	Ave.	74. Potomac Place Shopping Center	10110 River Rd.
21. Colersville Center	13441 New Hampshire	Ave.	75. Potomac Promenade	9812 Falls Rd.
22. College Plaza	15100 Frederick	Ave.	76. Potomac Valley Shopping Center	12116 Darnestown Rd.
23. Colonial Shopping Center	12209 Veirs Mill	Rd.	77. Potomac Village Pl. and Shping.	10101 River Rd.
24. Colonial Veirs Mill Village	4501 Randolph	Rd.	78. Quince Orchard Plaza	602 Quince Orchard Rd.
25. Congressional North	1503 Rockville	Pike	79. Randolph Hills Shopping Center	4838 Boiling Park Pkwy.
26. Congressional Plaza	154 Congressional	Lane	80. Randolph Shopping Center	12204 Nebel Street St.
27. Congressional South	1747 Rockville	Pike	81. Redmill Shopping Center	7258 Muncaster Mill Rd.
28. Damascus Center	9815 Main	St.	82. Ridgeview Centre	26005 Ridge Rd.
29. Diamond Square Center	46 Bureau	Dr.	83. Ritchie Center	765 Rockville Pike
30. Edmonston Crossing	1020 Rockville	Pike	84. Rockshire Village Center	2401 Wootton Pkwy.
31. Federal Plaza Shopping Center	1776 E. Jefferson	St.	85. Route 124 Plaza	18522 Woodfield Rd.
32. Festival at Muddy Branch	203 Muddy Branch	Rd.	86. Seminary Place	9440 Georgia Ave.
33. Flagship Center	12051 Rockville	Pike	87. Seven Locks Plaza	1083 Seven Locks Rd.
34. Flower Hill Shopping Center	18200 Flower Hill	Way	88. Shady Grove Center	15900 Shady Grove Rd.
35. Fox Chapel Center	19701 N. Frederick	Rd.	89. Sugarloaf Centre	12933 Wisteria Dr.
36. Gaither Center	15900 Luanne	Dr.	90. Talbot Center	1043 Rockville Pike
37. Gaithersburg Square	468 N. Frederick	Ave.	91. The Grove	16801 Crabbs Branch Way
38. Gaithers town Plaza	206 N. Frederick	Ave.	92. The Shoppes of Bethesda	4915 Elm St.
39. Georgetown Square	10400 Old Georgetown	Rd.	93. The Shops of Chevy Chase	6831 Wisconsin Ave.
40. Germantown Center	12801 Wisteria	Dr.	94. The Summit	551 Girard St.
41. Germantown Commons Shopping Center	300 Middlebrook	Rd.	95. Travilah Square Shopping Center	10016 Darnestown Rd.
42. Germantown Square Shopping Center	12601 Wisteria	Dr.	96. Twinbrook Shopping Center	1300 Rockville Pike
43. Glenmont Shopping Center	12345 Georgia	Ave.	97. Walnut Center	615 S. Frederick Ave.
44. Goshen Crossing Shopping Center	20044 Goshen	Rd.	98. Walnut Hill Shopping Center	16500 Frederick Rd.
45. Goshen Plaza	9100 Rothbury	Dr.	99. Westwood Center II	5110 Ridgefield Rd.
46. Hockinger Square Bethesda	7111 Westlake	Ter.	100. Westwood Shopping Center	5350 Westbard Ave.
47. Hockinger Station	13501 N. Frederick	Ave.	101. Wheaton Plaza Shopping Center	11160 Veirs Mill Rd.
48. Hillandale Shopping Center	10113 New Hampshire	Ave.	102. Wheaton Shopping Center	11401 Georgia Ave.
49. Kemp Mill Shopping Center	1099 Arcola	Ave.	103. Wheaton Station	11240 Grandview Ave.
50. Kensington Shopping Center	19500 Connecticut	Ave.	104. White Flint Mall	11301 Rockville Pike
51. Kenwood Station Shopping Center	5225 River	Rd.	105. White Oak Shopping Center	11200 New Hampshire Ave.
52. Keib Center	7601 Airport	Rd.	106. Wildwood Shopping Center	10241 Old Georgetown Rd.
53. Lakeforest Shopping Center	701 Russell	Ave.	107. Wistergreen Plaza	815 Rockville Pike
54. Layhill Shopping Center	14504 Layhill	Rd.	108. Woodmont Corner	7647 Old Georgetown Rd.

\* The map index table and map, classifies non-supermarket neighborhood centers as neighborhood centers and the regional center as a super regional.

Attribute	Area 1
Population:	
2000 Total.....	1857
1995 Total.....	1782
1990 Total.....	1713
1980 Total.....	1827
% Change 90-95.....	4.0
% Change 80-90.....	-6.2
Households:	
2000 Total.....	751
1995 Total.....	713
1990 Total.....	681
1980 Total.....	701
% Change 90-95.....	4.7
% Change 80-90.....	-2.9
Av. HH Size:	
2000.....	2.35
1995.....	2.37
1990.....	2.38
1995 Group Quarters Population..	89
Families:	
2000 Total.....	486
1995 Total.....	469
1990 Total.....	455
% Change 90-95.....	3.1
Housing Units:	
2000 Total.....	822
1995 Total.....	781
1990 Total.....	747
1995 Population by Race/Hispanic	1782 %
White (not Hispanic).....	1604 90.0
Black (not Hispanic).....	44 2.5
Asian (not Hispanic).....	58 3.3
All Other (not Hispanic).....	5 0.3
Hispanic Origin.....	71 4.0
1995 Pop. by Age:	1782 %
Under 5 Years.....	113 6.3
5 to 9 Years.....	100 5.6
10 to 14 Years.....	71 4.0
15 to 19 Years.....	64 3.6
20 to 24 Years.....	84 4.7
25 to 29 Years.....	95 5.3
30 to 34 Years.....	123 6.9
35 to 39 Years.....	147 8.2
40 to 44 Years.....	158 8.9
45 to 54 Years.....	214 12.0
55 to 64 Years.....	167 9.4
65 to 74 Years.....	226 12.7
75 to 84 Years.....	152 8.5
85 Years and Over.....	68 3.8
Total Median Age (in Years)...	43.0
Male Median Age (in Years)....	40.1

Attribute	Area 1	
-----	-----	-----
1995 Females by age:(see pp.9-10)	1017	%
Under 5 years.....	59	5.8
5 to 9 years.....	51	5.0
10 to 14 years.....	31	3.0
15 to 19 years.....	36	3.5
20 to 24 years.....	45	4.4
25 to 29 years.....	56	5.5
30 to 34 years.....	65	6.4
35 to 39 years.....	73	7.2
40 to 44 years.....	76	7.5
45 to 54 years.....	131	12.9
55 to 64 years.....	96	9.4
65 to 74 years.....	142	14.0
75 to 84 years.....	98	9.6
85 years and over.....	58	5.7
Female Median age (in years)..	46.0	
1995 White population by age:...	1675	%
White under 5 years.....	109	6.5
White 5 to 17 years.....	198	11.8
White 18 to 44 years.....	597	35.6
White 45 to 64 years.....	353	21.1
White 65 years and over.....	418	25.0
1995 Black population by age:...	44	%
Black under 5 years.....	1	2.3
Black 5 to 17 years.....	5	11.4
Black 18 to 44 years.....	11	25.0
Black 45 to 64 years.....	11	25.0
Black 65 years and over.....	16	36.4
1995 Hispanic population by age:	71	%
Hispanic under 5 years.....	2	2.8
Hispanic 5 to 17 years.....	13	18.3
Hispanic 18 to 44 years.....	32	45.1
Hispanic 45 to 64 years.....	16	22.5
Hispanic 65 years and over....	8	11.3
Per capita inc.: 1995.....	\$31063	
1989 (Census)..	\$25426	
% Change 89-95.	22.2	
Avg. hhld inc.: 1995.....	\$76855	
1989 (Census)..	\$63178	
% Change 89-95	21.6	
Med. hhld inc.: 1995.....	\$55903	
1989 (Census)..	\$49145	
% Change 89-95.	13.8	
Med. Family HH inc.: 1995.....	\$70195	
1989 (Census)..	\$62695	
% Change 89-95.	12.0	

Attribute	Area 1	
1995 Average Household Wealth...	\$212383	
1995 Median Household Wealth...	\$126105	
1995 Households by Hhld Income:	713	%
(See pg.11) Under \$10,000.....	30	4.2
\$ 10,000 to \$ 19,999.....	54	7.6
\$ 20,000 to \$ 24,999.....	34	4.8
\$ 25,000 to \$ 29,999.....	41	5.8
\$ 30,000 to \$ 34,999.....	28	3.9
\$ 35,000 to \$ 49,999.....	123	17.3
\$ 50,000 to \$ 74,999.....	158	22.2
\$ 75,000 to \$ 99,999.....	96	13.5
\$100,000 to \$149,999.....	112	15.7
\$150,000 and Over.....	37	5.2
1990 Hholds by 1989 hhld income:	681	%
Under \$10,000.....	27	4.0
\$ 10,000 to \$ 19,999.....	62	9.1
\$ 20,000 to \$ 24,999.....	43	6.3
\$ 25,000 to \$ 29,999.....	33	4.8
\$ 30,000 to \$ 34,999.....	35	5.1
\$ 35,000 to \$ 49,999.....	147	21.6
\$ 50,000 to \$ 74,999.....	136	20.0
\$ 75,000 to \$ 99,999.....	97	14.2
\$100,000 to \$149,999.....	74	10.9
\$150,000 and Over.....	27	4.0
1995 Fam. HHs by Fam. Hhld Inc.:	469	%
Under \$10,000.....	19	4.1
\$ 10,000 to \$ 19,999.....	17	3.6
\$ 20,000 to \$ 24,999.....	12	2.6
\$ 25,000 to \$ 29,999.....	12	2.6
\$ 30,000 to \$ 34,999.....	10	2.1
\$ 35,000 to \$ 49,999.....	62	13.2
\$ 50,000 to \$ 74,999.....	123	26.2
\$ 75,000 to \$ 99,999.....	82	17.5
\$100,000 to \$149,999.....	97	20.7
\$150,000 and Over.....	35	7.5
1990 Fam. HH by 1989 Fam. HH Inc	455	%
Under \$10,000.....	15	3.3
\$ 10,000 to \$ 19,999.....	19	4.2
\$ 20,000 to \$ 24,999.....	13	2.9
\$ 25,000 to \$ 29,999.....	11	2.4
\$ 30,000 to \$ 34,999.....	9	2.0
\$ 35,000 to \$ 49,999.....	102	22.4
\$ 50,000 to \$ 74,999.....	111	24.4
\$ 75,000 to \$ 99,999.....	84	18.5
\$100,000 to \$149,999.....	66	14.5
\$150,000 and Over.....	25	5.5

NOTE: When median household wealth is < \$25,000 it will be listed as \$24,999.

Claritas, Inc.  
 Sales (800)234-5973  
 Area 1 = TOK

23-SEP-96  
 Support (800)234-5629

Attribute	Area 1	
1995 Households by Hhold Wealth:	713	%
Less than \$25,000.....	196	27.5
\$ 25,000 to \$ 49,999.....	49	6.9
\$ 50,000 to \$ 99,999.....	80	11.2
\$100,000 to \$249,999.....	181	25.4
\$250,000 to \$499,999.....	131	18.4
\$500,000 and Over.....	76	10.7
1995 Householders by Age:	713	%
15 to 24 Years.....	17	2.4
25 to 34 Years.....	93	13.0
35 to 44 Years.....	153	21.5
45 to 54 Years.....	120	16.8
55 to 64 Years.....	95	13.3
65 to 74 Years.....	132	18.5
75 Years and Over.....	103	14.4
1995 Households by Hhold Inc:		
Age of Hholder 25-44 Years:	246	%
Under \$15,000.....	10	4.1
\$ 15,000 to \$ 24,999.....	10	4.1
\$ 25,000 to \$ 34,999.....	14	5.7
\$ 35,000 to \$ 49,999.....	39	15.9
\$ 50,000 to \$ 74,999.....	53	21.5
\$ 75,000 to \$ 99,999.....	40	16.3
\$100,000 and Over.....	80	32.5
Age of Hholder 45-64 Years:	215	%
Under \$15,000.....	14	6.5
\$ 15,000 to \$ 24,999.....	7	3.3
\$ 25,000 to \$ 34,999.....	11	5.1
\$ 35,000 to \$ 49,999.....	29	13.5
\$ 50,000 to \$ 74,999.....	58	27.0
\$ 75,000 to \$ 99,999.....	41	19.1
\$100,000 and over.....	55	25.6
Age of Householder 65+ Years:	235	%
Under \$15,000.....	18	7.7
\$ 15,000 to \$ 24,999.....	49	20.9
\$ 25,000 to \$ 34,999.....	43	18.3
\$ 35,000 to \$ 49,999.....	53	22.6
\$ 50,000 to \$ 74,999.....	45	19.1
\$ 75,000 to \$ 99,999.....	14	6.0
\$100,000 and Over.....	13	5.5
1990 Households by Hhold Type:	673	%
Male no wife no Child.....	13	1.9
Female no Husband no Child....	29	4.3
Married Couple Family.....	395	58.7
Other Family Hhold Own Child..	13	1.9
Non-Family.....	223	33.1

Claritas, Inc.  
Sales (800)234-5973  
Area 1 = TOK

23-SEP-96  
Support (800)234-5629

Attribute	Area 1
-----	-----
1990 Pop. 65+ Yr. by HH Type:	415 %
Living Alone.....	95 22.9
In Families.....	221 53.3
In Non-Families.....	14 3.4
In Group Quarters.....	85 20.5
1990 Marital status:	
For Population 15+ Years:	1462 %
Never Married.....	374 25.6
Now Married (Exc. Separated)	812 55.5
Divorced or Separated.....	118 8.1
Widowed.....	158 10.8
For Females 15+ Years:	840 %
Never Married.....	221 26.3
Now Married (Exc. Separated)	410 48.8
Divorced or Separated.....	72 8.6
Widowed.....	137 16.3
1990 Educational Attainment for Population 25+ Years:	1306 %
Less than 9th Grade.....	88 6.7
9th to 12th Grade, No Diploma..	82 6.3
High School Graduate.....	231 17.7
Some College, No Degree.....	215 16.5
Associate Degree.....	44 3.4
Bachelor's Degree.....	343 26.3
Graduate or Prof. Degree.....	303 23.2
1990 Pop. Age 16+, In Labor Frc:	897 %
Civilian Employed Males.....	430 47.9
Civilian Employed Females.....	451 50.3
Persons in Armed Forces.....	5 0.6
Persons Unemployed.....	11 1.2
1990 Occupat.-Employed pop. 16+:	881 %
Managerial/Prof. Spec.....	471 53.5
Exec/Admin/Managerial.....	228 25.9
Professional Specialty.....	243 27.6
Tech./Sales/Admn. Support.....	234 26.6
Technician and Related.....	22 2.5
Sales.....	109 12.4
Administrative Support.....	103 11.7
Service Occupation.....	94 10.7
Private Household.....	11 1.2
Protective Service.....	14 1.6
Other Service.....	69 7.8
Farming/Forestry/Fishing.....	11 1.2
Precision/Craft/Repair.....	28 3.2
Operator/Fabricators/Laborer..	43 4.9
Machine Op/Assem./Inspect....	15 1.7
Trans. & Material Moving.....	11 1.2
Handlers/Helpers/Laborers....	17 1.9



Attribute	Area 1	
1990 Industry-Employed Pop. 16+:	881	%
Agriculture/Forestry/Fisheries	21	2.4
Mining.....	0	0.0
Construction.....	47	5.3
Manufacturing-Nondurable Goods	21	2.4
Manufacturing-Durable Goods...	19	2.2
Transportation.....	11	1.2
Communications and Public Util	7	0.8
Wholesales Trade.....	25	2.8
Retail Trade.....	135	15.3
Finance/Insurance/Real Estate..	55	6.2
Business and Repair Services..	63	7.2
Personal Services.....	37	4.2
Entertainment/Recreation Serv.	10	1.1
Professional and Related Serv.	320	36.3
Public Administration.....	110	12.5
1990 Pop. by Travel Time to Work:	877	%
Travel in Under 10 Minutes...	169	19.3
Travel in 10 to 14 Minutes....	87	9.9
Travel in 15 to 19 Minutes....	97	11.1
Travel in 20 to 29 Minutes....	181	20.6
Travel in 30 to 44 Minutes....	198	22.6
Travel in 45 to 59 Minutes....	89	10.1
Travel in 60 to 89 Minutes....	49	5.6
Travel in 90 Minutes and Over.	7	0.8
1990 Pop. by Transport. to Work:	877	%
Travel by Driving Alone.....	532	60.7
Travel by Carpool.....	116	13.2
Travel by Public transport....	110	12.5
Travel by Walking Only.....	56	6.4
Travel by Other Means.....	2	0.2
Working at Home.....	61	7.0
1990 Housing Units:	747	%
Owner-Occupied Housing Units..	443	59.3
Renter-Occupied Housing Units.	238	31.9
Vacant Housing Units.....	66	8.8
1990 Specified Owner-Occ. Housing Units by Value:	417	%
Under \$ 20,000.....	1	0.2
\$20,000 to \$39,999.....	2	0.5
\$40,000 to \$49,999.....	1	0.2
\$50,000 to \$74,999.....	2	0.5
\$75,000 to \$99,999.....	9	2.2
\$100,000 to \$149,999.....	57	13.7
\$150,000 to \$199,999.....	100	24.0
\$200,000 to \$299,999.....	133	31.9
\$300,000 to \$499,999.....	89	21.3
\$500,000 and Over.....	23	5.5
Median Housing Value.....	222812	

Attribute Area 1

1990 Specified Renter-Occupied Units by Gross Rent:		
	238	%
With Cash Rent.....	236	99.2
Less than \$100.....	0	0.0
\$100 to \$149.....	0	0.0
\$150 to \$199.....	2	0.8
\$200 to \$249.....	4	1.7
\$250 to \$299.....	0	0.0
\$300 to \$399.....	7	2.9
\$400 to \$499.....	27	11.3
\$500 to \$599.....	35	14.7
\$600 to \$749.....	84	35.3
\$750 to \$999.....	50	21.0
\$1,000 or More.....	27	11.3
No Cash Rent.....	2	0.8

1990 Households by Vehicles:		
	681	%
0 Vehicles.....	60	8.8
1 Vehicle Available.....	276	40.5
2 Vehicles Available.....	219	32.2
3 Vehicles Available.....	82	12.0
4 Vehicles Available.....	25	3.7
5+ Vehicles Available.....	19	2.8

1990 Housing Units by Number of Units in Structure:		
	747	%
Single Detached Unit.....	503	67.3
Single Attached Unit.....	8	1.1
Structures with 2 Units.....	11	1.5
Structures w/ 3-4 Units.....	14	1.9
Structures w/ 5-9 Units.....	28	3.7
Structures w/ 10-19 Units.....	49	6.6
Structures w/ 20-49 Units.....	0	0.0
Structures w/ 50+ Units.....	134	17.9
Mobile Homes/Trailers or Other	0	0.0

1990 Housing Units by Year Built:		
	747	%
Built 1989 to March 1990.....	5	0.7
Built 1985 to 1988.....	18	2.4
Built 1980 to 1984.....	16	2.1
Built 1970 to 1979.....	74	9.9
Built 1960 to 1969.....	142	19.0
Built 1950 to 1959.....	191	25.6
Built 1940 to 1949.....	118	15.8
Built 1939 or Earlier	183	24.5

1990 HUs by Year Moved In:		
	681	%
Moved in 1989 to March 1990...	119	17.5
Moved in 1985 to 1988.....	211	31.0
Moved in 1980 to 1984.....	70	10.3
Moved in 1970 to 1979.....	119	17.5
Moved in 1969 or Earlier.....	162	23.8

Claritas, Inc.  
Sales (800)234-5973  
Area 1 = TOK

23-SEP-96  
Support (800)234-5629

Attribute	Area 1	
-----		
1995 Expenditures by Selected Product Categories (in thousands of dollars):	U.S.	Index
	(\$000s)	
	-----	-----
Food at Home	\$2701	100
Food Away From Home	\$2190	128
Alcoholic Beverages at Home	\$198	120
Alcoholic Beverages Away From Home	\$170	134
Personal Care Products	\$280	121
Personal Care Services	\$263	126
Nonprescription Drugs	\$110	119
Women's Apparel	\$654	129
Men's Apparel	\$375	131
Girls' Apparel	\$53	98
Boys' Apparel	\$77	98
Infants' Apparel	\$60	95
Footwear (Excl. Infants)	\$286	115
Housekeeping Supplies	\$372	120
Lawn/Garden Supplies (Incl. Plants)	\$69	145
Domestic Services	\$537	149
Household Textiles	\$139	136
Furniture	\$419	128
Floor Coverings	\$121	129
Major Appliances	\$164	115
Small Appliances & Houseware	\$89	133
TV, Radio & Sound Equipment	\$541	114
Other Entertainment Equip./Services	\$607	122
Transportation	\$5446	123
-----		
1995 Expenditures by Selected Store Type (in thousands of dollars):	U.S.	Index
	(\$000s)	
	-----	-----
Building Materials & Supply Stores	\$243	107
Hardware Stores	\$79	123
Retail Nursery/Lawn/Garden Supply	\$73	134
Auto Supply Stores	\$287	126
Gasoline/Service Stations	\$1393	114
Grocery Stores	\$3065	104
Drug and Proprietary Stores	\$634	123
Eating Places	\$1869	127
Drinking Places	\$115	134
Department Stores (Excl. Leased)	\$1696	125
Apparel Stores	\$634	124
Shoe Stores	\$179	115
Furniture	\$383	129
Home Furnishing Stores	\$213	135
Household Appliance Stores	\$110	123
Radio/TV/Computer/Music Stores	\$280	127

SUMMARY BUSINESS DATA REPORT FOR SELECTED RETAIL SIC CATEGORIES (Page 1 of 2)

SIC Code	Business Description	Total Estab.	-----Estimated-----		
			Total Employ.	Sales (in millions)	Estab. 20+ Emp.
RET	ALL RETAILING (SIC 52-59)	130	725	93.6	8
52	BLDG MAT'RL/GARDEN SUP./MOB'L HOMES	6	42	8.4	1
521	LUMBER AND OTHER BUILDING MAT'RLS	2	29	6.6	1
523	PAINT, GLASS, AND WALLPAPER STORE	3	2	0.7	0
525	HARDWARE STORES	0	0	0.0	0
526	NURSERIES & GARDEN SUPPLY STORES	1	11	1.1	0
527	MOBILE HOME DEALERS	0	0	0.0	0
53	GENERAL MERCHANDISE STORES	0	0	0.0	0
531	DEPARTMENT STORES	0	0	0.0	0
54	FOOD STORES	7	137	19.3	3
541	GROCERY STORES	4	113	16.8	2
542	MEAT & FISH MARKETS, FREEZER PROV	2	20	2.4	1
543	FRUIT AND VEGETABLE MARKETS	0	0	0.0	0
544	CANDY, NUT, & CONFECT'NERY STORES	0	0	0.0	0
545	DAIRY PRODUCTS STORES	0	0	0.0	0
546	RETAIL BAKERIES	1	4	0.1	0
549	MISCELLANEOUS FOOD STORES	0	0	0.0	0
55	AUTO. DEALERS & GAS. SERV. STATIONS	11	63	12.3	0
551	MOTOR VEHICLE DEALERS (NEW&USED)	2	3	2.3	0
552	MOTOR VEHICLE DEALERS (USED ONLY)	0	0	0.0	0
553	AUTO AND HOME SUPPLY STORES	2	18	2.1	0
554	GASOLINE SERVICE STATIONS	6	40	7.6	0
555	BOAT DEALERS	0	0	0.0	0
556	RECREATIONAL VEHICLE DEALERS	0	0	0.0	0
557	MOTORCYCLE DEALERS	1	2	0.3	0
559	AUTOMOTIVE DEALERS, N.E.C.	0	0	0.0	0
56	APPAREL AND ACCESSORY STORES	7	21	1.6	0
561	MEN'S & BOYS' CLOTHING STORES	0	0	0.0	0
562	WOMEN'S CLOTHING STORES	1	7	0.6	0
563	WOMEN'S ACCESSORY & SPECIALTY	0	0	0.0	0
564	CHILDREN'S AND INFANTS' WEAR	2	9	0.7	0
565	FAMILY CLOTHING STORES	0	0	0.0	0
566	SHOE STORES	0	0	0.0	0
569	MISC. APPAREL & ACCESSORIES	4	5	0.4	0
57	HOME FURNITURE/FURNISHINGS/EQUIP.	22	184	30.2	1
571	FURNITURE, HOME FURNISHINGS STORE	7	12	1.6	0
5712	FURNITURE STORES	3	5	0.7	0
5713	FLOOR COVERING STORES	3	4	0.6	0
5719	MISC. HOME FURNISHINGS STORES	1	3	0.3	0

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SUMMARY BUSINESS DATA REPORT FOR SELECTED RETAIL SIC CATEGORIES (Page 2 of 2)

SIC Code	Business Description	Total Estab.	-----Estimated-----		
			Total Employ.	Sales (in millions)	Estab. 20+ Emp.
572	HOUSEHOLD APPLIANCE STORES	1	0	0.5	0
573	RADIO, TV, CONSUM. ELEC., MUSIC STORE	14	172	28.1	1
5731	RADIO, TV, CONSUMER ELECTRONICS	1	17	2.7	0
5734	COMPUTER/COMPUTER SOFTW. STORES	10	151	24.4	1
5735	RECORD, PRERECORDED TAPE STORES	1	4	0.5	0
58	EATING AND DRINKING PLACES	12	111	4.0	2
5812	EATING PLACES	12	111	4.0	2
5813	DRINKING PLACES (ALCOHOLIC BEV.)	0	0	0.0	0
59	MISCELLANEOUS RETAIL	65	167	17.9	1
591	DRUG STORES & PROPRIETARY STORES	2	30	3.7	0
592	LIQUOR STORES	1	9	1.4	0
593	USED MERCHANDISE STORES	33	38	3.7	0
5932A	ANTIQUE STORES	30	32	3.2	0
5932B	USED AND RARE BOOKS	1	0	0.0	0
594	MISC. SHOPPING GOODS STORES	15	51	5.5	1
5941	SPORTING GOODS & BICYCLE STORES	3	17	2.1	0
5942	BOOK STORES	1	0	0.3	0
5943	STATIONERY STORES	2	21	1.8	1
5944	JEWELRY STORES	3	2	0.5	0
5945	HOBBY, TOY, AND GAME SHOPS	1	0	0.2	0
5946	CAMERA/PHOTOGRAPHIC SUPPLY	0	0	0.0	0
5947	GIFT, NOVELTY, AND SOUVENIR	4	3	0.2	0
5948	LUGGAGE AND LEATHER GOODS	0	0	0.0	0
5949	SEWING/NEEDLEWORK/PIECE GOODS	1	8	0.5	0
596	NONSTORE RETAILERS	2	0	0.3	0
5961	CATALOG AND MAIL ORDER HOUSES	0	0	0.0	0
598	FUEL DEALERS	0	0	0.0	0
599	RETAIL STORES, N.E.C.	12	39	3.3	0
5992	FLORISTS	1	15	0.8	0
5993	TOBACCO STORES AND STANDS	0	0	0.0	0
5994	NEWS DEALERS AND NEWSSTANDS	0	0	0.0	0
5995	OPTICAL GOODS STORES	0	0	0.0	0
5999	MISC. RETAIL STORES, N.E.C.	11	24	2.5	0
5999M	PET SHOPS	1	4	0.4	0

Claritas, Inc.

Sales (800)234-5973

Area 1 = SECONDARY AREA

Area 2 = TERTIARY AREA

Attribute	Area 1	Area 2
Population:		
2000 Total.....	44343	225000
1995 Total.....	45707	225955
1990 Total.....	47881	229586
1980 Total.....	48224	215201
% Change 90-95.....	-4.5	-1.6
% Change 80-90.....	-0.7	6.7
Households:		
2000 Total.....	17583	91360
1995 Total.....	17816	90648
1990 Total.....	18393	91269
1980 Total.....	17335	82326
% Change 90-95.....	-3.1	-0.7
% Change 80-90.....	6.1	10.9
Av. HH Size:		
2000.....	2.49	2.43
1995.....	2.54	2.46
1990.....	2.58	2.49
1995 Group Quarters Population..	494	2735
Families:		
2000 Total.....	11493	57833
1995 Total.....	11893	58376
1990 Total.....	12568	59912
% Change 90-95.....	-5.4	-2.6
Housing Units:		
2000 Total.....	18205	95779
1995 Total.....	18441	95104
1990 Total.....	19019	95760
1995 Population by Race/Hispanic		
White (not Hispanic).....	45709   %	225954   %
Black (not Hispanic).....	32082 70.2	152744 67.6
Asian (not Hispanic).....	4254 9.3	28994 12.8
All Other (not Hispanic).....	3953 8.6	19587 8.7
Hispanic Origin.....	172 0.4	802 0.4
	5248 11.5	23827 10.5
1995 Pop. by Age:		
Under 5 Years.....	45707   %	225955   %
5 to 9 Years.....	3045 6.7	14482 6.4
10 to 14 Years.....	2634 5.8	12677 5.6
15 to 19 Years.....	2328 5.1	11660 5.2
20 to 24 Years.....	2071 4.5	10822 4.8
25 to 29 Years.....	2492 5.5	13200 5.8
30 to 34 Years.....	2492 5.5	13200 5.8
35 to 39 Years.....	3708 8.1	18291 8.1
40 to 44 Years.....	4332 9.5	19424 8.6
45 to 54 Years.....	4553 10.0	20501 9.1
55 to 64 Years.....	3950 8.6	20214 8.9
65 to 74 Years.....	5622 12.3	30905 13.7
75 to 84 Years.....	3911 8.6	19959 8.8
85 Years and Over.....	4193 9.2	19283 8.5
Total Median Age (in Years)...	2223 4.9	11171 4.9
Male Median Age (in Years)....	639 1.4	3367 1.5
	37.5	38.0
	36.1	36.7

Claritas, Inc.  
Sales (800)234-5973

Area 1 = SECONDARY AREA  
Area 2 = TERTIARY AREA

25-SEP-96  
Support (800)234-5629

Attribute	Area 1		Area 2	
1995 Females by age:(see pp.9-10)	23775	%	118318	%
Under 5 years.....	1486	6.3	7033	5.9
5 to 9 years.....	1266	5.3	6157	5.2
10 to 14 years.....	1111	4.7	5712	4.8
15 to 19 years.....	1002	4.2	5192	4.4
20 to 24 years.....	1268	5.3	6748	5.7
25 to 29 years.....	1916	8.1	9447	8.0
30 to 34 years.....	2115	8.9	9811	8.3
35 to 39 years.....	2198	9.2	10498	8.9
40 to 44 years.....	2040	8.6	10727	9.1
45 to 54 years.....	2957	12.4	16183	13.7
55 to 64 years.....	2140	9.0	10691	9.0
65 to 74 years.....	2432	10.2	10869	9.2
75 to 84 years.....	1345	5.7	6772	5.7
85 years and over.....	499	2.1	2478	2.1
Female Median age (in years)...	38.9		39.3	
1995 White population by age:...	36786	%	173211	%
White under 5 years.....	2355	6.4	10763	6.2
White 5 to 17 years.....	4452	12.1	21645	12.5
White 18 to 44 years.....	15686	42.6	69846	40.3
White 45 to 64 years.....	7809	21.2	40323	23.3
White 65 years and over.....	6484	17.6	30634	17.7
1995 Black population by age:...	4685	%	31854	%
Black under 5 years.....	375	8.0	2307	7.2
Black 5 to 17 years.....	982	21.0	5289	16.6
Black 18 to 44 years.....	2176	46.4	16643	52.2
Black 45 to 64 years.....	887	18.9	5836	18.3
Black 65 years and over.....	265	5.7	1779	5.6
1995 Hispanic population by age:	5243	%	23821	%
Hispanic under 5 years.....	481	9.2	2256	9.5
Hispanic 5 to 17 years.....	920	17.5	4080	17.1
Hispanic 18 to 44 years.....	2632	50.2	12308	51.7
Hispanic 45 to 64 years.....	894	17.1	3822	16.0
Hispanic 65 years and over....	316	6.0	1355	5.7
Per capita inc.: 1995.....	\$27401		\$35144	
1989 (Census)...	\$22689		\$29003	
% Change 89-95.	20.8		21.2	
Avg. hhld inc.: 1995.....	\$69932		\$87021	
1989 (Census)...	\$58758		\$72500	
% Change 89-95	19.0		20.0	
Med. hhld inc.: 1995.....	\$56584		\$60388	
1989 (Census)...	\$51269		\$54479	
% Change 89-95.	10.4		10.8	
Med. Family HH inc.: 1995.....	\$64110		\$74154	
1989 (Census)...	\$57460		\$67395	
% Change 89-95.	11.6		10.0	

Claritas, Inc.

Sales (800)234-5973

Area 1 = SECONDARY AREA

Area 2 = TERTIARY AREA

Attribute	Area 1		Area 2	
1995 Average Household Wealth...	\$201351		\$214781	
1995 Median Household Wealth....	\$111989		\$107118	
1995 Households by Hhld Income:..	17816	%	90648	%
(See pg.11) Under \$10,000.....	702	3.9	3980	4.4
\$ 10,000 to \$ 19,999.....	1197	6.7	5900	6.5
\$ 20,000 to \$ 24,999.....	812	4.6	4170	4.6
\$ 25,000 to \$ 29,999.....	896	5.0	4139	4.6
\$ 30,000 to \$ 34,999.....	1105	6.2	5106	5.6
\$ 35,000 to \$ 49,999.....	3019	16.9	13513	14.9
\$ 50,000 to \$ 74,999.....	4423	24.8	19502	21.5
\$ 75,000 to \$ 99,999.....	2740	15.4	12858	14.2
\$100,000 to \$149,999.....	2171	12.2	13332	14.7
\$150,000 and Over.....	755	4.2	8152	9.0
1990 Hholds by 1989 hhld income:	18393	%	91269	%
Under \$10,000.....	733	4.0	4095	4.5
\$ 10,000 to \$ 19,999.....	1377	7.5	6821	7.5
\$ 20,000 to \$ 24,999.....	997	5.4	4415	4.8
\$ 25,000 to \$ 29,999.....	1182	6.4	5397	5.9
\$ 30,000 to \$ 34,999.....	1055	5.7	4835	5.3
\$ 35,000 to \$ 49,999.....	3527	19.2	15354	16.8
\$ 50,000 to \$ 74,999.....	5083	27.6	20865	22.9
\$ 75,000 to \$ 99,999.....	2430	13.2	12347	13.5
\$100,000 to \$149,999.....	1401	7.6	9949	10.9
\$150,000 and Over.....	604	3.3	7187	7.9
1995 Fam. HHs by Fam. Hhld Inc.:	11893	%	58376	%
Under \$10,000.....	251	2.1	1230	2.1
\$ 10,000 to \$ 19,999.....	506	4.3	2343	4.0
\$ 20,000 to \$ 24,999.....	410	3.4	1766	3.0
\$ 25,000 to \$ 29,999.....	509	4.3	1905	3.3
\$ 30,000 to \$ 34,999.....	601	5.1	2377	4.1
\$ 35,000 to \$ 49,999.....	1889	15.9	7343	12.6
\$ 50,000 to \$ 74,999.....	3113	26.2	12650	21.7
\$ 75,000 to \$ 99,999.....	2129	17.9	10050	17.2
\$100,000 to \$149,999.....	1806	15.2	11264	19.3
\$150,000 and Over.....	681	5.7	7455	12.8
1990 Fam. HH by 1989 Fam. HH Inc	12568	%	59912	%
Under \$10,000.....	250	2.0	1205	2.0
\$ 10,000 to \$ 19,999.....	594	4.7	2653	4.4
\$ 20,000 to \$ 24,999.....	579	4.6	1983	3.3
\$ 25,000 to \$ 29,999.....	632	5.0	2421	4.0
\$ 30,000 to \$ 34,999.....	615	4.9	2421	4.0
\$ 35,000 to \$ 49,999.....	2367	18.8	8921	14.9
\$ 50,000 to \$ 74,999.....	3733	29.7	14734	24.6
\$ 75,000 to \$ 99,999.....	2055	16.4	10451	17.4
\$100,000 to \$149,999.....	1217	9.7	8656	14.4
\$150,000 and Over.....	520	4.1	6462	10.8

NOTE: When median household wealth is < \$25,000 it will be listed as \$24,999.

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Claritas, Inc.

Sales (800)234-5973

Area 1 = SECONDARY AREA

Area 2 = TERTIARY AREA

25-SEP-96

Support (800)234-5629

Attribute	Area 1	Area 2
<b>1995 Households by Hhold Wealth:</b>		
1995 Households by Hhold Wealth:	17820 %	90683 %
Less than \$25,000.....	4771 26.8	27708 30.6
\$ 25,000 to \$ 49,999.....	1396 7.8	6477 7.1
\$ 50,000 to \$ 99,999.....	2375 13.3	10164 11.2
\$100,000 to \$249,999.....	4598 25.8	20537 22.7
\$250,000 to \$499,999.....	2924 16.4	15057 16.6
\$500,000 and Over.....	1755 9.9	10704 11.8
<b>1995 Householders by Age:</b>		
1995 Householders by Age:	17820 %	90683 %
15 to 24 Years.....	410 2.3	2524 2.8
25 to 34 Years.....	3230 18.1	16021 17.7
35 to 44 Years.....	4319 24.2	20921 23.1
45 to 54 Years.....	3206 18.0	17870 19.7
55 to 64 Years.....	2276 12.8	11774 13.0
65 to 74 Years.....	2577 14.5	11970 13.2
75 Years and Over.....	1802 10.1	9603 10.6
<b>1995 Households by Hhold Inc:</b>		
<b>Age of Hholder 25-44 Years:</b>		
1995 Households by Hhold Inc:	7549 %	36942 %
Age of Hholder 25-44 Years:		
Under \$15,000.....	254 3.4	1721 4.7
\$ 15,000 to \$ 24,999.....	473 6.3	2734 7.4
\$ 25,000 to \$ 34,999.....	794 10.5	3991 10.8
\$ 35,000 to \$ 49,999.....	1351 17.9	6335 17.1
\$ 50,000 to \$ 74,999.....	2124 28.1	8978 24.3
\$ 75,000 to \$ 99,999.....	1318 17.5	5568 15.1
\$100,000 and Over.....	1235 16.4	7615 20.6
<b>Age of Hholder 45-64 Years:</b>		
1995 Households by Hhold Inc:	5482 %	29644 %
Age of Hholder 45-64 Years:		
Under \$15,000.....	203 3.7	1135 3.8
\$ 15,000 to \$ 24,999.....	356 6.5	1608 5.4
\$ 25,000 to \$ 34,999.....	518 9.4	2152 7.3
\$ 35,000 to \$ 49,999.....	847 15.5	3617 12.2
\$ 50,000 to \$ 74,999.....	1384 25.2	6062 20.4
\$ 75,000 to \$ 99,999.....	954 17.4	4681 15.8
\$100,000 and over.....	1220 22.3	10389 35.0
<b>Age of Householder 65+ Years:</b>		
1995 Households by Hhold Inc:	4379 %	21573 %
Age of Householder 65+ Years:		
Under \$15,000.....	643 14.7	3121 14.5
\$ 15,000 to \$ 24,999.....	675 15.4	2874 13.3
\$ 25,000 to \$ 34,999.....	630 14.4	2706 12.5
\$ 35,000 to \$ 49,999.....	734 16.8	3049 14.1
\$ 50,000 to \$ 74,999.....	822 18.8	4001 18.5
\$ 75,000 to \$ 99,999.....	424 9.7	2451 11.4
\$100,000 and Over.....	451 10.3	3371 15.6
<b>1990 Households by Hhold Type:</b>		
1990 Households by Hhold Type:	18514 %	91693 %
Male no Wife no Child.....	420 2.3	1831 2.0
Female no Husband no Child....	1054 5.7	4670 5.1
Married Couple Family.....	10378 56.1	49979 54.5
Other Family Hhold Own Child..	884 4.8	4199 4.6
Non-Family.....	5778 31.2	31014 33.8

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Claritas, Inc.

Sales (800)234-5973

Area 1 = SECONDARY AREA

Area 2 = TERTIARY AREA

25-SEP-96  
Support (800)234-5629

Attribute	Area 1		Area 2	
1990 Pop. 65+ Yr. by HH Type:	6973	%	33070	%
Living Alone.....	1739	24.9	8408	25.4
In Families.....	4725	67.8	22734	68.7
In Non-Families.....	92	1.3	643	1.9
In Group Quarters.....	417	6.0	1285	3.9
1990 Marital status:				
For Population 15+ Years:	39893	%	191168	%
Never Married.....	11097	27.8	54741	28.6
Now Married (Exc. Separated)	21858	54.8	105401	55.1
Divorced or Separated.....	4068	10.2	18162	9.5
Widowed.....	2870	7.2	12864	6.7
For Females 15+ Years:	21074	%	101605	%
Never Married.....	5278	25.0	26964	26.5
Now Married (Exc. Separated)	10865	51.6	52281	51.5
Divorced or Separated.....	2602	12.3	11500	11.3
Widowed.....	2329	11.1	10860	10.7
1990 Educational Attainment for Population 25+ Years:	34505	%	165114	%
Less than 9th Grade.....	1848	5.4	6943	4.2
9th to 12th Grade, No Diploma..	2653	7.7	8518	5.2
High School Graduate.....	6789	19.7	24919	15.1
Some College, No Degree.....	6075	17.6	27161	16.4
Associate Degree.....	1694	4.9	7582	4.6
Bachelor's Degree.....	8626	25.0	43168	26.1
Graduate or Prof. Degree.....	6820	19.8	46823	28.4
1990 Pop. Age 16+, In Labor Frc:	28147	%	136182	%
Civilian Employed Males.....	14199	50.4	67321	49.4
Civilian Employed Females.....	12909	45.9	62938	46.2
Persons in Armed Forces.....	230	0.8	2147	1.6
Persons Unemployed.....	809	2.9	3776	2.8
1990 Occupat.-Employed pop. 16+:	27106	%	130258	%
Managerial/Prof. Spec.....	12163	44.9	67185	51.6
Exec/Admin/Managerial.....	5382	19.9	28496	21.9
Professional Specialty.....	6781	25.0	38689	29.7
Tech./Sales/Admn. Support.....	8482	31.3	38620	29.6
Technician and Related.....	1452	5.4	6914	5.3
Sales.....	2869	10.6	13733	10.5
Administrative Support.....	4161	15.4	17973	13.8
Service Occupation.....	2856	10.5	12322	9.5
Private Household.....	348	1.3	1921	1.5
Protective Service.....	254	0.9	1092	0.8
Other Service.....	2254	8.3	9309	7.1
Farming/Forestry/Fishing.....	227	0.8	775	0.6
Precision/Craft/Repair.....	1977	7.3	6640	5.1
Operator/Fabricators/Laborer..	1401	5.2	4716	3.6
Machine Op/Assem./Inspect....	430	1.6	1529	1.2
Trans. & Material Moving.....	526	1.9	1669	1.3
Handlers/Helpers/Laborers....	445	1.6	1518	1.2

Claritas, Inc.

Sales (800)234-5973

Area 1 = SECONDARY AREA

Area 2 = TERTIARY AREA

Attribute	Area 1		Area 2	
1990 Industry-Employed Pop. 16+:	27106	%	130252	%
Agriculture/Forestry/Fisheries	232	0.9	919	0.7
Mining.....	14	0.1	44	0.0
Construction.....	1601	5.9	6277	4.8
Manufacturing-Nondurable Goods	890	3.3	3410	2.6
Manufacturing-Durable Goods...	671	2.5	2779	2.1
Transportation.....	601	2.2	2560	2.0
Communications and Public Util	706	2.6	2953	2.3
Wholesales Trade.....	749	2.8	3015	2.3
Retail Trade.....	3771	13.9	15851	12.2
Finance/Insurance/Real Estate.	2328	8.6	12309	9.5
Business and Repair Services..	1762	6.5	8429	6.5
Personal Services.....	1232	4.5	5378	4.1
Entertainment/Recreation Serv.	488	1.8	2015	1.5
Professional and Related Serv.	8999	33.2	48213	37.0
Public Administration.....	3062	11.3	16100	12.4
1990 Pop. by Travel Time to Work:	26912	%	130355	%
Travel in Under 10 Minutes...	2552	9.5	14974	11.5
Travel in 10 to 14 Minutes....	2757	10.2	12349	9.5
Travel in 15 to 19 Minutes....	3677	13.7	15498	11.9
Travel in 20 to 29 Minutes....	6107	22.7	26615	20.4
Travel in 30 to 44 Minutes....	6610	24.6	36630	28.1
Travel in 45 to 59 Minutes....	3340	12.4	16252	12.5
Travel in 60 to 89 Minutes....	1665	6.2	7356	5.6
Travel in 90 Minutes and Over.	204	0.8	681	0.5
1990 Pop. by Transport. to Work:	26913	%	130350	%
Travel by Driving Alone.....	18415	68.4	81040	62.2
Travel by Carpool.....	3329	12.4	15668	12.0
Travel by Public transport....	3654	13.6	22071	16.9
Travel by Walking Only.....	434	1.6	4340	3.3
Travel by Other Means.....	257	1.0	1159	0.9
Working at Home.....	824	3.1	6072	4.7
1990 Housing Units:	18992	%	95794	%
Owner-Occupied Housing Units..	13461	70.9	59876	62.5
Renter-Occupied Housing Units.	4906	25.8	31422	32.8
Vacant Housing Units.....	627	3.3	4493	4.7
1990 Specified Owner-Occ.				
Housing Units by Value:	11720	%	50320	%
Under \$ 20,000.....	23	0.2	60	0.1
\$20,000 to \$39,999.....	22	0.2	81	0.2
\$40,000 to \$49,999.....	12	0.1	36	0.1
\$50,000 to \$74,999.....	117	1.0	277	0.6
\$75,000 to \$99,999.....	743	6.3	1330	2.6
\$100,000 to \$149,999.....	3253	27.8	7166	14.2
\$150,000 to \$199,999.....	3959	33.8	12798	25.4
\$200,000 to \$299,999.....	2158	18.4	13162	26.2
\$300,000 to \$499,999.....	1263	10.8	9630	19.1
\$500,000 and Over.....	170	1.5	5780	11.5
Median Housing Value.....	168719		223560	

Claritas, Inc.

Sales (800)234-5973

Area 1 = SECONDARY AREA

Area 2 = TERTIARY AREA

25-SEP-96  
Support (800)234-5629

Attribute	Area 1		Area 2	
<b>1990 Specified Renter-Occupied</b>				
<b>Units by Gross Rent:</b>	4887	%	31277	%
<b>With Cash Rent.....</b>	4804	98.3	30626	97.9
Less than \$100.....	57	1.2	244	0.8
\$100 to \$149.....	54	1.1	439	1.4
\$150 to \$199.....	28	0.6	188	0.6
\$200 to \$249.....	42	0.9	133	0.4
\$250 to \$299.....	83	1.7	216	0.7
\$300 to \$399.....	74	1.5	396	1.3
\$400 to \$499.....	292	6.0	1286	4.1
\$500 to \$599.....	591	12.1	3978	12.7
\$600 to \$749.....	788	16.1	9292	29.7
\$750 to \$999.....	1478	30.2	8567	27.4
\$1,000 or More.....	1317	26.9	5887	18.8
<b>No Cash Rent.....</b>	83	1.7	651	2.1
<b>1990 Households by Vehicles:</b>				
0 Vehicles.....	18364	%	91297	%
1 Vehicle Available.....	1081	5.9	7867	8.6
2 Vehicles Available.....	6231	33.9	33435	36.6
3 Vehicles Available.....	7658	41.7	35568	39.0
4 Vehicles Available.....	2530	13.8	10765	11.8
5+ Vehicles Available.....	635	3.5	2789	3.1
	229	1.2	873	1.0
<b>1990 Housing Units by</b>				
<b>Number of Units in Structure:</b>	18993	%	95793	%
Single Detached Unit.....	13403	70.6	56458	58.9
Single Attached Unit.....	1815	9.6	6985	7.3
Structures with 2 Units.....	32	0.2	178	0.2
Structures w/ 3-4 Units.....	150	0.8	1212	1.3
Structures w/ 5-9 Units.....	869	4.6	4538	4.7
Structures w/ 10-19 Units.....	926	4.9	5945	6.2
Structures w/ 20-49 Units.....	311	1.6	2620	2.7
Structures w/ 50+ Units.....	1444	7.6	17422	18.2
Mobile Homes/Trailers or Other	42	0.2	430	0.4
<b>1990 Housing Units by Year Built:</b>				
Built 1989 to March 1990.....	18996	%	95793	%
Built 1985 to 1988.....	140	0.7	1160	1.2
Built 1980 to 1984.....	612	3.2	5693	5.9
Built 1970 to 1979.....	626	3.3	4552	4.8
Built 1960 to 1969.....	1518	8.0	9305	9.7
Built 1950 to 1959.....	3511	18.5	24047	25.1
Built 1940 to 1949.....	8076	42.5	28389	29.6
Built 1939 or Earlier	3601	19.0	14826	15.5
	912	4.8	7821	8.2
<b>1990 HUs by Year Moved In:</b>				
Moved in 1989 to March 1990...	18368	%	91300	%
Moved in 1985 to 1988.....	2951	16.1	17182	18.8
Moved in 1980 to 1984.....	5184	28.2	26897	29.5
Moved in 1970 to 1979.....	2284	12.4	12803	14.0
Moved in 1969 or Earlier.....	3217	17.5	14783	16.2
	4732	25.8	19635	21.5

Claritas, Inc.

Sales (800)234-5973

Area 1 = SECONDARY AREA

Area 2 = TERTIARY AREA

25-SEP-96  
Support (800)234-5629

Attribute	Area 1		Area 2	
-----	-----		-----	
1995 Expenditures by Selected Product Categories (in thousands of dollars):	U.S. (\$000s)	Index	U.S. (\$000s)	Index
-----	-----	-----	-----	-----
Food at Home	\$68326	102	\$344483	101
Food Away From Home	\$53952	126	\$280802	129
Alcoholic Beverages at Home	\$4939	120	\$26016	124
Alcoholic Beverages Away From Home	\$3960	125	\$21187	132
Personal Care Products	\$6956	120	\$35715	121
Personal Care Services	\$6534	125	\$33966	128
Nonprescription Drugs	\$2564	111	\$12760	108
Women's Apparel	\$16120	127	\$84606	131
Men's Apparel	\$9203	128	\$48631	133
Girls' Apparel	\$1435	106	\$6983	101
Boys' Apparel	\$2079	106	\$10190	102
Infants' Apparel	\$1657	105	\$8291	103
Footwear (Excl. Infants)	\$7322	118	\$37785	119
Housekeeping Supplies	\$9069	117	\$45714	115
Lawn/Garden Supplies (Incl. Plants)	\$1667	140	\$8274	136
Domestic Services	\$13722	153	\$71196	156
Household Textiles	\$3532	138	\$18134	139
Furniture	\$10860	133	\$55828	134
Floor Coverings	\$3277	140	\$16550	139
Major Appliances	\$4241	119	\$21253	117
Small Appliances & Houseware	\$2206	132	\$11411	134
TV, Radio & Sound Equipment	\$13829	117	\$70795	118
Other Entertainment Equip./Services	\$15520	125	\$78479	124
Transportation	\$139759	126	\$709412	126

1995 Expenditures by Selected Store Type (in thousands of dollars):	U.S. (\$000s)	Index	U.S. (\$000s)	Index
-----	-----	-----	-----	-----
Building Materials & Supply Stores	\$6765	119	\$32230	111
Hardware Stores	\$2021	127	\$10089	124
Retail Nursery/Lawn/Garden Supply	\$1820	134	\$9281	135
Auto Supply Stores	\$7325	129	\$37558	130
Gasoline/Service Stations	\$35867	117	\$180254	116
Grocery Stores	\$77011	104	\$388165	103
Drug and Proprietary Stores	\$15226	118	\$77003	117
Eating Places	\$46013	125	\$237808	127
Drinking Places	\$2754	128	\$14585	133
Department Stores (Excl. Leased)	\$42583	126	\$219570	127
Apparel Stores	\$15874	124	\$82584	127
Shoe Stores	\$4598	118	\$23730	120
Furniture	\$9885	133	\$50901	135
Home Furnishing Stores	\$5543	140	\$28502	142
Household Appliance Stores	\$2817	126	\$14383	126
Radio/TV/Computer/Music Stores	\$7113	129	\$36963	132

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 SECONDARY AREA  
 Claritas Inc.  
 Sales (800)234-5973  
 Study Area Summary

25-SEP-96  
 Support (800)234-5629

SUMMARY BUSINESS DATA REPORT FOR SELECTED RETAIL SIC CATEGORIES (Page 1 of 2)

SIC Code	Business Description	Total Estab.	-----Estimated-----		
			Total Employ.	Sales (in millions)	Estab. 20+ Emp.
RET	ALL RETAILING (SIC 52-59)	613	5379	658.1	58
52	BLDG MAT'RL/GARDEN SUP./MOB'L HOMES	22	115	22.0	2
521	LUMBER AND OTHER BUILDING MAT'RLS	8	67	15.3	2
523	PAINT, GLASS, AND WALLPAPER STORE	9	27	4.4	0
525	HARDWARE STORES	1	6	1.0	0
526	NURSERIES & GARDEN SUPPLY STORES	3	13	1.3	0
527	MOBILE HOME DEALERS	0	0	0.0	0
53	GENERAL MERCHANDISE STORES	10	844	99.9	3
531	DEPARTMENT STORES	8	843	99.7	2
54	FOOD STORES	47	658	86.6	12
541	GROCERY STORES	18	513	75.3	7
542	MEAT & FISH MARKETS, FREEZER PROV	6	31	4.5	1
543	FRUIT AND VEGETABLE MARKETS	0	0	0.0	0
544	CANDY, NUT, & CONFECT'NERY STORES	2	26	1.3	1
545	DAIRY PRODUCTS STORES	2	8	0.7	0
546	RETAIL BAKERIES	7	44	1.9	2
549	MISCELLANEOUS FOOD STORES	10	33	2.8	1
55	AUTO. DEALERS & GAS. SERV. STATIONS	33	534	168.9	5
551	MOTOR VEHICLE DEALERS (NEW&USED)	8	342	135.3	5
552	MOTOR VEHICLE DEALERS (USED ONLY)	0	0	0.0	0
553	AUTO AND HOME SUPPLY STORES	9	83	10.5	1
554	GASOLINE SERVICE STATIONS	12	87	17.8	0
555	BOAT DEALERS	1	19	5.0	0
556	RECREATIONAL VEHICLE DEALERS	0	0	0.0	0
557	MOTORCYCLE DEALERS	1	2	0.3	0
559	AUTOMOTIVE DEALERS, N.E.C.	0	0	0.0	0
56	APPAREL AND ACCESSORY STORES	88	622	53.6	5
561	MEN'S & BOYS' CLOTHING STORES	9	56	5.7	0
562	WOMEN'S CLOTHING STORES	28	279	22.8	2
563	WOMEN'S ACCESSORY & SPECIALTY	5	36	3.2	1
564	CHILDREN'S AND INFANTS' WEAR	3	11	0.9	0
565	FAMILY CLOTHING STORES	2	29	3.0	1
566	SHOE STORES	21	123	11.3	1
569	MISC. APPAREL & ACCESSORIES	19	84	6.6	1
57	HOME FURNITURE/FURNISHINGS/EQUIP.	99	652	99.0	6
571	FURNITURE, HOME FURNISHINGS STORE	48	175	22.8	0
5712	FURNITURE STORES	21	69	10.8	0
5713	FLOOR COVERING STORES	13	30	4.8	0
5719	MISC. HOME FURNISHINGS STORES	11	68	6.6	0

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CLARITAS

ARLINGTON, VA  
 703/261-2270

CHICAGO  
 312/926-2650

ITHACA, NY  
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LOS ANGELES  
 213/954-3200

A-21  
 NEW YORK  
 212/739-3580

SUMMARY BUSINESS DATA REPORT FOR SELECTED RETAIL SIC CATEGORIES (Page 2 of 2)

SIC Code	Business Description	-----Estimated-----			
		Total Estab.	Total Employ.	Sales (in millions)	Estab. 20+ Emp.
572	HOUSEHOLD APPLIANCE STORES	14	71	13.4	1
573	RADIO,TV,CONSUM.ELEC.,MUSIC STORE	199	1663	296.3	21
5731	RADIO, TV, CONSUMER ELECTRONICS	26	350	61.3	4
5734	COMPUTER/COMPUTER SOFTW. STORES	134	1022	197.2	13
5735	RECORD, PRERECORDED TAPE STORES	22	157	19.3	2
58	EATING AND DRINKING PLACES	443	5313	184.0	94
5812	EATING PLACES	439	5289	183.0	94
5813	DRINKING PLACES (ALCOHOLIC BEV.)	4	23	0.9	0
59	MISCELLANEOUS RETAIL	628	2805	287.5	23
591	DRUG STORES & PROPRIETARY STORES	38	424	60.3	5
592	LIQUOR STORES	17	82	14.0	0
593	USED MERCHANDISE STORES	101	265	21.3	3
5932A	ANTIQUA STORES	59	116	9.8	1
5932B	USED AND RARE BOOKS	11	14	1.8	0
594	MISC. SHOPPING GOODS STORES	250	1142	112.0	10
5941	SPORTING GOODS & BICYCLE STORES	47	192	22.8	2
5942	BOOK STORES	23	114	12.3	2
5943	STATIONERY STORES	23	134	13.0	2
5944	JEWELRY STORES	55	238	24.2	2
5945	HOBBY, TOY, AND GAME SHOPS	15	47	6.1	0
5946	CAMERA/PHOTOGRAPHIC SUPPLY	4	45	6.8	0
5947	GIFT, NOVELTY, AND SOUVENIR	62	254	17.5	1
5948	LUGGAGE AND LEATHER GOODS	7	50	5.0	0
5949	SEWING/NEEDLEWORK/PIECE GOODS	11	64	4.2	1
596	NONSTORE RETAILERS	19	97	14.9	1
5961	CATALOG AND MAIL ORDER HOUSES	5	18	6.1	0
598	FUEL DEALERS	0	0	0.0	0
599	RETAIL STORES, N.E.C.	201	792	65.0	5
5992	FLORISTS	37	324	17.7	2
5993	TOBACCO STORES AND STANDS	2	2	0.2	0
5994	NEWS DEALERS AND NEWSSTANDS	5	17	1.5	0
5995	OPTICAL GOODS STORES	30	87	7.9	0
5999	MISC. RETAIL STORES, N.E.C.	125	361	37.7	3
5999M	PET SHOPS	7	47	4.3	1

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PREPARED FOR: BBP ASSOCIATES  
 TERTIARY AREA  
 Claritas Inc.  
 Sales (800)234-5973  
 Study Area Summary

25-SEP-96  
 Support (800)234-5629

SUMMARY BUSINESS DATA REPORT FOR SELECTED RETAIL SIC CATEGORIES (Page 1 of 2)

SIC Code	Business Description	Total Estab.	-----Estimated-----		
			Total Employ.	Sales (in millions)	Estab. 20+ Emp.
RET	ALL RETAILING (SIC 52-59)	2030	17623	2021.9	213
52	BLDG MAT'RL/GARDEN SUP./MOB'L HOMES	64	525	76.6	7
521	LUMBER AND OTHER BUILDING MAT'RLS	15	104	23.5	2
523	PAINT, GLASS, AND WALLPAPER STORE	30	275	37.8	4
525	HARDWARE STORES	11	113	11.6	1
526	NURSERIES & GARDEN SUPPLY STORES	6	31	3.7	0
527	MOBILE HOME DEALERS	0	0	0.0	0
53	GENERAL MERCHANDISE STORES	22	1748	201.7	7
531	DEPARTMENT STORES	17	1725	199.7	8
54	FOOD STORES	161	1934	228.7	30
541	GROCERY STORES	72	1394	197.5	19
542	MEAT & FISH MARKETS, FREEZER PROV	11	41	5.7	1
543	FRUIT AND VEGETABLE MARKETS	2	5	0.6	0
544	CANDY, NUT, & CONFECT'NERY STORES	6	50	2.5	1
545	DAIRY PRODUCTS STORES	7	35	2.9	0
546	RETAIL BAKERIES	30	302	11.2	7
549	MISCELLANEOUS FOOD STORES	30	104	8.3	1
55	AUTO. DEALERS & GAS. SERV. STATIONS	124	1803	548.5	17
551	MOTOR VEHICLE DEALERS (NEW&USED)	24	1054	413.1	12
552	MOTOR VEHICLE DEALERS (USED ONLY)	0	0	0.0	0
553	AUTO AND HOME SUPPLY STORES	31	229	28.8	1
554	GASOLINE SERVICE STATIONS	63	484	98.2	3
555	BOAT DEALERS	2	21	5.4	0
556	RECREATIONAL VEHICLE DEALERS	0	0	0.0	0
557	MOTORCYCLE DEALERS	1	2	0.3	0
559	AUTOMOTIVE DEALERS, N.E.C.	1	12	2.8	0
56	APPAREL AND ACCESSORY STORES	245	1357	124.4	12
561	MEN'S & BOYS' CLOTHING STORES	20	137	14.4	1
562	WOMEN'S CLOTHING STORES	89	644	58.1	6
563	WOMEN'S ACCESSORY & SPECIALTY	12	70	6.0	1
564	CHILDREN'S AND INFANTS' WEAR	13	60	5.1	0
565	FAMILY CLOTHING STORES	2	29	3.0	1
566	SHOE STORES	42	238	22.8	2
569	MISC. APPAREL & ACCESSORIES	65	176	14.9	1
57	HOME FURNITURE/FURNISHINGS/EQUIP.	339	2134	370.5	23
571	FURNITURE, HOME FURNISHINGS STORE	125	399	60.8	0
5712	FURNITURE STORES	49	174	27.8	1
5713	FLOOR COVERING STORES	36	86	17.8	0
5719	MISC. HOME FURNISHINGS STORES	29	103	12.0	1

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CLARITAS

WASHINGTON, VA  
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CHICAGO  
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ITACA, NY  
 607/257-5757

LOS ANGELES  
 213/951-3200

A-23  
 NEW YORK  
 212/732-3380



PREPARED FOR: BBP ASSOCIATES  
 SECONDARY AREA  
 Claritas Inc.  
 Sales (800)234-5973  
 Study Area Summary

25-SEP-96  
 Support (800)234-5629

SUMMARY BUSINESS DATA REPORT FOR SELECTED RETAIL SIC CATEGORIES (Page 2 of 2)

SIC Code	Business Description	Total Estab.	-----Estimated-----		
			Total Employ.	Sales (in millions)	Estab. 20+ Emp.
572	HOUSEHOLD APPLIANCE STORES	3	4	1.9	0
573	RADIO, TV, CONSUM. ELEC., MUSIC STORE	47	472	74.4	6
5731	RADIO, TV, CONSUMER ELECTRONICS	7	107	17.8	2
5734	COMPUTER/COMPUTER SOFTW. STORES	26	220	38.6	3
5735	RECORD, PRERECORDED TAPE STORES	9	95	11.6	1
58	EATING AND DRINKING PLACES	98	1096	40.6	18
5812	EATING PLACES	97	1095	40.5	18
5813	DRINKING PLACES (ALCOHOLIC BEV.)	0	0	0.0	0
59	MISCELLANEOUS RETAIL	213	855	87.5	7
591	DRUG STORES & PROPRIETARY STORES	6	70	9.2	0
592	LIQUOR STORES	6	35	5.6	0
593	USED MERCHANDISE STORES	59	108	9.4	1
5932A	ANTIQUA STORES	48	80	7.2	1
5932B	USED AND RARE BOOKS	2	5	0.5	0
594	MISC. SHOPPING GOODS STORES	86	453	44.5	5
5941	SPORTING GOODS & BICYCLE STORES	15	79	9.1	1
5942	BOOK STORES	8	69	6.9	2
5943	STATIONERY STORES	5	31	3.2	1
5944	JEWELRY STORES	20	121	12.2	1
5945	HOBBY, TOY, AND GAME SHOPS	6	14	1.6	0
5946	CAMERA/PHOTOGRAPHIC SUPPLY	1	11	1.6	0
5947	GIFT, NOVELTY, AND SOUVENIR	18	69	4.7	0
5948	LUGGAGE AND LEATHER GOODS	5	40	4.0	0
5949	SEWING/NEEDLEWORK/PIECE GOODS	4	14	1.1	0
596	NONSTORE RETAILERS	4	10	2.7	0
5961	CATALOG AND MAIL ORDER HOUSES	1	7	1.6	0
598	FUEL DEALERS	0	0	0.0	0
599	RETAIL STORES, N.E.C.	50	177	16.1	1
5992	FLORISTS	4	24	1.4	0
5993	TOBACCO STORES AND STANDS	0	0	0.0	0
5994	NEWS DEALERS AND NEWSSTANDS	0	0	0.0	0
5995	OPTICAL GOODS STORES	8	30	2.8	0
5999	MISC. RETAIL STORES, N.E.C.	36	121	11.9	1
5999M	PET SHOPS	4	21	2.0	0

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CLARITAS

ARLINGTON, VA  
 703/512-2700

CHICAGO  
 312/936-2650

ITHACA, NY  
 607/257-5757

LOS ANGELES  
 213/954-3200

A-24  
 NEW YORK  
 212/739-3580

**APPENDIX TABLE  
CENSUS TRACT 7042.00 (1/  
GENERAL DEMOGRAPHIC TRENDS 1970-1990**

	1970		1980			1990			Change 1970-90
	Number	Percent Total	Number	Percent Total	Change 1970-80	Number	Percent Total	Change 1970-80	
<b>Population</b>									
Total	<u>2,322</u>	<u>100.0%</u>	<u>1,822</u>	<u>100.0%</u>	<u>-21.5%</u>	<u>1,709</u>	<u>100.0%</u>	<u>-6.2%</u>	<u>-26.4%</u>
- Males	1,079	46.5%	799	43.9%	-25.9%	747	43.7%	-6.5%	-30.8%
- Females	1,243	53.5%	1,023	56.1%	-17.7%	962	56.3%	-6.0%	-22.6%
<b>Households</b>									
Total	<u>769</u>	<u>100.0%</u>	<u>732</u>	<u>100.0%</u>	<u>-4.8%</u>	<u>673</u>	<u>100.0%</u>	<u>-8.0%</u>	<u>-12.5%</u>
- Families	600	78.0%	508	69.4%	-15.3%	450	66.9%	-11.4%	-25.0%
- Nonfamily	169	22.0%	224	30.6%	32.5%	223	33.1%	-0.3%	32.1%
<b>Age Distribution by Sex</b>									
<b>Females</b>									
* Under 5 years	49	3.9%	32	3.1%	-34.7%	60	8.0%	87.5%	22.4%
* 5-19 years	309	24.9%	143	14.0%	-53.7%	99	13.3%	-30.8%	-68.0%
* 20-34 years	202	16.3%	167	16.3%	-17.3%	176	23.6%	5.4%	-12.9%
* 35-44 years	128	10.3%	98	9.6%	-23.4%	136	18.2%	38.8%	6.3%
* 45-54 years	189	15.2%	109	10.7%	-42.3%	106	14.2%	-2.8%	-43.9%
* 54-65 years	158	12.7%	182	17.8%	15.2%	106	14.2%	-41.8%	-32.9%
* 65-74 years	133	10.7%	164	16.0%	23.3%	145	19.4%	-11.6%	9.0%
* 75+ years	113	9.1%	128	12.5%	13.3%	134	17.9%	4.7%	18.6%
<b>Males</b>									
* Under 5 years	69	6.4%	37	4.6%	-46.4%	50	6.7%	35.1%	-27.5%
* 5-19 years	323	29.9%	135	16.9%	-58.2%	117	15.7%	-13.3%	-63.8%
* 20-34 years	202	18.7%	195	24.4%	-3.5%	157	21.0%	-19.5%	-22.3%
* 35-44 years	106	9.8%	71	8.9%	-33.0%	135	18.1%	90.1%	27.4%
* 45-54 years	153	14.2%	87	10.9%	-43.1%	68	9.1%	-21.8%	-55.6%
* 54-65 years	123	11.4%	129	16.1%	4.9%	86	11.5%	-33.3%	-30.1%
* 65-74 years	65	6.0%	103	12.9%	58.5%	87	11.6%	-15.5%	33.8%
* 75+ years	38	3.5%	42	5.3%	10.5%	47	6.3%	11.9%	23.7%
<b>Totals</b>									
* Under 5 years	118	5.1%	69	3.8%	-41.5%	110	14.7%	59.4%	-6.8%
* 5-19 years	632	27.2%	278	15.3%	-56.0%	216	28.9%	-22.3%	-65.8%
* 20-34 years	404	17.4%	362	19.9%	-10.4%	333	44.6%	-8.0%	-17.6%
* 35-44 years	234	10.1%	169	9.3%	-27.8%	271	36.3%	60.4%	15.8%
* 45-54 years	342	14.7%	196	10.8%	-42.7%	174	23.3%	-11.2%	-49.1%
* 54-65 years	281	12.1%	311	17.1%	10.7%	192	25.7%	-38.3%	-31.7%
* 65-74 years	198	8.5%	267	14.7%	34.8%	232	31.1%	-13.1%	17.2%
* 75+ years	151	6.5%	170	9.3%	12.6%	181	24.2%	6.5%	19.9%

1/ Census tract 7042.00 is roughly analogous to the corporate boundaries for the Town of Kensington-- the difference in population for 1990 census (when Kensington was a census-designated place) was 4 persons.

Source: Basile Baumann Prost and Associates

**APPENDIX TABLE  
BETHESDA 1/  
GENERAL DEMOGRAPHIC TRENDS 1970-1990**

	1970		1980			1990			Change 1970-90
	Number	Percent Total	Number	Percent Total	Change 1970-80	Number	Percent Total	Change 1970-80	
<b>Population</b>	<u>71,621</u>	<u>100.0%</u>	<u>85,407</u>	<u>100.0%</u>	<u>19.2%</u>	<u>92,592</u>	<u>100.0%</u>	<u>8.4%</u>	<u>29.3%</u>
---Males	34,305	47.9%	39,968	46.8%	16.5%	42,971	46.4%	7.5%	25.3%
---Females	37,316	52.1%	45,439	53.2%	21.8%	49,621	53.6%	9.2%	33.0%
<b>Households</b>	<u>22,979</u>	<u>100.0%</u>	<u>34,462</u>	<u>100.0%</u>	<u>50.0%</u>	<u>40,140</u>	<u>100.0%</u>	<u>16.5%</u>	<u>74.7%</u>
Families	18,404	80.1%	22,430	65.1%	21.9%	23,885	59.5%	6.5%	29.8%
Nonfamily	4,575	19.9%	12,032	34.9%	163.0%	16,255	40.5%	35.1%	255.3%
<b>Age Distribution by Sex</b>									
<b>Males</b>									
* Under 5 years	2,078	6.1%	1,632	4.1%	-21.5%	2,366	5.5%	45.0%	13.9%
* 5-19 years	10,743	31.3%	8,823	22.1%	-17.9%	6,446	15.0%	-26.9%	-40.0%
* 20-34 years	5,736	16.7%	9,198	23.0%	60.4%	10,511	24.5%	14.3%	83.2%
* 35-44 years	4,345	12.7%	4,967	12.4%	14.3%	6,917	16.1%	39.3%	59.2%
* 45-54 years	5,440	15.9%	5,553	13.9%	2.1%	5,544	12.9%	-0.2%	1.9%
* 54-65 years	3,854	11.2%	5,641	14.1%	46.4%	4,745	11.0%	-15.9%	23.1%
* 65-74 years	1,485	4.3%	2,970	7.4%	100.0%	4,096	9.5%	37.9%	175.8%
* 75+ years	624	1.8%	1,184	3.0%	89.7%	2,359	5.5%	99.2%	278.0%
<b>Females</b>									
* Under 5 years	2,098	5.6%	1,636	3.6%	-22.0%	2,226	4.5%	36.1%	6.1%
* 5-19 years	10,056	26.9%	8,088	17.8%	-19.6%	6,058	12.2%	-25.1%	-39.8%
* 20-34 years	6,405	17.2%	9,886	21.8%	54.3%	11,630	23.4%	17.6%	81.6%
* 35-44 years	5,098	13.7%	6,028	13.3%	18.2%	8,116	16.4%	34.6%	59.2%
* 45-54 years	6,113	16.4%	6,505	14.3%	6.4%	6,345	12.8%	-2.5%	3.8%
* 54-65 years	4,189	11.2%	6,477	14.3%	54.6%	5,655	11.4%	-12.7%	35.0%
* 65-74 years	2,089	5.6%	3,990	8.8%	91.0%	5,172	10.4%	29.6%	147.6%
* 75+ years	1,268	3.4%	2,829	6.2%	123.1%	4,406	8.9%	55.7%	247.5%
<b>Totals</b>									
* Under 5 years	4,176	5.8%	3,268	3.8%	-21.7%	4,592	5.0%	40.5%	10.0%
* 5-19 years	20,799	29.0%	16,911	19.8%	-18.7%	12,504	13.5%	-26.1%	-39.9%
* 20-34 years	12,141	17.0%	19,084	22.3%	57.2%	22,141	23.9%	16.0%	82.4%
* 35-44 years	9,443	13.2%	10,995	12.9%	16.4%	15,033	16.2%	36.7%	59.2%
* 45-54 years	11,553	16.1%	12,058	14.1%	4.4%	11,889	12.8%	-1.4%	2.9%
* 54-65 years	8,043	11.2%	12,118	14.2%	50.7%	10,400	11.2%	-14.2%	29.3%
* 65-74 years	3,574	5.0%	6,960	8.1%	94.7%	9,268	10.0%	33.2%	159.3%
* 75+ years	1,892	2.6%	4,013	4.7%	112.1%	6,765	7.3%	68.6%	257.6%

1/ 1970 data is from Bethesda (U); 1980 and 1990 data from aggregated Bethesda and North Bethesda CDPs

Source: Basile Baumann Prost and Associates; U.S. Census

**APPENDIX TABLE  
SILVER SPRING 1/  
GENERAL DEMOGRAPHIC TRENDS 1970-1990**

	1970		1980			1990			Change 1970-90
	Number	Percent Total	Number	Percent Total	Change 1970-80	Number	Percent Total	Change 1970-80	
<b>Population</b>	<u>77,496</u>	<u>100.0%</u>	<u>72,893</u>	<u>100.0%</u>	<u>-5.9%</u>	<u>76,046</u>	<u>100.0%</u>	<u>4.3%</u>	<u>-1.9%</u>
---Males	36,418	47.0%	34,033	46.7%	-6.5%	36,188	47.6%	6.3%	-0.6%
---Females	41,078	53.0%	38,860	53.3%	-5.4%	39,858	52.4%	2.6%	-3.0%
<b>Households</b>	<u>28,008</u>	<u>100.0%</u>	<u>30,533</u>	<u>100.0%</u>	<u>9.0%</u>	<u>31,579</u>	<u>100.0%</u>	<u>3.4%</u>	<u>12.8%</u>
Families	21,070	75.2%	19,270	63.1%	-8.5%	19,089	60.4%	-0.9%	-9.4%
Nonfamily	6,938	24.8%	11,263	36.9%	62.3%	12,490	39.6%	10.9%	80.0%
<b>Age Distribution by Sex</b>									
<b>Males</b>									
* Under 5 years	2,792	7.7%	2,089	6.1%	-25.2%	2,827	7.8%	35.3%	1.3%
* 5-19 years	9,072	24.9%	6,435	18.9%	-29.1%	5,675	15.7%	-11.8%	-37.4%
* 20-34 years	8,465	23.2%	10,255	30.1%	21.1%	10,558	29.2%	3.0%	24.7%
* 35-44 years	3,839	10.5%	4,181	12.3%	8.9%	6,867	19.0%	64.2%	78.9%
* 45-54 years	4,879	13.4%	3,456	10.2%	-29.2%	3,511	9.7%	1.6%	-28.0%
* 54-65 years	4,327	11.9%	3,842	11.3%	-11.2%	2,645	7.3%	-31.2%	-38.9%
* 65-74 years	2,140	5.9%	2,532	7.4%	18.3%	2,483	6.9%	-1.9%	16.0%
* 75+ years	904	2.5%	1,243	3.7%	37.5%	1,622	4.5%	30.5%	79.4%
<b>Females</b>									
* Under 5 years	2,638	6.4%	1,912	4.9%	-27.5%	2,681	6.7%	40.2%	1.6%
* 5-19 years	8,734	21.3%	6,300	16.2%	-27.9%	5,343	13.4%	-15.2%	-38.8%
* 20-34 years	9,180	22.3%	10,960	28.2%	19.4%	10,596	26.6%	-3.3%	15.4%
* 35-44 years	4,205	10.2%	4,396	11.3%	4.5%	7,197	18.1%	63.7%	71.2%
* 45-54 years	6,017	14.6%	4,011	10.3%	-33.3%	3,912	9.8%	-2.5%	-35.0%
* 54-65 years	5,254	12.8%	4,879	12.6%	-7.1%	3,321	8.3%	-31.9%	-36.8%
* 65-74 years	3,163	7.7%	3,677	9.5%	16.3%	3,452	8.7%	-6.1%	9.1%
* 75+ years	1,887	4.6%	2,725	7.0%	44.4%	3,356	8.4%	23.2%	77.8%
<b>Totals</b>									
* Under 5 years	5,430	7.0%	4,001	5.5%	-26.3%	5,508	7.2%	37.7%	1.4%
* 5-19 years	17,806	23.0%	12,735	17.5%	-28.5%	11,018	14.5%	-13.5%	-38.1%
* 20-34 years	17,645	22.8%	21,215	29.1%	20.2%	21,154	27.8%	-0.3%	19.9%
* 35-44 years	8,044	10.4%	8,577	11.8%	6.6%	14,064	18.5%	64.0%	74.8%
* 45-54 years	10,896	14.1%	7,467	10.2%	-31.5%	7,423	9.8%	-0.6%	-31.9%
* 54-65 years	9,581	12.4%	8,721	12.0%	-9.0%	5,966	7.8%	-31.6%	-37.7%
* 65-74 years	5,303	6.8%	6,209	8.5%	17.1%	5,935	7.8%	-4.4%	11.9%
* 75+ years	2,791	3.6%	3,968	5.4%	42.2%	4,978	6.5%	25.5%	78.4%

1/ All data for Silver Spring CDP

Source: Basile Baumann Prost and Associates; U.S. Census

**APPENDIX TABLE  
MONTGOMERY COUNTY  
GENERAL DEMOGRAPHIC TRENDS 1970-1990**

	1970		1980			1990			Change 1970-90
	Number	Percent Total	Number	Percent Total	Change 1970-80	Number	Percent Total	Change 1970-80	
<b>Population</b>	<u>522,809</u>	<u>100.0%</u>	<u>579,053</u>	<u>100.0%</u>	<u>10.8%</u>	<u>757,027</u>	<u>100.0%</u>	<u>30.7%</u>	<u>44.8%</u>
—Males	253,242	48.4%	278,740	48.1%	10.1%	364,880	48.2%	30.9%	44.1%
—Females	269,567	51.6%	300,313	51.9%	11.4%	392,147	51.8%	30.6%	45.5%
<b>Households</b>	<u>156,559</u>	<u>100.0%</u>	<u>207,011</u>	<u>100.0%</u>	<u>32.2%</u>	<u>282,738</u>	<u>100.0%</u>	<u>36.6%</u>	<u>80.6%</u>
Families	132,020	84.3%	152,086	73.5%	15.2%	198,232	70.1%	30.3%	50.2%
Nonfamily	24,539	15.7%	54,925	26.5%	123.8%	84,506	29.9%	53.9%	244.4%
<b>Age Distribution by Sex</b>									
<b>Males</b>									
* Under 5 years	21,911	8.7%	17,067	5.7%	-22.1%	29,382	8.1%	72.2%	34.1%
* 5-19 years	81,957	32.4%	70,540	23.5%	-13.9%	70,486	19.3%	-0.1%	-14.0%
* 20-34 years	49,226	19.4%	71,178	23.7%	44.6%	97,634	26.8%	37.2%	98.3%
* 35-44 years	33,930	13.4%	39,007	13.0%	15.0%	63,988	17.5%	64.0%	88.6%
* 45-54 years	33,844	13.4%	33,684	11.2%	-0.5%	42,974	11.8%	27.6%	27.0%
* 54-65 years	20,101	7.9%	27,938	9.3%	39.0%	29,663	8.1%	6.2%	47.6%
* 65-74 years	8,323	3.3%	13,367	4.5%	60.6%	20,337	5.6%	52.1%	144.3%
* 75+ years	3,950	1.6%	5,959	2.0%	50.9%	10,416	2.9%	74.8%	163.7%
<b>Females</b>									
* Under 5 years	21,163	7.9%	16,307	5.9%	-22.9%	27,756	7.6%	70.2%	31.2%
* 5-19 years	79,423	29.5%	67,729	24.3%	-14.7%	66,735	18.3%	-1.5%	-16.0%
* 20-34 years	55,890	20.7%	75,977	27.3%	35.9%	102,792	28.2%	35.3%	83.9%
* 35-44 years	36,013	13.4%	42,666	15.3%	18.5%	69,806	19.1%	63.6%	93.8%
* 45-54 years	35,487	13.2%	35,438	12.7%	-0.1%	45,881	12.6%	29.5%	29.3%
* 54-65 years	21,245	7.9%	30,617	11.0%	44.1%	32,439	8.9%	6.0%	52.7%
* 65-74 years	11,988	4.4%	18,095	6.5%	50.9%	25,990	7.1%	43.6%	116.8%
* 75+ years	8,358	3.1%	13,484	4.8%	61.3%	20,748	5.7%	53.9%	148.2%
<b>Totals</b>									
* Under 5 years	43,074	8.2%	33,374	5.8%	-22.5%	57,138	15.7%	71.2%	32.7%
* 5-19 years	161,380	30.9%	138,269	23.9%	-14.3%	137,221	37.6%	-0.8%	-15.0%
* 20-34 years	105,116	20.1%	147,155	25.4%	40.0%	200,426	54.9%	36.2%	90.7%
* 35-44 years	69,943	13.4%	81,673	14.1%	16.8%	133,794	36.7%	63.8%	91.3%
* 45-54 years	69,331	13.3%	69,122	11.9%	-0.3%	88,855	24.4%	28.5%	28.2%
* 54-65 years	41,346	7.9%	58,555	10.1%	41.6%	62,102	17.0%	6.1%	50.2%
* 65-74 years	20,311	3.9%	31,462	5.4%	54.9%	46,327	12.7%	47.2%	128.1%
* 75+ years	12,308	2.4%	19,443	3.4%	58.0%	31,164	8.5%	60.3%	153.2%

Source: Basile Baumann Prost and Associates

# TOWN OF KENSINGTON RESIDENT QUESTIONNAIRE FOR KENSINGTON COMMERCIAL MARKET ANALYSIS

**NOTE:** All information from this questionnaire will remain strictly confidential. Information will be used exclusively in the ongoing commercial market analysis of Kensington, and not for any solicitation. Data will be published only in documents associated with that study, and in aggregated form.

Please bring this completed form with you to the scheduled town meeting on May 8 at the Town Hall (7:30 PM) or drop the form off at the Town Hall prior to May 8.

1. Where do you most usually purchase the following types of goods and services?:

<u>Type of Goods</u>	<u>Store(s) and Location(s)</u>
Groceries .....	_____
Restaurants/ Eating Out .....	_____
Clothing .....	_____
Personal Services (Barber, Beauty, Dry Cleaning, Etc.) ...	_____
Other (e.g. Gifts, Books, Entertainment--please specify) ..	_____

2. Please circle the phrase below that best describes your attitude towards current retail and service offerings in Kensington..

Very Satisfied      Satisfied      Not Satisfied      Very Unsatisfied      Don't Know/No Opinion

3. What changes, if any, would you like to see in Kensington retail and service stores and/or the merchandise offered by those stores?

4. What other changes, if any, would you like to see in the Kensington retail and service business environment?

5. Where do you live in Kensington (street address)? How long have you lived there? What was your previous address?

Current Address: \_\_\_\_\_ Years There \_\_\_\_\_

Previous Address: \_\_\_\_\_ Years There \_\_\_\_\_

6. Please provide the following information about the members of your household.

<u>Relationship *</u>	<u>Age</u>	<u>Status **</u>
Yourself	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

\* e.g., Husband, Wife, Son, Daughter, etc.

\*\* Employed, Retired, Student, or Other

7. Please provide us with any other comments that you may have. Please use the reverse side and attach additional sheets if necessary.



DEPARTMENT OF HOUSING AND COMMUNITY AFFAIRS

Douglas M. Duncan  
*County Executive*

Elizabeth B. Davison  
*Director*

**Kensington Business District Survey**

**Contact Person: Marian Hershenson, Kensington Revitalization Coordinator**  
**Division of Community Development**  
**Department of Housing and Community Affairs**  
**Phone (301) 217-3650**

# Kensington Business District

North

- Retail
- Mixed Use
- Office
- Auto Repairs / Gas Stations
- Warehouse/Showroom / Industry
- Institutional Uses
- Parking Garages
- Park

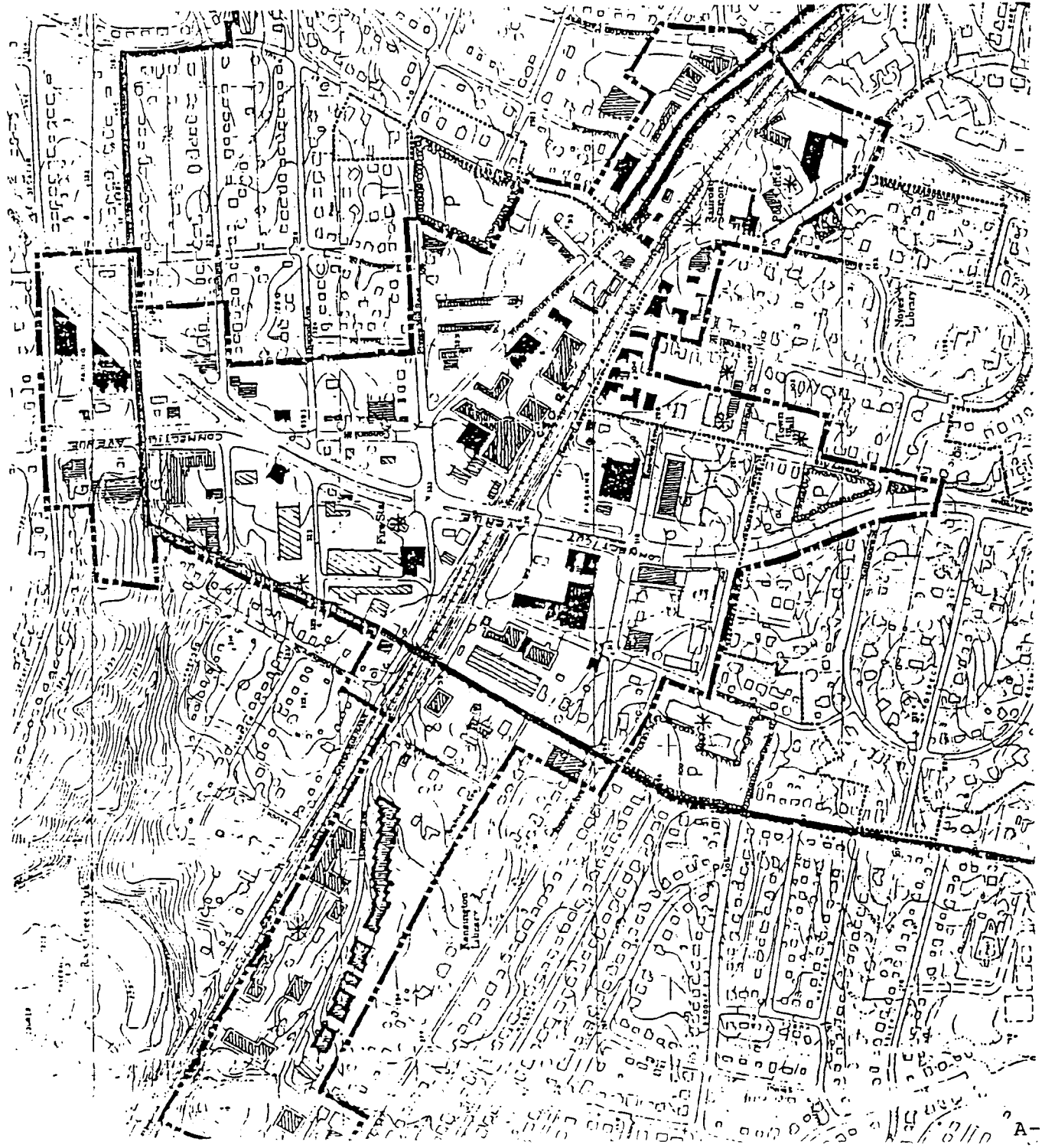
Existing Land Use



BUSINESS DISTRICT

Town Limits

Future District





**KENSINGTON BUSINESS DISTRICT SURVEY**  
 Division of Community Development  
 Department of Housing and Community Affairs

Date: \_\_\_\_\_

Business Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

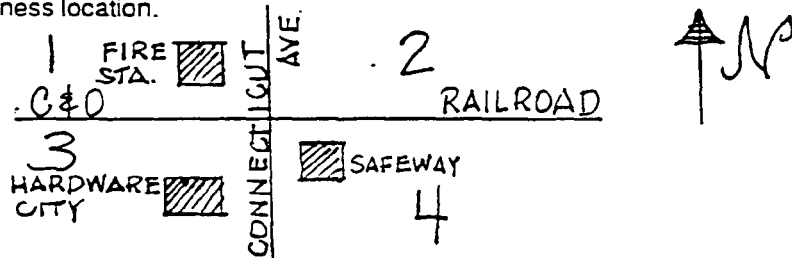
Respondent's Name: \_\_\_\_\_ Title \_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

- A. How many years has the business been located in the Kensington Business District? \_\_\_\_\_  
 How many years elsewhere? \_\_\_\_\_
- B. How many years has the business been at its present location? \_\_\_\_\_
- C. What type of business is this? Please fill in the blank with the number associated with the appropriate choice or write in the best description below. Number: \_\_\_\_\_

- |                            |                             |                       |                         |
|----------------------------|-----------------------------|-----------------------|-------------------------|
| 1. Antique Dealer          | 2. Apparel (children)       | 3. Apparel (adults)   | 4. Auto Dealer          |
| 5. Auto Parts              | 6. Auto Sales               | 7. Auto/Truck Rental  | 8. Banking              |
| 9. Dentist                 | 10. Dry Cleaners            | 11. Florist           | 12. Garden Supplies     |
| 13. Gas Station            | 14. Grocery                 | 15. Hardware/Lumber   | 16. Heating/AC          |
| 17. Insurance              | 18. Lawyer                  | 19. Medical Doctor    | 20. Pet Store           |
| 21. Plumbing Service       | 22. Plumbing Supply         | 23. Office Supplies   | 24. Appliance Repairs   |
| 25. Real Estate            | 26. Auto Repairs            | 27. TV/Stereo Repairs | 28. Restaurant (family) |
| 29. Restaurant (fast food) | 30. Other (not above) _____ |                       |                         |

- D. The Kensington Business District is often viewed as divided into four quadrants, as shown below. Circle the quadrant number in which the business is located. If the business is located elsewhere, circle the quadrant number closest to the business location.



- E. Which of the following are the major advantages for the business in the Kensington Business District? Please check all that apply:

1. \_\_\_ Reasonable Rent    2. \_\_\_ Convenient Location for Customers    3. \_\_\_ Ample Parking  
 4. \_\_\_ Small town Image    5. \_\_\_ Convenient Location for Employees    6. \_\_\_ Good Access from Other Areas  
 7. \_\_\_ Other (specify) \_\_\_\_\_

**KENSINGTON BUSINESS DISTRICT SURVEY**  
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 Department of Housing and Community Affairs

F. What are the major disadvantages of the business location? Please check all that apply.

1. \_\_\_ Poor image for the business    2. \_\_\_ Lack of parking availability    3. \_\_\_ Traffic congestion  
 4. \_\_\_ Poor street signage            5. \_\_\_ Town street closures            6. \_\_\_ Town street travel restrictions  
 7. \_\_\_ Speed bumps                    8. \_\_\_ Historic District restrictions    9. \_\_\_ Business signage restrictions  
 10. \_\_\_ Inadequate sidewalks  
 11. \_\_\_ Town and/or County Ordinance restrictions (specify) \_\_\_\_\_  
 \_\_\_\_\_  
 12. \_\_\_ Other (Specify) \_\_\_\_\_  
 \_\_\_\_\_

G. How important do you think that the following public improvements would be for the Kensington Business District? Please rank the choices on a scale of 1 to 5, with 5 being the most important and 1 being the least important. You can use the same rank twice. Please be as specific as possible about particular suggestions and/or locations for the improvements you feel are important.

	<u>IMPROVEMENT</u>	<u>RANK (1-5)</u>	<u>SUGGESTION/LOCATION</u>
1.	Road Improvements		
2.	More Crosswalks		
3.	More Traffic Signals		
4.	Improve auto circulation		
5.	Improve pedestrian circulation		
6.	Streetscape improvements (sidewalks, streetlights, plantings, etc.)		
7.	Better use of existing parking		
8.	Develop more public parking		

**KENSINGTON BUSINESS DISTRICT SURVEY**  
 Division of Community Development  
 Department of Housing and Community Affairs

<u>IMPROVEMENT</u>		<u>RANK (1-5)</u>	<u>SUGGESTION/LOCATION</u>
9.	Larger signs in present locations		
10.	More signs in other locations		

H. What type of impact do you feel that the following would have on the business?  
 Please circle (--) for negative impact, (0) for no impact, (+) for positive impact, and (++) for very positive impact.

	<u>IMPACT</u>			
	<u>(a)</u>	<u>(b)</u>	<u>(c)</u>	<u>(d)</u>
1. Shuttle Service among 4 quadrants.	--	0	+	++
2. Shuttle bus from Wheaton METRO.	--	0	+	++
3. Valet parking.	--	0	+	++
4. Metered public parking.	--	0	+	++
5. MARC train scheduled for shoppers.	--	0	+	++
6. More public events.	--	0	+	++
7. Joint advertising and promotion.	--	0	+	++
8. Other _____	--	0	+	++

I. In order to provide some of the services and improvements listed in questions G and H, it may be necessary for the business community to contribute for them. Please list, in order of importance, those services and improvements for which the business would be willing to contribute:

- |           |           |           |           |
|-----------|-----------|-----------|-----------|
| 1. _____  | 2. _____  | 3. _____  | 4. _____  |
| 5. _____  | 6. _____  | 7. _____  | 8. _____  |
| 9. _____  | 10. _____ | 11. _____ | 12. _____ |
| 13. _____ | 14. _____ | 15. _____ | 16. _____ |
| 17. _____ | 18. _____ |           |           |

**KENSINGTON BUSINESS DISTRICT SURVEY**  
**Division of Community Development**  
**Department of Housing and Community Affairs**

J. If, in fact, "contributions" from the business community are necessary to fund improvements and services listed in questions G and H, would you be willing to consider any of the following means for assessing and collecting the monies, and implementing the improvements and services? Check all those you would consider.

- 1.  Special Tax District.
- 2.  Private non-profit corporation.
- 3.  Other \_\_\_\_\_

K. What additional types of business do you think would add to the market draw and be compatible with your business? Please list the businesses below in order of importance.

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_
- 6. \_\_\_\_\_

L. For each type of business that you listed above, describe why you would like to see them in Kensington?

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_
- 6. \_\_\_\_\_

M. **ESTIMATE ONLY:** Please give us a sense of the percentage of the buying customers that the business gets by the following means:

	<u>Percent</u>
1. Repeat business _____	_____
2. Word of mouth _____	_____
3. People walking by _____	_____
4. People driving by _____	_____
5. Advertising _____	_____
6. Learning about you at antique shows. _____	_____
7. Other _____	_____
	100%

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**Department of Housing and Community Affairs**

N. Check the following Kensington area and Montgomery County business organizations to which you belong. Fill in below the number of years or months you have belonged to each.

	<u>Membership</u>	<u>Years/Months</u>
1. Montgomery County Chamber of Commerce.	a. _____	h. _____
2. Wheaton-Kensington Chamber of Commerce.	b. _____	i. _____
3. Kensington Business District Association.	c. _____	j. _____
4. Old Town Kensington Merchants Association	d. _____	k. _____
5. West Howard Avenue Antique Dealers Association	e. _____	l. _____
6. Other _____	f. _____	m. _____
_____	g. _____	n. _____

O. **ESTIMATE ONLY:** Please give us an idea of the percentage of the customers that the business draws from the following areas:

	<u>Percent</u>
1. Town of Kensington.	_____
2. The rest of Zip Code 20895 outside the Town.	_____
3. Wheaton/Silver Spring (Southeast)	_____
4. Chevy Chase/Bethesda (South)	_____
5. Garrett Park/North Bethesda/Potomac (West)	_____
6. Rockville (North)	_____
7. Other Montgomery Counties	_____
8. Other Maryland Counties	_____
9. D.C.	_____
10. Northern Virginia	_____
11. Other _____	_____
	100%

P. How many indoor square feet does the business occupy? 1. \_\_\_\_\_ Square Feet  
For restaurants only, how many outdoor seats does the business have? 2. \_\_\_\_\_ Seats

**KENSINGTON BUSINESS DISTRICT SURVEY**  
**Division of Community Development**  
**Department of Housing and Community Affairs**

Q. Please estimate the number of square feet of the total indoor space that is:

	<u>Percent</u>
1. Sales Floor	_____
2. Office Space	_____
3. Storage Space	_____
4. Other _____	_____
	100%

R. How many private and shared off-street parking spaces are assigned to the business?

1. \_\_\_\_\_ Private Spaces
2. \_\_\_\_\_ Shared Spaces

S. How many of these spaces are used by the employees? \_\_\_\_\_ Spaces

T. Do you need more employee parking?

1. \_\_\_\_\_ Yes
2. \_\_\_\_\_ No

U. Do you need more customer parking?

1. \_\_\_\_\_ Yes
2. \_\_\_\_\_ No

V. How many persons work at the business at present?

	<u>Sales/Production</u>	<u>Management</u>	<u>Working Owner</u>	<u>Other</u>
1. Full-Time	a. _____	b. _____	c. _____	d. _____
2. Part-Time	a. _____	b. _____	c. _____	d. _____

W. Is an absentee owner associated with the business?

1. \_\_\_\_\_ Yes
2. \_\_\_\_\_ No

**KENSINGTON BUSINESS DISTRICT SURVEY**  
 Division of Community Development  
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X. Please provide us with your impressions about business conditions for the business over the last two years, i.e., from 1994 to present.

1. Sales	a. ___ Up a lot	b. ___ Up a little	c. ___ The same	d. ___ Down a little	e. ___ Down a lot
2. Occupancy Costs	a. ___ Up a lot	b. ___ Up a little	c. ___ The same	d. ___ Down a little	e. ___ Down a lot
3. Number of Employees	a. ___ Up a lot	b. ___ Up a little	c. ___ The same	d. ___ Down a little	e. ___ Down a lot

Y. Please comment on the reasons you see behind the above sales/business trends for the business.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Z. Does the business rent or own its space?

Check one:

1. \_\_\_ Rent      2. \_\_\_ Own

A.A. When does the lease expire?

1. \_\_\_ Months    2. \_\_\_ Years    3. \_\_\_ No lease (on month to month basis)

B.B. Is this space suitable for the needs of the business?

1. \_\_\_ Yes      2. \_\_\_ No

If "no," why not? \_\_\_\_\_

\_\_\_\_\_

C.C. Would you prefer staying in Kensington, if you could find the appropriate space?

1. \_\_\_ Yes      2. \_\_\_ No

**KENSINGTON BUSINESS DISTRICT SURVEY**  
Division of Community Development  
Department of Housing and Community Affairs

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D.D. Does the business plan to expand? 1. \_\_\_ Yes 2. \_\_\_ No

If so, where?

3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

And why there?

4. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

E.E. If the business plans to relocate, where?

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Why?

2. \_\_\_\_\_  
\_\_\_\_\_

F.F. What rent could the business pay for its space needs in the Kensington Business District?

1. \$ \_\_\_\_\_ Per square foot/month or 2. \$ \_\_\_\_\_ Per square foot/year

Check if this rate is lower or higher than the rent it now pays. 3. \_\_\_ Lower 4. \_\_\_ Higher 5. \_\_\_ Same

How much total cost per month is affordable for the Business, regardless of square foot size?

6. \$ \_\_\_\_\_



**KENSINGTON BUSINESS DISTRICT SURVEY**  
Division of Community Development  
Department of Housing and Community Affairs

G.G. If the business plans to stay in its present location, are any improvements being considered?

1.  Yes      2.  No

If yes, what kind of improvements? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

H.H. If improvements were to be made to the business in its present location, how much could be spent?

Check one:

- |                        |                          |                        |                          |
|------------------------|--------------------------|------------------------|--------------------------|
| 1. Less than \$10,000  | <input type="checkbox"/> | 4. \$50,000 - \$75,000 | <input type="checkbox"/> |
| 2. \$10,000 - \$25,000 | <input type="checkbox"/> | 5. More than \$75,000  | <input type="checkbox"/> |
| 3. \$25,000 - \$50,000 | <input type="checkbox"/> |                        |                          |

I.I. Would the business need financial assistance to make these improvements?

1.  Yes      2.  No

J.J. If "yes," how would these improvements be financed?

- |   |  |
|---|--|
| 1. <input type="checkbox"/> Bank loan             | 4. <input type="checkbox"/> Line of credit                   |
| 2. <input type="checkbox"/> Home equity loan      | 5. <input type="checkbox"/> Government program, if available |
| 3. <input type="checkbox"/> Other (specify) _____ |  |
| _____   |  |
| _____   |  |

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**APPENDIX 2**

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Immediate Actions (Calendar Year 1997)**

***FIRST QUARTER 1997 (FY 97 - 3rd Quarter)***

<b>Goal</b>	<b>Action</b>	<b>Area</b>	<b>Responsible Parties</b>	<b>Relevant Parties</b>	<b>Currently Budgeted</b>	<b>Potential Funding Source(s)</b>
G1 - Revitalization Strategy	* A1 - Review Strategy	Overall	1a, 2, 4	5, 6, 7	1a	
	* A2 - Refine Strategy	Overall	1a, 2, 4	5, 6, 7	1a	
	* A3 - Approve Strategy	Overall	1a, 2, 4	5, 6, 7	1a	
G2 - Revitalization/Steering Committee	* A1 - Help to review/refine strategy	Overall	1a, 4		1a	
G3 - Gateway/Signage Program	* A1 - Adopt logo for sign design	Overall	1a, 2, 4	5, 6	1a	
	* A2 - Design signs	Overall	1a, 2, 3, 8	4, 5, 6, 7	1a	
	* A3 - Obtain funding as needed	Conn/How Ave (east)	1a, 2		1a	2
G5 - Streetscape Improvements Program	* A1 - Finalize concept plan (Phase I)	Howard Ave (east)	1a, 2, 4, 8	5, 6, 7	1a	
	* A2 - Prepare contract drawings (Phase I)	Howard Ave (east)	1a, 2, 8	4, 5, 7	1a	
G6 - Facade Improvements Program	* A1 - Complete facade concept plan (Phase I)	Howard Ave (east)	1a, 2, 8	7	1a	

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<i>County:</i>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	<b>TBD</b> To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Immediate Actions (Calendar Year 1997)**

*SECOND QUARTER 1997 (FY 97 - 4th Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G1 - Revitalization Strategy	* A4 - Adopt Strategy	Overall	1a, 2		1a	
	* A5 - Initiate Revitalization Strategy	Overall	2, 4	1a, 5, 6, 7	1a, 2	3, 4, 5, 7
	* A6 - Continue Revitalization Strategy	Overall	2, 4	1a, 5, 6, 7	1a, 2	3, 4, 5, 7
	* A7 - Monitor Revitalization Strategy	Overall	2, 4	1a, 5, 6, 7	1a, 2	
G2 - Revitalization/Steering Committee	* A2 - Define mission statement	Overall	1a, 2, 4	5, 6, 7	1a, 2	
	* A3 - Delineate Membership	Overall	2	1a, 4, 5, 6, 7,	1a, 2	
	* A4 - Establish liaison with other groups	Overall	1a, 2, 4	3, 5, 6, 7, 8	1a, 2	
	* A5 - Hold organizing meeting	Overall	4		1a, 2	
G3 - Gateway/Signage Program	* A4 - Receive approval for placement of signs	Conn/How Ave (east)	1a, 2, 3	7	1a	
	* A5 - Select contractor	Conn/How Ave (east)	1a	2, 4	1a	2
	* A6 - Manufacture signs	Conn/How Ave (east)	1a, 2	4	1a	2
	* A7 - Place signs in areas	Conn/How Ave (east)	1a, 2	4	1a	2
	* A8 - Hold "groundbreaking" event/ceremony	Connecticut Ave	1a, 2	3, 4, 5, 6, 7	1a	2
G4 - Traffic and Parking Study	* A1 - Seek matching funds	Howard Ave (east)	2		2 (part)	3
	* A2 - Hire traffic/parking consultant	Howard Ave (east)	2	1a, 1b	2 (part)	

Source: Basile Baumann Prost & Associates, Inc.

Legend		
<i>County:</i>	2	Town
1a Dept. of Housing & Community Affairs	3	State
1b Dept. of Transportation	4	Revitalization Entity
1c Dept. of Economic Development	5	Business Community
	6	Resident Community
	7	Property Owners
	8	Other
	TBD	To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Immediate Actions (Calendar Year 1997)**

*SECOND QUARTER 1997 - Continued (FY 97 - 4th Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)	
G5 - Streetscape Improvements Program	* A3 - Complete contract drawings (Phase I)	Howard Ave (east)	1a, 2, 8	4, 5, 7	1a		
	* A4 - Obtain rights-of-way (Phase I)	Howard Ave (east)	1a, 2	4, 7	1a		
	* A5 - Get approvals/permits (Phase I)	Howard Ave (east)	1a, 3	4	1a		
	* A6 - Hire contractor (Phase I)	Howard Ave (east)	1a	2, 4, 5, 7	1a		
	* A7 - Identify needs for improvements	Overall	2, 3, 4	1a, 1b, 5, 7		1a, 1b, 2	
	* A8 - Identify areas and prioritize	Overall	2, 3, 4	1a, 1b, 5, 7		1a, 1b, 2	
	* A9 - Identify potential funding	Overall	2, 3, 4	1a, 1b, 5, 7		1a, 1b, 2	
	* A10 - Identify roles and responsibilities	Overall	2, 3, 4	1a, 1b, 5, 7		1a, 1b, 2	
	* A11 - Identify SHA program	Overall, Metropolitan	2, 3, 4	1a, 1b, 5, 7		1a, 1b, 2, 3	
	* A12 - Identify SHA role and responsibilities	& Connecticut Ave.	2, 3, 4	1a, 1b, 5, 7		1a, 1b, 2, 3	
	* A13 - Overview of SHA program	Metro/Conn Ave.	2, 3, 4	1a, 1b, 5, 7		1a, 1b, 2, 3	
	G6 - Facade Improvements Program	* A2 - Negotiate facade easements with owners (Phase I)	Howard Ave (east)	1a, 7		1a	
		* A3 - Hire architects for contract drawings (Phase I)	Howard Ave (east)	7			7
* A4 - Prepare facade contract drawings (Phase I)		Howard Ave (east)	8	1a, 2, 4, 7		7	
* A5 - Get approval/permits (Phase I)		Howard Ave (east)	7	1a, 2, 4, 8		7	
G7 - Code Enforcement Program	* A1 - Define roles and responsibilities	Overall	1a, 2, 4	5, 6, 7	1a, 2		
	* A2 - Define program objectives	Overall	1a, 2, 4	5, 6, 7	1a, 2		

Source: Basile Baumann Prost & Associates, Inc.

Legend	
<b>County:</b>	2 Town
<b>1a</b> Dept. of Housing & Community Affairs	3 State
<b>1b</b> Dept. of Transportation	4 Revitalization Entity
<b>1c</b> Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Immediate Actions (Calendar Year 1997)**

*SECOND QUARTER 1997 - Continued (FY 97 - 4th Quarter)*

<b>Goal</b>	<b>Action</b>	<b>Area</b>	<b>Responsible Parties</b>	<b>Relevant Parties</b>	<b>Currently Budgeted</b>	<b>Potential Funding Source(s)</b>
G8 - Clean-up/Paint-up Program	* A1 - Organize program	Overall	2, 4	1a, 5, 7		1a, 2, 4
	* A2 - Define roles and responsibilities	Overall	2, 4	1a, 5, 6, 7		1a, 2, 4
	* A3 - Identify and prioritize areas	Overall	2, 4	1a, 5, 6, 7		1a, 2, 4
G9 - Advertising/Public Relations Campaign	* A1 - Define program objectives	Overall	2, 4	1a, 1c, 5, 7		2, 4, 5
	* A2 - Establish advertising/PR responsibilities	Overall	2, 4	1a, 1c, 5, 7		2, 4, 5
	* A3 - Organize program	Overall	2, 4	1a, 1c, 5, 7		2, 4, 5
	* A4 - Establish funding	Overall	2, 4	1a, 1c, 5, 7		2, 4, 5, 7
G10 - Event(s) Planning	* A1 - Organize program	Overall	4	1a, 2, 5	2	5
	* A2 - Establish roles and responsibilities	Overall	4	1a, 2, 5, 6, 7, 8	2	5
	* A3 - Obtain sponsors	Overall	4	2, 5, 6, 7, 8	2	5, 6, 7, 8
G11 - Recruit Businesses	* A1 - Develop plan	Overall	2, 4	1a, 1c, 5, 7, 8	1a, 2	1c, 4, 5, 7
	* A2 - Identify roles and responsibilities	Overall	2, 4	1a, 1c, 5, 7, 8	1a, 2	1c, 4, 5, 7, 8
	* A3 - Obtain background information	Overall	2, 4	1a, 1c, 5, 7, 8		1a, 2, 4, 5, 7, 8
G12 - Alcoholic Beverage Legislation	* A1 - Explore issues	Overall	2, 3, 4	5, 6, 7		
	* A2 - Identify roles and responsibilities	Overall	2, 3, 4	5, 6, 7		

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<i>County:</i>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Immediate Actions (Calendar Year 1997)**

*THIRD QUARTER 1997 (FY 98 - 1st Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G1 - Revitalization Strategy	* A6 - Continue strategy	Overall	2, 4	1a		1a, 2, 4
	* A7 - Monitor strategy	Overall	2, 4	1a		1a, 2, 4
G2 - Revitalization/Steering Committee	* A5 - Prepare by-laws	Overall	4	1a, 2	1a, 2	
	* A6 - Establish executive committee	Overall	4	1a, 2	1a, 2	
	* A7 - Establish working committee	Overall	4	1a, 2	1a, 2	
	* A8 - Prepare work program	Overall	4	1a, 2	1a, 2	
	* A9 - Obtain "seed" funds	Overall	2, 4	5, 7, 8		1a, 2, 3, 5, 7, 8
G4 - Traffic & Parking Study	* A3 - Initiate study with "kick-off" meeting	Howard Ave (east)	1a, 1b, 2, 4		2 (part)	3
	* A4 - Consultants to prepare study	Howard Ave (east)	8	1a, 1b, 2, 4	2 (part)	3
G5 - Streetscape Improvements Program	* A14 - Begin improvements (Phase I)	Howard Ave. (east)	1a	2, 4, 5, 7, 8	1a	2
	* A15 - Apply to SHA	Overall	2, 4	1a, 1b	2	4
	* A16 - Work with SHA to prepare plan (includes road imp.)	Metropolitan Ave.	2, 3, 4	5, 7		1a, 1b, 3, 4
G6 - Facade Improvements	* A6 - Hire contractor (Phase I)	Howard Ave (east)	7			7
	* A7 - Begin improvements (Phase I)	Howard Ave (east)	1a, 7, 8	2, 4		7
G7 - Code Enforcement Program	* A3 - Identify violations	Overall	1a, 2, 4	5, 6, 7		1a, 2
	* A4 - Enforce	Overall	1a, 2	3, 4		1a, 2

Source: Basile Baumann Prost & Associates, Inc.

Legend		
<i>County:</i>	2	Town
1a Dept. of Housing & Community Affairs	3	State
1b Dept. of Transportation	4	Revitalization Entity
1c Dept. of Economic Development	5	Business Community
	6	Resident Community
	7	Property Owners
	8	Other
	TBD	To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Immediate Actions (Calendar Year 1997)**

*THIRD QUARTER 1997 - Continued (FY 98 - 1st Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G8 - Clean-up/Paint-up Program	* A4 - Obtain sponsors	Overall	2, 4	5, 6, 7		2, 4
	* A5 - Plan & schedule event	Overall	2, 4			2, 4
	* A6 - Promote event	Overall	2, 4	5, 6, 7, 8		4, 5, 6, 7, 8
G9 - Advertising/Public relations Campaign	* A5 - Begin campaign with press release about revitalization	Overall	4, 5	1a, 1c, 2		2, 4
	* A6 - Advertise in media about upcoming events	Overall	4, 5	1a, 1c, 2		2, 4, 5
	* A7 - Begin preparing brochure on Kensington revitalization	Overall	2, 4, 5	1a, 1c, 2		1a, 2, 4, 5, 7
G10 - Event(s) Planning	* A4 - Plan & schedule event	Overall	2, 4	1a, 5, 6, 7		2, 4
	* A5 - Promote event	Overall	2, 4	1a, 5, 6, 7		2, 4, 5, 6, 7
	* A6 - Conduct first event	TBD	2, 4, 5, 6, 7	1a, 5, 6, 7		2, 4, 5, 6, 7, 8
G11 - Recruit Businesses	* A4 - Prepare information package	Overall	1a, 1c, 2, 4	5, 7, 8		1a, 1c, 2, 4, 5, 7, 8
	* A5 - Contact existing businesses, brokers and owners	Overall	4	1a, 1c, 2, 5, 7		1a, 1c, 2, 4, 5, 7, 8
	* A6 - Contact prospective businesses	Overall	4	1a, 1c, 2, 5, 7		1a, 1c, 2, 4, 5, 7, 8
G12 - Alcoholic Beverage Legislation	* A3 - Develop options	Overall	2, 4	3, 5, 6, 7	2	4
	* A4 - Review options	Overall	2, 4	3, 5, 6, 7	2	4

Source: Basile Baumann Prost & Associates, Inc.

Legend	
<i>County:</i>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined



**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Immediate Actions (Calendar Year 1997)**

***FOURTH QUARTER 1997 (FY 98 - 2nd Quarter)***

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G1 - Revitalization Strategy	* A6 - Continue strategy	Overall	2, 4	1a		1a, 2, 4
	* A7 - Monitor strategy	Overall	2, 4	1a		1a, 2, 4
G2 - Revitalization/Steering Committee	* A10 - Incorporate	Overall	4	1a, 2		4
	* A11 - Raise funds	Overall	4	1a		2, 3, 4, 5, 6, 7, 8
	* A12 - Refine work program	Overall	2, 4	1a, 5, 6, 7		1a, 2, 4
	* A13 - Initiate Work Program	Overall	4	1a		4
G4 - Traffic and Parking Study	* A5 - Review plan/study	Howard Ave (east)	1a, 1b, 2, 4	5, 6, 7	2	3
	* A6 - Approve plan/study	Howard Ave (east)	1a, 1b, 2, 4		2	3
G5 - Streetscape Improvements	* A17 - Commence Phase II plans	Howard Ave. (east)	1a, 2, 4, 8	5, 7	1a	
	* A18 - Prepare plan for sidewalks/roads	Metropolitan Ave.	3			3
	* A19 - Obtain construction funding	Metropolitan Ave.	2, 3, 4	1a, 1b		3
G6 - Facade Improvements	* A8 - Complete facade concept plans (Phase II)	Howard Ave (east)	1a, 7, 8	2, 4		7
	* A9 - Negotiate facade easments with owners (Phase II)	Howard Ave (east)	1a, 7		1a	
	* A10 - Hire architect for contract drawings (Phase II)	Howard Ave (east)	7			7

Source: Basile Baumann Prost & Associates, Inc.

Legend	
<b>County:</b>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	<b>TBD</b> To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Immediate Actions (Calendar Year 1997)**

*FOURTH QUARTER 1997 - Continued (FY 98 - 2nd Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G7 - Code Enforcement Program	* A5 - Continue identifying violations	Overall	1a, 2, 4	5, 6, 7		1a
	* A6 - Continue with enforcement	Overall	1a, 2	3, 4		1a
G8 - Clean-up/Paint-up Program	* A7 - Conduct event	Howard Ave. (East)	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
G9 - Advertising/Public relations Campaign	* A8 - Advertise in media about upcoming events	Overall	4, 5			2, 4, 5
	* A9 - Finalize and print brochure	Overall	2, 4, 5	1a		2, 4, 5, 7, 8
G10 - Event(s) Planning	* A7 - Plan & schedule 2nd event	Overall	2, 4	1a, 5, 6, 7		2, 4
	* A8 - Promote 2nd event	Overall	2, 4	5, 6, 7		2, 4, 5, 6, 7
	* A9 - Conduct 2nd event (Holiday theme?)	TBD	2, 4	5, 6, 7		2, 4, 5, 6, 7, 8
G11 - Recruit Businesses	* A7 - Refine program	Overall	4	1a, 1c, 2, 5, 7		1c, 2, 4, 5, 7
G12 - Alcoholic Beverage Legislation	* A5 - Review options	Overall	2, 4	3, 5, 6, 7	2	4
	* A6 - Define options	Overall	2, 4	3, 5, 6, 7	2	4
	* A7 - Generate support	Overall	2, 4	5, 6, 7	2	4, 5, 6, 7

Source: Basile Baumann Prost & Associates, Inc.

Legend	
<i>County:</i>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Near Term Actions ( Calendar Years 1998 and 1999)**

***FIRST QUARTER 1998 (FY 98 - 3rd Quarter)***

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G1 - Revitalization Strategy	* A6 - Continue strategy	Overall	2, 4	1a		1a, 2, 4
	* A7 - Monitor strategy	Overall	2, 4	1a		1a, 2, 4
G4 - Traffic and Parking Study	* A7 - Fund Recommendations	Howard Ave. (east)	2, 4	1a, 1b, 5, 7		1a, 1b, 2, 3, 7
G5 - Streetscape Improvements	* A20 - Complete plans for Phase II	Howard Ave. (east)	1a, 2, 8	4, 5, 7	1a	
	* A21 - Get approvals/permits (Phase II)	Howard Ave. (east)	1a, 2	3, 4, 7	1a	
	* A22 - Hire contractor (Phase II)	Howard Ave (east)	1a	2, 4	1a	
	* A23 - Obtain right-of-way for sidewalk/road improvements	Metropolitan Ave.	3	2, 7		3
	* A24 - Review plans for sidewalk/road improvements	Metropolitan Ave	2, 3, 4, 7	1a, 1b, 5, 6, 8		2
G6 - Facade Improvements	* A11- Prepare contract drawings (Phase II)	Howard Ave (east)	7, 8	1a, 2, 4		7
G7 - Code Enforcement Program	* A5 - Continue identifying violations	Overall	1a, 2, 4	5, 6, 7		1a, 2
	* A6 - Continue enforcement	Overall	1a, 2	3, 4		1a, 2, 3

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<i>County:</i>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Near Term Actions ( Calendar Years 1998 and 1999)**

*FIRST QUARTER 1998 - Continued (FY 98 - 3rd Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G8 - Clean-up/Paint-up Program	* A8 - Plan & schedule event	Howard Ave. (east)	2, 4	1a		2, 4
	* A9 - Promote event	Overall	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
	* A10 - Conduct event	Howard Ave. (east)	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
G9 - Advertising/Public relations Campaign	* A10 - Advertise in media about upcoming events	Overall	4, 5	1a, 1c, 2		1c, 2, 4, 5
	* A11 - Distribute brochures to area organizations	Overall	4, 5	1a, 1c, 2		1c, 4
G10 - Event(s) Planning	* A10 - Plan & schedule event	Overall	2, 4	1a, 5, 6, 7		2, 4
	* A11 - Promote event	Overall	2, 4	5, 6, 7		2, 4, 5, 6, 7
	* A12 - Conduct event	TBD	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
G11 - Recruit Businesses	* A8 - Implement program	Overall	2, 4	1a, 1c, 5, 7, 8		1c, 2, 4, 5, 7, 8
	* A9 - Seek compatible uses	Howard Ave. (east)	2, 4, 7	1a, 1c, 5, 8		1c, 2, 4, 5, 7, 8
G12 - Alcoholic Beverage Legislation	* A8 - Request bill in legislature for referendum question	Overall	2	4, 5, 7		2
G13 - Maintenance/Housekeeping	* A1 - Identify program objectives	Overall	2, 4	1a, 5, 6, 7		2, 4
	* A2 - Identify roles and responsibilities	Overall	2, 4	1a, 5, 6, 7		2, 4
	* A3 - Organize program	Overall	2, 4	1a, 5, 6, 7		2, 4
	* A4 - Obtain sponsors	Overall	2, 4	5, 6, 7		2, 4
	* A5 - Establish potential funding	Overall	2, 4	5, 6, 7		2, 4, 5, 6, 7, 8

Source: Basile Baumann Prost & Associates, Inc.

Legend	
<b>County:</b>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Near Term Actions ( Calendar Years 1998 and 1999)**

***SECOND QUARTER 1998 (FY 98 - 4th Quarter)***

<b>Goal</b>	<b>Action</b>	<b>Area</b>	<b>Responsible Parties</b>	<b>Relevant Parties</b>	<b>Currently Budgeted</b>	<b>Potential Funding Source(s)</b>
G1 - Revitalization Strategy	* A6 - Continue strategy	Overall	2, 4	1a		1a, 2, 4
	* A7 - Monitor strategy	Overall	2, 4	1a		1a, 2, 4
G4 - Traffic and Parking Study	* A8 - Implement recommendations	Howard Ave (east)	2	1a, 1b, 3, 4, 5, 6, 7		2, 3, 7
G5 - Streetscape Improvements	* A25 - Begin improvements (Phase II)	Howard Ave (east)	1a	2, 4, 5, 7	1a	2
	* A26 - Approve plan for sidewalk/road improvements	Metropolitan Ave	3	1a, 1b, 2, 4, 5, 7		3
G6 - Facade Improvements	* A12 - Complete drawings (Phase II)	Howard Ave (east)	7, 8	1a		7
	* A13 - Get approvals/permits (Phase II)	Howard Ave (east)	7	1a, 2, 3, 8		7
	* A13 - Hire contractor (Phase II)	Howard Ave (east)	7			7
	* A14 - Begin improvements (Phase II)	Howard Ave (east)	1a, 7, 8	2, 4		7
G7 - Code Enforcement Program	* A5 - Continue identifying violations	Overall	1a, 2, 4	5, 6, 7		1a, 2
	* A6 - Continue enforcement	Overall	1a, 2	3, 4		1a, 2, 3
G8 - Clean-up/Paint-up Program	* A11 - Plan & schedule event	Howard Ave. (east)	2, 4	1a		2, 4
	* A12 - Promote event	Overall	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
	* A13 - Conduct event	Howard Ave. (east)	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<b>County:</b>	2 Town
<b>1a</b> Dept. of Housing & Community Affairs	3 State
<b>1b</b> Dept. of Transportation	4 Revitalization Entity
<b>1c</b> Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	<b>TBD</b> To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Near Term Actions ( Calendar Years 1998 and 1999)**

***SECOND QUARTER 1998 - Continued (FY 98 - 4th Quarter)***

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G9 - Advertising/Public relations Campaign	* A12 - Advertise in media about upcoming events	Overall	4, 5	1a, 1c, 2		2, 4, 5
	* A13 - Press release updating Kensington Revitalization effort	Overall	2, 4	1a, 1c, 5		
G10 - Event(s) Planning	* A13 - Plan & schedule event	Overall	2, 4	1a, 5, 6, 7		2, 4
	* A14 - Promote event	Overall	2, 4	1a, 5, 6, 7		2, 4, 5, 6, 7
	* A15 - Conduct event (sidewalk sale?)	TBD	2, 4	1a, 5, 6, 7, 8		2, 4, 5, 6, 7, 8
G11 - Recruit Businesses	* A8 - Continue to implement program	Overall	2, 4	1a, 1c, 5, 7, 8		2, 4, 5, 7, 8
	* A10 - Seek compatible uses	Howard Ave. (west)	2, 4, 7	1a, 1c, 5, 8		2, 4, 5, 7, 8
G12 - Alcoholic Beverage Legislation	* A9 - Conduct promotional campaign	Overall	2, 4	5, 7		2, 4, 5, 7
G13 - Maintenance/Housekeeping	* A6 - Identify areas	Overall	2, 4	1a, 5, 6, 7	2	4
	* A7 - Implement program	Overall	2, 4	1a, 5, 6, 7	2	4, 5, 7

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<b>County:</b>	<b>2</b> Town
<b>1a</b> Dept. of Housing & Community Affairs	<b>3</b> State
<b>1b</b> Dept. of Transportation	<b>4</b> Revitalization Entity
<b>1c</b> Dept. of Economic Development	<b>5</b> Business Community
	<b>6</b> Resident Community
	<b>7</b> Property Owners
	<b>8</b> Other
	<b>TBD</b> To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Near Term Actions ( Calendar Years 1998 and 1999)**

*THIRD QUARTER 1998 (FY 99 - 1st Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G1 - Revitalization Strategy	* A6 - Continue strategy	Overall	2, 4	1a		1a, 2, 4
	* A7 - Monitor strategy	Overall	2, 4	1a		1a, 2, 4
G4 - Traffic and Parking Study	* A9 - Continue with recommendations	Howard Ave (east)	2, 4	1a, 3, 5, 7		2, 3, 5
	* A10 - Seek funding for continued study	Overall	2			
G5 - Streetscape Improvements	* A27 - Complete Phase II plans	Howard Ave (east)	1a, 2, 4	2, 4, 5, 6, 7, 8	1a	
	* A28 - Commence Phase III plans	Howard Ave (east)	1a	2, 4, 5, 6, 7	1a	2
	* A29 - Hire contractor for sidewalk/road improvements	Metropolitan Ave	3	2, 4		3
	* A30 - Begin sidewalk/road improvements	Metropolitan Ave	3, 8	1a, 1b, 2, 4		3
	* A31 - Seek funding	Howard Ave (west)	2	1a		1a, 2
G6 - Facade Improvements	* A15 - Prepare concept plan (Phase III)	Howard Ave (east)	1a, 7, 8	2, 4		7
	* A16 - Negotiate facade easements with owners (Phase III)	Howard Ave (east)	1a, 7		1a	
	* A17 - Hire architect for contract drawings (Phase III)	Howard Ave (east)	7			7
	* A18 - Commence contract drawings (Phase III)	Howard Ave (east)	7, 8	1a, 2, 4		7
	* A19 - Seek funding	Howard Ave (west)	2	1a, 5, 7		1a, 2
G7 - Code Enforcement Program	* A5 - Continue identifying violations	Overall	1a, 2, 4	5, 6, 7		1a, 2
	* A6 - Continue enforcement	Overall	1a, 2	3, 4		1a, 2

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<i>County:</i>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Near Term Actions ( Calendar Years 1998 and 1999)**

***THIRD QUARTER 1998 - Continued (FY 99 - 1st Quarter)***

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G8 - Clean-up/Paint-up Program	* A14 - Plan & schedule event	Howard Ave. (west)	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
	* A15 - Promote event	Overall	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
	* A16 - Conduct event	Howard Ave. (west)	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
G9 - Advertising/Public relations Campaign	* A14 - Advertise in media about upcoming events	Overall	4, 5	2		2, 4, 5
G10 - Event(s) Planning	* A16 - Plan & schedule event	Overall	2, 4	1a, 5, 6, 7		2, 4
	* A17 - Promote event	Overall	2, 4	5, 6, 7		2, 4, 5, 6, 7
	* A18 - Conduct event (parade?)	TBD	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
G11 - Recruit Businesses	* A8 - Continue to implement program	Overall	2, 4	1a, 1c, 5, 7, 8		2, 4, 5, 7, 8
	* A11 - Seek compatible uses	Connecticut Ave.	2, 4, 7	1a, 1c, 5, 8		1a, 1c, 2, 4, 5, 7, 8
G12 - Alcoholic Beverage Legislation	* A10 - Continue promotional campaign	Overall	2, 4	5, 7		2, 4, 5, 7
G13 - Maintenance/Housekeeping	* A8 - Continue program	Overall	2, 4	5, 6, 7		2, 5, 7

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<i><b>County:</b></i>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined



**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Near Term Actions ( Calendar Years 1998 and 1999)**

***FOURTH QUARTER 1998 (FY 99 - 2nd Quarter)***

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G1 - Revitalization Strategy	* A6 - Continue strategy	Overall	2, 4	1a		1a, 2, 4
	* A7 - Monitor strategy	Overall	2, 4	1a		1a, 2, 4
G4 - Traffic and Parking Study	* A9 - Continue with recommendations	Howard Ave (east)	2	1a, 1b, 3, 4, 5, 7		2, 3, 7
G5 - Streetscape Improvements	* A32 - Complete plans (Phase III)	Howard Ave (east)	1a, 2, 8	4, 5, 7	1a	
	* A33 - Get approvals/permits	Howard Ave (east)	1a, 2	4, 7	1a	
	* A34 - Hire contractor (Phase III)	Howard Ave (east)	1a	2		1a
	* A35 - Continue to implement sidewalk/road improvements	Metropolitan Ave	3, 8	1a, 1b, 2, 4		3
G6 - Facade Improvements	* A20 - Complete contract drawings (Phase III)	Howard Ave (east)	8	1a, 2, 7		7
	* A21 - Hire contractor (Phase III)	Howard Ave (east)	7			7
G7 - Code Enforcement Program	* A5 - Continue identifying violations	Overall	1a, 2, 4	5, 6, 7		1a, 2
	* A6 - Continue enforcement	Overall	1a, 2	3, 4		1a, 2, 3
G8 - Clean-up/Paint-up Program	* A17 - Plan & schedule event	Howard Ave. (west)	2, 4			2, 4, 5, 6, 7, 8
	* A18 - Promote event	Howard Ave. (west)	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
	* A19 - Conduct event	Howard Ave. (west)	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<b>County:</b>	<b>2</b> Town
<b>1a</b> Dept. of Housing & Community Affairs	<b>3</b> State
<b>1b</b> Dept. of Transportation	<b>4</b> Revitalization Entity
<b>1c</b> Dept. of Economic Development	<b>5</b> Business Community
	<b>6</b> Resident Community
	<b>7</b> Property Owners
	<b>8</b> Other
	<b>TBD</b> To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Near Term Actions ( Calendar Years 1998 and 1999)**

***FOURTH QUARTER 1998 - Continued (FY 99 - 2nd Quarter)***

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G9 - Advertising/Public relations Campaign	* A15 - Advertise in media about upcoming events	Overall	4, 5	2		2, 4, 5
G10 - Event(s) Planning	*A19 - Plan & schedule event	Overall	2, 4	1a, 5, 6, 7		2, 4
	* A20 - Promote event	Overall	2, 4	5, 6, 7		2, 4, 5, 6, 7
	* A21 - Conduct event (decoration contest?)	Overall	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
G11 - Recruit Businesses	* A12 - Monitor program	Overall	2, 4	1a, 1c, 5, 7, 8		2, 4, 5, 7
	* A13 - Seek compatible uses	Metropolitan Ave.	2, 4, 7	1a, 1c, 5, 8		1a, 1c, 2, 4, 5, 7
G12 - Alcoholic Beverage Legislation	* A11- Approve Legislation	Overall	2, 3	4, 5, 6, 7		
G13 - Maintenance/Housekeeping	* A8 - Continue with program	Overall	2, 4	5, 6, 7		2, 5, 7

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<i><b>County:</b></i>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined

**IMPLEMENTATION PLAN  
ACTION WORK PROGRAM**

Near Term Actions Continued (Calendar Years 1998 and 1999)

*FIRST QUARTER 1999 (FY 99 - 3rd Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G1 - Revitalization Strategy	* A6 - Continue strategy	Overall	2, 4	1a		1a, 2, 4
	* A7 - Monitor strategy	Overall	2, 4	1a		1a, 2, 4
G4 - Traffic and Parking Study	* A11 - Continue with recommendations	Howard Ave (east)	2, 4	1a, 1b, 3, 5, 7		2, 3, 5
G5 - Streetscape Improvements Program	* A36 - Begin improvements (Phase III)	Howard Ave. (east)	1a, 8	2, 4, 5, 7	1a	
G6 - Facade Improvements	* A22 - Begin improvements (Phase III)	Howard Ave (east)	7, 8	1a, 2, 4, 7		7
G7 - Code Enforcement Program	* A5 - Continue identifying violations	Overall	1a, 2, 4	5, 6, 7		1a, 2
	* A6 - Continue enforcement	Overall	1a, 2	3, 4		1a, 2, 3
G8- Clean-up/Paint-up Program	* A20 - Plan & schedule event	Metropolitan Ave.	2, 4			2, 4
	* A21 - Promote event	Metropolitan Ave.	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
	* A22 - Conduct event	Metropolitan Ave.	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8

Source: Basile Baumann Prost & Associates, Inc.

Legend	
<b>County:</b>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined

**IMPLEMENTATION PLAN  
ACTION WORK PROGRAM**

**Near Term Actions Continued (Calendar Years 1998 and 1999)**

***FIRST QUARTER 1999 - Continued (FY 99 - 3rd Quarter)***

<b>Goal</b>	<b>Action</b>	<b>Area</b>	<b>Responsible Parties</b>	<b>Relevant Parties</b>	<b>Currently Budgeted</b>	<b>Potential Funding Source(s)</b>
G9 - Advertising/Public relations Campaign	* A16 - Advertise in media about upcoming events	Overall	4, 5	2		2, 4, 5
G10 - Event(s) Planning	* A22 - Plan & schedule event	Overall	2, 4	1a, 5, 6, 7		2, 4
	* A23 - Promote event	Overall	2, 4	5, 6, 7		2, 4, 5, 6, 7
	* A24 - Conduct event	TBD	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
G11 - Recruit Businesses	* A12 - Monitor Program	Overall	2, 4	1a, 1c, 5, 7		4, 5, 7
	* A13 - Continue to seek compatible uses	Metropolitan Ave.	2, 4, 7	1a, 1c, 5		1a, 1c, 2, 4, 5, 7
G12 - Alcoholic Beverage Legislation	* A12 - Implement changes	Overall	2, 3			2, 3
G13 - Maintenance/Housekeeping	* A8 - Continue program	Overall	2, 4	5, 6, 7		2, 5, 7

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<i><b>County:</b></i>	<b>2</b> Town
<b>1a</b> Dept. of Housing & Community Affairs	<b>3</b> State
<b>1b</b> Dept. of Transportation	<b>4</b> Revitalization Entity
<b>1c</b> Dept. of Economic Development	<b>5</b> Business Community
	<b>6</b> Resident Community
	<b>7</b> Property Owners
	<b>8</b> Other
	<b>TBD</b> To Be Determined

**IMPLEMENTATION PLAN  
ACTION WORK PROGRAM**

Near Term Actions Continued (Calendar Years 1998 and 1999)

*SECOND QUARTER 1999 (FY 99 - 4th Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G1 - Revitalization Strategy	* A6 - Continue strategy	Overall	2, 4	1a		1a, 2, 4
	* A7 - Monitor strategy	Overall	2, 4	1a		1a, 2, 4
G5 - Streetscape Improvements Program	* A37 - Continue improvements (Phase III)	Howard Ave. (east)	1a, 8	2, 4, 5, 7	1a	
G6 - Facade Improvements	* A23 - Continue improvements (Phase III)	Howard Ave (east)	7, 8	1a, 2, 4, 7		7
G7 - Code Enforcement Program	* A5 - Continue identifying violations	Overall	1a, 2, 4	5, 6, 7		1a, 2
	* A6 - Continue enforcement	Overall	1a, 2	3, 4		1a, 2, 3
G8 - Clean-up/Paint-up Program	* A23 - Plan & schedule event	Metropolitan Ave.	2, 4	1a		2, 4
	* A24 - Promote event	Metropolitan Ave.	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
	* A25 - Conduct event	Metropolitan Ave.	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8

Source: Basile Baumann Prost & Associates, Inc.

Legend		
<i>County:</i>		
	2	Town
1a	Dept. of Housing & Community Affairs	3 State
1b	Dept. of Transportation	4 Revitalization Entity
1c	Dept. of Economic Development	5 Business Community
		6 Resident Community
		7 Property Owners
		8 Other
		TBD To Be Determined

**IMPLEMENTATION PLAN  
ACTION WORK PROGRAM**

**Near Term Actions Continued (Calendar Years 1998 and 1999)**

*SECOND QUARTER 1999 - Continued (FY 99 - 4th Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G9 - Advertising/Public relations Campaign	* A17 - Advertise in media about upcoming events	Overall	4, 5	2		2, 4, 5
G10 - Event(s) Planning	* A25 - Plan & schedule event	Overall	2, 4	1a, 5, 6, 7		2, 4
	* A26 - Promote event	Overall	2, 4	1a, 5, 6, 7		2, 4, 5, 6, 7
	* A27 - Conduct event	TBD	2, 4	1a, 5, 6, 7, 8		2, 4, 5, 6, 7, 8
G11 - Recruit Businesses	* A12 - Monitor Program	Overall	2, 4	1a, 1c, 5, 7		4, 5, 7
	* A14 - Seek compatible uses	Connecticut Ave.	2, 4, 7	1a, 1c, 5		1a, 1c, 2, 4, 5, 7
G12 - Alcoholic Beverage Legislation	* A13 - Ongoing monitoring	Overall	2, 3			2, 3
G13 - Maintenance/Housekeeping	* A8 - Continue program	Overall	2, 4	5, 6, 7		2, 5, 7

Source: Basile Baumann Prost & Associates, Inc.

Legend	
<i>County:</i>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined

**IMPLEMENTATION PLAN  
ACTION WORK PROGRAM**

**Near Term Actions Continued (Calendar Years 1998 and 1999)**

*THIRD QUARTER 1999 (FY 2000 - 1st Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G1 - Revitalization Strategy	* A6 - Continue strategy	Overall	2, 4			2, 4
	* A7 - Monitor strategy	Overall	2, 4			2, 4
G4 - Traffic and Parking Study	* A12 - Obtain funding for continuation of study	Overall	2, 4	1a, 1b		1b, 2, 3
	* A13 - Prepare traffic plan	Overall	2, 4	1a, 1b		1b, 2, 3
G5 - Streetscape Improvements Program	* A38 - Obtain funding	Howard Ave (west)	2			1a
	* A39 - Hire architect to prepare plans	Howard Ave (west)	1a, 2	4, 5, 7		1a
	* A40 - Seek funding	Connecticut Ave	2, 4			1a, 1b, 3
G6 - Facade Improvements	* A27 - Obtain funding	Howard Ave (west)	2	1a		1a
	* A28 - Begin facade concept plan	Howard Ave (west)	7, 8	1a, 2, 4		7
	* A29 - Negotiate facade easment with owners	Howard Ave (west)	1a, 7			1a
	* A30 - Seek funding	Metropolitan Ave	2, 4	1a, 7		1a
G7 - Code Enforcement Program	* A5 - Continue identifying violations	Overall	2, 4	5, 6, 7		1a, 2
	* A6 - Continue enforcement	Overall	1a, 2	3, 4		1a, 2, 3

Source: Basile Baumann Prost & Associates, Inc.

Legend	
<i>County:</i>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined

**IMPLEMENTATION PLAN  
ACTION WORK PROGRAM**

**Near Term Actions Continued (Calendar Years 1998 and 1999)**

***THIRD QUARTER 1999 - Continued (FY 2000 - 1st Quarter)***

<b>Goal</b>	<b>Action</b>	<b>Area</b>	<b>Responsible Parties</b>	<b>Relevant Parties</b>	<b>Currently Budgeted</b>	<b>Potential Funding Source(s)</b>
G8 - Clean-up/Paint-up Program	* A26 - Plan & schedule event	Connecticut Ave.	2, 4			2, 4
	* A27 - Promote event	Connecticut Ave.	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
	* A28 - Conduct event	Connecticut Ave.	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
G9 - Advertising/Public relations Campaign	* A18 - Advertise in media about upcoming events	Overall	4, 5	2		2, 4, 5
G10 - Event(s) Planning	* A28 - Plan & schedule event	Overall	2, 4	5, 6, 7		2, 4
	* A29 - Promote event	Overall	2, 4	5, 6, 7		2, 4, 5, 6, 7
	* A30 - Conduct event	TBD	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
G11 - Recruit Businesses	* A12 - Monitor Program	Overall	2, 4	1c, 5, 7		2, 4, 5, 7
	* A15 - Continue to seek compatible uses	TBD	2, 4, 7	1c, 5		1c, 2, 4, 5, 7
G12 - Alcoholic Beverage Legislation	* A13 - Ongoing monitoring	Overall	2, 3			2, 3
G13 - Maintenance/Housekeeping	* A12 - Continue with program	Overall	2, 4	5, 6, 7		2, 5, 7

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>		
<b>County:</b>	2	Town
1a Dept. of Housing & Community Affairs	3	State
1b Dept. of Transportation	4	Revitalization Entity
1c Dept. of Economic Development	5	Business Community
	6	Resident Community
	7	Property Owners
	8	Other
	TBD	To Be Determined



**IMPLEMENTATION PLAN  
ACTION WORK PROGRAM**

**Near Term Actions Continued (Calendar Years 1998 and 1999)**

*FOURTH QUARTER 1999 (FY 2000 - 2nd Quarter)*

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G1 - Revitalization Strategy	* A6 - Continue strategy	Overall	2, 4			2, 4
	* A7 - Monitor strategy	Overall	2, 4			2, 4
G4 - Traffic and Parking Study	* A14 - Review plan/study	Overall	2, 4	1a, 1b, 5, 6, 7		1a, 1b, 2, 4
G5 - Streetscape Improvements Program	* A41 - Prepare contract drawings	Howard Ave (west)	1a, 2, 8	4, 5, 7		1a
	* A42 - Get approvals/permits	Howard Ave (west)	1a, 2	4		1a
	* A43 - Obtain right-of-way	Howard Ave (west)	1a, 2	4		1a
G6 - Facade Improvements	* A28 - Hire architect for contract drawings	Howard Ave (west)	7			7
	* A29 - Commence contract drawings	Howard Ave (west)	7, 8	1a, 2, 4		7
	* A30 - Get approvals/permits	Howard Ave (west)	7	1a, 2, 4, 8		7
G7 - Code Enforcement Program	* A5 - Continue identifying violations	Overall	1a, 2, 4	5, 6, 7		1a, 2
	* A6 - Continue enforcement	Overall	1a, 2	3, 4		1a, 2, 3

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>		
<i>County:</i>		2 Town
1a Dept. of Housing & Community Affairs		3 State
1b Dept. of Transportation		4 Revitalization Entity
1c Dept. of Economic Development		5 Business Community
		6 Resident Community
		7 Property Owners
		8 Other
		TBD To Be Determined

**IMPLEMENTATION PLAN  
ACTION WORK PROGRAM**

**Near Term Actions Continued (Calendar Years 1998 and 1999)**

***FOURTH QUARTER 1999 - Continued (FY 2000 - 2nd Quarter)***

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G9 - Clean-up/Paint-up Program	* A29 - Plan & schedule event	TBD	2, 4			2, 4
	* A30 - Promote event	TBD	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
	* A31 - Conduct event	TBD	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
G10 - Advertising/Public Relations Campaign	* A19 - Advertise in media about upcoming events	Overall	4, 5	2		2, 4, 5
G11 - Event(s) Planning	* A31 - Plan & schedule event	Overall	2, 4	5, 6, 7		2, 4
	* A32 - Promote event	Overall	2, 4	5, 6, 7		2, 4, 5, 6, 7
	* A33 - Conduct event	TBD	2, 4	5, 6, 7, 8		2, 4, 5, 6, 7, 8
G12 - Recruit Businesses	* A12 - Monitor Program	Overall	2, 4	1a, 1c, 5, 7		2, 4, 5, 7
	* A15 - Continue to seek compatible uses	TBD	2, 4, 7	1a, 1c, 5		1a, 1c, 2, 4, 5, 7
G13 - Alcoholic Beverage Legislation	* A13 - Ongoing monitoring	Overall	2, 3			2, 3
G14 - Maintenance/Housekeeping	* A12 - Continue with program	Overall	2, 4	5, 6, 7		2, 5, 7

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<b>County:</b>	2 Town
<b>1a</b> Dept. of Housing & Community Affairs	3 State
<b>1b</b> Dept. of Transportation	4 Revitalization Entity
<b>1c</b> Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	<b>TBD</b> To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Mid-Term Actions (Calendar Years 2000 - 2005)**

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G1 - Revitalization Strategy	* A9 - Update strategy	Overall	2, 4			2, 4
	* A10 - Review changes	Overall	2, 4	5, 6, 7		2, 4
	* A11 - Adopt changes	Overall	2, 4			2, 4
G2 - Revitalization/Steering Committee	* A15 - Review organizational structure	Overall	2, 4	5, 6, 7		2, 4
	* A16 - Suggest changes	Overall	2, 4	5, 6, 7		2, 4
	* A17 - Implement changes	Overall	2, 4			2, 4
G3 - Gateway/Signage Program	* A7 - Review signage	Overall	2, 4			2, 4
	* A8 - Update as needed	Overall	2, 4			2, 4
G4 - Traffic and Parking Study	* A15 - Approve plan/study	Overall	1a, 1b, 2	4		1b, 2, 3
	* A16 - Implement recommendations	Overall	2	1a, 1b, 3, 4		1b, 2, 3
	* A11 - Review traffic and parking study	Overall	2, 4	1a, 1b, 3		1b, 2, 3
	* A12 - Update as needed	Overall	2, 4	1a, 1b, 3		1b, 2, 3
G5 - Streetscape Improvements Program	* A44 - Complete plans	Howard Ave (west)	1a, 2, 8	4, 5, 7		1a, 2
	* A45 - Hire contractor	Howard Ave (west)	1a	2		1a, 2
	* A46 - Begin improvements	Howard Ave (west)	1a, 8	2, 4, 5, 7		1a, 2
	* A47 - Seek funding	Connecticut Ave	1a, 2			1a, 2
	* A48 - Begin process	Connecticut Ave	1a, 2			1a, 2
	* A49 - Review streetscape improvements	Overall	2, 4	1a, 5, 6, 7, 8		1a, 2, 4, 5, 7, 8
	* A50 - Update as needed	Overall	2, 4	1a, 5, 6, 7, 8		1a, 2, 4, 5, 7, 8

Source: Basile Baumann Prost & Associates, Inc.

Legend	
<i>County:</i>	2 Town
1a Dept. of Housing & Community Affairs	3 State
1b Dept. of Transportation	4 Revitalization Entity
1c Dept. of Economic Development	5 Business Community
	6 Resident Community
	7 Property Owners
	8 Other
	TBD To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Mid-Term Actions Continued (Calendar Years 2000 - 2005)**

<b>Goal</b>	<b>Action</b>	<b>Area</b>	<b>Responsible Parties</b>	<b>Relevant Parties</b>	<b>Currently Budgeted</b>	<b>Potential Funding Source(s)</b>
G6 - Facade Improvements Program	* A31 - Complete contract drawings	Howard Ave (west)	8	1a, 2, 7		1a, 2, 7
	* A32 - Hire contractor	Howard Ave (west)	7			7
	* A33 - Begin improvements	Howard Ave (west)	1a, 8	2, 4, 7		7
	* A34 - Seek funding	Metropolitan Ave	2			1a, 2
	* A35 - Begin process	Metropolitan Ave	1a, 2			1a, 2
	* A36 - Review facade improvements	Overall	2, 4	1a, 5, 6, 7, 8		1a, 2, 4, 5, 7, 8
	* A37 - Update as needed	Overall	2, 4	1a, 5, 6, 7, 8		1a, 2, 4, 5, 7, 8
G7 - Code Enforcement Program	* A7 - Review program	Overall	2, 4	1a		1a, 2
	* A8 - Update as needed	Overall	2	1a, 4		1a, 2
G8 - Clean-up/Paint-up Program	* A32 - Review program	Overall	2, 4	5, 7		2, 4, 5, 7
	* A33 - Update as needed	Overall	2, 4	5, 7		2, 4, 5, 7
G9 - Advertising/Public Relations Campaign	* A20 - Review campaign program	Overall	2, 4	5		2, 4, 5, 7, 8
	* A21 - Update as needed	Overall	2, 4	5		2, 4, 5, 7, 8
G10 - Event Programming	* A34 - Review program	Overall	2, 4			2, 4
	* A35 - Update as needed	Overall	2, 4			2, 4
G11 - Recruit Businesses	* A16 - Review program	Overall	2, 4	1c, 5, 6, 7, 8		2, 4, 5, 7, 8
	* A17 - Update as needed	Overall	2, 4	1c, 5, 6, 7, 8		2, 4, 5, 7, 8

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<b>County:</b>	<b>2</b> Town
<b>1a</b> Dept. of Housing & Community Affairs	<b>3</b> State
<b>1b</b> Dept. of Transportation	<b>4</b> Revitalization Entity
<b>1c</b> Dept. of Economic Development	<b>5</b> Business Community
	<b>6</b> Resident Community
	<b>7</b> Property Owners
	<b>8</b> Other
	<b>TBD</b> To Be Determined

**IMPLEMENTATION PLAN  
ANNUAL WORK PROGRAM**

**Mid-Term Actions Continued (Calendar Years 2000 - 2005)**

Goal	Action	Area	Responsible Parties	Relevant Parties	Currently Budgeted	Potential Funding Source(s)
G12 - Alcoholic Beverage Legislation	* A14 - Review legislation	Overall	2, 3	4, 5, 6, 7		2, 3
	* A15 - Update as needed	Overall	2, 3			2, 3
G13 - Maintenance/Housekeeping	* A13 - Review program	Overall	2, 4	5, 6, 7	2	4, 5, 7
	* A14 - Update as needed	Overall	2, 4	5, 6, 7		2, 4, 5, 7
G14 - Explore Conversion	* A1 - Concrete plant	Metropolitan Ave.	2, 4	1a, 7		1a, 2, 7, 8
	* A2 - State Highway Administration site	Howard Ave. (west)	2, 4	1a, 1b, 3, 7		1a, 1b, 2, 7, 8
	* A3 - Industrial buildings	Overall	2, 4	1a, 7		1a, 2, 7, 8
	* A4 - Auto repair	Overall	2, 4	1a, 7		1a, 2, 7
G15 - Explore Physical Linkages	* A1 - Railroad crossing to connect Howard with Metropolitan	Overall	2, 4	1a, 1b, 3, 5, 6, 7, 8		1a, 1b, 2, 3, 8
	* A2 - Connecticut Ave.	Overall	2, 4	1a, 1b, 3, 5, 6, 7, 8		1a, 1b, 2, 3, 8
G16 - Explore Mixed-Use Development	* A1 - Residential/Office/Retail	Overall	2, 4	1a		1a, 2, 4
G17 - Explore Circulation Changes	* A1 - Review	Overall	2, 4	1a, 1b		1a, 1b, 2, 4
G18 - Other	TBD	TBD	TBD	TBD	TBD	TBD

Source: Basile Baumann Prost & Associates, Inc.

<b>Legend</b>	
<b>County:</b>	2 Town
1a Dept. of Housing & Community Affairs	3 State
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	7 Property Owners
	8 Other
	TBD To Be Determined