

APP. 1

**RESIDENT needs assessment,
NEIGHBORHOOD SURVEY, and
BUSINESS OWNER SURVEY**

RESIDENT needs assessment

NEIGHBORHOOD PERCEPTION

Douglass Court
Parkside Homes
Frederick Manor

WHAT RESIDENTS AT DOUGLASS COURT, PARKSIDE HOMES AND FREDERICK MANOR SAID ABOUT THE STRENGTHS AND CHALLENGES OF THEIR NEIGHBORHOOD...

STRENGTHS BY HOUSING SITE:

Douglass Court

- 1 My neighbors, and community
- 2 Housing Affordability
- 3 Parks and open spaces

Parkside Homes

- 1 My neighbors, and community
- 2 Parks and open spaces
- 3 Access to downtown

Frederick Manor

- 1 Schools
- 2 Parks and open spaces
- 3 My neighbors, and community

OVERALL CHALLENGES

50%
of respondents
identified "childcare" as the neighborhood greatest challenge



>15%
of respondents
across the housing sites
experience food insecurity
during a regular week

93%
of respondents
would like a "safe, stable, family-friendly neighborhood" in the future

67%
of respondents
would like a "place where neighbors know and help each other" in the future

WHAT AMENITIES COULD ENHANCE YOUR NEIGHBORHOOD?

Douglass Court

- 1 Playing fields for children
- 2 Large spaces for markets
- 3 Large spaces for events
- 4 Community garden(s)

Parkside Homes

- 1 Community garden(s)
- 2 Large spaces for markets
- 3 Large spaces for events
- 4 Public art/ murals

Frederick Manor

- 1 Large spaces for markets
- 2 Large spaces for events
- 3 Playing fields for children
- 4 Community garden(s)

WHAT SORTS OF SOCIAL ACTIVITIES ARE MISSING IN THE NEIGHBORHOOD?

Douglass Court

- 63% Safe place for children and teens
- 37% Training & workforce programs
- 26% Community garden(s)

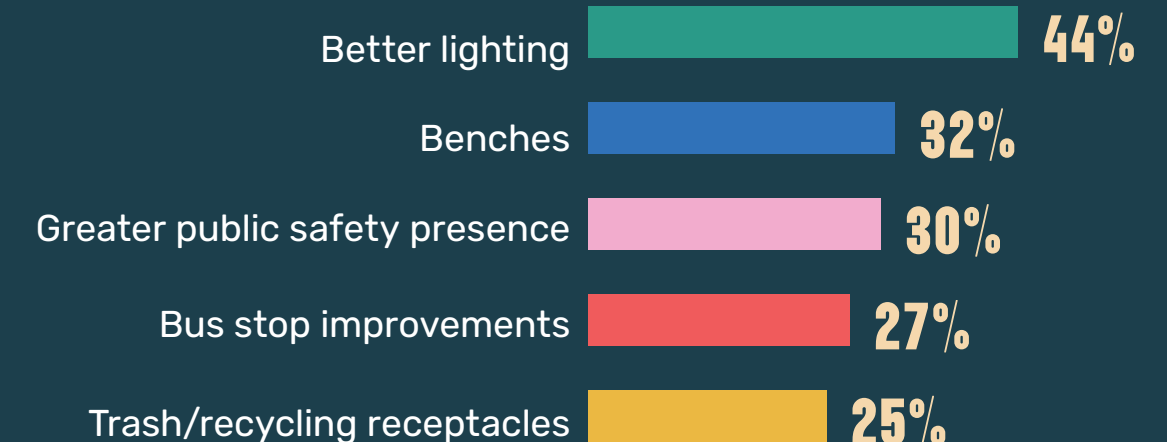
Parkside Homes

- 59% Safe place for children and teens
- 41% Community garden(s)
- 26% Training & workforce programs

Frederick Manor

- 55% Safe place for children and teens
- 49% Community garden(s)
- 35% Training & workforce programs

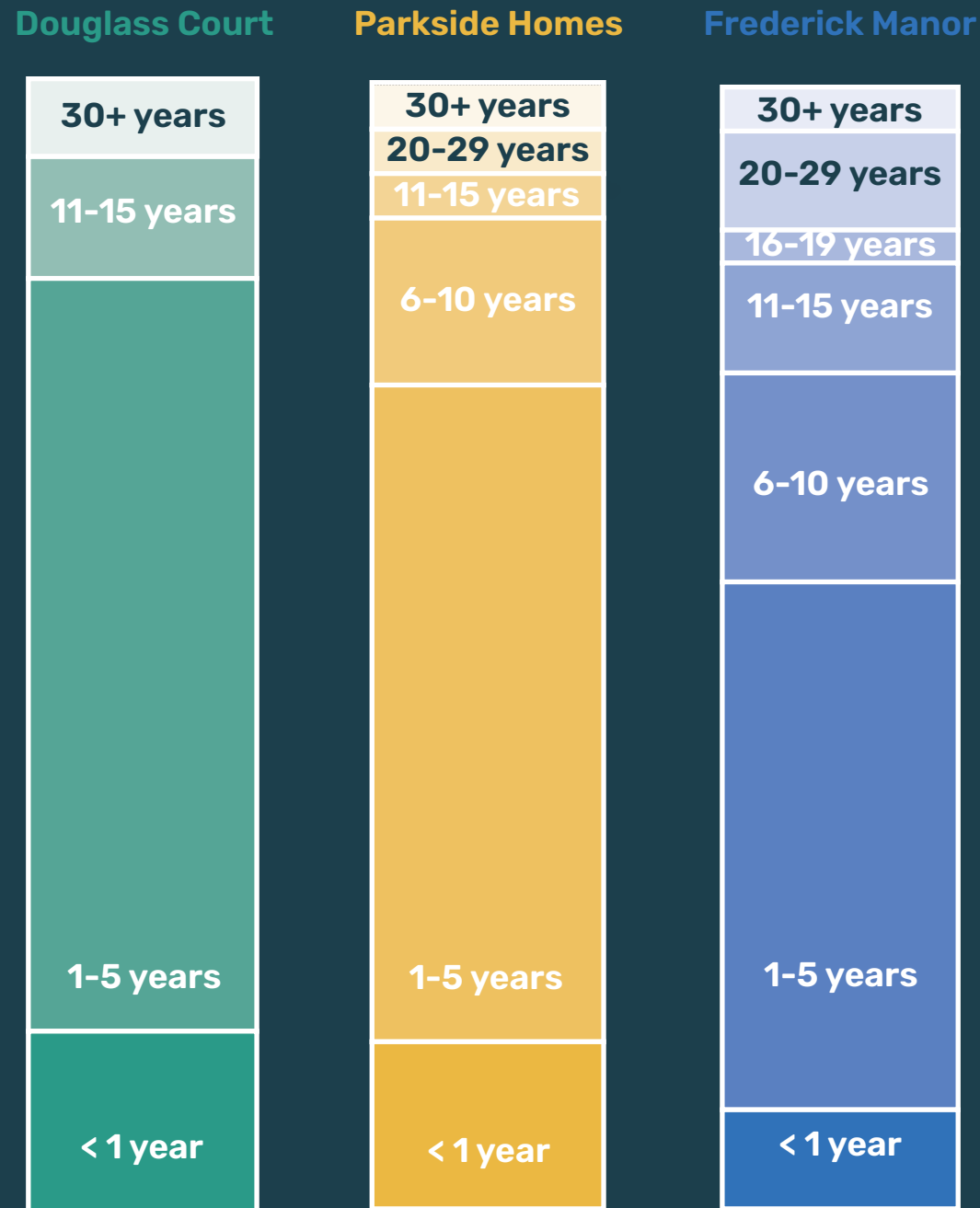
WHAT AMENITIES COULD ENHANCE YOUR NEIGHBORHOOD?



HOUSING IN THE CHOICE NEIGHBORHOODS

- Douglass Court
- Parkside Homes
- Frederick Manor

HOW LONG HAVE YOU LIVED AT YOUR CURRENT RESIDENCE?

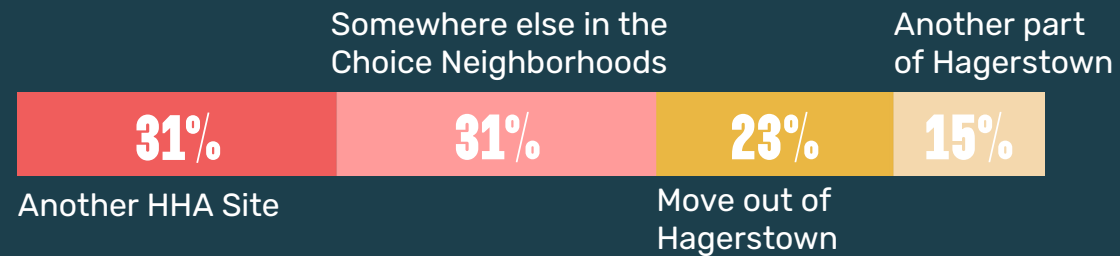


HOW DO YOU FEEL ABOUT RETURNING TO YOUR RESIDENCE POST-REDEVELOPMENT?

88% Most residents would like to return to their current housing site post redevelopment

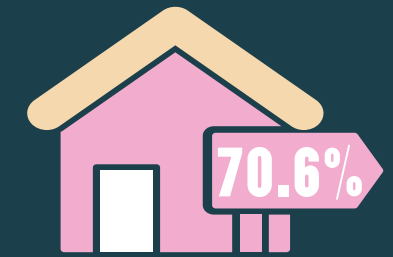
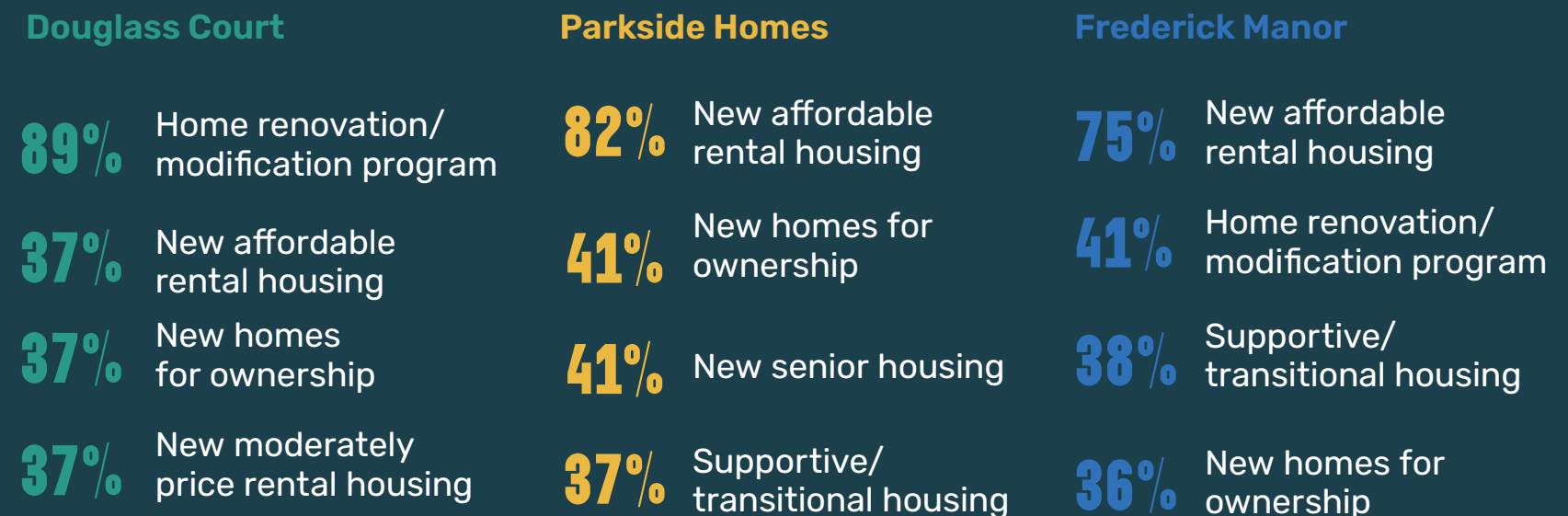
77% of those who would prefer permanent relocation, want to stay in Hagerstown

Of those who prefer permanent relocation:



>40% of respondents support creating a mix of housing on-site to attract residents of varied incomes

WHAT TYPES OF HOUSING WOULD YOU LIKE TO SEE IN YOUR NEIGHBORHOOD?



70.6% of respondents would like to work towards buying a new home in the next 5 years

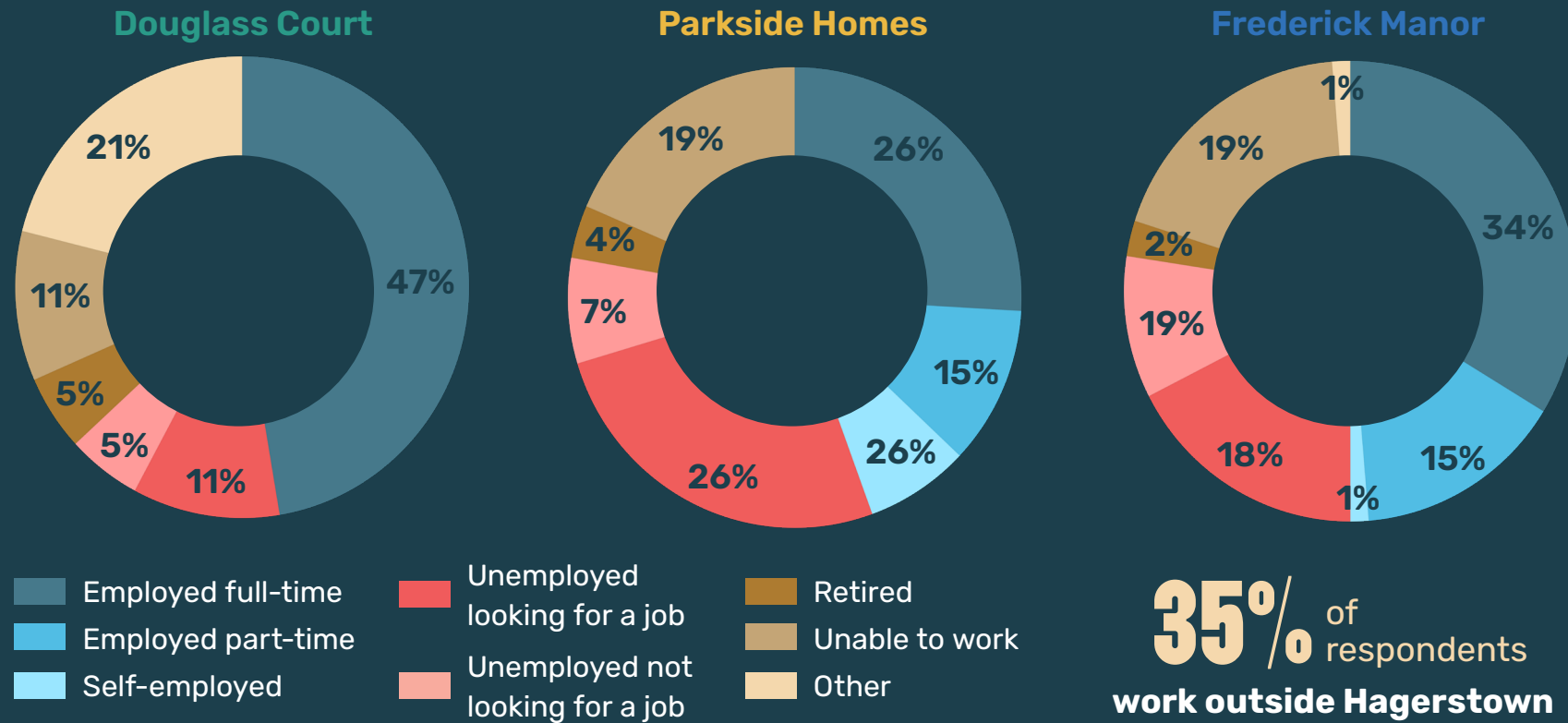
WHAT PROGRAMS COULD HELP YOU?

- #1 Downpayment assistance
- #2 Homebuyer education
- #3 Budgeting support
- #4 Support improving credit

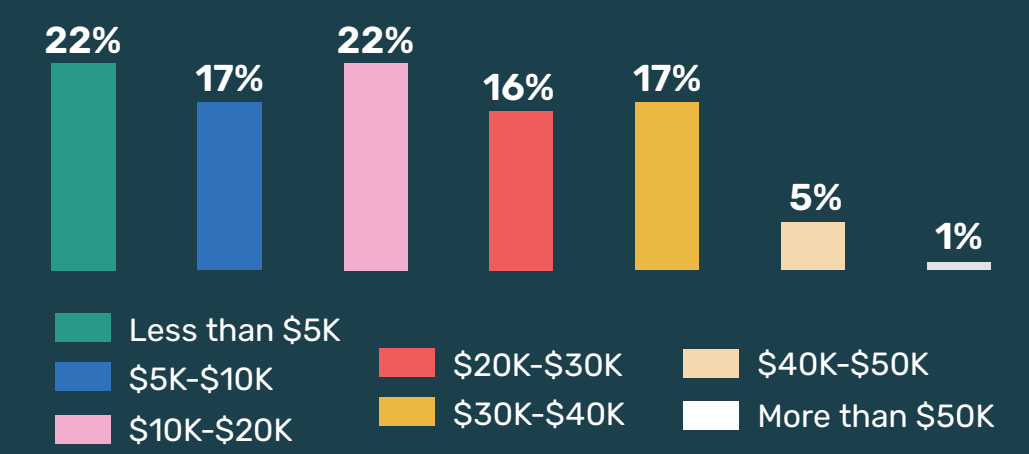
EMPLOYMENT AND INCOME

- Douglass Court
- Parkside Homes
- Frederick Manor

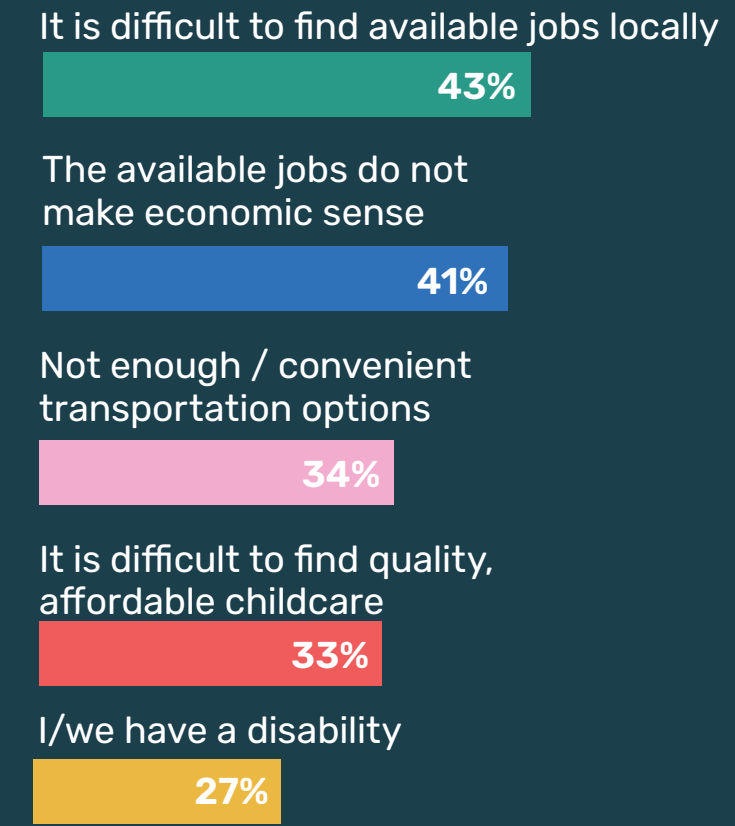
WHAT IS YOUR CURRENT EMPLOYMENT STATUS?



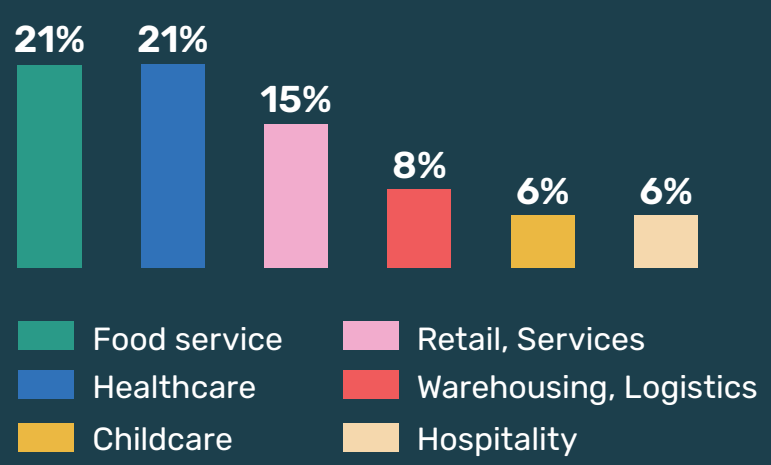
WHAT WAS YOUR HOUSEHOLD INCOME LAST YEAR?



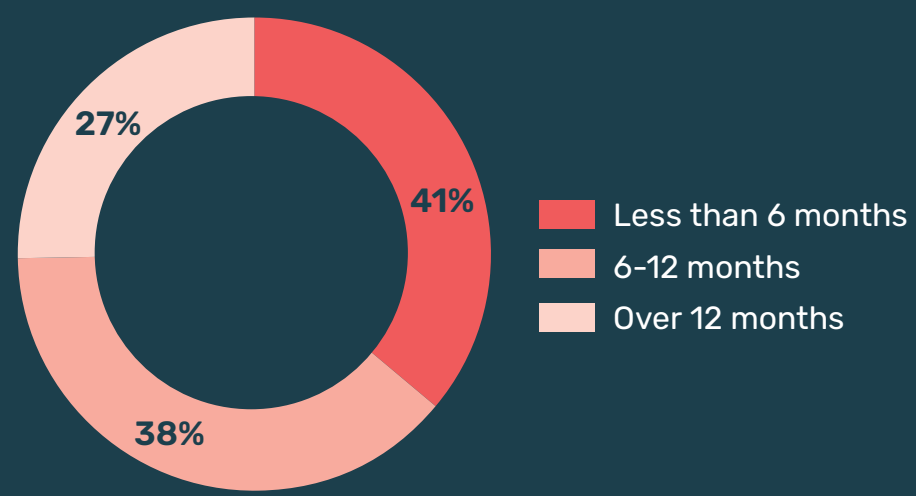
WHAT ARE BARRIERS TO EMPLOYMENT FOR YOU AND/OR YOUR FAMILY?



OF THOSE EMPLOYED, THESE ARE THE INDUSTRIES THEY WORK IN...



OF THOSE NOT EMPLOYED, THIS IS HOW LONG THEY'VE BEEN UNEMPLOYED...



MOBILITY and access to services

- Douglass Court
- Parkside Homes
- Frederick Manor

TRANSPORTATION CHALLENGES

Douglass Court

- 1 Pedestrian safety
- 2 Availability of parking
- 3 Cost of ride share services
- 4 Road conditions/maintenance

Parkside Homes

- 1 Cost of ride share services
- 2 Frequency of buses
- 3 Reliability of buses
- 4 Location and number of bus stops

Frederick Manor

- 1 Pedestrian safety
- 2 Availability of parking
- 3 Cost of ride share services
- 4 Traffic congestion

WHERE DO YOU WORK?

- 21% In the Choice Neighborhood
- 41% Other areas of Hagerstown
- 18% Washington County (outside Hagerstown)
- 14% Outside Washington County
- 3% Out of State
- 3% Remotely

WHAT ADDITIONAL STORES/SERVICES ARE NEEDED?

Douglass Court

- 1 Access to fresh foods
- 2 Quality affordable childcare
- 3 Laundromat
- 4 Mental health facilities

Parkside Homes

- 1 Access to fresh foods
- 2 Mental health facilities
- 3 Gym/fitness center
- 4 Quality affordable childcare

Frederick Manor

- 1 Gym/fitness center
- 2 Access to fresh foods
- 3 Training & workforce programs
- 4 Quality affordable childcare

Access to fresh foods is one of the most mentioned services that are needed...

>>

26%
of respondents
who experience food insecurity named difficulty to get to the store as the primary barrier

HOW DO YOU GET TO WORK?

- 75% Drive my own car
- 9% Ride with a friend or family
- 7% Rideshare service
- 6% Walk
- 3% Bus



WHAT PARKS OR OPEN SPACES DO YOU VISIT MOST?

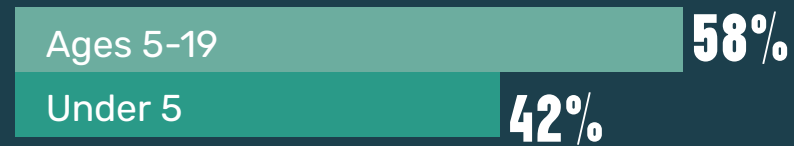
- #1 Hagerstown City Park
- #2 Fairgrounds Park
- #3 Pangborn Park
Wheaton Park
Hager Park

CHILDREN and education

Douglass Court
Parkside Homes
Frederick Manor

DO YOU HAVE CHILDREN IN YOUR HOUSEHOLD?

Douglass Court



Parkside Homes



Frederick Manor

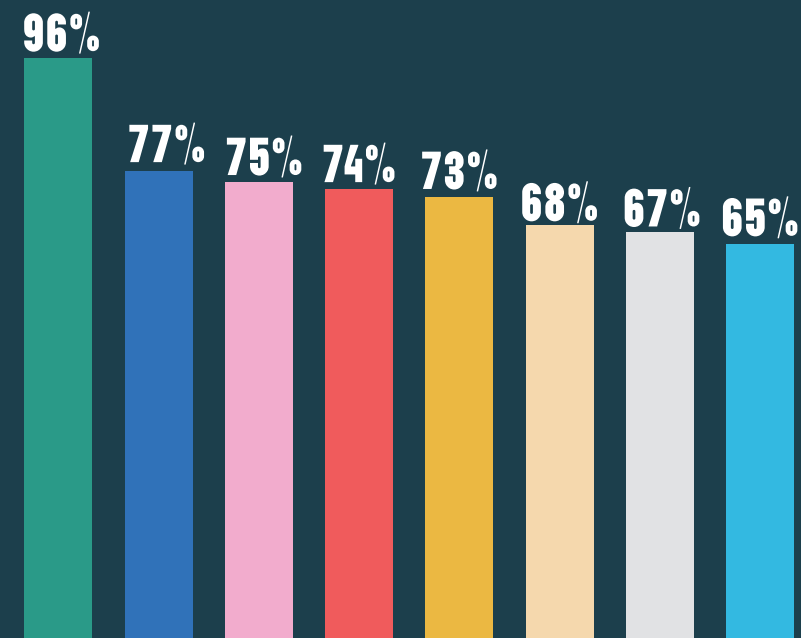


"MY CHILD DOESN'T ATTEND AN EARLY CHILDHOOD OR PRE-K PROGRAM BECAUSE"...



WHAT IS YOUR OUTLOOK ON YOUR CHILD'S EDUCATION?

(Only respondents with children were asked this question. The chart reflects the % of respondents who "agreed" with the following statements)



- I take an active role in my child's education
- My child is safe at school
- I feel valued as a partner in my child's education
- School staff respect my child
- My child is safe on the way to and from school
- My child is engaged, motivated, and/or inspired at school
- My child has access to quality trauma informed mental and behavioral health support at school
- My child receives high quality education at school

ONLY 49% of respondents report their children attend an early childhood or pre-K program

WHAT ARE THE PRESSING ISSUES FACING YOUTH IN THE NEIGHBORHOOD TODAY?

Graphic is a reflection of the responses with the most consensus.

MENTAL HEALTH **BULLYING**
ACCESS TO RESOURCES
BELONGING **SUBSTANCE USE**

WHAT ADDITIONAL SERVICES WOULD HELP YOUR CHILDREN DO WELL IN SCHOOL?

Douglass Court

- Homework club on site
- Recreational activities
- Anti-bullying support

Parkside Homes

- Recreational activities
- Summer programming
- Regular after-school programs

Frederick Manor

- Anti-bullying support
- Summer programming
- Regular after-school programs

HEALTH, WELLNESS, AND FOOD ACCESS

■ Douglass Court
■ Parkside Homes
■ Frederick Manor

DO YOU HAVE HEALTH INSURANCE?

89% Douglass Court

89% Parkside Homes

97% Frederick Manor

DO THE CHILDREN IN YOUR HOUSEHOLD HAVE HEALTH INSURANCE?

100% Douglass Court

100% Parkside Homes

93% Frederick Manor

WHAT ARE SOME WAYS OF IMPROVING YOUR ACCESS TO HEALTHCARE?

Douglass Court

- 1** Locating more healthcare facilities in the neighborhood
- 2** Extending the hours of health facilities in the neighborhood
- 3** Providing more services that I actually need

Parkside Homes

- 1** Funding for prescriptions
- 2** Improving transportation to major healthcare facilities
- 3** Extending the hours of health facilities in the neighborhood

Frederick Manor

- 1** Extending the hours of health facilities in the neighborhood
- 2** Locating more healthcare facilities in the neighborhood
- 3** Improving transportation to major healthcare facilities

ARE THERE ADEQUATE AFFORDABLE HEALTHCARE FACILITIES NEARBY?

Douglass Court



Parkside Homes



Frederick Manor



IN A TYPICAL YEAR, RESIDENTS TAKE PART IN THE FOLLOWING:



98% Have an annual medical check-up



82% Have at least one dental cleaning



83% Get vaccinations



57% Take part in a free health screening

HAVE YOU OR ANYONE IN YOUR HOUSEHOLD BEEN DIAGNOSED WITH ANY HEALTH CONDITIONS?

41% Depression/anxiety/post-traumatic stress

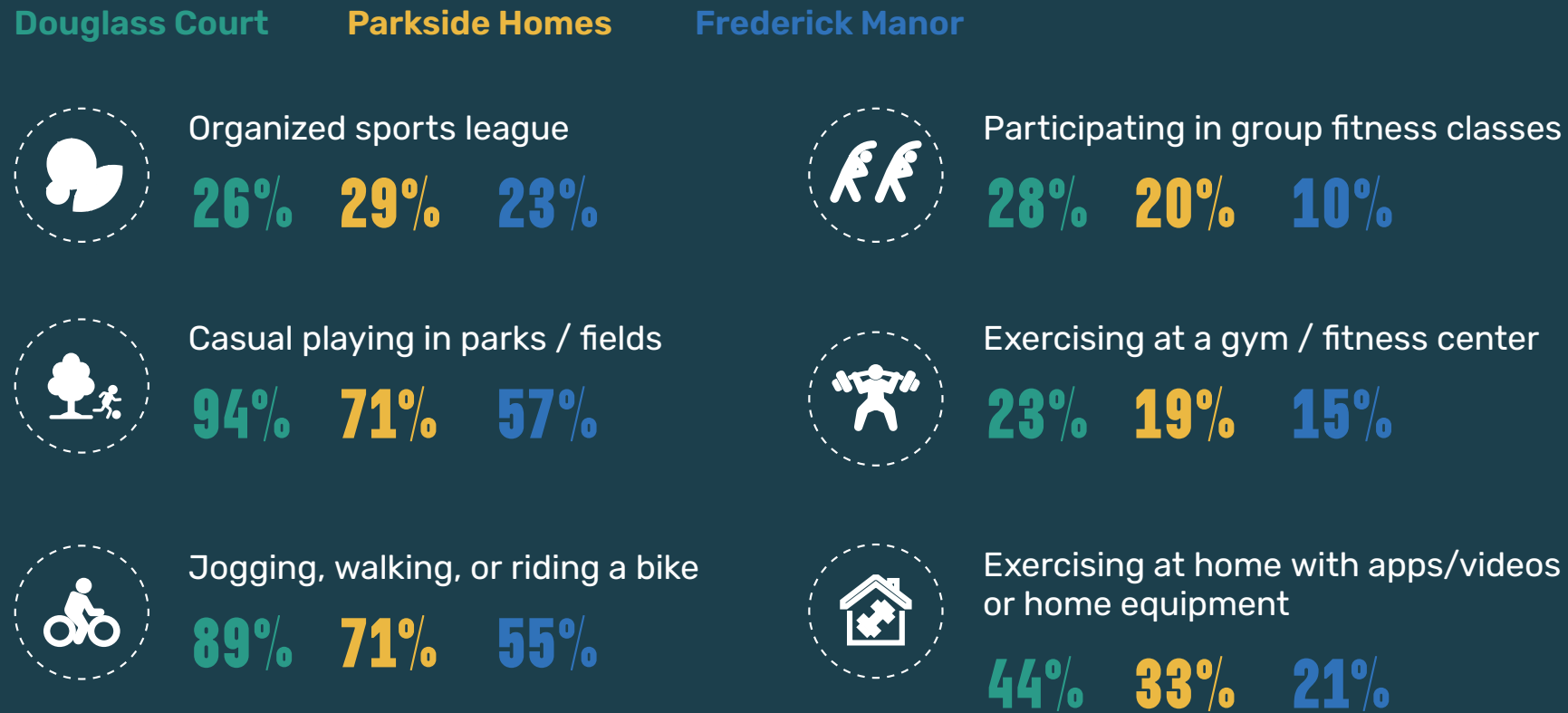
30% Asthma/breathing issues

27% Mental/behavioral health

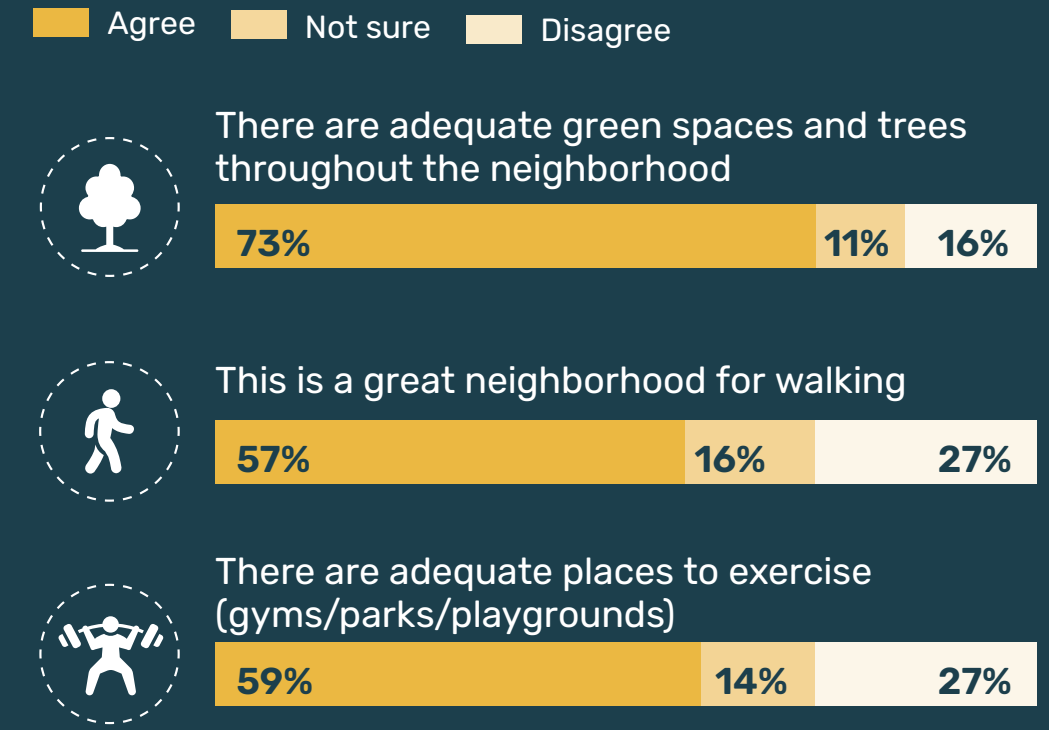
HEALTH, WELLNESS AND FOOD ACCESS

■ Douglass Court
■ Parkside Homes
■ Frederick Manor

CHILDREN TAKING PART IN THE FOLLOWING ACTIVITIES FEW TIMES A WEEK:



DO YOU AGREE WITH THE FOLLOWING COMMUNITY HEALTH STATEMENTS?



ACTIVITIES THAT HEADS OF HOUSEHOLD PARTICIPATES IN:

- 42% Jogging/walking/riding a bike outside
- 35% Casual playing in parks/fields
- 24% Exercising at home with apps/videos or home equipment

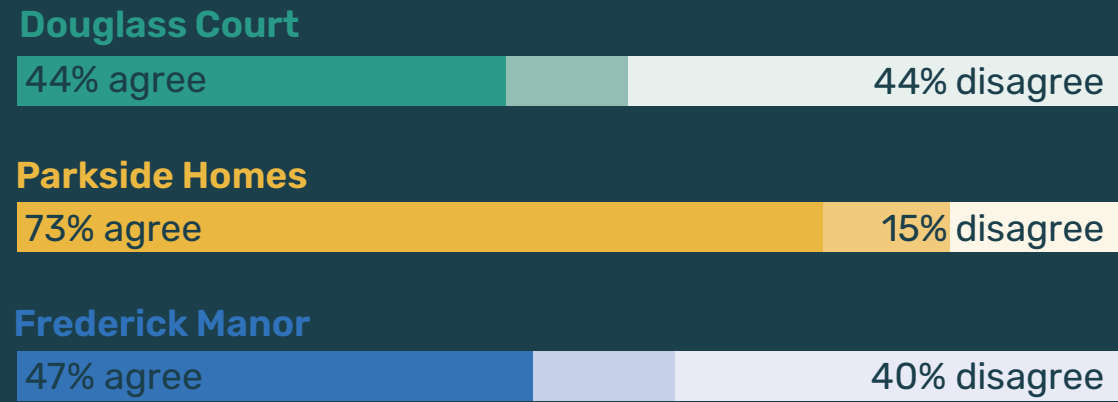
IF THEY DO NOT PARTICIPATE, THESE ARE THE BARRIERS:

- 33% Do not have enough time
- 25% I am not interested
- 23% Cost is too high

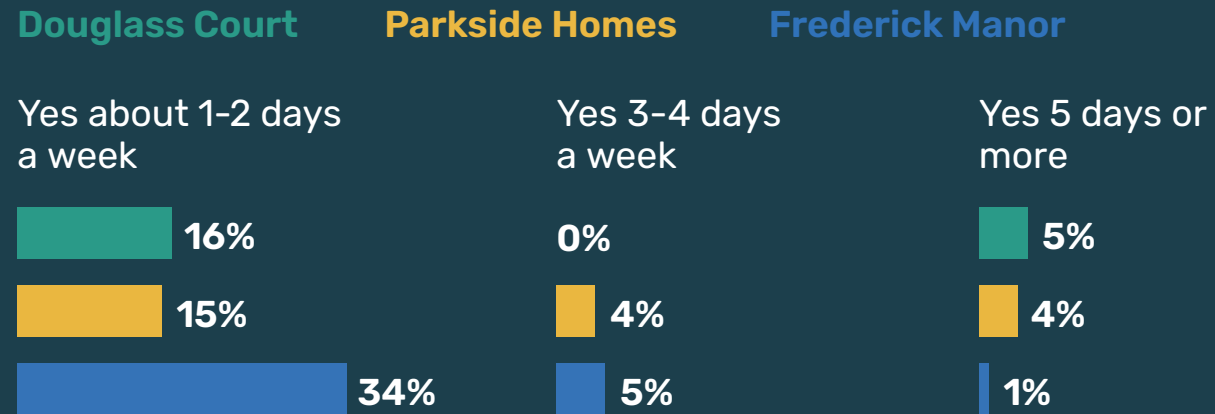
HEALTH, WELLNESS AND FOOD ACCESS

Douglass Court
Parkside Homes
Frederick Manor

HIGH QUALITY FRESH FRUITS, VEGETABLES, AND FOOD ARE WIDELY AVAILABLE AND AFFORDABLE



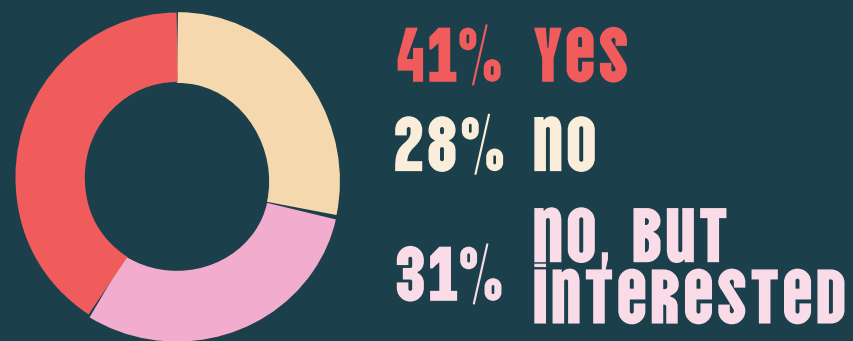
DURING A REGULAR WEEK, ARE THERE TIMES THAT YOU FIND THERE IS NOT ENOUGH FOOD TO EAT IN YOUR HOUSEHOLD?



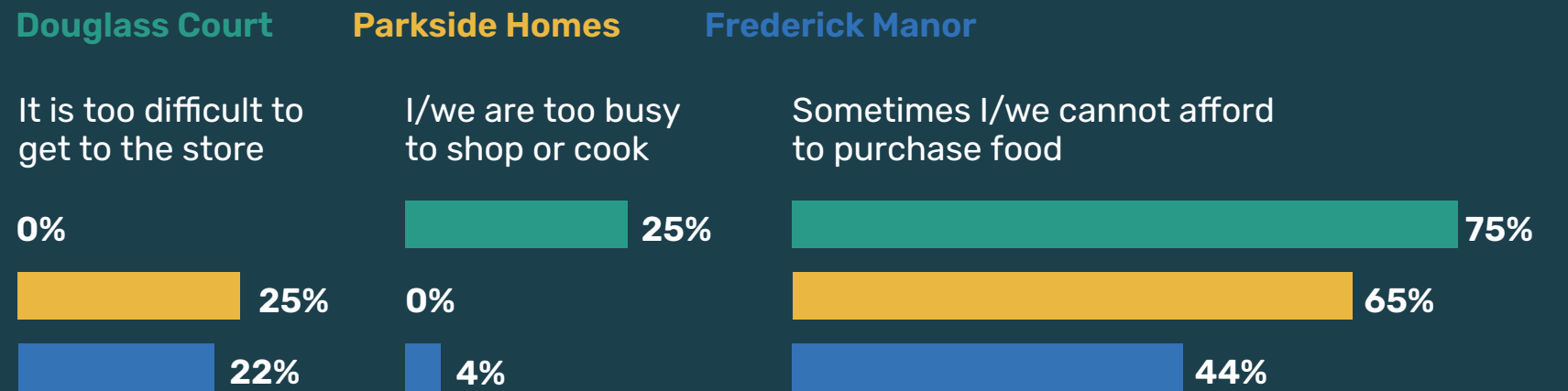
59%
of respondents
have utilized free or low-cost resources in the last year

77%
of respondents
have received SNAP/WIC benefits in the last year

DO YOU EVER SHOP FOR FRUIT/VEGETABLES AT A LOCAL FARMERS' MARKET?



IF YOU HAVE EXPERIENCED FOOD INSECURITY, WHAT IS THE MAIN REASON THAT YOU HAVE NOT HAD ENOUGH FOOD TO EAT IN THE LAST 30 DAYS?



41%
of respondents
think that large spaces for markets (i.e., pop-ups, seasonal, farmers' market) could enhance the neighborhood

34%
of respondents
would like to see community gardens in the neighborhood

PUBLIC SAFETY

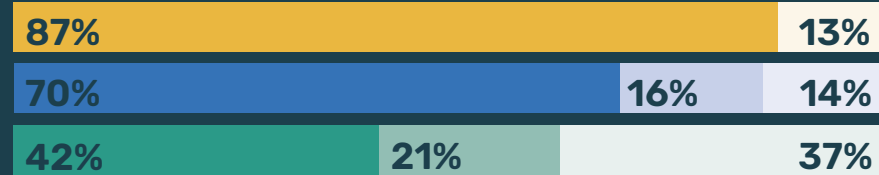
Douglass Court
Parkside Homes
Frederick Manor

SAFETY IN THE NEIGHBORHOOD

Douglass Court **Parkside Homes** **Frederick Manor**

Agree Agree Agree
Not sure Not sure Not sure
Disagree Disagree Disagree

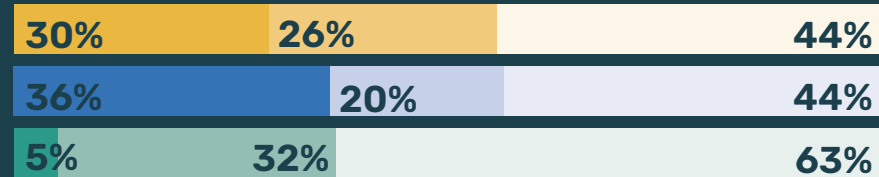
I feel safe in my neighborhood



It is safe to walk in the neighborhood during the day



I feel safe allowing my children to walk home from school



I want to be involved in making the neighborhood safer



I feel that I know my neighbors and I have a sense of belonging to the community



TOP SAFETY CONCERNS IN THE NEIGHBORHOOD

Douglass Court

- 1 People using drugs
- 2 Gun shots/gun violence
- 3 People buying and selling drugs

Parkside Homes

- 1 Gun shots/gun violence
- 2 People using drugs
- 3 Public drinking

Frederick Manor

- 1 People buying and selling drugs
- 2 People using drugs
- 3 Loitering

Parents would like more awareness for mental and behavioral health, substance abuse for children

81%
of respondents
cite belonging in the
community as an important
pillar for children

“I feel safe allowing my children to walk home from and to school, I feel that I know my neighbors and I have a sense of belonging to the community”

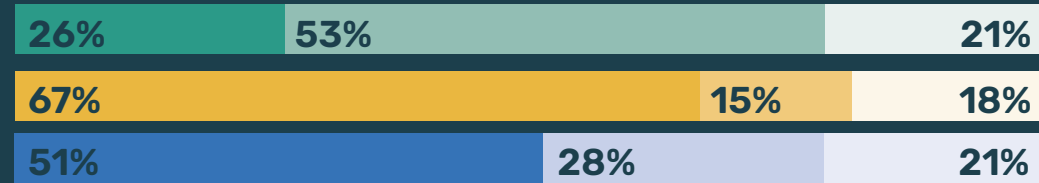
PUBLIC SAFETY

■ Douglass Court
■ Parkside Homes
■ Frederick Manor

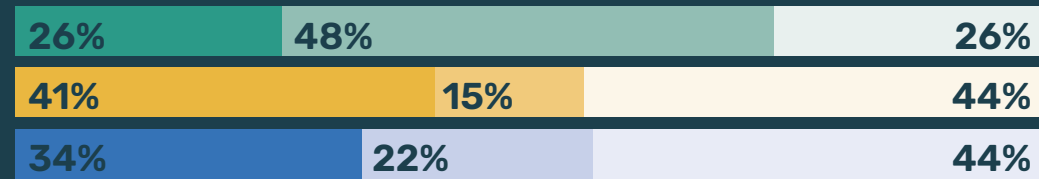
INTERACTIONS WITH PUBLIC SAFETY AND POLICE OFFICERS IN THE NEIGHBORHOOD

■ Douglass Court ■ Parkside Homes ■ Frederick Manor
■ Agree ■ Agree ■ Agree
■ Not sure ■ Not sure ■ Not sure
■ Disagree ■ Disagree ■ Disagree

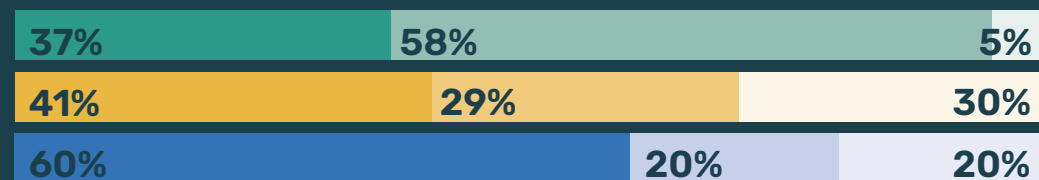
I believe that our local police treat people in my community fairly



I am satisfied with the number of officers policing in my neighborhood



When people in my neighborhood call the police the police come right away



WHAT WOULD MAKE YOU FEEL SAFER IN YOUR NEIGHBORHOOD?

Douglass Court

- 1** More security cameras in public spaces
- 2** Better lighting
- 3** Police engaging more with at-risk youth

Parkside Homes

- 1** Better lighting
- 2** More security cameras in public spaces
- 3** Police engaging more with at-risk youth

Frederick Manor

- 1** More security cameras in public spaces
- 2** Better lighting
- 3** More visible police presence (i.e., park and walk/bike patrol)

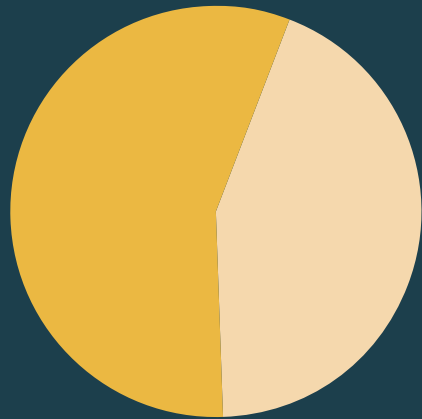
NEIGHBORHOOD SURVEY

ABOUT THE NEIGHBORHOOD

DO YOU LIVE IN THE HAGERSTOWN CHOICE NEIGHBORHOODS?

YES 57%

NO 43%



WHAT ARE THE **STRENGTHS** & **WEAKNESSES** OF THE HAGERSTOWN CHOICE NEIGHBORHOODS?

STRENGTHS

- 1 Access to Downtown
- 2 Parks & open spaces
- 3 History & culture

WEAKNESSES

- 1 Condition of buildings
- 2 People / neighbors
- 3 Housing affordability

WHAT **SOCIAL ACTIVITIES** WOULD YOU LIKE TO SEE IN THE NEIGHBORHOODS?

- 66% Safe youth-based place for teens and school-aged children
- 53% Community garden or area for individual garden plots
- 44% Central gathering place for the community

WHAT WOULD YOU LIKE TO SEE IN THE **COMMERCIAL** & **RESIDENTIAL** AREAS IN AND AROUND THE HAGERSTOWN CHOICE NEIGHBORHOODS?

- | | | |
|-----------------------------------|-----|-----|
| #1 Greater public safety presence | 61% | 63% |
| #2 Storefront improvements | 50% | 46% |
| #3 Brighter lighting | 40% | 38% |
| #4 More street trees and flowers | 40% | 37% |

CLEAR PRIORITIES

Respondents would like to see the same things in the **commercial** and **residential** areas in and around the Hagerstown choice neighborhoods.

DO YOU USE ANY OF THE FOLLOWING **PARKS & OPEN SPACES**?

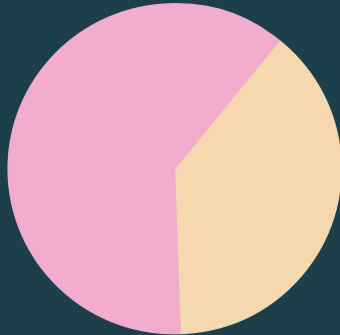
- 94% Hagerstown City Park
- 80% Fairgrounds Park
- 62% Pangborn Park
- 53% University Plaza

HOUSING IN THE CHOICE NEIGHBORHOODS

DO YOU RENT OR OWN YOUR HOME?

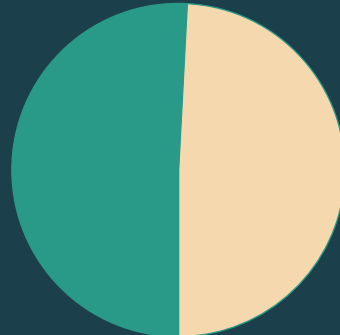
I live outside the choice neighborhoods

RENT 38%
OWN 62%



I live inside the choice neighborhoods

RENT 51%
OWN 49%



OVER 59% of current renters want to be working towards **buying a home** in the next 5 years. What will they need?



OVER 83%

Of renters identified **affordability of downpayments and homes** as barriers to homeownership.

#1 Downpayment assistance

#2 Housing Affordability

#3 Homes in safe areas

WHAT IS THE BEST HOUSING TYPE FOR THE NEIGHBORHOOD?

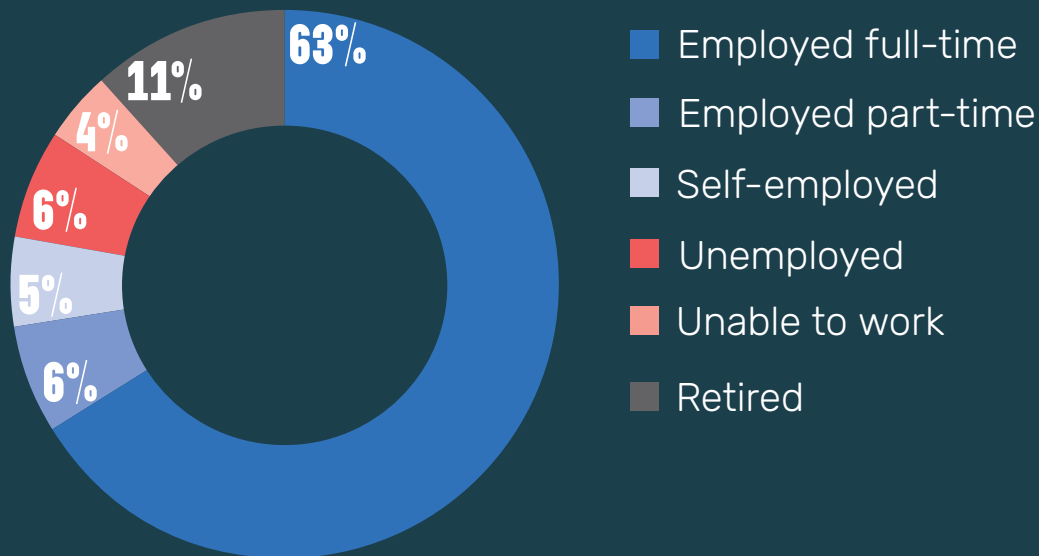
- 1** Mixed-use buildings (multiple apartments with stores and services on the ground floor)
- 2** Single family homes
- 3** Mid-rise apartment with elevators and amenity spaces for residents (20 or more units)

WHAT TYPES OF HOUSING WOULD YOU LIKE TO SEE IN YOUR NEIGHBORHOOD?

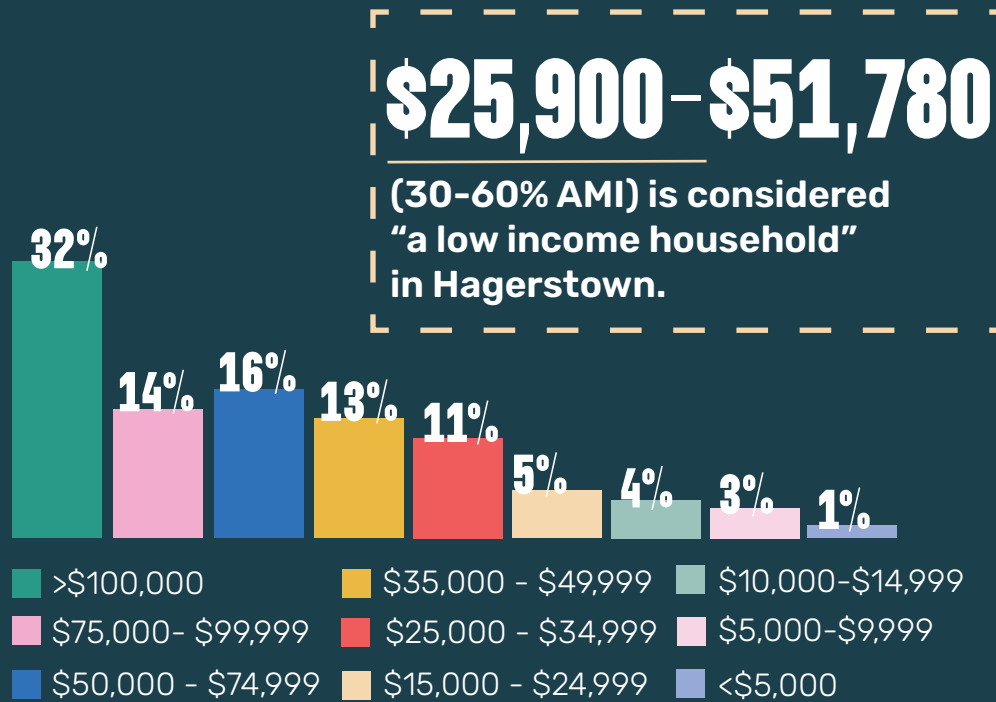
- 54%** Home renovation / modification program
- 53%** New affordable rental housing
- 46%** New homes for ownership
- 38%** New moderately price rental housing

EMPLOYMENT

WHAT IS YOUR CURRENT EMPLOYMENT STATUS?



HOUSEHOLD INCOME



BARRIERS TO EMPLOYMENT

Legend: Agree (Blue), Not sure (White), Disagree (Yellow), N/A (Grey)

"The available low-wage jobs do not make economic sense"



"It is difficult to find available jobs locally"



"It is difficult to find quality and/or affordable childcare"



"I/we have physical or mental health challenges"



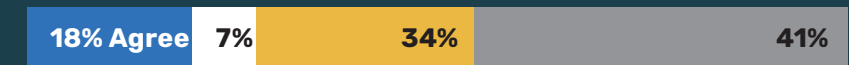
"There are not enough / convenient transportation options"



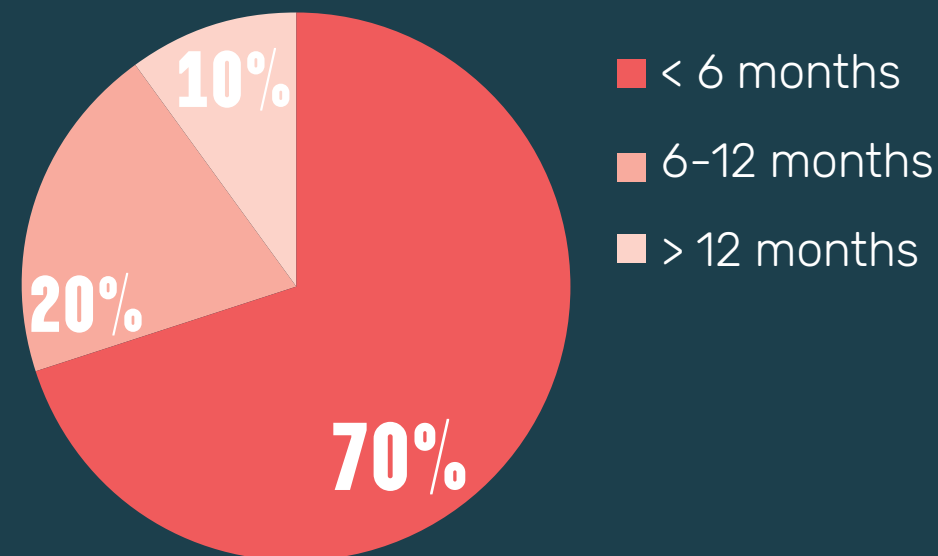
"I/we have chronic health issues like obesity, diabetes, etc"



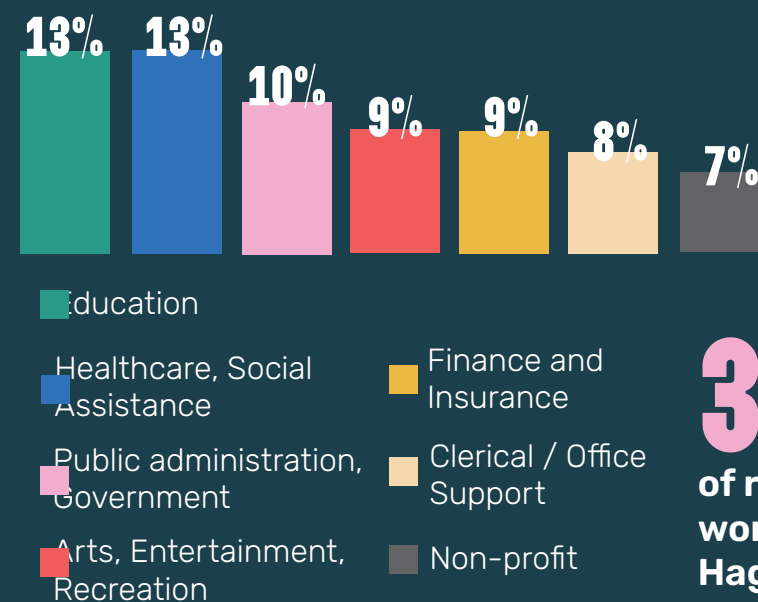
"I/we have a handicap or disability"



IF NOT EMPLOYED, HOW LONG HAS IT BEEN?



OF THOSE EMPLOYED, THESE ARE THE INDUSTRIES THEY WORK IN...



31%
of respondents work outside Hagerstown.

SAFETY

WHAT FORM OF TRANSPORTATION DO YOU USE MOST OFTEN?

82%
OF RESPONDENTS
USE A CAR AS THEIR
PRIMARY FORM OF
TRANSPORTATION



DAILY TRANSPORTATION CHALLENGES?

Top car-oriented challenges

- 60%** Road conditions / maintenance
- 56%** Road congestion / traffic
- 47%** Availability of parking

Top multi-modal challenges

- 58%** Pedestrian Safety
- 56%** Accessibility / condition of sidewalks
- 42%** Bicycle Safety

SAFETY IN THE NEIGHBORHOODS

Agree Not sure Disagree

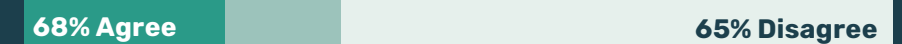
I feel safe in my neighborhood



It is safe to walk in the neighborhood during the day



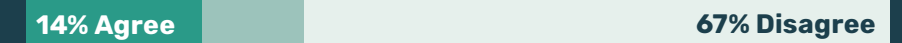
It is safe to walk in the neighborhood at night



I want to be involved in making the neighborhood safer



There are enough police on foot/bike in the neighborhood



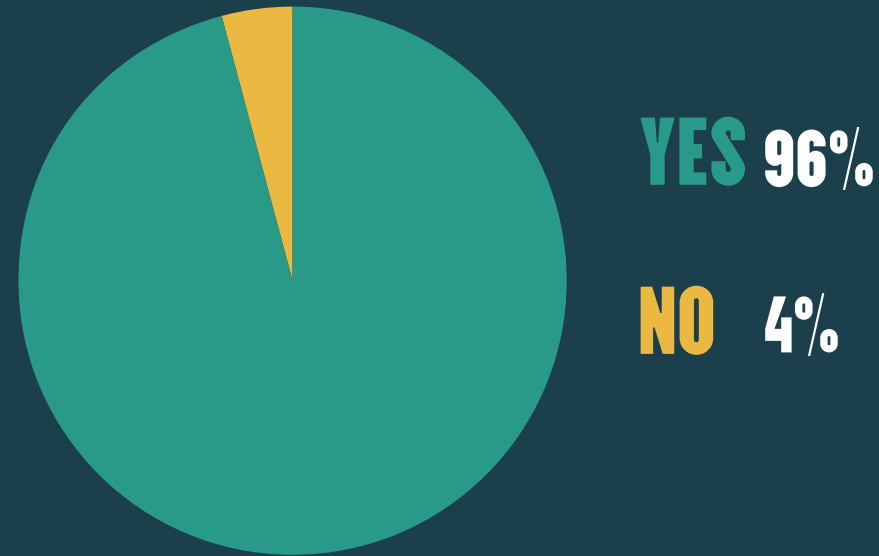
TOP SAFETY CONCERNS?

- 1 People buying and selling drugs
- 2 People using drugs
- 3 Gun shots / gun violence

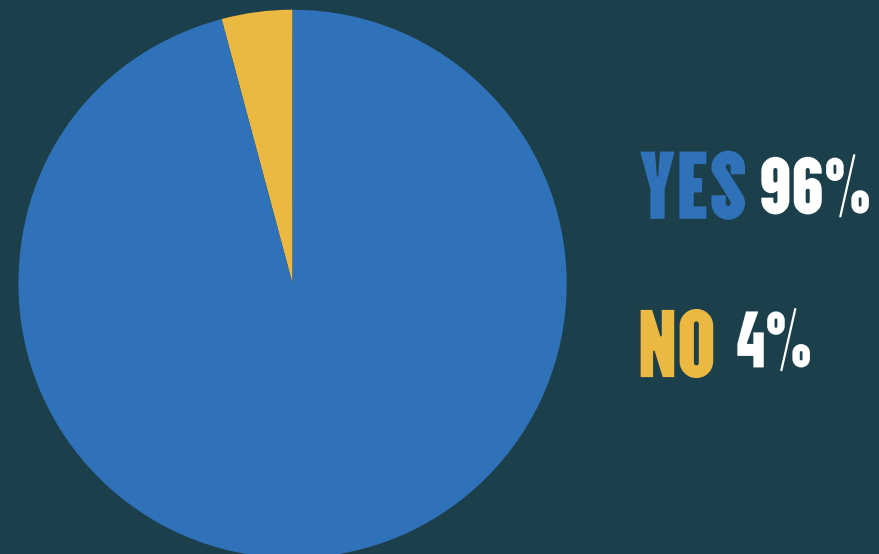
HEALTH AND WELLNESS

HEALTH INSURANCE COVERAGE

DO YOU HAVE HEALTH INSURANCE?



DO THE CHILDREN IN YOUR HOUSEHOLD HAVE INSURANCE?



HOW COULD YOUR ACCESS TO QUALITY HEALTHCARE BE IMPROVED?

- 1 I am satisfied with my healthcare
- 2 Locating more healthcare facilities in the neighborhood
- 3 Extending the hours of health facilities in the neighborhood
- 4 Being able to access affordable prescriptions

IF YOU DO NOT HAVE HEALTH INSURANCE, WHAT IS KEEPING YOU AND/OR YOUR FAMILY FROM GETTING IT?

- 70% Cost
- 20% Not sure how to get it
- 5% I (we) don't feel it is necessary
- 5% Difficulty being approved for insurance

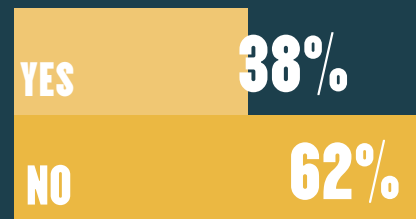
CHILDREN AND EDUCATION

DO YOU HAVE CHILDREN IN YOUR HOUSEHOLD?

Children under the age of 5



Children between 5 and 19

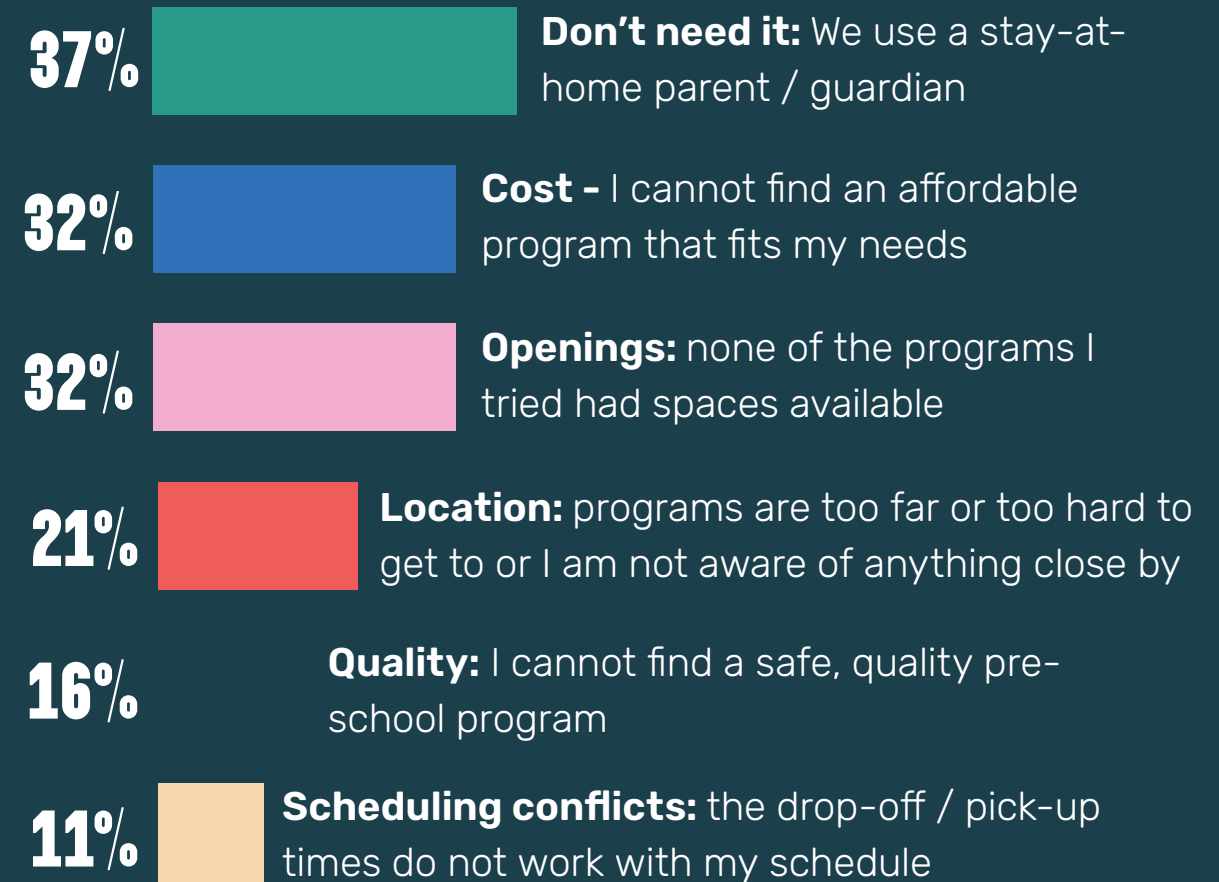


WHAT ARE THE PRESSING ISSUES FACING YOUTH IN THE NEIGHBORHOOD TODAY?

Graphic is a reflection of the responses with the most consensus.



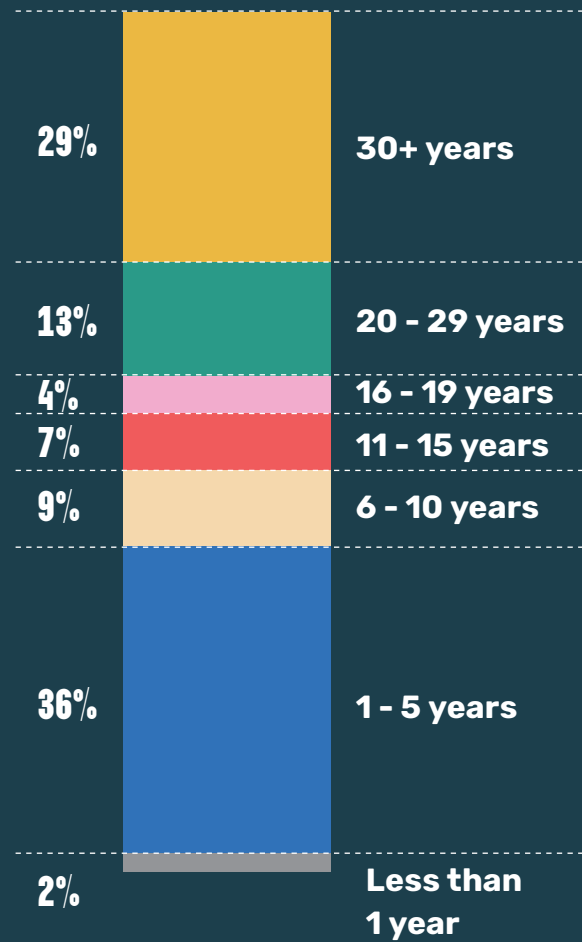
"MY CHILD DOESN'T ATTEND AN EARLY CHILDHOOD OR PRE-K PROGRAM BECAUSE" ...



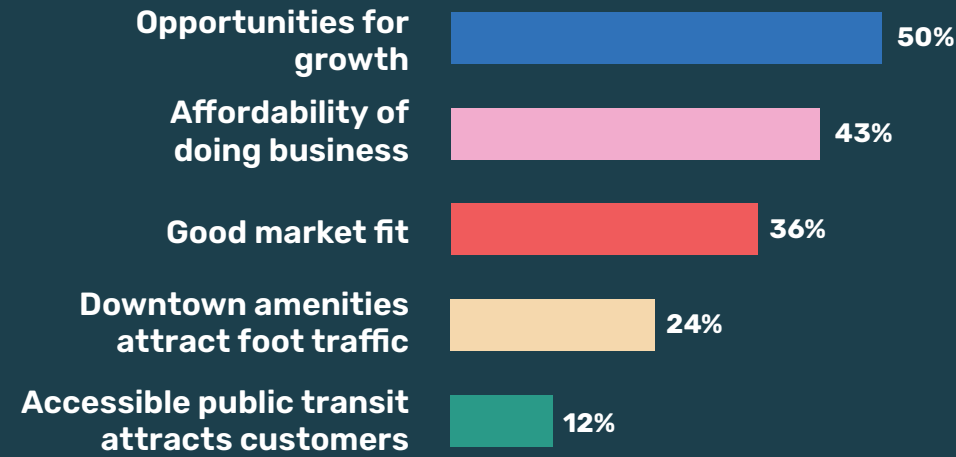
Business Owner Survey

ABOUT BUSINESSES IN THE CHOICE NEIGHBORHOODS

HOW MANY YEARS HAS YOUR BUSINESS BEEN IN HAGERSTOWN?



WHAT ARE THE PRIMARY REASONS WHY YOU DECIDED TO LOCATE YOUR BUSINESS IN HAGERSTOWN?

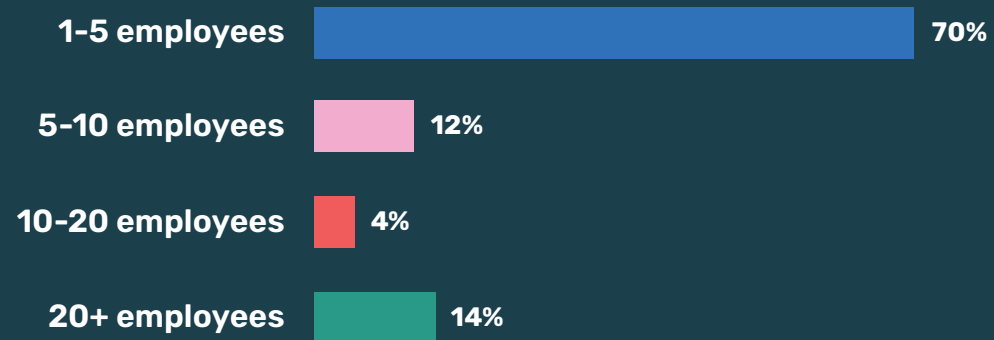


TYPE OF BUSINESSES IN THE NEIGHBORHOOD:

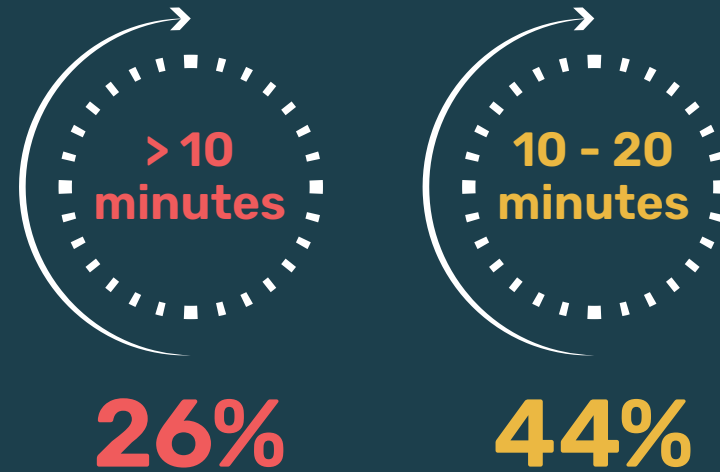


ABOUT EMPLOYEES WORKING IN THE CHOICE NEIGHBORHOODS

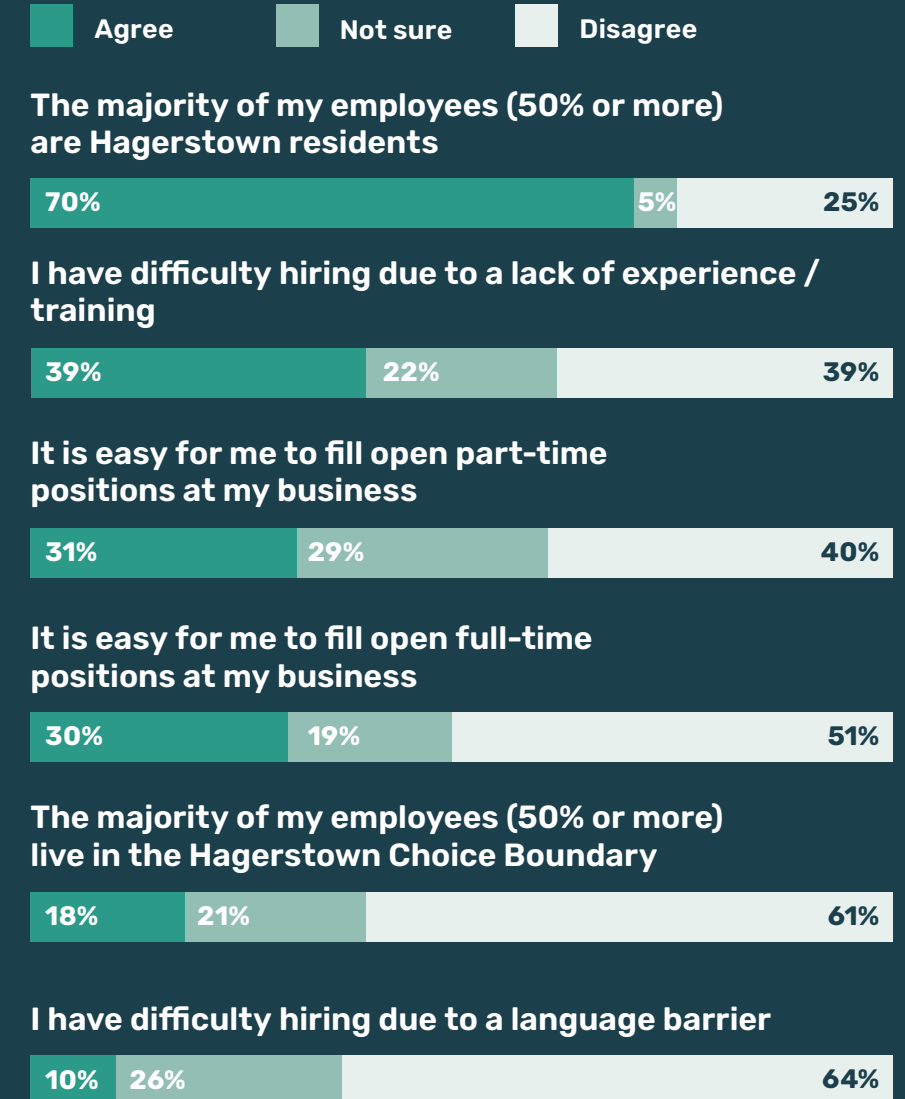
HOW MANY INDIVIDUALS DO YOU EMPLOY FULL-TIME?



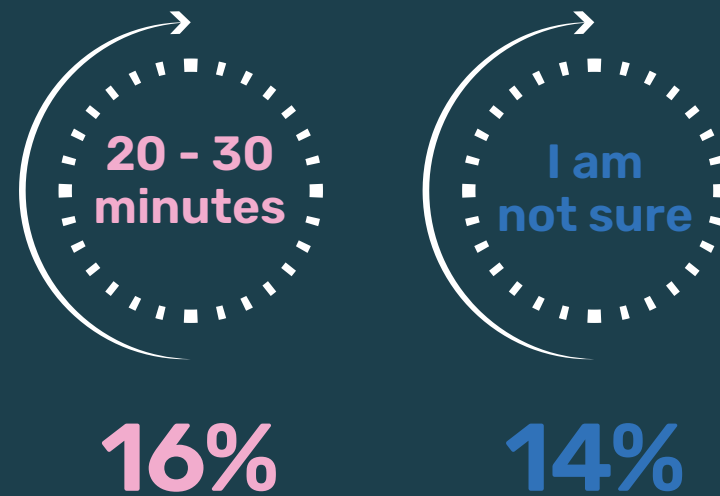
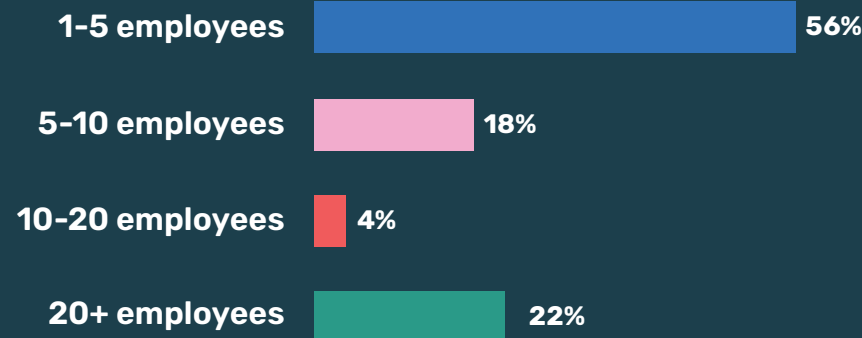
HOW LONG IS YOUR EMPLOYEES' COMMUTE TO WORK?



EMPLOYEES AND HIRING OPPORTUNITIES:

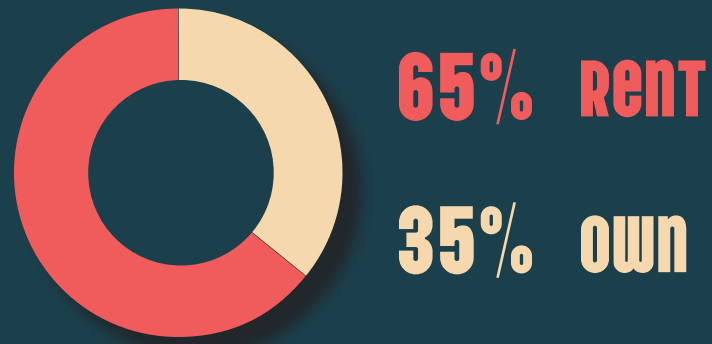


HOW MANY INDIVIDUALS DO YOU EMPLOY PART-TIME?

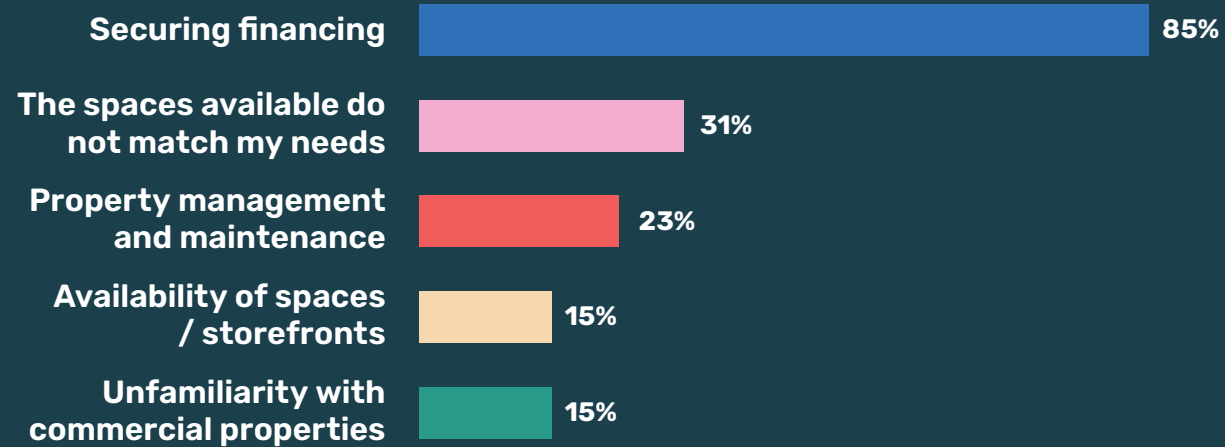


THE COST OF DOING BUSINESS

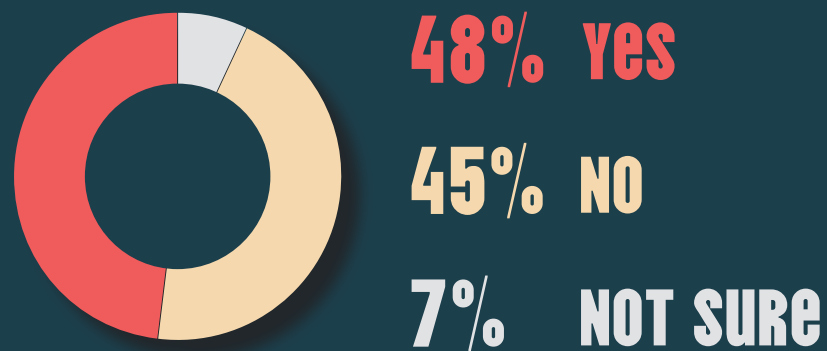
DOES YOUR BUSINESS OWN OR RENT THE SPACE?



IF YOU ARE INTERESTED IN BECOMING AN OWNER BUT HAVE NOT YET, WHAT IS PREVENTING YOU?



IF YOU CURRENTLY RENT YOUR SPACE/BUILDING, ARE YOU INTERESTED IN BECOMING AN OWNER?



HOW EASY IS IT FOR YOU TO MEET YOUR CURRENT BUSINESS COST AND EXPENSES/RENT OR MORTGAGES/TAXES AND UTILITIES?



86% of respondents are looking to invest in their business in to attract additional customers

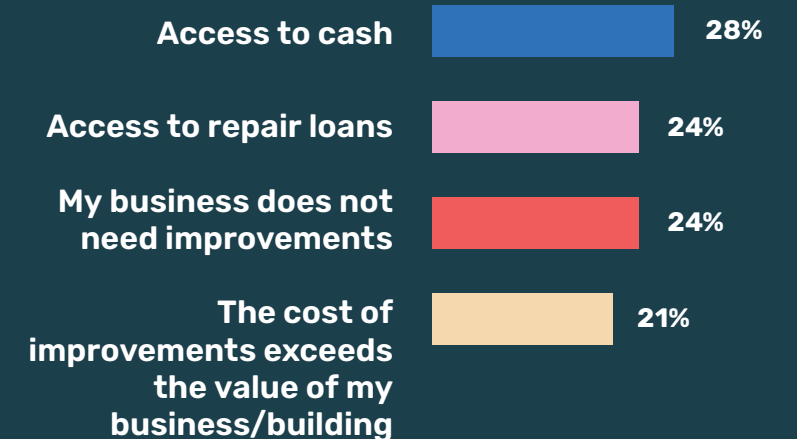
68% of respondents are going to be maintaining operations primarily the same as last year

IMPROVEMENTS

WHAT, IF ANY, PHYSICAL IMPROVEMENTS DOES YOUR BUSINESS/BUILDING CURRENTLY NEED?

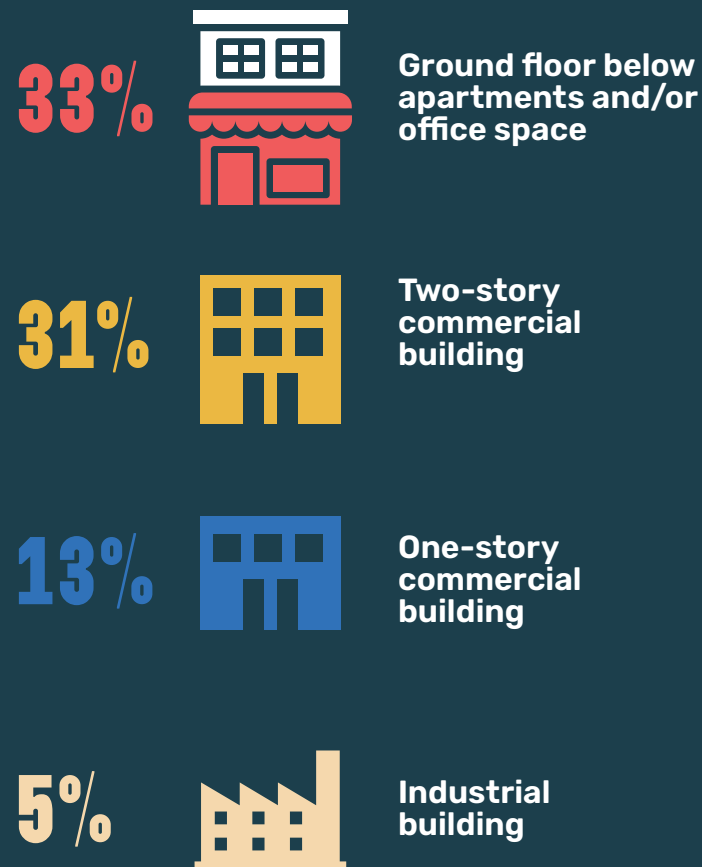


IF PHYSICAL IMPROVEMENTS ARE NEEDED, WHAT MAY BE PREVENTING YOU FROM IMPROVING THE PHYSICAL CONDITIONS OF YOUR BUSINESS?



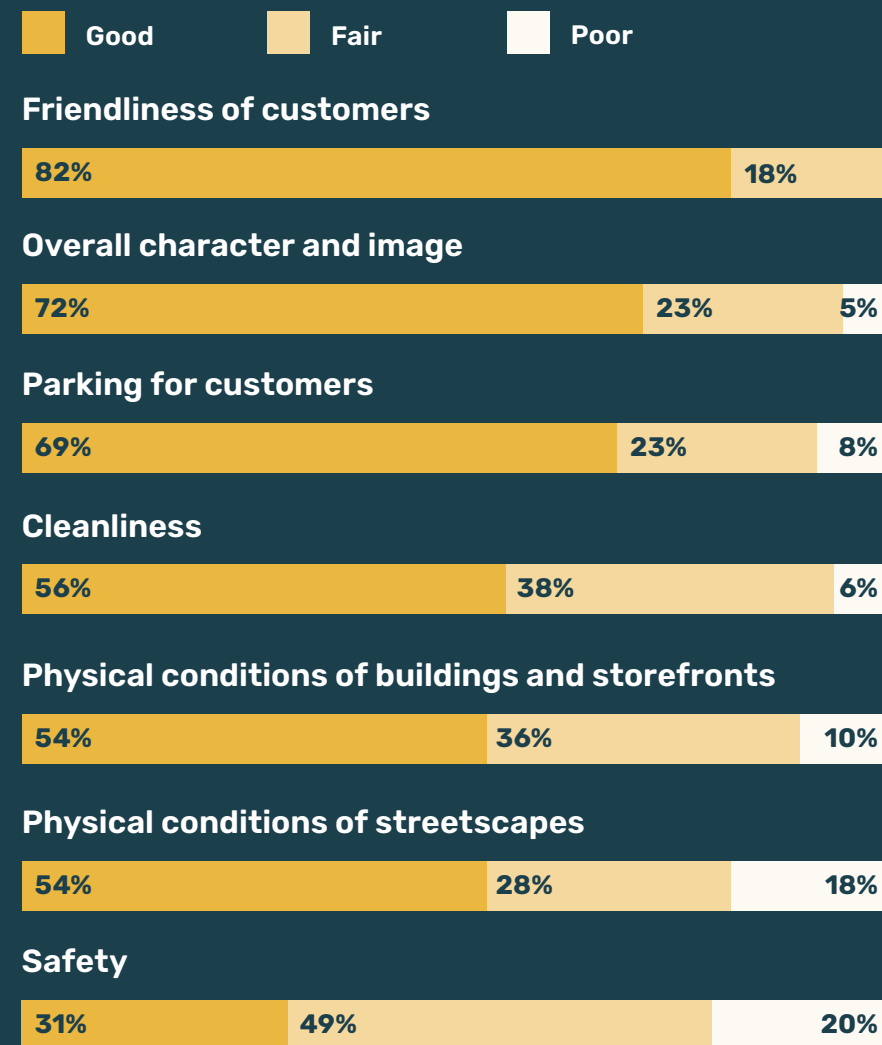
ABOUT THE NEIGHBORHOOD AND LOCATION OF BUSINESSES IN HCN

IN WHAT TYPE OF BUILDING IS YOUR BUSINESS LOCATED?



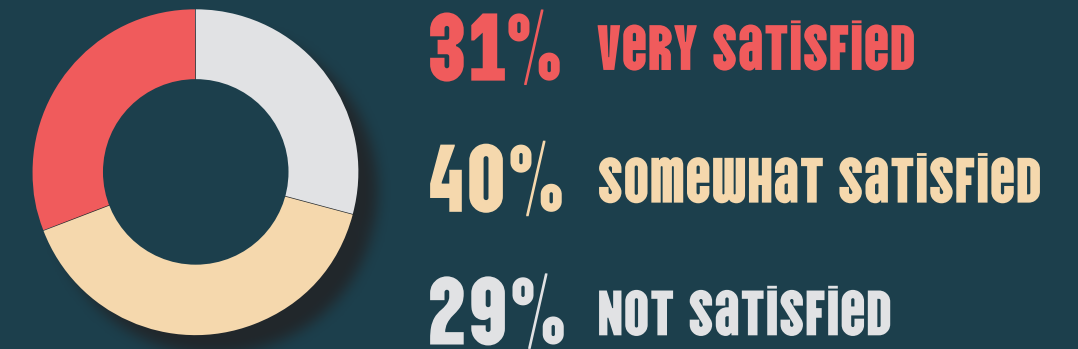
56% of respondents are **very satisfied** with the physical location of their business.

HOW WOULD YOU RATE EACH OF THE FOLLOWING ASPECTS OF THE AREA WHERE YOUR BUSINESS IS LOCATED?

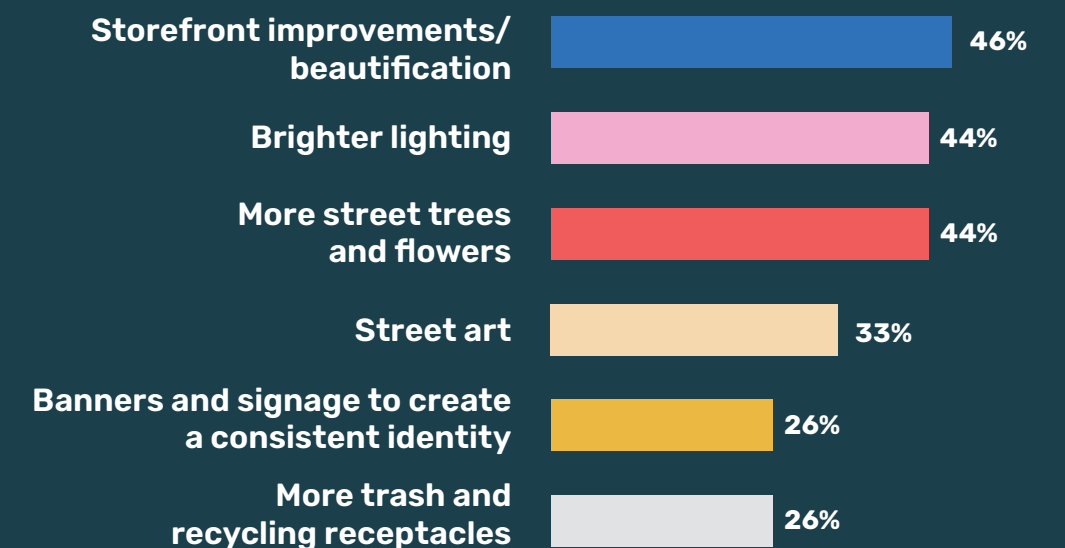


82% of respondents **agree** that their business is located in an area with **friendly customers** but **only 31%** agree that their business is located in a **safe area**.

HOW SATISFIED ARE YOU WITH THE OPPORTUNITIES THAT DOWNTOWN HAGERSTOWN OFFERS TO YOUR BUSINESS?



WHAT IMPROVEMENTS DO YOU THINK SHOULD BE MADE TO THE DOWNTOWN COMMERCIAL CORRIDORS TO MAKE THEM MORE INVITING?



**RESIDENT needs assessment,
NEIGHBORHOOD SURVEY, and
BUSINESS OWNER SURVEY comparison**

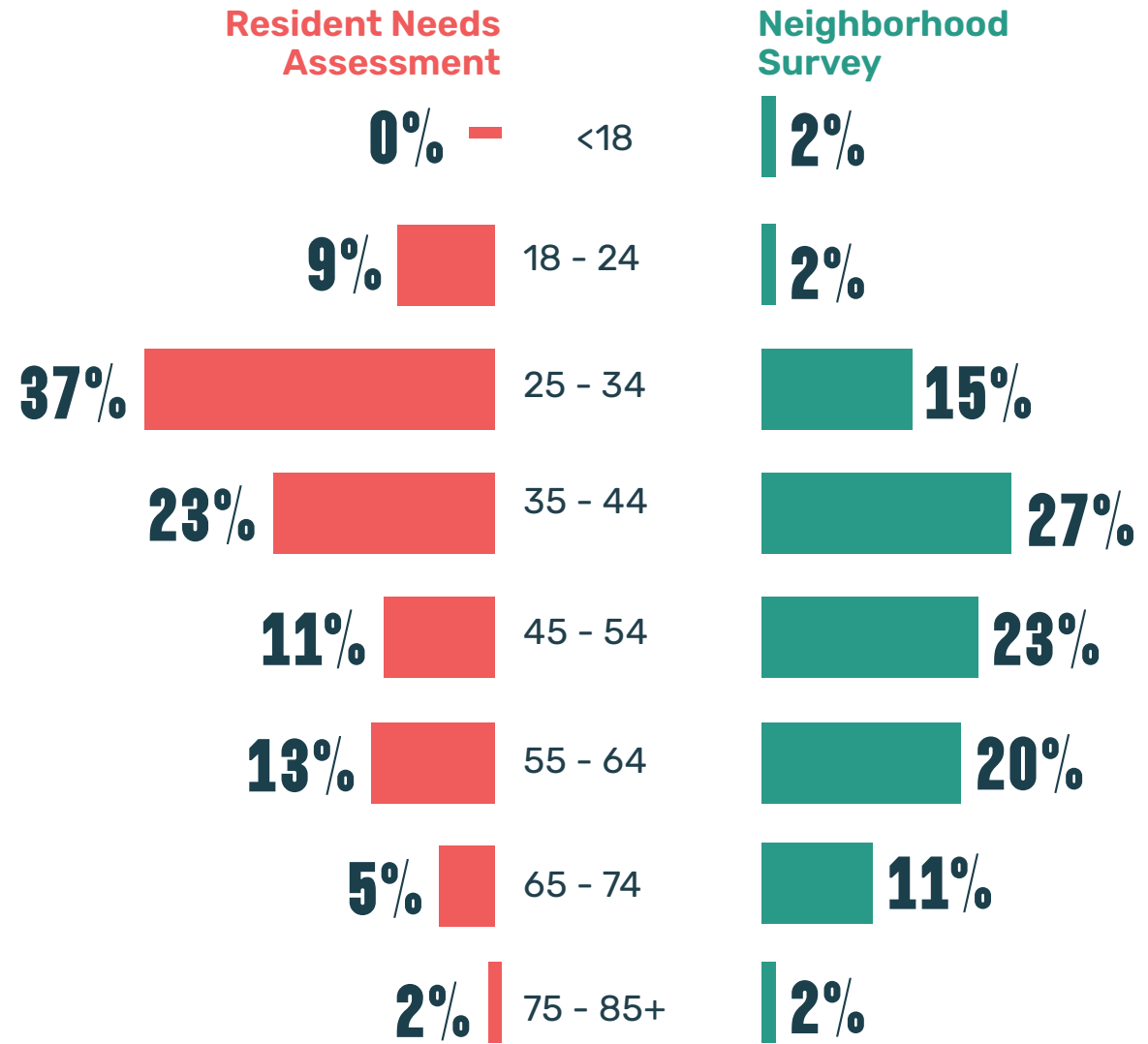
DEMOGRAPHICS OF THOSE WHO TOOK THE SURVEY

Resident Needs Assessment
Neighborhood Survey

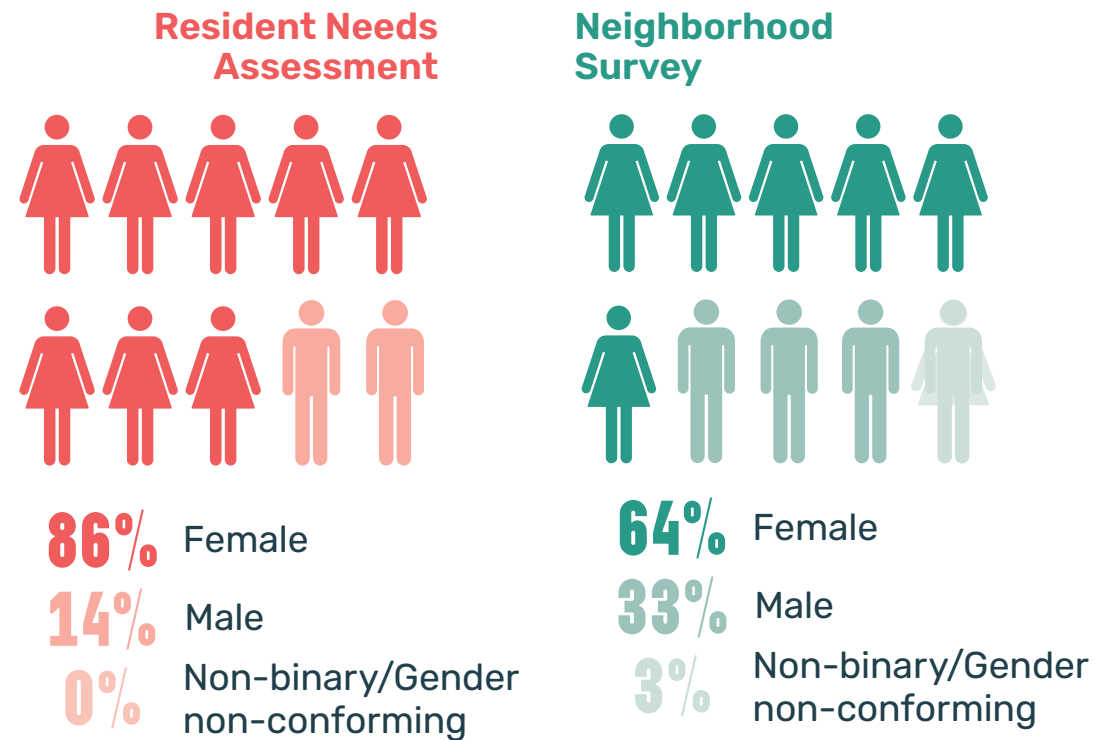
RACE OF SURVEY RESPONDENTS

Race	Resident Needs Assessment	Neighborhood Survey
Black/African-American	55%	9%
White	35%	75%
Hispanic/Latino	2%	4%
American Indian/Alaska native/Asian	2%	1%
Two or more races	2%	5%
Not specified	3%	6%

AGE CATEGORY OF SURVEY RESPONDENTS



GENDER OF SURVEY RESPONDENTS



HOUSEHOLD INCOME OF SURVEY RESPONDENTS

99% of housing site residents & **42%** of neighborhood residents reported a household income of below \$50,000 (Hagerstown AMI is \$25,900-\$51,100)

NEIGHBORHOOD PERCEPTION

■ Resident Needs Assessment
■ Neighborhood Survey
■ Business Survey

WHAT ARE THE STRENGTHS OF THE NEIGHBORHOOD?

Resident Needs Assessment	Neighborhood Survey	Business Survey
#1 My neighbors, my community	#1 Parks and open spaces	#1 Opportunities for growth
#2 Parks and open spaces	#2 Access to downtown	#2 Affordability of doing business
#3 Access to downtown	#3 History and culture	#3 Good market fit

PARKS RESIDENTS USE THE MOST

- #1 Hagerstown City Park
- #2 Fairgrounds Park
- #3 Pangborn Park

93%
 of housing site residents
would like to live in a “safe, stable, family-friendly neighborhood”
 BUT
OVER 50%
 identified “quality affordable childcare” as one of the neighborhood’s greatest challenge

WHAT IMPROVEMENTS WOULD YOU LIKE TO SEE IN THE COMMERCIAL IN AND AROUND THE HAGERSTOWN CHOICE NEIGHBORHOODS?

Resident Needs Assessment	Neighborhood Survey	Business Survey
■ 44% Better lighting	■ 61% Greater public safety presence	■ 46% Storefront improvements/beautification
■ 32% Benches	■ 50% Storefront improvements	■ 44% Brighter lighting
■ 30% Greater public safety presence	■ 40% Brighter lighting	■ 44% More street trees and flowers
■ 27% Bus stop improvements	■ 40% More street trees and flowers	■ 33% Street art

82%
 of business owners
agree that their business is located in an area with friendly customers,
 BUT
ONLY 31%
agree that their business is located in a safe area

HOUSING AND ACCESS TO SERVICES

Resident Needs Assessment
Neighborhood Survey

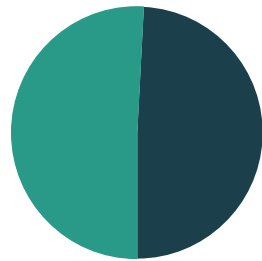
DO YOU RENT OR OWN YOUR HOME?

Neighborhood Survey

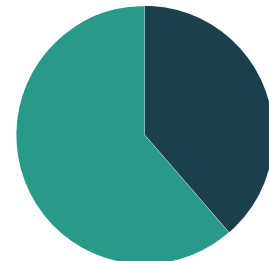
I live INSIDE
the Choice Neighborhoods

I live OUTSIDE
the Choice Neighborhoods

RENT 51%
OWN 49%



RENT 38%
OWN 62%



70%
of housing site
residents

&

59%
of neighborhood
residents who are renters

would like to work towards
homeownership in the next five years

WHAT PROGRAMS COULD HELP YOU WORK TOWARDS HOMEOWNERSHIP?



Resident Needs Assessment

#1 Downpayment assistance

#2 Homebuyer education

#3 Budgeting support

Neighborhood Survey

#1 Downpayment assistance

#2 Housing affordability

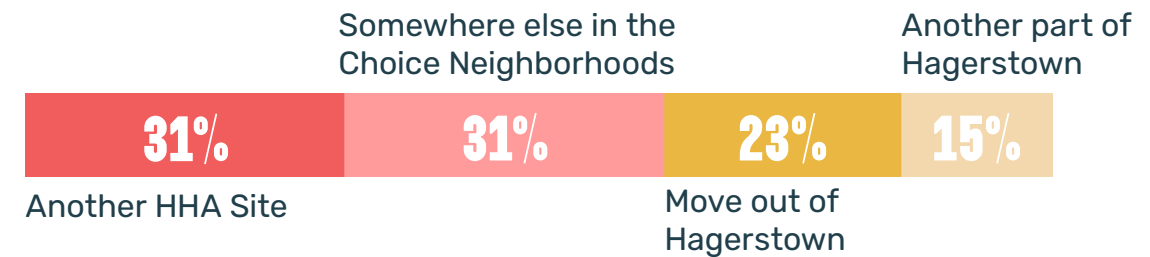
#3 Homes in safe areas

HOW DO YOU FEEL ABOUT RETURNING TO YOUR RESIDENCE POST-REDEVELOPMENT?

88% Most residents would like to return to their current housing site post redevelopment

77% of those who would prefer permanent relocation, want to stay in Hagerstown

Of those who prefer permanent relocation:



WHAT DAILY TRANSPORTATION CHALLENGES DO YOU EXPERIENCE?

Resident Needs Assessment

36% Pedestrian safety

35% Availability of parking

34% Road congestion/traffic

32% Road conditions/maintenance

Neighborhood Survey

60% Road conditions/maintenance

58% Pedestrian safety

56% Accessibility/condition of sidewalks

56% Road congestion/traffic

HOUSING AND ACCESS TO SERVICES

HOW DO YOU FEEL ABOUT CREATING A MIX OF HOUSING ON-SITE?

Resident Needs Assessment

- 54%** “I like the idea of a mixed-income community as long as there is still plenty of affordable housing.”
- 24%** “Sounds like a good idea.”
- 22%** “I would prefer only affordable housing on-site at Douglass Court, Parkside Homes, and Frederick Manor.”

WHAT IS THE BEST HOUSING TYPE FOR THE NEIGHBORHOOD?

Neighborhood Survey

- #1** Mixed-use buildings (multiple apartments with stores and services on the ground floor)
- #2** Single family homes
- #3** Mid-rise apartment with elevators and amenity spaces for residents (20 or more units)

WHAT TYPES OF HOUSING WOULD YOU LIKE TO SEE IN YOUR NEIGHBORHOOD?

Resident Needs Assessment

- 75%** New affordable rental housing
- 59%** Home renovation/modification program
- 44%** New homes for ownership
- 36%** Supportive/transitional housing

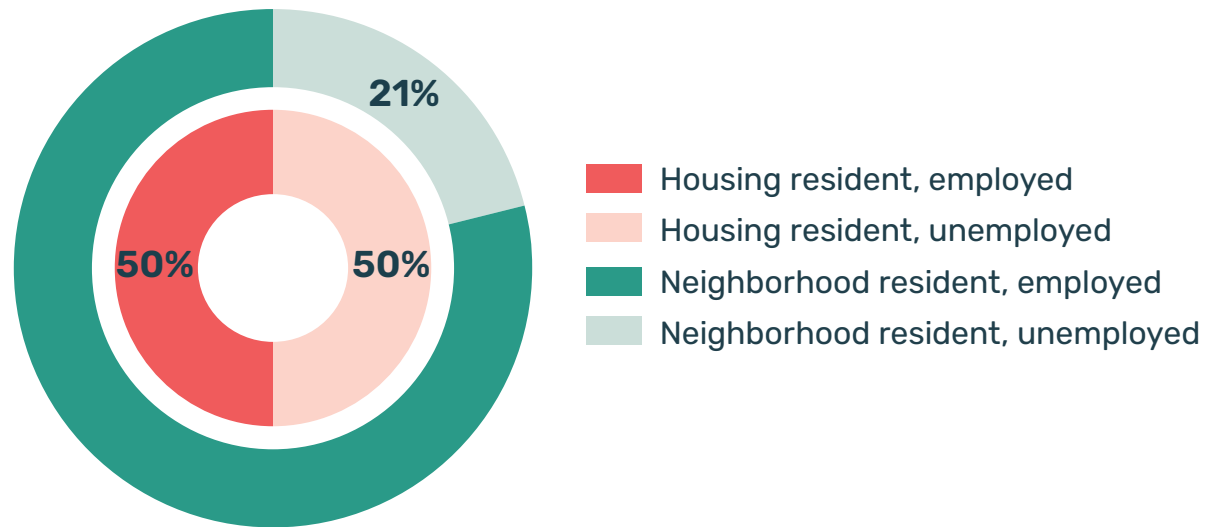
Neighborhood Survey

- 54%** Home renovation/modification program
- 53%** New affordable rental housing
- 46%** New homes for ownership
- 38%** New moderately price rental housing

EMPLOYMENT IN THE CHOICE NEIGHBORHOODS

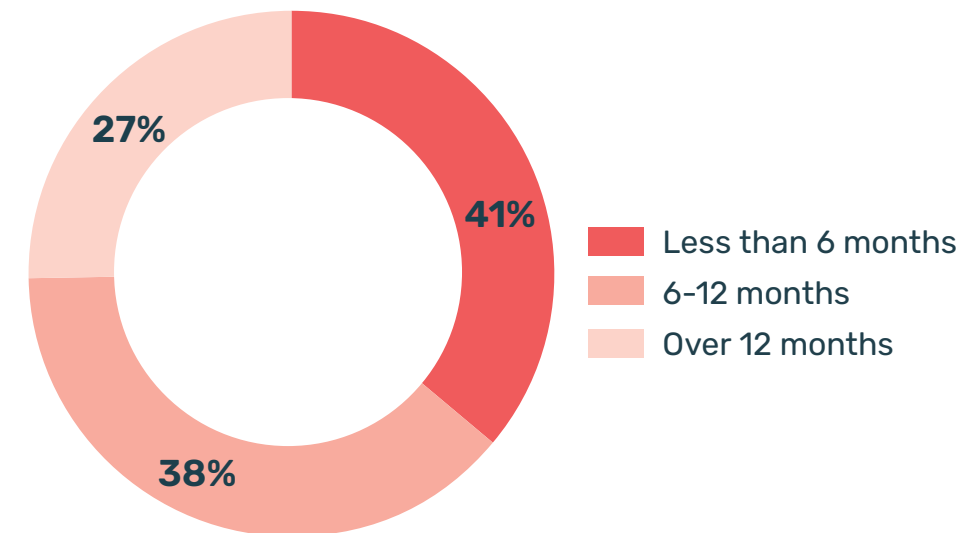
- Resident Needs Assessment
- Neighborhood Survey
- Business Survey

EMPLOYMENT STATUS OF THOSE WHO TOOK THE SURVEY

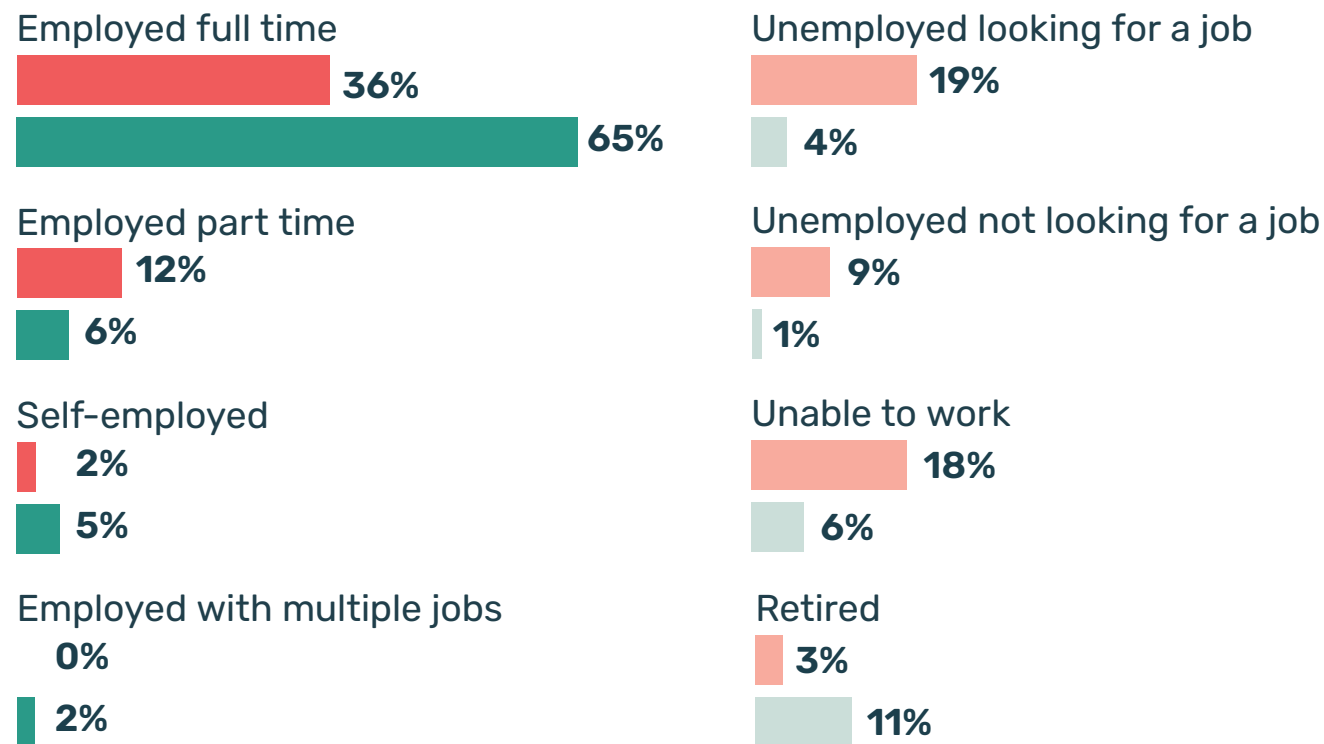


OF THOSE NOT EMPLOYED, THIS IS HOW LONG IT HAS BEEN SINCE THEY HAD A JOB...

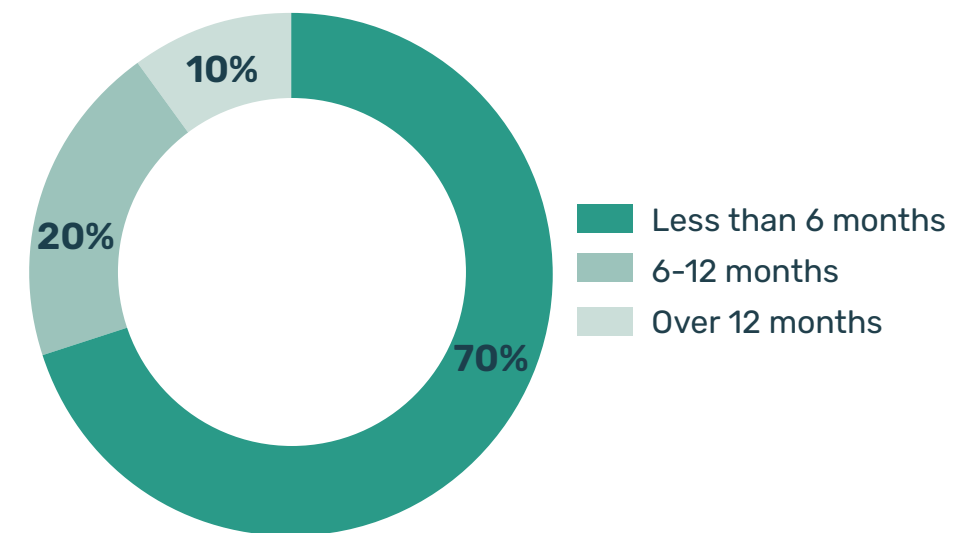
Resident Needs Assessment



Resident Needs Assessment Neighborhood Survey



Neighborhood Survey



EMPLOYMENT IN THE CHOICE NEIGHBORHOODS

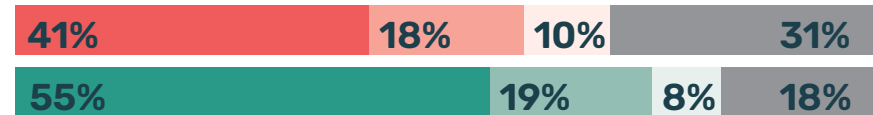
■ Resident Needs Assessment
■ Neighborhood Survey
■ Business Survey

WHAT ARE THE BARRIERS TO EMPLOYMENT?

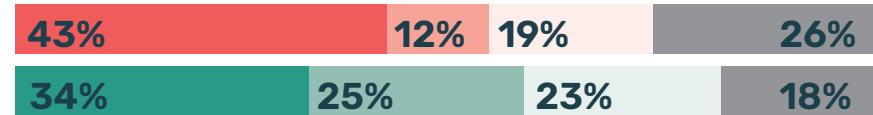
Resident Needs Assessment Neighborhood Survey

■ Agree ■ Not sure ■ Disagree ■ N/A

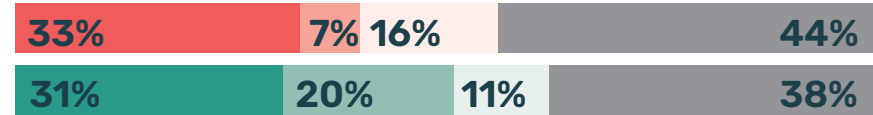
The available jobs do not make economic sense



It is difficult to find available jobs locally



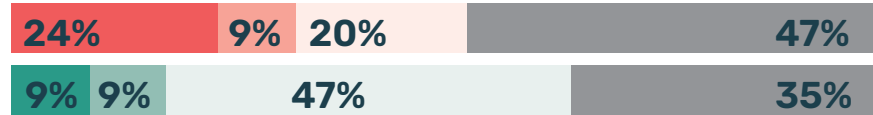
It is difficult to find quality, affordable childcare



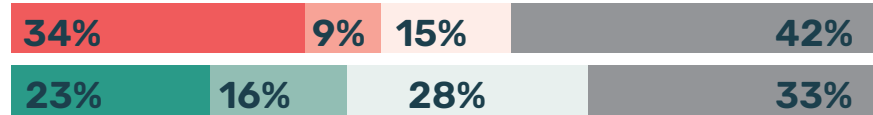
I/we lack the skills needed for available jobs



I/we do not have the required education for the jobs



There are not enough / convenient transportation to get to jobs



WHAT INDUSTRY DO YOU WORK ON?

Resident Needs Assessment

Neighborhood Survey

#1 Food services

#1 Education

#2 Healthcare/social assistance

#2 Healthcare/social assistance

#3 Warehousing/distribution/logistics

#3 Public administration/government

TYPES OF BUSINESS THAT TOOK THE SURVEY:

Business Survey

#1 Professional services

#2 Social services

#3 Food retail

OVER HALF

of businesses in the Hagerstown Choice Neighborhoods employ between 1 to 5 employees, with a mix of part-time and full time employees

For those with over 20 employees, a higher percentage of employees are employed part-time

EMPLOYEES AND HIRING OPPORTUNITIES:

Business Owner Survey

■ Agree ■ Not sure ■ Disagree

The majority of my employees (50% or more) are Hagerstown residents



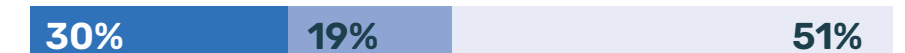
I have difficulty hiring due to a lack of experience/training



It is easy for me to fill open part-time positions at my business



It is easy for me to fill open full-time positions at my business



The majority of my employees (50% or more) live in the Hagerstown Choice Boundary



I have difficulty hiring due to a language barrier

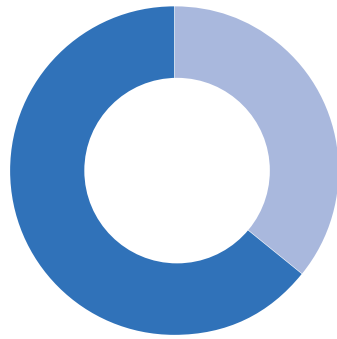


BUSINESSES IN THE CHOICE NEIGHBORHOODS

Business Survey

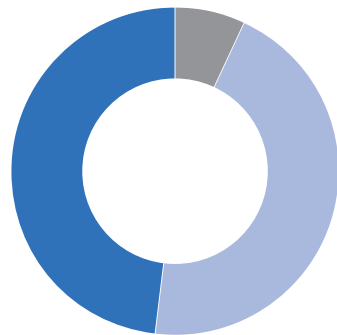
DOES YOUR BUSINESS OWN OR RENT THE SPACE?

RENT 65%
OWN 35%



IF YOU CURRENTLY RENT YOUR SPACE/BUILDING, ARE YOU INTERESTED IN BECOMING AN OWNER?

YES 65%
NO 35%
NOT SURE 7%



86%

of business owners

are looking to invest in their business to attract additional customers

IF YOU ARE INTERESTED IN BECOMING AN OWNER BUT HAVE NOT YET, WHAT IS PREVENTING YOU?

Securing financing



The spaces available do not match my needs



Property management and maintenance



Availability of spaces/storefronts



Unfamiliarity with commercial properties



56%

of business owners

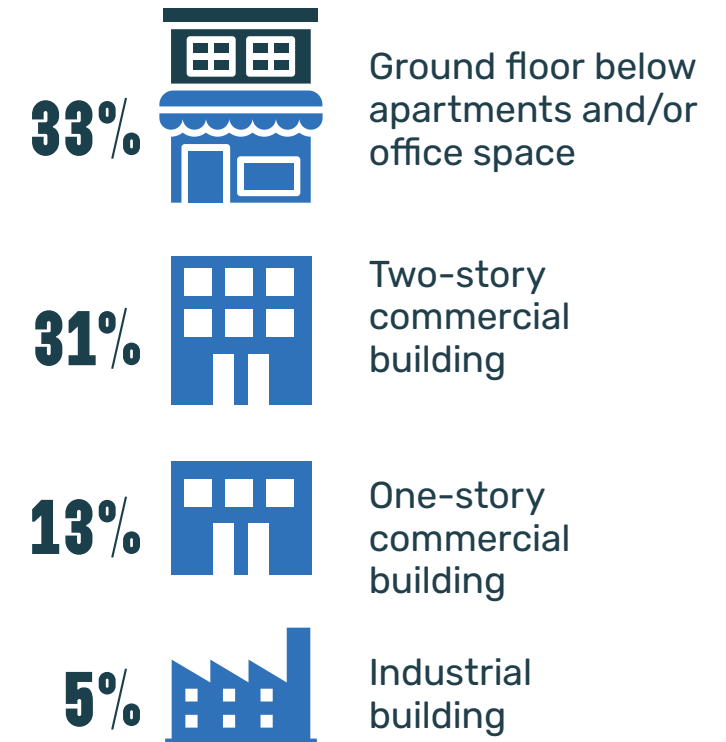
are very satisfied with the physical location of their business

68%

of business owners

are going to be maintaining operations primarily the same as last year

IN WHAT TYPE OF BUILDING IS YOUR BUSINESS LOCATED?



HOW EASY IS IT FOR YOU TO MEET YOUR CURRENT BUSINESS COST AND EXPENSES/RENT OR MORTGAGES/TAXES AND UTILITIES?

40% SOMEWHAT DIFFICULT

40% SOMEWHAT EASY

13% VERY EASY

7% VERY DIFFICULT

CHILDREN and YOUTH

Resident Needs Assessment
Neighborhood Survey

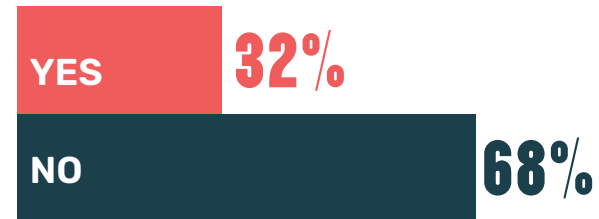
DO YOU HAVE CHILDREN IN YOUR HOUSEHOLD?

Resident Needs Assessment

Neighborhood Survey

Children under the age of 5

Children under the age of 5



Children between 5 and 19

Children between 5 and 19



WHAT ARE THE MOST PRESSING ISSUES FACING YOUTH IN THE NEIGHBORHOOD TODAY?

Graphic is a reflection of the responses with the most consensus

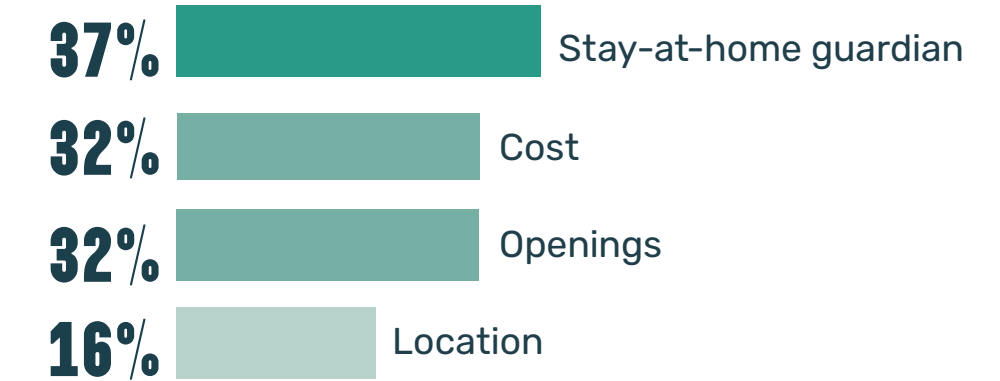


"MY CHILD DOESN'T ATTEND AN EARLY CHILDHOOD OR PRE-K PROGRAM BECAUSE"

Resident Needs Assessment



Neighborhood Survey:



49% of housing site residents & **52%** of neighborhood residents with children under 5, reported they attend an early childhood/pre-K program.

HEALTH AND WELLNESS

Resident Needs Assessment
Neighborhood Survey

DO YOU AND MEMBERS OF YOUR HOUSEHOLD HAVE HEALTH INSURANCE?

Resident Needs Assessment

94% of respondents have health insurance

98% of respondents said that children in their household have health insurance

Neighborhood Survey

93% of respondents have health insurance

96% of respondents said that children in their household have health insurance

THE RESIDENT AND NEIGHBORHOOD RESPONDENTS AGREE THAT THE ACCESS TO QUALITY HEALTHCARE CAN BE IMPROVED BY...



#1
Extending the hours of health facilities in the neighborhood



#3
Improving transportation to major medical facilities



#2
Locating more healthcare facilities in the neighborhood



#4
Being able to access affordable prescriptions

DO YOU AGREE WITH THE FOLLOWING COMMUNITY HEALTH STATEMENTS?

Resident Needs Assessment

Agree Not sure Disagree



There are adequate green spaces and trees throughout the neighborhood

73% **11%** **16%**



This is a great neighborhood for walking

57% **16%** **27%**



There are adequate places to exercise (gyms/parks/playgrounds)

59% **14%** **27%**

DO YOU AGREE WITH THE FOLLOWING HEALTH AND WELLNESS STATEMENTS?

Resident Needs Assessment

Agree Not sure Disagree



High-quality fresh fruits/vegetables/food are widely available and affordable.

52% **12%** **36%**



There are adequate affordable healthcare facilities nearby

64% **12%** **24%**

PUBLIC SAFETY

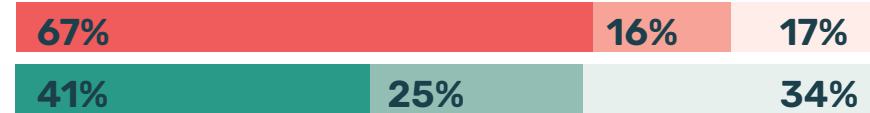
■ Resident Needs Assessment
■ Neighborhood Survey
■ Business Survey

PERCEPTION OF SAFETY IN THE NEIGHBORHOOD

Resident Needs Assessment Neighborhood Survey

■ Agree ■ Not sure ■ Disagree ■ N/A

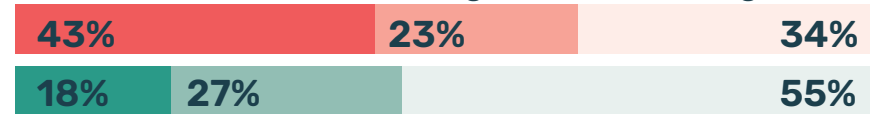
I feel safe in my neighborhood



It is safe to walk in the neighborhood during the day



It is safe to walk in the neighborhood at night



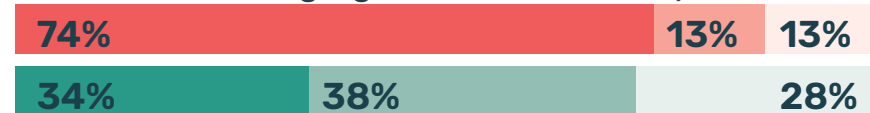
It is safe for my children to walk home from school



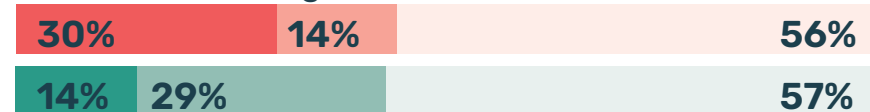
I want to be involved in making the neighborhood safer



I feel that I know my neighbors and I have a sense of belonging to the community



There is enough police presence on foot or bike in the neighborhood



HOW WOULD YOU RATE EACH OF THE FOLLOWING ASPECTS OF THE AREA WHERE YOUR BUSINESS IS LOCATED?

Business Owner Survey

■ Good ■ Fair ■ Poor

Friendliness of customers



Physical conditions of streetscapes



Safety



Overall character and image



Cleanliness



Physical conditions of buildings and storefronts



NEIGHBORHOOD AND BUSINESS RESPONDENTS AGREE THAT THESE ARE THE TOP SAFETY CONCERNS:

- #1 People buying and selling drugs
- #2 People using drugs
- #3 Gun shots/gun violence

ONLY 31%

of business owners

agree that their business is located in a safe area