



BON SECOURS BALTIMORE HEALTH SYSTEM

The Economic and Community Impact of
Bon Secours Baltimore Health System
Operations on the
City of Baltimore

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1.0 Introduction

Bon Secours Baltimore Health System retained Richard Clinch, PhD Director of Economic Research at the Jacob France Institute of the Merrick School of Business at the University of Baltimore (JFI) to analyze the economic¹ and community impacts associated with the operations of Bon Secours and its subsidiaries on the City of Baltimore economy. The three goals of this analysis are:

1. To describe the economic contribution of Bon Secours Baltimore Health System's overall operations to the City of Baltimore's overall economy;
2. To describe the economic contribution of Bon Secours Baltimore Health System's overall operations to the West Side² of the City of Baltimore; and
3. To present information on the important role of Bon Secours Baltimore Health System in the West Side community in which it is located and on the larger City of Baltimore.

2.0 Summary of Findings

The key findings³ of this project are as follows:

- The Bon Secours Baltimore Health System had total FY2010 revenues of \$138.8 million and employs 956 workers earning \$67.2 million in employee compensation;
- The operation of Bon Secours Baltimore Health System contributes \$226.3 million in economic activity to the City of Baltimore economy, supports 1,532 jobs earning \$94.0 million in employee compensation, and generates an estimated \$7.6 million in combined State and local tax revenues;
- Bon Secours Baltimore Health System spends a total of \$2.4 million in purchases of goods and services from suppliers located in West Baltimore, 6% of its total procurement expenditures;
- Bon Secours Baltimore Health System employs a total of 157 residents of West Baltimore, 16% of its total employees;
- The West Baltimore community in which Bon Secours Hospital is located has a lower level of median household income, a lower level of workforce participation, and a higher percentage of residents living in poverty than the overall City of Baltimore;
- Bon Secours Baltimore Health System is the largest employer in zip code 21223 and accounts for 17% of all jobs located in the zip code;
- Bon Secours spent a total of \$26.3 million on capital projects in the last five years, which generated \$38.7 million in economic activity; and
- The residents of its ten West Side buildings have an estimated \$16.5 million in income, which generates a total of \$15.4 million in local economic activity in the City.

¹ This analysis does not assess the extent to which the Hospital competes with or substitutes for other hospital and health care-related activity in the City; thus, this analysis measures the relationship between the Hospital and Foundation and the larger City of Baltimore economy. This analysis employs a similar methodology to that used in *The Economic Impact of the Academic Medical Infrastructure on New York State and the New York City Metropolitan Region* report produced by the Greater New York Hospital Association in 1999. Please note that throughout this report – totals may not sum due to rounding.

² Unless otherwise noted, West Baltimore is defined as zip codes 21216, 21217, 21223 and 21229 for this analysis. See Appendix Map 1 to see the West Baltimore geography analyzed.

³ For a description of the economic impact terms used – please see the methodology section – Section 6.0 – below.

3.0 Economic Impact of Bon Secours Baltimore Health System Operations on the City of Baltimore

The goal of this analysis is to present data on the contribution made to the City of Baltimore economy by the operations of Bon Secours Baltimore Health System. The economic contribution of the operations of Bon Secours was analyzed using the IMPLAN model for Baltimore City. This analysis was based on actual fiscal year 2010 operating revenues and expenses.⁴ It is important to note that this analysis does not include the impacts of spending in the City or community by patients and visitors to Bon Secours Hospital. Both patients and visitors are likely to make purchases in the surrounding community on meals, gifts, prescriptions, and other items. The impacts of these expenditures are not included in this analysis and thus, the actual impacts of Bon Secours Baltimore Health System are likely to be higher.

3.1 Bon Secours Baltimore Health System Operations

As presented in Table 1, Bon Secours Baltimore Health System had fiscal 2010 revenues of \$138.8 million with 7,475 patient admissions, 35,112 in-patient days, 116,573 outpatient visits and 25,167 Emergency Room Visits. Bon Secours Baltimore Health System employs 956 full- and part-time workers.

Table 1
Bon Secours Health System - Baltimore Operations
(Fiscal 2010)

Item	
Revenues (Mil. \$)	\$138,788,000
Expenses (Mil. \$)	\$138,376,000
Net Income (Mil. \$)	\$412,000
Employment (Total)	956
Employment (FTEs)	835
Salaries, Wages and Benefits	\$67,151,804
Admissions	7,475
In-Patient Days	35,112
Out-Patient Visits	116,573
ER Visits	25,167

Source: Bon Secours

⁴ As described in note 1, this report does not adjust for potential substitution impacts and can be viewed as an economic activity report.

3.2 The Economic Contribution of Bon Secours Baltimore Health System Operations

The total economic activity in the City of Baltimore supported by the operations of Bon Secours Baltimore Health System is presented in Table 2. Bon Secours Baltimore Health System’s operations support \$226.3 million in City economic activity; with an associated 1,532 jobs earning a total of \$94.0 million in salaries and wages; and generated an estimated \$7.6 million in State and local government revenues.

Table 2
Bon Secours Health System - Impact Summary

Item	Direct Revenues (\$s)	Total Economic Impact			Selected State and Local Fiscal Impact ¹ (\$s)
		Output (\$s)	Employment (# of Jobs)	Employee Compensation (\$s)	
Bon Secours Impact	\$138,788,000	\$226,316,745	1,532	\$94,037,260	\$7,640,711

Source: Bon Secours, IMPLAN and the JFI

The Baltimore City economic output activity supported by Bon Secours Baltimore Health System’s operations is presented by sector in Table 3. Total Bon Secours Baltimore Health System revenues of \$138.8 million are leveraged with \$46.9 million in *indirect effects*, through purchases of supplies and services from City companies, and \$40.6 million in *induced effects*, through the changes in spending attributable to the increase in household income generated by the jobs created or supported by Bon Secours Hospital and Foundation, for a total impact of over \$226.3 million.⁵ Outside of the health care sector – the real estate, finance, professional, scientific & technical services and administrative & waste services sectors experience the largest impacts from the economic activity generated by Bon Secours Baltimore Health System.

⁵ This analysis excludes the local spending on such items as hotels, dining, and retail items by the patients and visitors to Bon Secours Hospital; thus, the actual impacts are likely to be greater.

Table 3
Output Impact of
Bon Secours Baltimore Health System Operations on Baltimore City
By Sector

Item	Direct Impact	Indirect Impact	Induced Impact	Total Impact
<u>Total</u>	<u>\$138,788,001</u>	<u>\$46,899,002</u>	<u>\$40,629,742</u>	<u>\$226,316,745</u>
Natural Resources	\$0	\$82	\$99	\$181
Mining	\$0	\$0	\$0	\$0
Utilities	\$0	\$2,179,691	\$930,449	\$3,110,140
Construction	\$0	\$292,626	\$243,828	\$536,454
Manufacturing	\$0	\$1,547,606	\$1,091,486	\$2,639,092
Wholesale Trade	\$0	\$618,418	\$405,105	\$1,023,523
Retail Trade	\$0	\$287,965	\$2,569,301	\$2,857,266
Transportation & Warehousing	\$0	\$1,207,920	\$771,840	\$1,979,760
Information	\$0	\$1,938,351	\$1,108,475	\$3,046,826
Finance & Insurance	\$0	\$6,295,828	\$6,591,431	\$12,887,259
Real Estate	\$0	\$15,306,714	\$7,814,304	\$23,121,018
Professional Scientific & Technical Services	\$0	\$4,755,576	\$1,945,941	\$6,701,517
Management of Companies	\$0	\$388,450	\$37,324	\$425,774
Administrative & Waste Services	\$0	\$5,121,873	\$1,022,914	\$6,144,787
Educational Services	\$0	\$59,273	\$1,262,638	\$1,321,911
Health & Social Services	\$138,788,001	\$2,590,390	\$8,738,886	\$150,117,277
Arts, Entertainment & Recreation	\$0	\$132,877	\$705,590	\$838,467
Accommodation & Food Services	\$0	\$979,741	\$2,334,564	\$3,314,305
Other Services	\$0	\$1,268,862	\$1,936,206	\$3,205,068
Government	\$0	\$1,926,759	\$1,119,361	\$3,046,120

Source: IMPLAN

The employment effects and associated employee compensation effects of Bon Secours Baltimore Health System’s operations are presented by sector in Table 4 and Table 5. As presented in Table 4, the employment impact of Bon Secours Baltimore Health System’s operations is far greater than its direct employment of 956. There are an estimated 291 additional jobs in supplier firms supported by the *indirect effects* of the Bon Secours Baltimore Health System as it purchases goods and services from local suppliers and another 286 additional jobs from the *induced effects* generated by the City incomes attributed to Bon Secours Baltimore Health System’s operations for a total of 1,532 jobs directly and indirectly supported by Bon Secours Baltimore Health System. As presented in Table 5, there is a total of more than \$94.0 million in employee compensation associated with these jobs.

Table 4
Employment Impact of
Bon Secours Health System Operations on Baltimore City
By Sector (Number of Jobs)

Item	Direct Impact	Indirect Impact	Induced Impact	Total Impact
<u>Total</u>	<u>956</u>	<u>291</u>	<u>286</u>	<u>1,532</u>
Natural Resources	0	0	0	0
Mining	0	0	0	0
Utilities	0	2	1	3
Construction	0	2	2	4
Manufacturing	0	4	3	6
Wholesale Trade	0	3	2	5
Retail Trade	0	5	40	45
Transportation & Warehousing	0	9	7	16
Information	0	6	3	9
Finance & Insurance	0	21	22	43
Real Estate	0	52	10	62
Professional Scientific & Technical Services	0	38	15	53
Management of Companies	0	3	0	3
Administrative & Waste Services	0	85	15	100
Educational Services	0	1	13	13
Health & Social Services	956	18	73	1,047
Arts, Entertainment & Recreation	0	4	17	21
Accommodation & Food Services	0	13	32	44
Other Services	0	16	26	41
Government	0	12	5	17

Source: IMPLAN

Table 5
Employee Compensation Impact of
Bon Secours Baltimore Health System Operations on Baltimore City
By Sector

Item	Direct Impact	Indirect Impact	Induced Impact	Total Impact
<u>Total</u>	<u>\$67,151,804</u>	<u>\$13,267,171</u>	<u>\$13,618,285</u>	<u>\$94,037,260</u>
Natural Resources	\$0	\$5	\$22	\$27
Mining	\$0	\$0	\$0	\$0
Utilities	\$0	\$383,758	\$164,838	\$548,596
Construction	\$0	\$126,520	\$96,953	\$223,473
Manufacturing	\$0	\$209,684	\$136,837	\$346,521
Wholesale Trade	\$0	\$236,075	\$154,645	\$390,720
Retail Trade	\$0	\$137,402	\$1,173,285	\$1,310,687
Transportation & Warehousing	\$0	\$472,581	\$300,475	\$773,056
Information	\$0	\$495,103	\$279,431	\$774,534
Finance & Insurance	\$0	\$1,989,085	\$2,121,667	\$4,110,752
Real Estate	\$0	\$1,447,013	\$295,644	\$1,742,657
Professional Scientific & Technical Services	\$0	\$1,887,318	\$731,323	\$2,618,641
Management of Companies	\$0	\$198,489	\$19,072	\$217,561
Administrative & Waste Services	\$0	\$2,636,425	\$461,320	\$3,097,745
Educational Services	\$0	\$35,163	\$764,388	\$799,551
Health & Social Services	\$67,151,804	\$1,041,844	\$4,487,969	\$72,681,617
Arts, Entertainment & Recreation	\$0	\$34,219	\$205,629	\$239,848
Accommodation & Food Services	\$0	\$372,108	\$904,833	\$1,276,941
Other Services	\$0	\$674,879	\$958,345	\$1,633,224
Government	\$0	\$889,500	\$361,609	\$1,251,109

Source: IMPLAN

4.0 Economic Impact of Bon Secours Baltimore Health System Operations on the West Side of the City of Baltimore

Bon Secours Baltimore Health System is a core anchor institution in the West Baltimore community in which it is located. As described in Section 5.1 (below) Baltimore's West Side is a distressed community, with higher rate of poverty and social distress than the City. The West Side, however, is undergoing a significant redevelopment, driven by the development of the UMB BioPark. Bon Secours Baltimore Health System, along with the University of Maryland Medical System and University of Maryland, Baltimore are key institutions driving life sciences oriented redevelopment in the West Side. In order to better understand the role and importance of Bon Secours Baltimore Health System in the City's West Side, the System's spending in the community was analyzed. This analysis represents the share of total City-level economic impacts described above that occur in the City's West Side.

4.1 Bon Secours Baltimore Health System West Side Payroll and Purchases

Bon Secours has an important impact on the City's West Side through the wages and salaries paid to West Side residents and purchases made from West Side suppliers. Bon Secours City and West Side payroll and supplier purchases are presented in Table 6. As presented in Table 6:

- Bon Secours Baltimore Health System had total payroll spending of \$4.5 million to 157 employees residing in the City's West Side communities;
- These 157 West Side residents account for 16% of total Health System employment;
- A total of 389 of the Health System's 956 employees, 41% of the total, reside in Baltimore City;
- Bon Secours Baltimore Health System made a total of \$2.4 million in purchases from 87 suppliers located the City's West Side communities, and the Health System purchase a total of \$14.9 million in goods and services from 337 Baltimore City suppliers;
- West Side suppliers account for 26% of the total base of City suppliers and 16% of goods and services purchases made in the City;
- West Side suppliers account for an estimated 6% of total procurement purchases made by the Health System, and City suppliers account for an estimated 37%; and
- Bon Secours Baltimore Health System had both the largest number of employees residing in and suppliers located in zip code 21229.

Table 6
Bon Secours Baltimore Health System
Employment, Wages and Salaries and Purchases
Made in West Baltimore
(Fiscal 2010)

Item	Zip Code		
<u>Employment and Payroll</u>		<u>Employment</u>	<u>Payroll (\$s)</u>
	21216	29	\$747,801
	21217	23	\$662,655
	21223	45	\$1,207,043
	21229	<u>60</u>	<u>\$1,874,691</u>
	Total West Side	157	\$4,492,189
	Total Baltimore City	389	\$12,503,720
<u>Purchases</u>		<u># of Suppliers</u>	<u>Procurement (\$s)</u>
	21216	10	\$32,826
	21217	21	\$69,260
	21223	22	\$47,922
	21229	<u>34</u>	<u>\$2,267,349</u>
	Total West Side	87	\$2,417,358
	Total Baltimore City	337	\$14,942,522

Source: Bon Secours

4.2 The Economic Contribution of Bon Secours Baltimore Health System to Baltimore City's West Side

Bon Secours Baltimore Health System makes important contributions to the level of economic activity occurring in the City's distressed West Side. This analysis estimates the economic contribution made by the local purchases made by Bon Secours from suppliers located in and wages and salaries paid to residents of the West Side. The numbers presented below represent the share of the indirect and induced economic impacts described above attributable to Bon Secours' spending in the City's West Side. The total economic activity in the West Side of the City of Baltimore supported by the operations of Bon Secours Baltimore Health System is presented in Table 7. Bon Secours Baltimore Health System's operations support \$5.4 million in West Side economic activity; with an associated 34 jobs earning a total of \$1.6 million in salaries and wages; and generated an estimated \$321,877 in State and local government revenues.⁶

Table 7
Bon Secours Baltimore Health System
Economic Contribution of Wages, Salaries and Purchases
Made in West Baltimore
(Fiscal 2010)

Item	Zip Code	Payroll and Procurement Spending (\$s)	Output (\$s)	Employment (Jobs)	<u>Impacts</u>	
					Employee Compensation (\$s)	State and Local Fiscal Impact (\$s)
<u>Payroll and Procurement Spending</u>						
	21216	\$780,627	\$198,460	1.2	\$48,412	\$12,748
	21217	\$731,915	\$289,096	1.8	\$74,009	\$20,343
	21223	\$1,254,965	\$623,241	4.4	\$208,222	\$36,362
	21229	\$4,142,040	\$3,650,368	24.6	\$1,186,540	\$195,997
	Inter Zip Code Purchases	n.m.	\$642,405	2.4	\$125,227	\$56,427
	Total West Side	\$6,909,547	\$5,403,570	34.4	\$1,642,410	\$321,877

Source: IMPLAN

The West Side economic output activity supported by Bon Secours Baltimore Health System's operations is presented by sector in Table 8. Total Bon Secours Baltimore Health System expenditures of just over \$2.4 million are leveraged with \$302,568 in *indirect effects*, through supplier-driven purchases of supplies and services from other West Side companies, and \$2.7 million in *induced effects*, through the spending associated with the Health System's \$4.5 million in salaries and wages⁷ paid to West Side residents and the wages and salaries associated with West Side suppliers and spending. The total West Side economic impact of Bon Secours

⁶ In order to evaluate the economic contribution of Bon Secours Hospital and Foundation on the West Side community in which it is located, this analysis used a bill of goods approach to estimate total West Side spending and its associated impacts. Bon Secours Hospital and Foundation provided data on total payroll paid to residents of the purchases made from suppliers located in the West Side area. The composition of local purchases was estimated based on the national average spending by hospitals.

⁷ The Induced Impact of local payrolls is less than the total level of payrolls because of "leakages" or out-of-area spending by local employees. See the methodology section below for a description of terms used and methodology.

Baltimore Health System’s West Side payroll and purchases is \$5.4 million, with the greatest local impacts in the Real Estate and Health and Social Services sectors.⁸ The West Side employment impacts are presented by sector in Table 9 and the employee compensation impacts are presented by sector in Table 10.

Table 8
Output Impact of
Bon Secours Baltimore Health System Operations on the West Side of Baltimore City
By Sector

Item	Direct Impact	Indirect Impact	Induced Impact	Total Impact
Total	<u>\$2,417,361</u>	<u>\$302,568</u>	<u>\$2,683,641</u>	<u>\$5,403,570</u>
Natural Resources	\$0	\$0	\$0	\$0
Mining	\$0	\$0	\$0	\$0
Utilities	\$0	\$0	\$0	\$0
Construction	\$17,270	\$15,075	\$27,281	\$59,626
Manufacturing	\$218,971	\$37,976	\$97,568	\$354,515
Wholesale Trade	\$226,932	\$26,670	\$113,882	\$367,484
Retail Trade	\$18,225	\$1,416	\$135,043	\$154,684
Transportation & Warehousing	\$93,556	\$29,426	\$69,496	\$192,478
Information	\$21,920	\$4,824	\$15,342	\$42,086
Finance & Insurance	\$18,918	\$13,256	\$56,345	\$88,519
Real Estate	\$991,235	\$66,467	\$728,789	\$1,786,491
Professional Scientific & Technical Services	\$165,839	\$50,032	\$47,639	\$263,510
Management of Companies	\$0	\$0	\$0	\$0
Administrative & Waste Services	\$144,058	\$19,064	\$23,428	\$186,550
Educational Services	\$5,085	\$324	\$98,145	\$103,554
Health & Social Services	\$262,942	\$8,127	\$925,262	\$1,196,331
Arts, Entertainment & Recreation	\$1,407	\$1,018	\$17,263	\$19,688
Accommodation & Food Services	\$21,917	\$4,853	\$75,653	\$102,423
Other Services	\$73,205	\$5,931	\$145,739	\$224,875
Government	\$135,881	\$18,109	\$106,766	\$260,756

Source: IMPLAN

⁸ As described in note 5 above - This analysis excludes the local spending on such items as hotels, dining, and retail items by patients and visitors coming to Bon Secours Hospital to receive medical care; thus, the actual impacts are likely to be greater.

Table 9
Employment Impact of
Bon Secours Baltimore Health System Operations on the West Side of Baltimore City
By Sector (# of Jobs)

Item	Direct Impact	Indirect Impact	Induced Impact	Total Impact
<u>Total</u>	<u>14</u>	<u>2</u>	<u>19</u>	<u>34</u>
Natural Resources	0	0	0	0
Mining	0	0	0	0
Utilities	0	0	0	0
Construction	0	0	0	0
Manufacturing	1	0	0	1
Wholesale Trade	1	0	1	2
Retail Trade	0	0	2	2
Transportation & Warehousing	1	0	1	2
Information	0	0	0	0
Finance & Insurance	0	0	0	0
Real Estate	3	0	1	4
Professional Scientific & Technical Services	2	0	0	2
Management of Companies	0	0	0	0
Administrative & Waste Services	2	0	0	3
Educational Services	0	0	1	1
Health & Social Services	2	0	8	10
Arts, Entertainment & Recreation	0	0	0	0
Accommodation & Food Services	0	0	1	1
Other Services	1	0	2	3
Government	1	0	1	2

Source: IMPLAN

Table 10
Employee Compensation Impact of
Bon Secours Baltimore Health System Operations on the West Side of Baltimore City
By Sector

Item	Direct Impact	Indirect Impact	Induced Impact	Total Impact
<u>Total</u>	<u>\$650,215</u>	<u>\$92,037</u>	<u>\$900,158</u>	<u>\$1,642,410</u>
Natural Resources	\$0	\$0	\$0	\$0
Mining	\$0	\$0	\$0	\$0
Utilities	\$0	\$0	\$0	\$0
Construction	\$7,751	\$6,383	\$10,743	\$24,877
Manufacturing	\$28,195	\$5,521	\$14,870	\$48,586
Wholesale Trade	\$86,629	\$10,181	\$43,473	\$140,283
Retail Trade	\$8,952	\$696	\$64,679	\$74,327
Transportation & Warehousing	\$34,519	\$11,250	\$25,458	\$71,227
Information	\$5,418	\$1,283	\$3,109	\$9,810
Finance & Insurance	\$5,168	\$3,687	\$15,101	\$23,956
Real Estate	\$98,667	\$6,787	\$24,965	\$130,419
Professional Scientific & Technical Services	\$74,320	\$20,766	\$19,656	\$114,742
Management of Companies	\$0	\$0	\$0	\$0
Administrative & Waste Services	\$75,550	\$9,222	\$11,154	\$95,926
Educational Services	\$3,046	\$192	\$60,028	\$63,266
Health & Social Services	\$104,704	\$3,195	\$470,018	\$577,917
Arts, Entertainment & Recreation	\$291	\$216	\$4,627	\$5,134
Accommodation & Food Services	\$8,509	\$1,884	\$29,371	\$39,764
Other Services	\$41,718	\$3,293	\$70,841	\$115,852
Government	\$66,778	\$7,481	\$32,065	\$106,324

Source: IMPLAN

5.0 Community Impacts of Bon Secours Baltimore Health System Operations

In addition to the economic impacts described above, Bon Secours Baltimore Health System impacts the City of Baltimore and the region in a number of ways. Bon Secours Baltimore Health System is an important source of economic activity in a distressed part of the City and provides a variety of community service programs targeted on improving the quality of life and public health in the community, City and region. Bon Secours is also involved in real estate development and management in the Community. Both the capital spending to construct or renovate its buildings and the spending by the residents of its properties impact the City and West Side economies.

5.1 Socioeconomic Importance - Community Demographics

Bon Secours Baltimore Health System is a key source of economic activity in the distressed West Baltimore community in which it is located. While West Baltimore is now experiencing redevelopment – centered on the educational, life sciences and health care sectors, West Baltimore lags behind the City in several key measures of community, economic and social vitality. Demographic and socioeconomic conditions in Bon Secours Baltimore Health System’s West Baltimore community were analyzed using 2009 U.S. Bureau of the Census - American Community Survey data.⁹ As presented in Table 11, the western part of the City in which Bon Secours Baltimore Health System is located lags the overall City of Baltimore in most key demographic, housing and socio-economic measures. Overall, the West Baltimore area that was analyzed has a lower level of median household income, a lower level of workforce participation, and a higher percentage of residents living in poverty than the overall City of Baltimore. Some of the key demographic and socioeconomic characteristics of the community, as compared to the larger City of Baltimore areas, are as follows:

- The West Baltimore area’s population is slightly older and has a higher concentration of African American residents than the City of Baltimore;
- West Baltimore has a lower share of population residing in owner occupied dwellings and a higher share of population residing in rental properties than the City overall;
- A higher share of the West Baltimore area’s population is cost burdened¹⁰ in terms of paying more than 30% of their income for housing than both the City of Baltimore , with 44% of West Baltimore home-owners with mortgages and 60% of West Baltimore renters paying more than 30% of their income for housing;
- The West Baltimore area’s population has a lower level of educational attainment than City of Baltimore residents, with 27% lacking a high school degree compared to 23% of City residents. Only 14% of West Baltimore residents have completed a bachelor’s degree or above, compared to 25% of City residents;

⁹ Data is for the census tracts with more than one half of their landmass located in the four zip codes – 21216, 21219, 21223 and 21229 – used to define West Baltimore. Census Bureau ACS data are available for a five-year moving average for small geographic areas, such as the census tracts used in this analysis. Thus, data for West Baltimore are averages for multiple years – and thus, may not reflect recent trends of demographic changes. This is, however, the best data available to describe demographic, housing and social conditions in Bon Secours Hospital and Foundation’s West Baltimore community.

¹⁰ According to the U.S. Department of Housing and Urban Development (HUD), the generally accepted definition of housing affordability is for a household to pay no more than 30 percent of its annual income on housing. Families who pay more than 30 percent of their income for housing are considered “cost burdened” and may have difficulty affording necessities such as food, clothing, transportation and medical care. See <http://www.hud.gov/offices/cpd/affordablehousing/index.cfm>.

- The West Baltimore area's population has a lower level of workforce participation than City of Baltimore residents, with 58% of residents engaged in work activities compared to 62% of City residents;
- The 2010 unemployment rate in West Baltimore is 8% compared to just under 7% in the City. Statewide only 6% of workers were unemployed and 6.2% were unemployed in the Baltimore Metropolitan area;
- The West Baltimore area has a far lower percentage of its workforce employed in higher skilled Management, Professional and Related Occupations and a higher share employed in lower-skill Service occupations than the City of Baltimore; and
- The West Baltimore area has a lower level of median household income and higher poverty rate than the City of Baltimore.

Table 11
West Baltimore Community Demographics - Selected Measures
2005-2009 (Moving Average)

Item	West Baltimore ¹	Baltimore City
<u>Basic Demographics</u>		
Population	140,268	639,337
Total Households	50,046	237,819
Median Age	36.5	34.3
% African American (alone or in combination)	85.6%	64.4%
% White (alone or in combination)	13.6%	33.0%
% Hispanic	0.7%	2.7%
<u>Housing</u>		
Percent Owner-occupied	47.3%	51.1%
Percent Renter-occupied	52.7%	48.6%
Percent of Home Owners with Mortgages Paying More than 30% of Income for Housing	43.5%	39.4%
Percent of Renters Paying More than 30% of Income for Housing	59.5%	55.1%
<u>Educational Attainment</u>		
Percent non High School Graduates	26.5%	23.1%
Percent high school graduate or higher	73.1%	76.9%
Percent bachelor's degree or higher	13.7%	24.9%
<u>Employment</u>		
Percent in Labor Force	57.8%	62.2%
Percent Not in Labor Force	42.3%	37.8%
Percent Unemployed	8.0%	6.9%
Percent in Management, Professional, and Related Occupations	25.7%	35.8%
Percent in Service Occupations	26.6%	21.8%
<u>Income</u>		
Median Household Income	\$30,179	\$38,738
Poverty Rate (% of Families Below)	25.0%	20.1%
(1) Data is for census tracts more than 50% located in the four zip code West Baltimore area		

Source: U.S. Bureau of the Census - American Community Survey (ACS)

5.2 Economic Importance of Bon Secours Baltimore Health System Operations

Bon Secours Baltimore Health System is also a core part of the economic and employment base in the West Baltimore community in which it is located. U.S. Bureau of the Census County Business Patterns and Longitudinal Employer-Household Dynamics (LEHD) data for the West Baltimore community in which Bon Secours Baltimore Health System is located were analyzed. This U.S. Bureau of the Census County Business Patterns data and the LEHD data are for 2009. In both cases, these were the most recent years for which data were available, and thus, differ from the economic impact estimate data presented above. Employment data for the City's West Side area are presented in Table 12 and Table 13.

Bon Secours Baltimore Health System is the largest employer in zip code 21223 and its 2010 employment of 956 accounts for 17% of all jobs located in the zip code. Bon Secours Baltimore Health System accounts for just over 5% of all jobs located in the City's West Side area. As presented in Table 13, health care is the largest employment sector in the City's West Side, accounting for 20% of all West Side employment. When the LEHD data for the City's West Side are compared to the overall City of Baltimore, the West Side community in which Bon Secours Baltimore Health System is located has:

- A slightly older workforce, with 21% of employees being age 55 or older, compared to 19% in the larger City of Baltimore;
- A much higher concentration of lower paying jobs, with 26% of jobs in the West Side paying less than \$1,250 per month, and 40% paying between \$1,251 and \$3,333 per month, compared to 19% and 33% respectively in the City of Baltimore. Only 34% of West Side jobs earn more than \$3,333 per month, compared to 47% in the larger City of Baltimore;
- A higher concentration of lower skilled jobs, with 31% of jobholders having a high school degree or less compared to 27% Citywide. Only 22% of Westside jobholders have a college degree or higher, compared to 26% Citywide;
- As a result of the presence of Bon Secours Baltimore Health System in the West Side and the community's proximity to the UM,B and UMMS cluster of healthcare related activities across the Martin Luther King Boulevard, the City's West Side community has a similar share of reported employment in reported employment in health care (20% of total employment) as the overall City of Baltimore (22% of total employment); and
- A much higher concentration of employment in lower skilled retail jobs at 10%, compared to 5% in the larger City of Baltimore.

Table 12
Bon Secours Community Economic Data, 2009

Item	West			
	Baltimore ¹		Baltimore City	
<u>Basic Economic Data - 2008²</u>				
Establishment Count	1,375		12,333	
Establishments with More than 500 Employees	3		43	
Employment	18,849		275,608	
Total Payroll (Mil. \$s)	\$666.2		\$14,026	
<u>Work Area Data - All Jobs, 2009³</u>				
	18,259	Jobs	314,845	Jobs
<u>Jobs by Worker Age</u>				
Age 29 or younger	4,095	22%	67,722	22%
Age 30 to 54	10,255	56%	186,750	59%
Age 55 or older	3,909	21%	60,373	19%
<u>Jobs by Earnings Paid</u>				
\$1,250 per month or less	4,764	26%	60,254	19%
\$1,251 to \$3,333 per month	7,231	40%	105,343	33%
More than \$3,333 per month	6,264	34%	149,248	47%
<u>Jobs by Worker Educational Attainment</u>				
Less than high school	1,787	10%	26,106	8%
High school or equivalent, no college	3,908	21%	61,026	19%
Some college or Associate degree	4,464	24%	77,429	25%
Bachelor's degree or advanced degree	4,005	22%	82,562	26%
Educational attainment not available (workers aged 29 or younger)	4,095	22%	67,722	22%

(1) West Baltimore is defined as Zip Codes 21216, 21217, 21223 and 21229

(2) U.S. Bureau of the Census - County Business Patterns - Data is for 2009

(3) U.S. Bureau of the Census - LEHD. The LEHD Job number is slightly higher due to differences between the two data sources.

Source: U.S. Bureau of the Census - American Community Survey (ACS)

Table 13
Bon Secours Community Economic Data, 2009

Item	West Baltimore ¹		Baltimore City	
<u>Work Area Data - All Jobs³</u>	18,259	Jobs	314,845	Jobs
<u>Jobs by Industry Type (2-digit NAICS)</u>				
Agriculture, Forestry, Fishing and Hunting	1	0%	30	0%
Mining, Quarrying, and Oil and Gas Extraction	0	0%	10	0%
Utilities	233	1%	4,243	1%
Construction	663	4%	9,462	3%
Manufacturing	1,104	6%	14,311	5%
Wholesale Trade	707	4%	8,616	3%
Retail Trade	1,784	10%	16,345	5%
Transportation and Warehousing	954	5%	17,451	6%
Information	357	2%	7,310	2%
Finance and Insurance	689	4%	14,900	5%
Real Estate and Rental and Leasing	248	1%	4,835	2%
Professional, Scientific, and Technical Services	990	5%	21,843	7%
Management of Companies and Enterprises	85	0%	1,471	0%
Administration & Support, Waste Management and Remediation	1,022	6%	16,981	5%
Educational Services	2,314	13%	42,316	13%
Health Care and Social Assistance	3,595	20%	68,017	22%
Arts, Entertainment, and Recreation	255	1%	5,216	2%
Accommodation and Food Services	1,138	6%	19,607	6%
Other Services (excluding Public Administration)	614	3%	11,192	4%
Public Administration	1,506	8%	30,689	10%

(1) U.S. Bureau of the Census - County Business Patterns.

(2) U.S. Bureau of the Census - LEHD. The LEHD Job number is slightly higher due to differences between the two data sources.

Source: U.S. Bureau of the Census - LEHD

5.3 Health and Selected Social Indicators for West Baltimore

Bon Secours also plays an important role by being a primary health care provider in West Baltimore. In order to understand the community's need for health care services, an analysis of health and key social indicators in Bon Secours Baltimore Health System's West Baltimore community was conducted by the Baltimore Neighborhood Indicators Alliance – Jacob France Institute of the University of Baltimore (BNIA-JFI). This analysis was conducted for the eleven Community Statistical Areas (CSAs) located in West Baltimore.¹¹ Health, birth, crime, education, and housing indicators are provided for each of these eleven CSAs, along with Baltimore City, to provide context as to the neighborhood conditions in West Baltimore and the importance of Bon Secours to the area. Data is provided for the most recent time period available. Detailed definitions, the time period and sources for the indicators used are included in Section 6.0 (Table 24).

As presented in Table 14, indicators of life expectancy and mortality rates are typically worse for CSAs located within West Baltimore as compared to the City average. When vital statistics data was analyzed for the CSAs within the West Baltimore area, most West Baltimore CSAs lagged the City in terms of mortality:

- Only one CSA (Forest Park/Walbrook – 72.4 years old) had a higher life expectancy than the City average (72.3 years old);
- Upton/Druid Heights had the lowest life expectancy at 64.5 years old;
- Forest Park/Walbrook had the lowest mortality rate at 107.2¹² and Poppleton/The Terraces/Hollins Market had the highest mortality rate at 154.1;
- Only Forest Park/Walbrook (23.3) and Greater Mondawmin (26.0) have a lower heart disease mortality rate than the City average (26.8);
- Only Greater Mondawmin (20.3), Penn North/Reservoir Hill (20.4), and Forest Park/Walbrook (21.2) have a lower cancer mortality rate than the City average (21.6);
- Only Beechfield/Ten Hills/West Hills (2.7), Greater Rosemont (2.7), and Allendale/Irvington/South Hilton (3.2) have lower diabetes mortality rates than the City average (3.3); and
- Only Beechfield/Ten Hills/West Hills (2.5) and Allendale/Irvington/South Hilton (3.4) have lower HIV/AIDS mortality rates than the City average (3.8).

¹¹ See Appendix Map 1 for a description of the CSAs. Unlike the prior analysis which was based on zip codes, this analysis was conducted by the Baltimore Neighborhood Indicators Alliance based on the City's Community Statistical Areas (CSA). CSAs are aggregations of Census tract boundaries that are based on neighborhood boundaries. More information on CSAs can be found at <http://www.bnijfi.org/>.

¹² Mortality figures are the number of deaths per 10,000 people.

Table 14
West Baltimore CSAs - Resident Life Expectancy and Mortality Rates by Cause, 2005-2009

Community Statistical Area	Life Expectancy	All Cause	Heart	Cancer	Diabetes	HIV/AIDS
Allendale/Irvington/South Hilton	70.4	114.4	33.1	22.3	3.2	3.4
Beechfield/Ten Hills/West Hills	72.3	111.3	27.7	24.2	2.7	2.5
Edmonson Village	71.2	120.2	33.6	25.0	4.0	4.4
Forest Park/Walbrook	72.4	107.2	23.3	21.2	5.0	4.6
Greater Mondawmin	69.7	110.9	26.0	20.3	3.6	5.5
Greater Rosemont	69.0	116.6	29.5	22.8	2.7	6.0
Penn North/Reservoir Hill	69.9	117.2	33.9	20.4	5.7	8.0
Poppleton/The Terraces/Hollins Market	64.4	154.1	28.0	24.8	4.8	11.8
Sandtown-Winchester/Harlem Park	66.9	128.8	32.6	25.5	3.9	5.9
Southwest Baltimore	66.8	138.4	37.5	27.4	4.8	5.3
Upton/Druid Heights	64.5	147.9	39.6	25.4	6.2	11.7
Baltimore City	72.3	104.2	26.8	21.6	3.3	3.8

Source: Baltimore City Health Department

BCHD Analysis of 2005-2009 Maryland Vital Statistics data.

Rates are based on 2000 Census populations, given per 10,000 people.

Table 15 provides age specific mortality rates for the CSAs in West Baltimore. There is variation among many of the CSAs for each specific age group, but again West Baltimore CSAs generally continued to lag the City. Important findings include:

- The age adjusted mortality rate for persons under the age of one year in Sandtown-Winchester/Harlem Park is 230 per 10,000 children (City average of 130 per 10,000 children); and
- Upton/Druid Heights has the highest mortality rate for young adults (persons aged 15 to 24 and persons aged 25 to 44).

Table 15
West Baltimore CSAs - Resident Age Specific Mortality Rates, 2005-2009

Community Statistical Area	Age Specific Mortality Rate						
	Under 1	1 to 14	15 to 24	25 to 44	45 to 64	65 to 84	85 and Over
Allendale/Irvington/South Hilton	137.0	3.4	24.3	36.8	151.4	347.9	1,565.6
Beechfield/Ten Hills/West Hills	157.1	1.4	16.9	28.2	105.0	401.2	1,850.0
Edmonson Village	114.3	2.2	11.9	31.6	142.2	367.1	2,000.0
Forest Park/Walbrook	94.7	4.1	14.5	27.3	127.8	347.6	1,637.7
Greater Mondawmin	184.9	5.5	31.9	46.5	142.6	311.6	1,579.5
Greater Rosemont	173.3	3.0	23.4	47.8	171.7	326.8	1,460.1
Penn North/Reservoir Hill	119.8	0.8	23.9	40.5	163.8	391.6	1,236.4
Poppleton/The Terraces/Hollins Market	141.2	1.7	27.0	54.4	255.3	485.8	1,396.2
Sandtown-Winchester/Harlem Park	228.3	2.8	26.2	47.9	209.4	391.6	1,198.6
Southwest Baltimore	133.3	4.1	21.9	45.7	213.3	435.6	1,518.7
Upton/Druid Heights	155.3	2.4	34.2	66.4	231.3	411.1	1,493.2
Baltimore City	134.1	2.4	15.4	30.5	137.0	347.6	1,403.0

Source: Baltimore City Health Department

BCHD Analysis of 2005-2009 Maryland Vital Statistics data.

Rates are based on 2000 Census populations, given per 10,000 people.

Table 16 presents several additional health indicators for the West Baltimore CSAs. These include the teen birth rate, babies born at term, babies born with satisfactory birth weight (at least 5.5 pounds at birth), and the percent of mothers that received early prenatal care (in the first trimester). While many of these indicators for the CSAs are close to the City average, they can still be viewed as being too low meaning that children born in West Baltimore are at a disadvantage from the moment they are born. Birth outcome data for the West Baltimore CSA include:

- Only two CSAs, Beechfield/Ten Hills/West Hills (50.6) and Forest Park/Walbrook (57.4), have a lower teen birth rate than the City average in 2009 (60.1);
- Only three CSAs, Penn North/Reservoir Hill (86.7%), Beechfield/Ten Hills/West Hills (88.4%), and Forest Park/Walbrook (89.2%), have the same or higher percentage of babies born at term than the City average in 2009 (86.7%);
- Only two CSAs, Forest Park/Walbrook (88.3%) and Beechfield/Ten Hills/West Hills (88.4%), have a higher percentage of babies born with satisfactory birth weight than the City average in 2009 (87.2%); and
- Four CSAs have a greater percentage of births where the mother received early prenatal care than the City average.

Table 16
West Baltimore CSAs - Birth Indicators, 2009

Community Statistical Area	Teen Birth Rate	Percent Babies Born at Term	Percent Babies Born with Satisfactory Birth Weight	Percent of Births where Mother Received Early Prenatal Care (First Trimester)
Allendale/Irvington/South Hilton	88.3	81.5%	83.6%	79.4%
Beechfield/Ten Hills/West Hills	50.6	88.4%	88.4%	81.8%
Edmonson Village	63.2	81.3%	84.8%	77.7%
Forest Park/Walbrook	57.4	89.2%	88.3%	73.0%
Greater Mondawmin	84.9	82.0%	82.0%	68.4%
Greater Rosemont	110.2	86.3%	83.5%	74.2%
Penn North/Reservoir Hill	83.3	86.7%	84.8%	72.7%
Poppleton/The Terraces/Hollins Market	86.8	84.3%	84.3%	81.9%
Sandtown-Winchester/Harlem Park	88.4	85.8%	86.2%	70.5%
Southwest Baltimore	98.1	85.9%	86.2%	71.6%
Upton/Druid Heights	84.7	82.3%	85.9%	71.4%
Baltimore City	60.1	86.7%	87.2%	77.4%

Source: Maryland Department of Health and Mental Hygiene

Rates are based on 2000 Census populations, given per 10,000 people.

Baltimore City has a relatively high crime rate with nearly 6 per 100 persons being a victim of a Part 1 crime in 2009. Crime and its effects touch the lives of nearly all of the City's residents. The presence of Bon Secours, providing emergency and critical care services is of great importance to the residents and the community. While the indicators of crime and safety vary significantly within the West Baltimore CSAs, many of the CSAs have crime rates higher than the City average. Table 17 presents the Part 1 crime rate¹³, violent crime rate¹⁴, and the calls for domestic violence¹⁵ in the West Baltimore CSAs.

- Over half (6) of the West Baltimore CSAs have Part 1 crime rates above the City average with Greater Mondawmin having the highest Part 1 crime rate at nearly 96 crimes per 1,000 persons in 2009;
- Seven of the eleven West Baltimore CSAs have a violent crime rate above the City average with Upton/Druid Heights having the highest violent crime rate at nearly 27 per 1,000 persons in 2009; and

¹³ Part I crime rate offenses include murder, aggravated assault, rape, attempted rape, burglary, larceny, and auto theft.

¹⁴ Violent crime rate offenses include homicide, rape (and attempted rape), aggravated assault, and robbery.

¹⁵ The number of 911 calls to police for domestic violence incidents.

- Seven of the eleven West Baltimore CSAs have a domestic violence call rate above the City average with Greater Mondawmin having the highest domestic violence call rate at over 60 per 1,000 persons in 2009.

Table 17
West Baltimore CSAs - Resident Crime and Safety Indicators, 2009

Community Statistical Area	Part 1 Crime Rate	Violent Crime Rate	Domestic Violence Call Rate
Allendale/Irvington/South Hilton	42.1	12.3	49.9
Beechfield/Ten Hills/West Hills	40.1	7.1	41.0
Edmonson Village	24.5	7.6	46.2
Forest Park/Walbrook	46.6	11.0	42.2
Greater Mondawmin	95.9	26.0	60.4
Greater Rosemont	52.2	18.7	53.2
Penn North/Reservoir Hill	62.4	21.6	43.1
Poppleton/The Terraces/Hollins Market	65.1	22.6	50.7
Sandtown- Winchester/Harlem Park	61.2	23.9	57.1
Southwest Baltimore	60.7	24.1	57.9
Upton/Druid Heights	70.1	26.8	53.3
Baltimore City	59.6	15.3	47.8

Source: Baltimore City Police Department

Rates are based on 2000 Census populations, given per 1,000 people.

To provide greater context on the conditions and population that live within West Baltimore, BNIA-JFI also examined education and housing data. Overall, the analysis of educational indicators found that that a smaller percentage of West Baltimore students attending public schools graduate, a larger number drop out, and that West Baltimore students are more likely to be chronically absent (missing at least 20 days of school per year). Table 18 presents data on the educational indicators examined.

- Eight of the eleven CSAs have a higher dropout rate than the City average;
- Seven of the eleven CSAs have a lower high school completion rate than the City average;
- Six of the eleven CSAs have a higher chronic absence rate for elementary school students than the City average;
- Nine of the eleven CSAs have a higher chronic absence rate for middle school students than the City average with nearly 34% of the students living in Upton/Druid Heights missing at least 20 days of school in the 2008-2009 school year; and

- Nine of the eleven CSAs have a higher chronic absence rate for high school students than the City average with six of the CSAs having at least 45% of the high school students attending public schools missing at least 20 days of school in the 2008-2009 school year.

Table 18
West Baltimore CSAs - Baltimore City Public School Student Indicators, 2008-2009

	High School		Chronic Absence Rate		
	Dropout Rate	Completion Rate	Elementary Students	Middle School Students	High School Students
Allendale/Irvington/South Hilton	5.1%	82.5%	11.1%	21.9%	40.6%
Beechfield/Ten Hills/West Hills	4.3%	88.2%	7.0%	8.1%	30.0%
Edmonson Village	6.4%	82.6%	10.8%	21.5%	37.5%
Forest Park/Walbrook	6.6%	84.9%	13.0%	13.0%	44.3%
Greater Mondawmin	7.0%	78.8%	8.3%	16.4%	39.4%
Greater Rosemont	9.1%	78.0%	9.9%	19.3%	47.0%
Penn North/Reservoir Hill	7.7%	71.2%	9.3%	20.5%	47.8%
Poppleton/The Terraces/Hollins Market	8.5%	79.7%	11.3%	26.7%	49.6%
Sandtown-Winchester/Harlem Park	7.0%	76.3%	7.3%	21.5%	45.8%
Southwest Baltimore	5.8%	75.4%	11.8%	27.6%	48.0%
Upton/Druid Heights	9.4%	78.7%	10.9%	33.5%	49.0%
Baltimore City	5.9%	81.3%	10.1%	16.3%	39.2%

Source: Baltimore City Public Schools, 2008-2009 School Year

Housing data examined for the West Baltimore areas show that a greater percentage of the homes are vacant and abandoned, have a higher rate of foreclosure filings, and have a lower median sales price than the City average in 2009. Important findings from analyzing the housing indicators include:

- Seven of the eleven West Baltimore CSAs have at least 10% of the residential properties classified as being vacant and abandoned with Upton/Druid Heights having over 35% of the residential properties classified as being vacant and abandoned;
- Ten of the eleven CSAs have a higher rate of foreclosure filings than the City average in 2009. Only Sandtown-Winchester/Harlem Park has a lower rate of foreclosure filings (2.6% of residential properties) in 2009 compared to the City average; and
- In 2009, the highest median home sales price in the West Baltimore CSAs was Beechfield/Ten Hills/West Hills (\$155,000) and the lowest was Sandtown-Winchester/Harlem Park (\$30,000).

Table 19
West Baltimore CSAs - Housing Indicators, 2009

	Percent of Homes Vacant and Abandoned	Percent of Homes Receiving a Foreclosure Filing	Median Home Sales Price
Allendale/Irvington/South Hilton	4.2%	3.4%	\$89,900
Beechfield/Ten Hills/West Hills	0.4%	3.0%	\$155,000
Edmonson Village	3.1%	3.0%	\$90,000
Forest Park/Walbrook	5.4%	4.4%	\$99,950
Greater Mondawmin	11.2%	3.8%	\$82,800
Greater Rosemont	14.6%	3.4%	\$54,675
Penn North/Reservoir Hill	17.6%	5.5%	\$50,946
Poppleton/The Terraces/Hollins Market	20.6%	3.7%	\$109,000
Sandtown- Winchester/Harlem Park	32.1%	2.6%	\$30,000
Southwest Baltimore	23.8%	3.3%	\$45,000
Upton/Druid Heights	35.8%	3.6%	\$90,000
Baltimore City	8.1%	3.0%	\$145,000

Source: Baltimore City Department of Housing, Baltimore City Circuit Court,
First American Real Estate Solutions

5.4 Social, Educational and Programmatic Impacts of Bon Secours Baltimore Health System Operations

Bon Secours Baltimore Health System plays a vitally important role in the West Baltimore Community in which it is located. Bon Secours Hospital is both:

1. A source of employment and economic activity in a socially and economically depressed neighborhood; and
2. A source of health care services in a community facing significant health care related challenges.

In addition to these two important roles in terms of both providing needed health services and serving as a major source of economic activity in a distressed West Baltimore community, the Bon Secours of Maryland Foundation (now Bon Secours Community Works) has been at the center of efforts to improve the quality of life and social and economic vitality of its West Baltimore community. Bon Secours Community Works (BSCW), a division of Bon Secours Baltimore Health System, seeks to further the mission of the Sisters of Bon Secours through housing, health and community development initiatives and adheres to the Sisters' of Bon Secours commitment to provide good help to area residents.

As described above, the West Baltimore community in which Bon Secours is located has a high level of social and economic distress. As part of its service mission, BSCW works to improve social and economic conditions and the quality of life in West Baltimore. Bon Secours targets the issues of high poverty, low earnings and low levels of educational attainment in the community by offering educational and workforce programs to address the low level of workforce participation. It strives to improve access to affordable and quality housing by directly delivering housing services. Finally, Bon Secours offers a number of social and health care services to address the variety of social and health care concerns impacting the community.

Bon Secours Community Works provides community and economic development programs and services in six program areas:

1. Family Support Center
2. Women's Resource Center
3. Housing & Neighborhood Revitalization
4. Youth Employment and Entrepreneurship
5. Career & Workforce Development
6. Financial Services.

The **Family Support Center** provides resources for young, low-income families in West Baltimore. The mission of the Family Support Center is to:

- Create an environment that is family-focused, parent-driven and child-centered to encourage parents and their children to learn, grow and develop new skills;
- To give families the opportunity to experience a positive and healthy environment where they can receive support and encouragement;
- To help families make the best choices to become self-sufficient with the aid of appropriate services; and
- To provide opportunities for parents and their children to make positive connections with community organizations.

The center provides a full range of family services to assist expectant mothers and parents with children ages birth to 47 months. Services include parenting and child developmental education, employment readiness training that include a GED Program, Adult Basic Education classes, resume writing, interviewing skills and career counseling, and health education. The Family support Center provides vital resources for low-income women and children ages 0 to 4, including a developmentally appropriate pre-school, GED and parenting courses, computer and job readiness training, and referrals for public benefits by case workers who make home visits to new mothers and pregnant women. All Center services are free, and the Center provides on-site childcare for all participants. The Bon Secours Family Support Center also has a Home Visiting Program which is available for pregnant women and mothers with young children. The visits provide the same range as those at the center with an emphasis on healthy pregnancies and positive birth outcomes.

In fiscal year 2010, the Family Support Center served 111 families that participated in its programs. Career development workshops and parenting classes were provided to 100 participants and five GED certificates were earned by program participants. In-home Interventions were implemented for 37 families.

The Women’s Resource Center provides women who are homeless or at risk of becoming homeless with a safe, nurturing environment in which to seek assistance. The main purpose of the Women’s Resource Center is to foster a sense of self-worth and dignity in each and every woman that visits the center, and to help empower them to realize their full potential. Some of the issues that the Center confronts in assisting these women are domestic and criminal violence, depression, sub-standard living arrangements, unhealthy diets, unemployment and higher than average high school dropout rates. This drop-in center provides free hot meals, free domestic violence counseling, laundry, telephone and address use, life skills training, housing and eviction prevention funds, referral services to other community agencies, and a variety of other services.

The Center also provides referral services, connecting women with the services they need that are available in the community and City. Center staff acts as an advocate for each woman with agencies in order to obtain the required services. Domestic abuse victims are put in touch with the *House of Ruth*. In partnership with Mercy Supportive Housing, the Center helps obtain a healthy living environment for those without. Mothers receive parenting classes through the assistance of *Parents Anonymous*. In fiscal year 2010, 534 women were provided hospitality such as a hot meal, shower, breakfast, laundry, phone or mail access and 69 women were provided funds to prevent them from being evicted from their homes.

The **Housing and Neighborhood Revitalization** program provides housing and neighborhood revitalization services to West Baltimore residents and communities. It develops and manages affordable housing for low income families and seniors, provides capacity building assistance to community organizations, and preserves housing through homeowner education and home improvement grants. Bon Secours Community Works’ Housing and Neighborhood Revitalization initiatives are designed to sustain strong, stable, and thriving West Baltimore neighborhoods and were developed in partnership with Operation ReachOut Southwest (OROSW) – a coalition of more than 300 community businesses, churches, residents, partner organizations and institutions (including Bon Secours) that joined forces in 1997. Together, they developed a 20-year community revitalization plan for Southwest Baltimore’s 20,000 residents.

The Housing and Neighborhood Revitalization Department is active in three main areas:

1. Housing Development
 - Acquisition
 - Rental Housing
2. Housing Preservation
 - Expanded Home Improvement Program (Homeowner Grants and Volunteer Initiatives)
 - Asset Management
3. Community Development
 - Open Space Management
 - Neighborhood Projects/Association Capacity Building
 - Senior Support Services

Housing Development: Since 1988, Bon Secours has created 539 units of senior independent living and 119 units of family rental housing; the units are a mix of new construction and renovation and include:

- Hollins Terrace (1988) 85 units for seniors;

- Benet House (1991) 101 units for seniors and disabled;
- Bon Secours Apartments (four phases from 1997-2001) 119 family apartments in renovated row houses;
- Liberty Village (2000) 85 units for seniors;
- Smallwood Summit (2003) 89 units for seniors and disabled;
- New Shiloh (2007) 81 units for seniors; and
- Wayland Village (2011) 89 units for seniors and disabled.

Housing Preservation – Bon Secours’ major Housing Preservation Programs include:

- *Asset Management of Rental Housing Portfolio* provides high quality apartments to individuals and families (119 units) and seniors and people with disabilities (529 units). BSMF and our third-party management company review day-to-day operations and monitor the properties for long-term success.
- *Home Improvement Grants and Loans* for homeowners are for vital improvements that address their basic housing needs. With some funds targeted to strong blocks and others to seniors, the funds have a large impact. Since 2002, 77 homeowners received \$775,000 in funds.

Community Development– Bon Secours’ major Community Development Programs include:

- *Open Space Management* consists of strategies developed in collaboration with community partners- most importantly the Clean & Green Landscaping Program. Clean and Green converts vacant blighted lots into attractive green spaces and maintains them, engaging over 200 adults and 100 youth annually in job training, community events, exercise, recreation, and gardening. Since 2002, 600 lots and over 1 million square feet were converted.
- *Neighborhood Projects* identifies and assists neighborhood leaders to advocate for improvements and beautify streetscapes while building community. Over the past year, staff has worked on MARC and Red Line advocacy, an inner-block park, and assisting three neighborhood associations achieve their goals (lighting, tree-planting, housing inventories, etc.).
- *Senior Support Services* seeks to connect seniors living in OROSW to needed services through the Silver Seniors monthly social and education club, and in two target areas, to connect them to home improvement funds.

The **Youth Employment and Entrepreneurship Program (YEEP)** helps at-risk, vulnerable youth, ages 13-18, gain after-school and summer employment, develop a career plan, receive leadership and job readiness training, enter post-secondary education, and develop financial management skills. Upon completion of this program, youth are supported in securing career-track positions that have or will lead to attain self-sufficiency.

The 12-week job readiness training prepares the youth for summer employment. Area business owners provide full- and part- time positions, internships and shadowing opportunities for YEEP participants. YEEP Alumni have volunteered their time as mentors to participants. During the year, YEEP students and parents complete community service projects, attend

recreational and cultural activities, and participate in meetings and training sessions. Over 350 area youth participated in YEEP activities in FY 10.

The Bon Secours **Career and Workforce Development Program** strives to assist community residents to make positive steps forward in their lives through gainful employment. The program provides a five week job training curriculum designed to guide and direct clients in gaining employment or advancing a career goal. The program includes:

- Developing interview skills;
- Developing strong work ethics;
- Learning to become self-sufficient;
- Identifying appropriate work attire;
- Workplace do's and don'ts;
- Anger management and conflict resolution;
- Computer literacy skills including internet browser usage for the job search and email; and
- GED Instruction.

Upon completion of the program, clients are referred to an on-site job placement specialist to assist them with finding employment. The Bon Secours Career and Workforce Development Program provides three years of comprehensive follow-up services, which include: Driver Education; Homebuyer's Club and Free or low cost income tax preparation. A total of more than 140 individuals participated in the program in 2010 and 75 individuals were placed with one or more positions of employment.

Financial Services provides a full array of money management resources to residents in Southwest Baltimore, a community that is significantly underserved by the traditional financial services industry. Access to retail banking and bill paying services, credit repair, debt management, free and low cost tax preparation, emergency loans and pre-screening and enrollment in public assistance programs (WIC, MCHIP, PAC and Medicaid) are provided at two locations in the community.

In 2010 Bon Secours Financial Services achieved the following results:

- 119 individuals joined the Security Plus Federal Credit Union;
- Trained 53 participants on sound money management skills;
- Developed a debt reduction/credit improvement plan for six people;
- Provided 140 hours of financial management counseling; and
- Filed over 1000 free and more than 400 low-cost tax returns were on behalf of community residents.

Health Care Delivery and Education

Bon Secours Baltimore Health System offers a variety of health care education and delivery programs as well as community service programs that improve the quality of life and public health in its surrounding community and the larger City of Baltimore and region. As part of its healthcare mission, in 2010 Bon Secours Baltimore Health System provided \$9.7 million in ***charity care***— free or discounted health services provided to persons who cannot afford to pay and who meet the Hospital's criteria for financial assistance. Bon Secours also offers both

community based clinical services and health care support services to residents of its West Baltimore community and to the entire city.

Community Based Clinical Services: Bon Secours Baltimore Health System's community-based clinical services include the Community Institute of Behavioral Services which provides a variety of clinical and community based behavioral health services; health screenings at no charge at various sites throughout the community; and free transportation to and from medical appointments for the elderly and disabled. These programs served over 120,000 persons during FY 10.

Health Care Support Services: Bon Secours offers the Tele-Heart program, a disease management program for persons diagnosed with congestive heart failure and hypertension that served almost 4,800 persons in FY 10.

5.5 Economic Activity Associated with Bon Secours Baltimore Health System's Housing Portfolio

The core mission of Bon Secours Baltimore Health System's Housing and Neighborhood Revitalization program is to provide high quality, affordable housing to seniors and families residing in West Baltimore. The affordable housing provided by Bon Secours Foundation is vitally important to both a City and a community that has been losing residents to the surrounding suburbs. Bon Secours operates a portfolio of ten affordable apartment and senior housing buildings with a total of 648 apartment units. These residential developments contribute to the economic vitality of the City and the West Side community served by the Foundation – both through the spending by the tenants residing in the apartments and by the capital spending of the Foundation to develop, renovate and maintain its properties. The economic impacts of these activities were also analyzed as part of this project.

As presented in Table 20, Bon Secours has spent a total of \$26.3 million on two new buildings and two major renovation projects in the last five years. The economic impacts¹⁶ associated with these projects are presented in Table 21 for both the City of Baltimore and for the City's West Side. As presented in Table 21, the City-level impacts of Bon Secours Housing capital spending were:

- The construction of the New Shiloh Village Senior Living in 2006-2007 supported \$15.0 million in economic activity, supported 90 jobs earning \$4.6 million and generated \$0.4 million in State and local tax revenue;
- The Benet House - Window Replacement project in 2009 supported \$0.3 million in economic activity, supported 2 jobs earning \$0.1 million and generated \$8,385 in State and local tax revenue;
- The Wayland Village Senior Apartments in 2010-11 supported \$21.4 million in economic activity, supported 126 jobs earning \$6.6 million and generated \$0.6 million in State and local tax revenue; and
- The Hollins Terrace Renovations in 2011 supported \$2.0 million in economic activity, supported 15 jobs earning \$0.7 million and generated \$64,614 in State and local tax revenue.

¹⁶ All economic impact figures are valued in terms of the year of the project.

Table 20
Bon Secours Housing
Recent Capital Projects

Project	Date	Construction/ Development Cost
New Shiloh Village Senior Living	May 2006 to May 2007	\$10,252,903
Benet House - Window Replacement	2009	\$179,241
Wayland Village Senior Apartments	March 2010 to March 2011	\$14,424,288
Hollins Terrace - Misc. Renovations	2010-2011	\$1,400,000

Source: Bon Secours

Table 21
Bon Secours Housing
Baltimore City Economic Impact of Recent Capital Projects

Project	Construction/ Development Cost	Output (\$s)	Employment (Jobs)	Employee Compensation (\$s)	State and Local Government Revenues (\$s)
<u>Baltimore City Impact¹</u>					
New Shiloh Village Senior Living	\$10,252,903	\$15,004,452	90	\$4,634,697	\$434,960
Benet House - Window Replacement	\$179,241	\$264,033	2	\$95,343	\$8,385
Wayland Village Senior Apartments	\$14,424,288	\$21,354,728	126	\$6,643,858	\$621,829
Hollins Terrace - Misc. Renovations	\$1,400,000	\$2,047,286	15	\$739,655	\$64,614
<u>West Side of Baltimore City Impact^{1,2}</u>					
New Shiloh Village Senior Living	\$10,252,903	\$13,714,295	77.4	\$4,145,378	\$332,841
Benet House - Window Replacement	\$179,241	\$245,720	1.8	\$91,436	\$6,881
Wayland Village Senior Apartments	\$14,424,288	\$19,441,690	109	\$5,948,025	\$476,296
Hollins Terrace - Misc. Renovations	\$1,400,000	\$1,892,523	14	\$683,527	\$51,445

(1) All financial figures are expressed in terms of values in the year in which the spending occurred.

(2) As described above - for the purposes of this analysis the West Side is defined as Zip Codes 21216, 21217, 21223, and 21239

Source: Bon Secours

The tenants residing in Bon Secours Baltimore Health System’s ten properties also contribute to the level of economic activity occurring in the City and the West Side. The level of tenant incomes was estimated based on the rent level for each unit, which was provided by Bon Secours. The income of the apartment tenants was estimated as the minimum income required to rent an apartment at the specified rent level, based on the 30% of income for rental costs estimated as “affordable” by the U.S. Department of Housing and Urban Development. As presented in Table 22, there is a total of \$16.5 million in tenant incomes associated with the tenants of Bon Secours Foundation’s ten buildings and 648 apartment units. As presented in Table 23, the local spending by these tenants generates \$15.4 million in economic activity in the City of Baltimore, supports 109 jobs earning \$5.2 million, and generates \$0.9 million in combined State and local government revenues in the City of Baltimore.¹⁷ The local West Side spending by these tenants generates \$7.8 million in economic activity in the City’s West Side, supports 54 jobs earning \$2.6 million, and generates \$0.4 million in combined State and local government revenues in the City of Baltimore.¹⁸

Table 22
Bon Secours Housing
Current Portfolio of Apartments

Project	Number of Units	Range of Rent Levels	Estimated Tenant Incomes
Total	<u>648</u>		<u>\$16,491,680</u>
Benet	101	\$844-\$1,056	\$4,054,240
Bon Secours Apts I	30	\$420-\$588	\$665,640
Bon Secours Apts II	30	\$414-\$596	\$626,480
Bon Secours Apts III	30	\$394-\$588	\$566,680
Bon Secours Chesapeake Apts	29	\$359-\$673	\$575,160
Hollins	84	\$992-\$1,240	\$3,958,080
Liberty Village	84	\$121-\$516	\$1,273,320
Shiloh	81	\$207-\$662	\$1,422,960
Smallwood Summit	89	\$179-\$502	\$1,490,200
Wayland	90	\$394-\$820	\$1,858,920

Source: Bon Secours

¹⁷ The total impacts of tenant incomes is less than total estimated level of incomes due to savings, leakages occurring as a result of State and Federal taxation, and spending outside of the City of Baltimore.

¹⁸ The total impacts of tenant incomes is less than total estimated level of incomes due to savings and spending outside of the City of Baltimore. This analysis also excludes the Liberty Village project - which is located in Zip Code 21215 and outside of the West Side area analyzed.

Table 23
Bon Secours Housing
Baltimore City Economic Impact of Tenant Incomes

Project	Output ¹ (\$s)	Employment (Jobs)	Employee Compensation (\$s)	State and Local Government Revenues (\$s)
Baltimore City Impact	\$15,447,587	109	\$5,245,436	\$868,598
West Side of Baltimore City Impact ²	\$7,787,932	54	\$2,614,646	\$444,251

(1) Please note Output is less than Tenant Incomes Due to Out-of-Area Spending.

(2) As described above - for the purposes of this analysis the West Side is defined as Zip Codes 21216, 21217, 21223, and 21239. The Liberty Project - which is located in Zip Code 21215 was excluded from the West Side analysis.

Source: Bon Secours

6.0 Methodology and Terms

This analysis of the economic contribution of Bon Secours Baltimore Health System’s operations used the IMPLAN input-output model for Baltimore City and for the four zip codes analyzed.¹⁹ IMPLAN is one of the most widely used models in the nation, and can be used to analyze the impacts of companies, projects, or of entire industries. An input-output analysis examines the relationships among businesses and among businesses and final consumers. Input-output analysis is based on the use of multipliers, which describe the response of an economy to a change in demand or production. Multipliers measure the effects on an economy from a source of economic activity, in this case the provision of health care services.

The economic activity generated in a city, county, region or state is greater than the simple total of spending associated with the event or activity being studied. This is because as this money is earned it is, in turn, spent, earned and re-spent by other businesses and workers in the regional economy through successive cycles of spending, earning and spending. However, the spending in each successive cycle is less than in the preceding cycle because a certain portion of spending “leaks” out of the economy in each round of spending. Leakages occur through purchases of goods or services from outside of the region and federal taxation. The IMPLAN multipliers used in this analysis capture the effects of these multiple rounds of spending.

This analysis focuses on three measures of economic impact:

¹⁹ See www.IMPLAN.com for a description of the model. The IMPLAN model for the Baltimore City and for zip codes 21216, 21217, 21223, and 21229, were purchased, created and used for this project.

- **Output.** The total value of production or sales in all industries;
- **Employment.** The total number of full and part time jobs in all industries; and
- **Employee Compensation.** The wages and salaries, including benefits, earned by the workers holding the jobs created.

In the case of the zip code level analysis of hospital and foundation payroll and purchases, the economic activity analysis was conducted separately for each of the four zip codes and again, using the economic data four zip codes in an aggregated model for the entire West Side of the City of Baltimore. The results of the aggregated West Side analysis were larger than combined total for the separate four zip code level analyses conducted because it captured spending occurring between the areas studied.

Four measures of the economic activity and impact of the jobs supported by Bon Secours Hospital and Foundation’s proposed expansion and operations are included in this report:

- **Direct effects.** The change in economic activity being analyzed—in this case the provision of health care services;
- **Indirect effects.** The changes in inter-industry purchases, for example the purchase of medical supplies by Bon Secours Baltimore Health System, in response to the change in demand from the directly affected industries;
- **Induced effects.** The changes in spending from households as income and population increase due to changes in production; and
- **Total effects.** The combined total of direct, indirect and induced effects.

The indicators and data included in Section 5.3 were collected, analyzed, and provided by the Baltimore Neighborhood Indicators Alliance – Jacob France Institute (BNIA-JFI). BNIA-JFI collected this data from a variety of city and state agencies. Using Geographic Information Systems (GIS) each piece of data could be assigned a Community Statistical Area (CSA). Table 20 provides a list of each indicator, its definition, and its source.

Table 24
West Baltimore Community Statistical Area Indicator Information

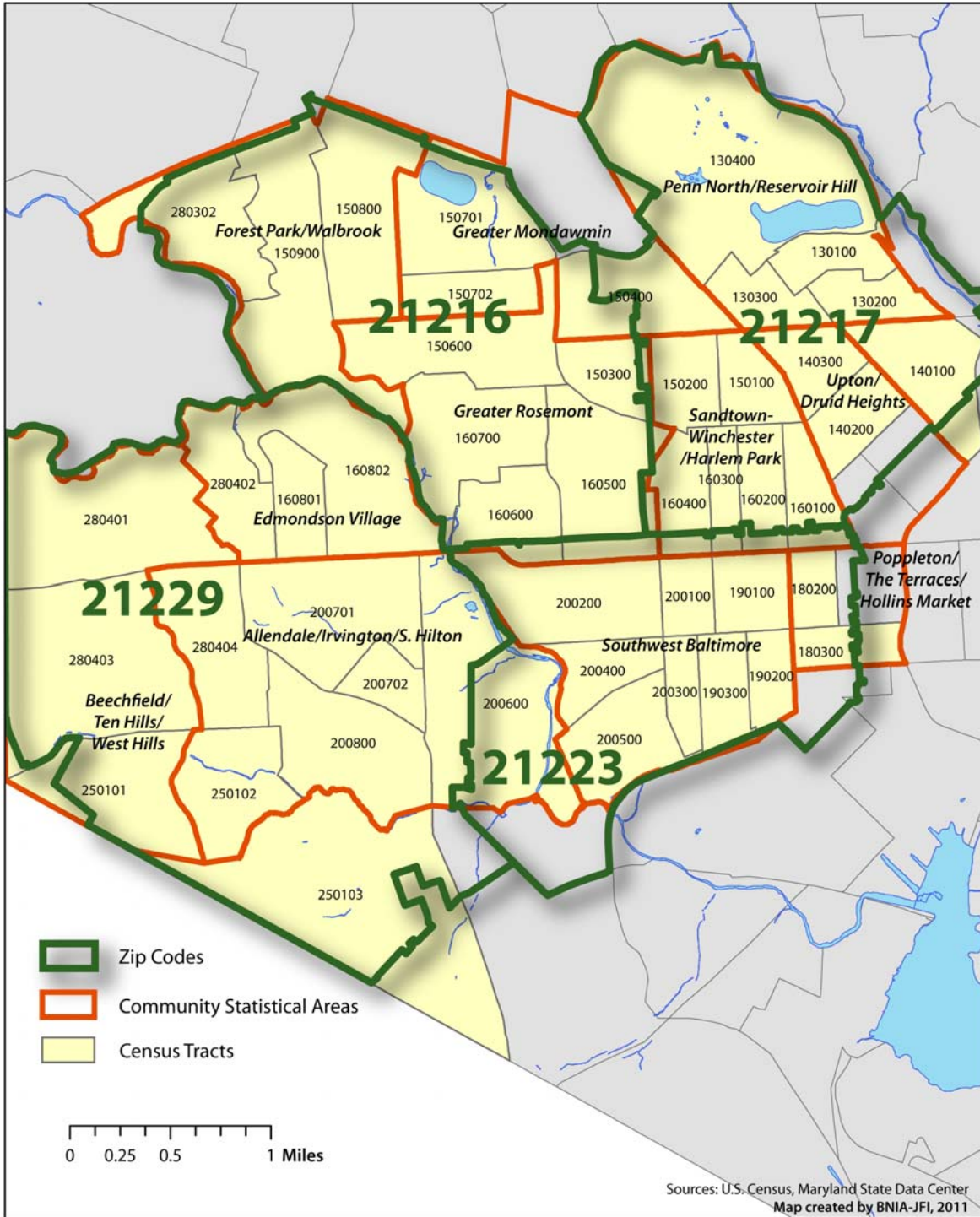
INDICATOR	DEFINITION	YEAR	SOURCE
Life Expectancy	Life expectancy	2005-2009	BCHD
All_cause	All causes of mortality rate	2005-2009	BCHD
Heart	Age-adjusted mortality rate for those with Heart Disease	2005-2009	BCHD
Cancer	Age-adjusted mortality rate for those with Cancer	2005-2009	BCHD
Diabetes	Age-adjusted mortality rate for those with Diabetes	2005-2009	BCHD
HIV/AIDS	Age-adjusted mortality rate for those with HIV/AIDS	2005-2009	BCHD
ASR_under1	Age-specific mortality rate for those aged less than 1 year	2005-2009	BCHD
ASR1_14	Age-specific mortality rate for those aged 1 to 14 years	2005-2009	BCHD
ASR15_24	Age-specific mortality rate for those aged 15 to 24 years	2005-2009	BCHD
ASR25_44	Age-specific mortality rate for those aged 25 to 44 years	2005-2009	BCHD
ASR45_64	Age-specific mortality rate for those aged 45 to 64 years	2005-2009	BCHD
ASR65_84	Age-specific mortality rate for those aged 65 to 84 years	2005-2009	BCHD
ASR85up	Age-specific mortality rate for those aged 85 years and older	2005-2009	BCHD
Teen Birth Rate	The number of teen ages 15-19 who gave birth per 1,000 teens (as reported by 2000 Census).	2009	DHMH
Percent Babies Born at Term	The percentage of babies born at full term (37-42 weeks gestation) that year.	2009	DHMH
Percent Babies Born Satisfactory Weight	The percentage of babies born with a birth weight of 5.5 pounds or more out that year.	2009	DHMH
Percent of Births with Prenatal Care (First Trimester)	The percentage of births where the mother received prenatal care in the first trimester of pregnancy that year.	2009	DHMH
Part 1 Crime Rate	The number of reported criminal offenses per 1,000 residents	2009	BCPD
Violent Crime Rate	The number of reported violent crimes per 1,000 residents	2009	BCPD
Domestic Violence Call Rate	The number of 911 calls to police for domestic violence incidents out of every 1,000 residents	2009	BCPD
Dropout Rate	The percentage of students enrolled in grades 9-12 at the beginning of the academic year who withdrew from school sometime before completion of the school year out of all students enrolled in grades 9-12 that year.	2008-2009 school year	BCPSS
High School Completion Rate	The percentage of students enrolled in public school in grade 12 who receive a Maryland High School diploma or certificate of completion for that year.	2008-2009 school year	BCPSS
Percent Elementary Chronic Absent	The percentage of elementary school students in public schools missing 20 or more days of school in the given school year.	2008-2009 school year	BCPSS
Percent Middle School Chronic Absent	The percentage of middle school students in public schools missing 20 or more days of school in the given school year.	2008-2009 school year	BCPSS
Percent High School Chronic Absent	The percentage of high school students in public schools missing 20 or more days of school in the given school year.	2008-2009 school year	BCPSS
Percent Vacant & Abandoned	Percent of vacant and abandoned homes out of all residential properties in that area that year (as reported by Maryland Property View). Properties are considered vacant/abandoned by Baltimore City if the property is not habitable.	2009	Baltimore City Housing
Percent Foreclosure Filings	The percentage of properties receiving mortgage foreclosure filings out of all residential properties in that area (as reported by Maryland Property View)	2009	Baltimore City Circuit Court
Median Home Sales Price	The selling price of a home that falls in the middle of the most expensive and least expensive home sale price in that area.	2009	FARES

Rates are given per 10,000 people

BCHD Analysis of 2005-2009 Maryland Vital Statistics data. Rates are based on 2000 Census populations, given per 10,000 people

Appendix 1

Bon Secours Hospital - West Baltimore Geography Analyzed



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