



A description of dollar stores in Baltimore City: Research findings and policy recommendations from structured store observations and community engagement

November 2023

Prepared by:

Faculty and students at The Center for Human Nutrition in the Department of International Health at Johns Hopkins University

Samantha M. Sundermeir, MS, RDN
Sydney Santos, BA
Lisa Poirier-Barna, MHS
Emma C. Lewis, MS
Shuxian Hua, BE
Joel Gittelsohn, PhD, MS

Funded by:

The Center for Science in the Public Interest

This report does not necessarily reflect the views of the Johns Hopkins Bloomberg School of Public Health or The Center for Science in the Public Interest

Acknowledgements

First, we would like to thank all of the Baltimore City residents, Department of Planning, and City Council members who participated in this study whose time and feedback was invaluable. We also thank Senator Mary Washington, PhD, and her staff for their ongoing collaboration on this work. Finally, we thank the Center for Science in the Public Interest who funded this research and whose staff provided expertise and technical support in a myriad of ways: Emily Friedman, JD, Karen Gardner, MA, and Sara John, PhD.

Table of Contents	
Executive Summary	5
Background	7
Methodology	9
Table 1: Dollar store study phases, number of participants, and participant descriptions	9
Recruitment	9
Table 2: Neighborhoods where community member interviewees reside	10
Ethical Considerations	11
Research Question 1: Where are dollar stores located in Baltimore City?	11
Research Question 2: How do Baltimore City community members view and utilize dollar stores?	13
Do Baltimore community members view dollar stores favorably?	13
Table 4: Ranking of Store Types Preferred by Community Members, (n=120)	13
Do dollar stores impact the community positively or negatively?	13
Table 5: Perspectives on how dollar stores impact neighborhoods, (n=120)	14
Why do people shop at dollar stores?	14
Why do people choose not to shop at dollar stores?	15
Do community members think dollar stores sell healthy food?	16
How do community members use dollar stores for food and non-food shopping?	17
Table 6: Shopping frequency for non-food shopping and food shopping at each store type, % shopping more than once per month, (n=61)	17
Table 7: Proportion of time spent non-food and food shopping at dollar stores, (n=91 dollar store shoppers)	17
Table 8: Dollar store food shopper profiles	18
Research Question 2: What comprises the current dollar store environment, inside and outside of the store?	19
Are fruits and vegetables available in Baltimore dollar stores?	19
Table 9: Percent of Baltimore City dollar stores stocking fruit and vegetables, (n=49)	19
Are milk, eggs, and cheese available at Baltimore dollar stores?	19
Table 10: Percent of Baltimore City dollar stores stocking milk, eggs, and cheese, (n=49).	19
Are ultra-processed foods available at Baltimore dollar stores?	20
Table 11: Percent of Baltimore City dollar stores stocking ultra-processed foods, (n=49) ..	20
Is the exterior well kept in Baltimore dollar stores?	20
Is the interior well kept at dollar stores?	20
Table 12: Interior and exterior appearance of dollar stores in Baltimore City, (n=49)	21

Research Question 3: What dollar store policies for Baltimore City are supported by community members?	22
Is there support for attracting other, better food retailers?	22
Is there support for policies to improve dollar store appearance?	22
Is there support for improving healthy food availability at dollar stores?	23
Is there support for a dollar store conditional use policy or community agreements?	24
Is there support for a dollar store dispersal ordinance?	26
Is there support for closing existing dollar stores, and banning all new dollar stores from opening?	26
Table 13: Level of Support for dollar store policy strategies among survey respondents, (n=120)	27
Table 14: Dollar store policy ideas, support, and key considerations, summarized across data sources	28
How can we enforce these potential new policies?	29
Research Question 4: What do community members and policy makers think of the proposed conditional use policy language?	30
Community Members	30
Figure 2: Dr. Joel Gittelsohn reviewing neighborhood strengths and challenges generated by participants.....	30
Figure 3: Participant votes for the top challenges in their neighborhoods (note, this image does not include all pages/votes).....	31
Policy Makers	31
Policy Recommendations	32
Conclusions	36
References	37

Executive Summary

The number of dollar stores is expanding rapidly in both urban and rural settings in the United States.²⁻⁴ This expansion has raised concerns among communities and policy makers across the nation, leading at least 70 municipalities to pass policies to restrict or regulate dollar stores over the last five years.^{2,5} Just within Baltimore City limits alone there are over 50 dollar stores, moving neighborhood associations and local policy makers to consider regulation. Given the limited existing literature that describes the dollar store environment and explores how community members perceive and use dollar stores, the State of Maryland mandated a study of dollar stores in Baltimore City to drive policy recommendations.⁶ The ultimate goal was to generate community-informed, evidence-based policy recommendations for Baltimore City. The project was guided by the following aims:

- (1) To understand where dollar stores are located in Baltimore City, and how this relates to neighborhood racial composition and socioeconomic status.
- (2) To understand how Baltimore City community members currently view and utilize dollar stores.
- (3) To describe the Baltimore City dollar store environment inside and outside of stores.
- (4) To understand what dollar store policies community stakeholders support, and gather feedback on the proposed conditional use policy language being drafted by City Council, and make policy recommendations.

To accomplish this, we employed a mixed-methods approach across four study phases from October 2022-August 2023: 1) in-depth interviews with community members and policymakers, 2) structured in-store observations, 3) an online survey, and 4) two workshops: one with community members and one with local policy makers.

Key Findings:

- Most stores (33 out of 53) are located in census tracts with the highest social vulnerability based on socioeconomic status, household characteristics, racial and ethnic minority status, and housing and transportation.⁷
- Community members report that dollar stores fill a need for food and non-food items like cleaning supplies and household products, at affordable prices and convenient locations.
- Only 4/49 dollar stores offered fresh produce. Most stores offered canned and frozen fruit and vegetables, and some stores had eggs and milk.
- Stores offered a wide variety of unhealthy food/beverage options like soda, chips, candy, frozen ready-to-heat meals, and hotdogs. These products were found in multiple locations throughout the store (endcaps, eye-level shelves, special displays, and at checkout).
- There are concerns among community members about the appearance and cleanliness of the stores, lack of healthy options available, and impact on nearby small businesses.

- A majority of community members expressed positive views of the proposed conditional use policy and liked that it included a community benefits agreement. Workshop participants were surprised and dissatisfied to learn that the new policy would not do anything to address the existing 50+ dollar stores in the city.
- At the policy maker workshop, participants expressed an interest in better aligning the proposed conditional use policy with community member priorities.

Recommendations

1. Amend Council Bill 23-0431 to:

- Suggest that parties to community benefits agreements agree that the store subject to the agreement will provide healthy foods.
- Include the conditional use language related to grocery stores that already exists in the enabling statute, Md. Land Use Code § 10-306(b)(3)(ii) and (iii).
- Increase the minimum dispersal distance in § 14-336.1(A) to 1 mile.

Additionally, consider suggesting that parties to community benefits agreements agree to terms related to:

- Regular inspection of store cleanliness and appearance.
- Sourcing food from local vendors and producers.
- Soliciting and incorporating community input on new store design to ensure the exterior appearance and façade aligns with the neighborhood strategic plan.
- Staffing standards.
- Dollar stores' investment back into the neighborhood they serve.
- Store accessibility.

2. In future policy, include language to address all existing dollar stores in Baltimore City, not just new dollar stores that open.

- Key components to address in such a policy include:
 - Store appearance and cleanliness (e.g., trash/debris, cluttered aisles)
 - Stocking requirements to improve healthy food access: see model language [here](#).

Strategies generated by participants for improving healthy food access in dollar stores:

- Work with local suppliers.
- Make dollar stores aware of federal grants.
- Encourage participation in local programs like Fresh Crate.¹
- Use the building code to require certain amount of food refrigeration.
- Encourage dollar stores to take advantage of existing tax credit opportunities.
- Increase the number of dollar stores that are Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) authorized.

Background

The number of dollar stores is expanding rapidly in both urban and rural settings in the United States.²⁻⁴ There are over 34,000 dollar store locations in the United States (US), which is more locations than Walmart, Starbucks, and McDonald's locations combined.^{2,8,9} Consumer behavior has also shifted over the last decade: household food purchases at dollar stores increased by 90% from 2008-2020.¹⁰

Dollar store proliferation has raised concerns among communities and policy makers across the nation, particularly in areas where residents tend to have low incomes and/or low access to healthy food.^{1,4,12,13} There is some evidence to show that dollar stores tend to be located in majority Black and Latine neighborhoods, and lower income US census tracts.^{3,10,11} This is important given that Black and Latine populations, and neighborhoods with lower-incomes are more likely to have a higher burden of chronic, diet-related disease such as cardiovascular disease, obesity, and diabetes,^{12,13} and dollar stores tend to prioritize offering ultra-processed foods over healthy options.¹⁴⁻¹⁶

Specific concerns such as the high availability of ultra-processed foods, store staffing and cleanliness, and negative economic impacts have led at least 70 municipalities to pass policies to restrict or regulate dollar stores over the last five years.^{2,5} For example, some municipalities have passed policies that limit where new stores can open in relation to existing stores (dispersal ordinances), while others require that a percentage of shelf or floor space be dedicated to healthy foods such as fresh produce and meat, whole grains, and low-fat dairy.^{2,5}

Despite recent media attention and policy movement in some municipalities, only one study exists to date that explores how community members perceive dollar stores and use them to meet their daily needs.¹⁷ This study found overall positive views of dollar stores, and support for improving the healthfulness of the foods offered.¹⁷ There is also limited literature that describes the dollar store environment in terms of interior and exterior appearance, and what types of food and non-food products are offered.^{14-16,18,19} These gaps are critical to understand prior to developing new dollar store policies in order to avoid widening racial and socioeconomic health disparities.

Just within Baltimore City limits alone there are over 50 dollar stores, moving neighborhood associations and local policy makers to investigate the impact of these stores further. In July 2022, the State of Maryland mandated a study of dollar stores in Baltimore City to drive community-informed, evidence-based dollar store policy recommendations.⁶ Therefore, our research team sought to fill the aforementioned dollar store knowledge gaps in the context of Baltimore City, guided by the following aims:

- (1) To understand where dollar stores are located in Baltimore City, and how this relates to neighborhood racial composition and socioeconomic status.
- (2) To understand how Baltimore City community members currently view and utilize dollar stores.
- (3) To describe the Baltimore City dollar store environment inside and outside of stores.

- (4) To understand what dollar store policies community stakeholders support, gather feedback on the proposed conditional use policy language being drafted by City Council, and make policy recommendations.

Prior to completing data collection, we were informed about a draft conditional use dollar store bill slated to be introduced by the Baltimore City Council. Thus, we were able to add Aim 4, and solicit feedback on the draft bill in the final phase of the study, and report back to City Council on our findings. The bill was later introduced in October of 2023 as Council Bill 23-0431.

Methodology

From October 2022-July 2023, we employed a sequential mixed-methods approach using qualitative and quantitative methods across four study phases: 1) in-depth interviews with community members and policymakers, 2) structured in-store observations, 3) an online survey of Baltimore City residents, and 4) two workshops: one with community members, followed by one with policy makers (see **Table 1**).

Table 1: Dollar store study phases, number of participants, and participant descriptions

Study Phase	Participants/Stores	Description
1. In-depth interviews	27	Community Members: 13 Dollar store staff: 5 Retail staff: 4 Policy makers: 5
2. Structured in-store observations	49	Dollar General Dollar Tree Family Dollar
3. Online survey	120	21 zip codes covered Food Insecure (49.2%) Black (42.5%) White (46.7%) Asian (1.7%) Declined to answer (5.8%)
4. Community member workshop	21	Black (57%) White (24%) Asian (5%) Declined to answer (9.5%)
4. Policy maker workshop	8	Black (50%) White (25%) Hispanic/Latine (25%) Declined to answer (12.5%)

Recruitment

In-Depth Interviews

We used purposive sampling and snowball sampling to identify policymakers and community members who were knowledgeable about dollar stores in their neighborhood. We also handed out flyers in the community, and distributed flyers to dollar store staff. We completed 27 interviews with Baltimore City residents, dollar store and retail staff, and policy makers (see **Table 2**). About 25% of informants from Baltimore City lived in Healthy Food Priority Areas.²⁰

Table 2: Neighborhoods where community member interviewees reside

Neighborhood	Number of Participants**
Mondawmin	2*
Radnor Winston	4
Yale Heights	1
Dorchester	3*
Ashburton	2
McElderry Park	1
Waverly	1
Cherry Hill	1*
Belair-Edison	1

*Healthy Food Priority Area

**Counts only include interviewees who reside in Baltimore City. We interviewed some policy makers and retail staff who reside outside of the city.

Dollar Stores

To identify dollar stores in Baltimore City, we used the Center for a Livable Future food retailer database.²¹ We also searched the “store finder” function on each of the three dollar store brand websites (Dollar General, Dollar Tree, and Family Dollar). We identified 53 stores within Baltimore City limits. One store was temporarily closed due to a burst waterpipe, and 3 stores were closed at the time of our visits on two occasions (during normal operating hours), leaving a total of 49 stores for observation.

Online Survey

The online survey was largely distributed through neighborhood associations and word-of-mouth. We also recruited in-person at community events and in zip codes where we had no responses at the time of the recruitment outing. We posted flyers in public spaces (libraries, recreation centers, senior centers). We conducted an initial analysis after receiving 91 responses and observed that our sample represented a largely food secure population. As a result, we added additional screening questions to the survey in order to diversify our sample by food security status for this final report which had a final sample of 120 (see **Table 3**).

Workshops

We used a number of email listservs to recruit workshop participants including neighborhood associations, City Council member contacts, and the Baltimore City Food Policy and Action Coalition (FoodPAC). We also used purposive sampling to identify community members who were knowledgeable about their neighborhoods, as well as snowball sampling and word-of-mouth. We contacted policy makers and Department of Planning staff who are involved in food access work and/or had expressed interested in contributing to the dollar store project via email to invite them to participate. We ultimately had 21 participants in the community member workshop, and 8 in the policy maker workshop.

Table 3: Number of online dollar store surveys collected in Baltimore City, by zip code, (n=118*)

Zip Code	Number of Surveys
21201	18
21202	10
21205	2
21206	7
21207	2
21208	0
21209	0
21210	4
21211	6
21212	17
21213	2
21214	2
21215	15
21216	6
21217	8
21218	4
21222	0
21223	1
21224	1
21225	1
21226	0
21227	0
21228	0
21229	4
21230	4
21231	2
21234	0
21236	0
21237	0
21239	2
21251	0

*Two Baltimore County surveys were included given that the participants owned a business (e.g., a carryout restaurant) in Baltimore City. Those two zip codes are not displayed here.

Ethical Considerations

This study was approved by the Johns Hopkins School of Public Health Institutional Review Board (IRB00022523). All participants completed informed consent prior to engaging in an interview, workshop, or online survey. Compensation in the form of electronic or physical gift cards was provided for participation in each phase of the research.

Research Question 1: Where are dollar stores located in Baltimore City?

Data Sources: Dollar store addresses, Baltimore City map, social vulnerability index

Most dollar stores are located in neighborhoods with high social vulnerability.

In order to understand where dollar stores are located in Baltimore City, we mapped each store address with social vulnerability index scores (SVI).⁷ The SVI was created by the Center for Disease Control and Prevention’s Agency for Toxic Substances and Disease Registry and “refers to the potential negative effects on communities caused by external stresses on human health.”⁷ The SVI calculates the vulnerability of every US census tract based on 16 factors grouped into four themes: socioeconomic status, household characteristics, racial and ethnic minority status, and housing type and transportation. Census tracts with higher SVI scores indicate higher vulnerability.

In the map below (**Figure 1**), the darker shaded areas indicate census tracts with higher SVI scores, and lighter shaded areas with lower SVI scores. Of the 53 dollar stores in Baltimore City limits, 33 are located in census tracts with the highest SVI scores, and two are located in census tracts with the lowest SVI scores.

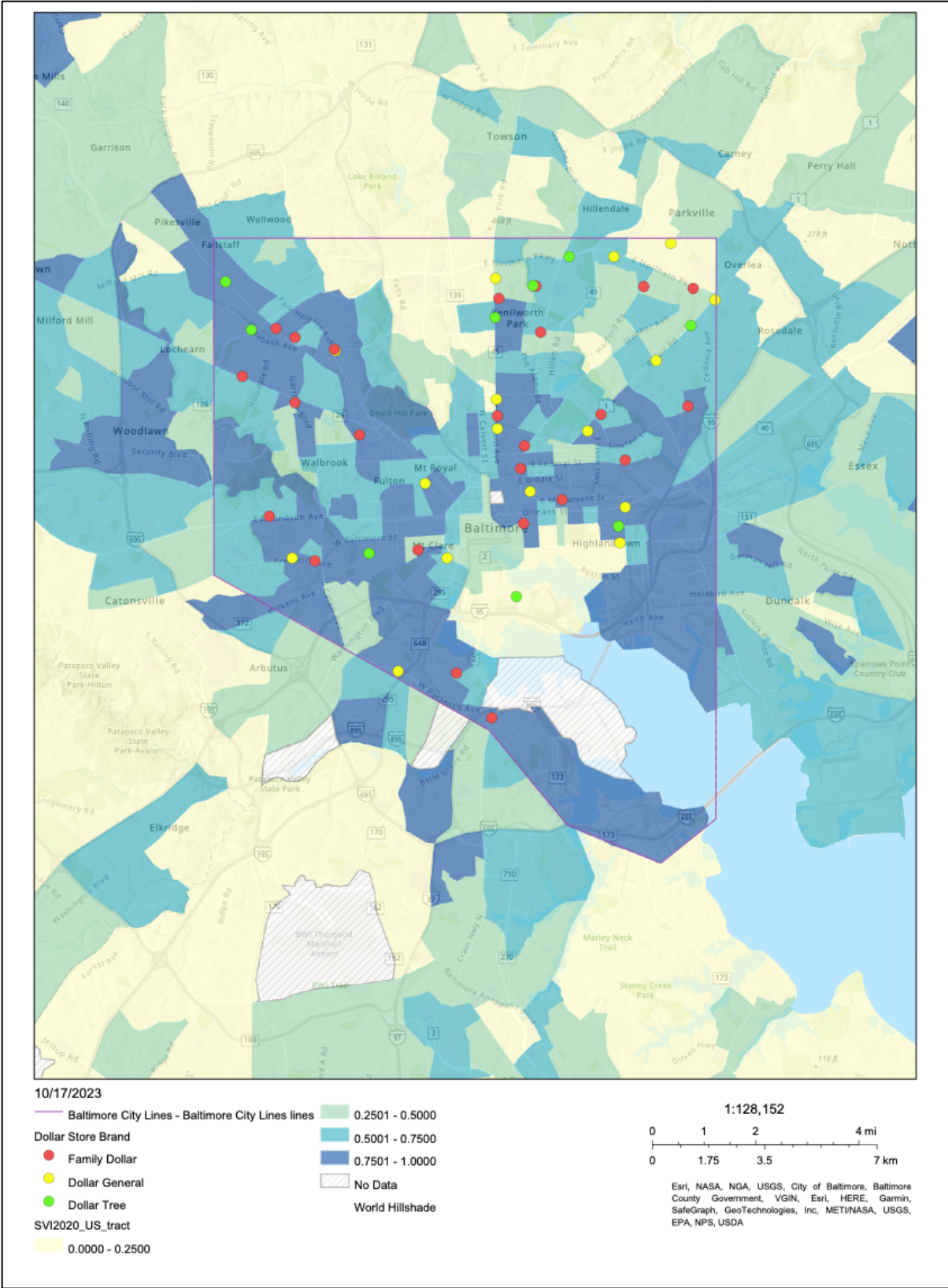


Figure 1: Dollar store locations and neighborhood social vulnerability index score

Research Question 2: How do Baltimore City community members view and utilize dollar stores?

Data Sources: In-depth interviews, online survey, community member workshops

Do Baltimore community members view dollar stores favorably?

No, Baltimore community members do not view dollar stores as favorably as several other store types.

In the survey, dollar stores were ranked below other store types such as supermarkets, discount/big box stores, and pharmacies when asked to rank their favorability of each store type from “favorable” to “unfavorable.” When asked what type of store they would want to open in their neighborhood if a new store were to open, survey respondents expressed the strongest desire for a supermarket or discount/big box store in their neighborhood. There was no desire for a new convenience store. See **Tables 4 and 5**.

Table 4: Ranking of Store Types Preferred by Community Members, (n=120)

	Favorability* of Store Type	Desire** for New Store
Supermarket	75.0%	44.2%
Discount/big box	60.8%	19.2%
Wholesale club	60.0%	11.7%
Pharmacy	55.0%	5.0%
Dollar Tree	41.7%	10.8%
Convenience	41.7%	0%
Small food store	38.3%	8.3%
Dollar General	30.8%	10.8%
Family Dollar	30.0%	10.8%

*Percentages reflect those who ranked each store type as “favorable” or “somewhat favorable.”

**Percentages reflect those who selected each store type in response to the question: “Hypothetically, if a new store selling food were built in a very convenient location near to you in your community, which of the following types of stores would you want it to be?”

Do dollar stores impact the community positively or negatively?

Respondents had mixed views on the impact of dollar stores on their communities.

About 51% of survey respondents said dollar stores help their communities, and 29% said these stores harm their communities (see **Table 5**). A higher proportion of food insecure survey respondents reported that dollar stores helped their communities (66%) compared to the overall sample (51%).

Positive view:

It [the produce] is beautiful, I mean really, really pretty. I think they even had tomatoes one time. No spots on it. Corn. Like they really had a nice variety of produce. I think what they're trying to do is make it so that this area is not a food desert anymore.

- Community Member from Yale Heights, speaking about a dollar store that sells produce

Negative view:

"I would say it has been a negative impact. There is certainly a lot more trash... they are a blight on the neighborhood. That they're too concentrated, we have three in half a mile, that they encourage people to buy unhealthy food and objects that are very cheap and will break quickly." - Community Member from Radnor Winston

Table 5: Perspectives on how dollar stores impact neighborhoods, (n=120)

How much do you agree with the following statements? Dollar stores....	% Agree* Overall	% Agree* Food Insecure† (N=59)
Help my community	50.8%	66.1%
Support the local economy	38.3%	45.8%
Put small businesses out of business	37.5%	23.7%
Are an important food source for my neighborhood	34.2%	54.2%
Harm my community	29.2%	18.6%
Attract crime	18.3%	15.3%

*Percentages reflect those who selected strongly agree or somewhat agree for each statement.

†Defined as an affirmative response to one or both questions on the 2-item Hunger Vital Sign screener.²²

Why do people shop at dollar stores?

In the survey, 76% of respondents reported shopping at dollar stores. Community members that we interviewed reported shopping at dollar stores because of the convenience, affordability, and stocking of items they like.

Across interview respondents, three common reasons for shopping at dollar stores emerged: convenience, cost, and alignment with preferences. The convenience or physical proximity of the stores to the respondents was top reason for shopping at dollar stores, especially compared to other food stores.

The cost of the food items at dollar stores was another significant factor in the deciding to shop at dollar stores. Of note, there were mixed respondent perspectives about cost, as some perceived prices being higher compared to other stores, and some lower:

*"...country ham there (at the dollar store) that is \$1.25 cents, and that same package of country ham [elsewhere] would cost you maybe **double the price** or more."*

- Community Member from Mondawmin

*“I think that the food is more expensive at Dollar General and Family Dollar because the convenience of it. My husband drinks Pepsi. I might pay \$2.39 if I go to Giant for a single Pepsi. I might pay \$2.69 if I get it from Family Dollar or Dollar Tree or one of the convenience stores, for the convenience of being able to purchase it closer to me. **So I might pay extra \$0.30.**” – Community Member from Yale Heights*

Lastly, dollar stores sell food items that align with the preferences of some respondents, including specialty items that are not sold at other food stores:

*“[other stores] don't have what the dollar store has. Sometimes they have, like the nuggets that I buy, **I can only get them from the dollar store.** Those are the only nuggets that my daughter likes.” - Community Member, Dollar Store Employee from McElderry Park*

Why do people choose not to shop at dollar stores?

In the survey, 24% reported not shopping at dollar stores. Among interviewees and survey respondents, reasons for not shopping at dollar stores included concerns about cleanliness, store appearance/organization, concerns about the impact they have on small businesses, and lack of healthy food options.

The cleanliness and general aesthetic, both on the exterior and interior of the store, was a deterrent for some respondents:

*“It's just nasty. They don't do anything. **The store is nasty.** I would not buy anything actually food-related out of that [dollar store]. If there was no other choice, yes. But because I have a choice, yeah no.” - Community Member from Yale Heights*

Some respondents cited the low number of staff as being a primary driver in the lack of organization in stores:

*“We were told it would be adequately staffed to have things taken from boxes and put on the shelves. And of course that that hasn't happened. It's **very inadequately staffed**, there are boxes of products there that are in the aisles...the shelves are a mess.” - Community Member from Radnor Winston*

Another reason why respondents did not shop at dollar stores was the concern that dollar stores had an impact on other businesses in the community (38% of online survey respondents, refer to **Table 5** above), specifically stating that they were out-competing more desirable businesses like grocery stores:

*“There's going to be a huge ripple effect because we have too many of them and so if... if we go that route [improving the store offerings] **without controlling the proliferation, then we'll kill our markets.**” -Community Member from Ashburton*

“But when you introduce a dollar store that's convenient, what is the result? You've now hurt those stores, the mom-and-pop stores and small businesses that have been there for decades, they can't compete.” - Community Member, Food Retail Employee from Belair-Edison

One business owner that we spoke to echoed this sentiment and discussed the impact of dollar stores on their business over the years:

“We are not able to compete with large chains like Dollar Tree, Dollar General, Family Dollar because we're a small mom-and-pop store. We just don't have that buying power. We don't. We can't get the prices they can get.”
- Community Member, Business Owner from Waverly

Lastly, some respondents did not shop for food at dollar stores because they did not like the kinds of food items that they perceive as being sold:

*“Mostly I'm not shopping there because everything is such **poor quality and there's nothing fresh**. There's not milk, there's not eggs, there's not any vegetables that are fresh and would be of interest to me.”* - Community Member from Radnor Winston

One respondent also expressed their skepticism of the quality of the processed food and its relationship to the socioeconomic status of the communities that many dollar stores are in:

*“I'm definitely checking the expiration date [of the food]. Because it's not the same. I truly believe that because of the neighborhood, **they'll just give us anything**”*
- Community Member from Yale Heights

Do community members think dollar stores sell healthy food?

Community member interviewees had mixed perceptions about the healthfulness of the food and beverage options at dollar stores. This variation could be due individual food preferences, and perceptions about what ‘healthy’ means. For more information about what’s actually sold in stores, see Research Question 3 on page 22.

Some respondents acknowledged the variety of healthy options available, and reported doing their food shopping at dollar stores before turning to other store types:

“They have eggs, and they have milk... They do have frozen vegetables in there. And if I have frozen vegetables on my list that I need to buy to stock up at home I'll go there [to the dollar store] to get them before I go to [another grocery store].”
- Community Member from Mondawmin

Others discussed the range of unhealthy options available:

“The dollar store closest to me... It is very sugar, carbohydrate, high fat, high sodium type foods that are there and so I can't imagine that's good.” - Community Member from York Road

How do community members use dollar stores for food and non-food shopping?

Community members generally shop at dollar stores for non-food items more than for food items.

In terms of shopping habits, some respondents used dollar stores for food shopping specifically. However, they used supermarkets, big box discount stores, and small food stores more frequently. See **Table 6**.

Table 6: Shopping frequency for non-food shopping and food shopping at each store type, % shopping more than once per month, (n=61)

	Food shopping overall (n=61)	Food shopping among food insecure† (n=47)
Supermarket	86.9%	80.9%
Discount/big box	60.7%	66.0%
Small food store	52.5%	59.6%
Wholesale club	44.3%	46.8%
Convenience	39.3%	46.8%
Family Dollar	39.3%	48.9%
Pharmacy	37.7%	42.6%
Dollar Tree	37.7%	46.8%
Dollar General	31.1%	38.3%

*Percentages reflect those who shopped more than once per month at each store type.

†Defined as an affirmative response to one or both questions on the 2-item Hunger Vital Sign screener.²²

Dollar store shoppers were asked to select whether they spent most of their time shopping at dollar stores for non-food shopping, food shopping, or an equal amount of time for both. Respondents reported spending more time shopping for non-food items (61.5%) than for food items (8.8%) (see **Table 7**).

Table 7: Proportion of time spent non-food and food shopping at dollar stores, (n=91 dollar store shoppers)

Shopping Behavior	% Yes Overall	% Yes Food Insecure† (n=55)
Non-food	61.5%	54.5%
Equal amount of time	25.3%	32.7%
Food	8.8%	12.7%

†Defined as an affirmative response to one or both questions on the 2-item Hunger Vital Sign screener.²²

This demonstrates how some community members may rely on dollar stores for non-food items like cleaning supplies, crafts, and greeting cards:

“People rely on them for different reasons, like Family Dollar cleaning supplies and things like that. You may want to do crafts and go and buy candles or vases and create something.” - Community Member from Ashburton

“I have bought greeting cards at Dollar Tree, like when the greeting cards are \$5 at CVS and \$1 at the Dollar Tree, greeting cards are greeting cards [laughs]. There have been members of our neighborhood who have said they appreciate the Dollar Tree. I think teachers tend to buy things at dollar stores.” - Community Member from Radnor Winston

I tell you, I love the dollar store. Because you know a lot of the things that I buy, like my envelopes and my pins, pencils and things like that where I don't need a large amount, I will go to the dollar store as opposed to going to Staples because I don't need that large of a quantity. -Community Member from Mondawmin

In terms of non-food and food shopping, we find there are two different shopper types: those who use dollar stores as the primary venue for food shopping, and those who use them to supplement their food shopping (see **Table 8**) We did not find descriptive or qualitative differences in shopper type by food security status or geographic location (e.g., residing in a healthy food priority area).

Table 8: Dollar store food shopper profiles

Primary dollar store food shopper	Supplemental dollar store food shopper
<p>Shopping Habits</p> <ul style="list-style-type: none"> - Frequent shopping - Buys most of their groceries at the dollar store 	<p>Shopping Habits</p> <ul style="list-style-type: none"> - Shops less frequently - Buys forgotten items or specialty items
<p>Illustrative Quote</p> <p><i>“...like I buy pies, the Hershey pies that are in the back, I buy chicken Nuggets for my daughter. She just got on this kick of the sausage, egg and cheese biscuits. We like pizzas. We like noodles. We like Spaghettios. Eggs of course. I mean, the essentials are all there.” - Community Member, Dollar Store Employee from McElderry Park</i></p>	<p>Illustrative Quote</p> <p><i>“.... And if I'm making spaghetti and I don't have canned sauce or bottled sauce, then I might go over there just to pick up some of that. But basically, that's about it. I don't buy a whole lot from there.” - Community Member from Mondawmin</i></p>

Research Question 2: What comprises the current dollar store environment, inside and outside of the store?

Data Source: Direct observations of interior and exterior of 49 dollar stores

Are fruits and vegetables available in Baltimore dollar stores?

Yes. But only 8% of dollar stores carry fresh produce.

The vast majority of dollar stores provide canned fruit (98.0%) and frozen vegetables (83.7%); while more than half of Baltimore’s dollar stores offer frozen fruit (59.2%) and canned vegetables (77.6%). These options were usually found at the back of the store, or on the bottom shelf. However, only four stores (8.2%) have fresh produce available. None of the stores were Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) authorized. See **Table 9**.

Table 9: Percent of Baltimore City dollar stores stocking fruit and vegetables, (n=49)

Produce	% Stores Stocking
Canned Fruit	98.0%
Frozen Fruit	59.2%
Fresh Fruit	8.2%
Frozen Vegetables	83.7%
Canned Vegetables	77.6%
Fresh Vegetables	8.2%

Are milk, eggs, and cheese available at Baltimore dollar stores?

Yes. Some stores had milk, eggs, and cheese available. See **Table 10**.

About half of the stores sold eggs. Most stores offered whole milk (67%), while fewer stores had 2% (59%) or low-fat (37%) options. The majority of stores (98%) offered cheese in various forms.

Table 10: Percent of Baltimore City dollar stores stocking milk, eggs, and cheese, (n=49)

Food Item	% Stores Stocking
Cheese	98.0%
Milk	73.5%
Whole milk	67.3%
2% milk	59.2%
1%/low-fat milk	36.7%
Eggs	51.0%

Are ultra-processed foods available at Baltimore dollar stores?

Yes. Most stores sold a variety of ultra-processed food products. These products were often found at eye-level in multiple locations through the store, such as at check-out counters, aisle endcaps, and special displays. See **Table 11**.

Table 11: Percent of Baltimore City dollar stores stocking ultra-processed foods, (n=49)

Food Item	% Stores Stocking
Soda	100%
Candy	100%
Energy drinks	98.0%
Ice Cream	93.9%
Hot dogs	83.7%
Chips (Lays, regular)*	77.6%

*All stores offered chips of some kind, while only a proportion offered Lays potato chips specifically which was collected for pricing data purposes.

Is the exterior well kept in Baltimore dollar stores?

Largely, yes. About half of the stores did not have trash/debris present, and most stores did not have visible graffiti.

About 50% of the dollar stores did not have visible trash present outside. The remaining 50% did, with the majority (29%) categorized as having “a little bit of trash.” Over 80% of the stores did not have visible graffiti on the building. At the same time, most of the stores did not have landscaping (59%) to enhance the stores’ appearance. See **Table 12**.

Is the interior well kept at dollar stores?

No, 81% of stores were cluttered inside of stores, with boxes of stock blocking the aisles. See **Table 12**.

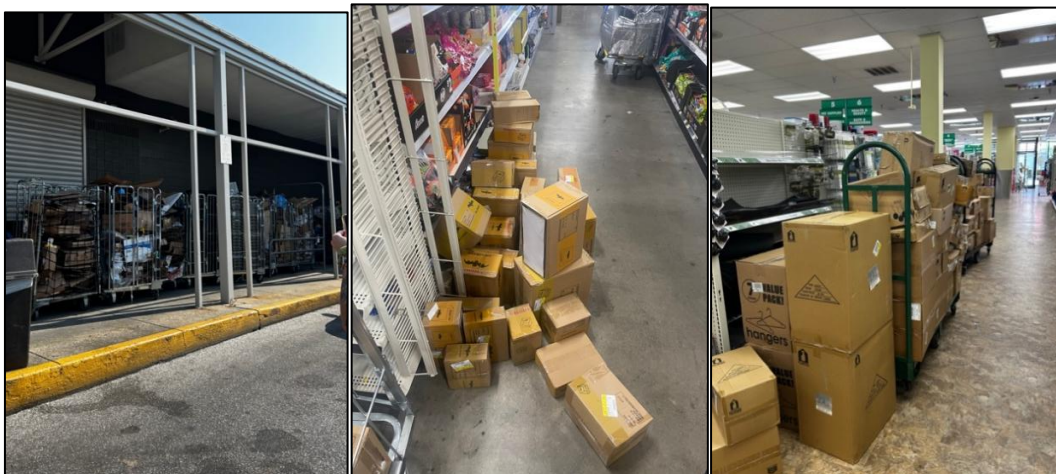


Table 12: Interior and exterior appearance of dollar stores in Baltimore City, (n=49)

Appearance and Operations	% Yes
<u>External</u>	
Trash Present	
None	51.0%
A little	28.6%
Some	14.3%
A lot	4.1%
Graffiti Present	
None	83.7%
A little	12.2%
Some	2.0%
A lot	2.0%
Landscaping	
None	59.2%
Some, well kept	14.3%
Some, not well kept	26.5%
A lot, well kept	0%
A lot, not well kept	0%
Bus stop nearby	75.5%
Security Cameras	65.3%
Security Bars	12.2%
<u>Internal</u>	
Cluttered floors	89.8%
Security Cameras	87.8%
High shelving	83.7%
Security personnel	14.3%
Foul odor	10.2%
Average Number of Staff Working, (mean ± standard deviation)	3.1 ± 1.7

Research Question 3: What dollar store policies for Baltimore City are supported by community members?

Data sources: In-depth interviews, online survey, community member workshops

Is there support for attracting other, better food retailers?

Yes. In the survey, 75% of respondents were interested in this type of policy (see Table 13). Several community members also discussed wanting support from the City to attract new, better food retailers to their neighborhoods and to Baltimore City in general.

Given the existing incentives discussed above, perhaps these ideas generated by community members could be used as complementary strategies:

“And sometimes those need subsidies, I don't know if you're familiar with the accelerator building, it's kind of our big commercial revitalization success story... It's got the Full Tilt Brewery on the first floor, nice big windows, they can open when it's nice outside. It's just an awesome space... You can rent out a portion of that kitchen and share these great facilities. But my understanding is that it got a bunch of public subsidies. So do we need to have something like that, do we need public subsidy for the kinds of uses that we do want to see in order to really attract [businesses]”

- Community Member from York Road

“...I tend to feel like a better use of that limited civic capacity on this corridor would be to figure out how to put together a comprehensive marketing strategy for the uses that we do want to see, including public subsidies if that's needed. Like, let's organize the political support for that.” - Community Member from York Road

“I think attracting local and homegrown developers. I mean there's developers, there are people that specialize in analyzing the market and the need in an area, and then finding the company, whether it's a chain like a Dollar Tree, or advertising or soliciting local companies to fill those spaces. That is the best solution. And in Baltimore, Remington and Hampden have had several developers who have become the local specialists, so those are neighborhoods that are nearby.” - Community Member from Radnor Winston

Is there support for policies to improve dollar store appearance?

Yes. In the survey, about 77% of respondents were supportive of a policy that would help improve the external and internal appearance of dollar stores.

There are existing regulations in place (e.g., related to trash and graffiti), but enforcement is difficult. The enforcement of exterior appearance standards was discussed among community members and policy makers. There were changes to the Baltimore City zoning code a few years ago to enhance the appearance of retailers:

“So, one of the things that the city had changed in in zoning code, and there was a major change to the zoning code in Baltimore City about five years ago, it took a very long time. So there was a series of updates to it. And one of the things that they tried to focus on was these older corridors and having standards for windows and bringing the building out to the sidewalk edge to create a much friendlier space for pedestrians, with street furniture and bus stops. And to not have parking lots right on the street frontage. To make you don't feel that as a pedestrian you're just surrounded by fast moving vehicles and parked vehicles. So part of the idea of having the windows is, I mean it creates interesting displays, it creates a nice rhythm to the architecture because it breaks up a pattern of a blank wall, obviously, and it makes it feel safer.”

- Community Member from Radnor Winston

However, compliance can be difficult to enforce, especially given the corporate status of dollar stores, as they appear to often just pay the fines without remediating issues:

“There is, I think it's a Family Dollar, off of Harford Road and the entire back of it is piles of trash, just like piles, and it's just like that all the time. There's no mechanism to be able to say like, until you work that out you can't be open. And the entity, the corporate entity is getting fined weekly, but they just pay. They just pay a \$1000 a week, because the employees aren't picking up the trash.” - Policy Maker

A solution being considered in one area of Baltimore is the Business Improvement District, which would increase property taxes to generate revenue for staff to keep streets safe and clean:

“But if 58% of them vote for the Business Improvement District, there will be a small surcharge on their property taxes, which will fund cleaning and greening mostly, and clean and safe type-things, like more eyes on the street and more people cleaning up. But also there'll be an executive director. It'll just be a little bit of capacity, someone whose job it is all day, every day, to think about the corridor and how to make it better.”

- Community Member from Radnor Winston

Is there support for improving healthy food availability at dollar stores?

Yes. Community members in the survey (66%), and interviewees were all in strong support of a policy (such as a staple foods ordinance) that would require dollar stores to stock healthy food items. See **Tables 13 and 14.**

Community members were supportive of a policy like that would require dollar stores to stock a certain amount of basic food items including fruits and vegetables, whole grains, eggs, and low-fat dairy, or shelf-space requirement for healthy foods at dollar stores. This was true among interviewees regardless of their food shopping frequency at dollar stores:

“If they were to expand, and they were to start carrying meat, fresh fruit and produce along with the items that they have now, I think that would be a great success.”

-Community Member from Mondawmin

Policy makers discussed the possibility of expanding existing incentive programs to dollars stores, and other stores, to improve healthy food options:

“Is there a tax break that they can get if they're WIC certified, or SNAP certified?”
- Policy Maker

“...there was a tax incentive for grocery stores to open in the city, and I think maybe two or three grocery stores benefited from that. But if we transition to dollar stores like getting either a tax incentive or tax break to have more fresh produce options, that would probably actually be utilized more than the grocery store incentive.” - Policy Maker

However, policy makers were also concerned about enforcement given the hierarchical corporate structure of dollar stores:

“...so that was a push that we tried to work with like Family Dollar, but because it's run by a corporation, like I mean you've probably experienced this, it's like, “Oh, I have to talk to my manager”. But then there's a regional manager, and then there's a national manager. And so there's a lot of bureaucracy when you're trying to do smaller things on the ground.” - Policy Maker

Is there support for a dollar store conditional use policy or community agreements?

Yes. About 66% of survey respondents, and community member interviewees were in favor of a policy that would require neighborhood notification or agreements before allowing a new dollar store to open. See Tables 13 and 14.

While “conditional use policies” were not specifically mentioned per se in community member interviews, there was discussion of community agreements, which are often embedded in conditional use policies. Community members want to be involved, or at least notified about new dollar stores coming to their neighborhoods. They want to be empowered to say “no” to a dollar store if a new store of this kind does not align with their neighborhood development plan, or if there are already multiple existing dollar stores in the area.

“One of the things that's missing is that new owners or new stores that come in should be able to provide to the city of Baltimore or to the neighborhoods what their benefits are going to be. If they're going to come into the community, what they're going to be? So the community would then have a voice in what kind of stores would be in place, and then have a voice for having those markets, whatever those particular stores are going to sell.” - Community Member from Ashburton

“...we do need a neighborhood agreement and I think anybody that comes into our community needs to have met with the neighborhood, so all of the Neighborhood Association presidents and vice presidents, along with community residents, need to attend the meeting to agree to allow them to come, like they do in other communities that are more affluent, like Roland Park.” - Community Member from Dorchester

At the same time, community members and policymakers both mentioned difficulties enforcing the content within community agreements.

“Yeah, I mean it's in a gray area for sure. The city did participate in the [neighborhood redevelopment] plan, and we did take it to the city's Planning Commission, which gives it a little bit more acknowledgement on the City side. It's not adopted by law by the legislative branch, the City Council. So when that happens, the City Planning Department doesn't have the force of law to enforce it.”

- Community Member from Radnor Winston

In addition, there is a fear that placing too many requirements for retailers to meet would deter new businesses from entering the market:

“But again, being a poor community, if we negotiate too much and put too many apparent limitations on a company coming in, then they could back off. And then you're stuck with another storefront church or a proliferation of nail salons, beauty parlors, that sort of level of use.” - Community Member from Dorchester

“[We] also had a few conversations with the Food Policy Division, and some of the barriers that we kept running into were like, ‘Well, we should just be grateful for any store that comes to Baltimore’. And so the Baltimore Development Corporation is really apprehensive to put any kind of additional barriers to entry for stores coming to Baltimore.” - Policy Maker

One policy maker highlighted that conditional use policies that require zoning board approvals may be inequitable for neighborhoods that have limited resources. They explained that zoning boards often approve uses unless there is opposition; that said, neighborhoods who don't have the manpower or budget for organizing may not benefit from a policy of this nature.

“Separate issue, conditional uses are generally presumed to be acceptable, unless a contester can show why it isn't according to a set of required findings and considerations. That means that it's generally presumed allowed, so somebody that doesn't want it has the burden of proof, as it were, to show why it's problematic... Different community groups have different capacity for dealing with that. They're almost all volunteers that have normal lives and other obligations. Very few of them are experienced in land use anything, especially in neighborhoods with lower average educational attainment. Just understanding how the process works is a challenge for them. Whereas, our higher educationally attained neighborhoods that have a lot of retirees that have money to hire attorneys on their behalf. Yeah, it's not a fair fight.”

- Policy Maker

Is there support for a dollar store dispersal ordinance?

There was moderate support for this from survey respondents (55%) and interviewees. See **Tables 13 and 14.**

There was some support for limiting where new dollar stores could open in relation to existing dollar stores. This was viewed positively in the context of protecting smaller, locally-owned businesses who want to open or remain open in the area where dollar stores are proliferating.

“It takes a couple of miles, maybe 3 miles, something like that, to break a habit for them to go outside to shop somewhere else. And so 3 miles, probably 2-3 miles [between dollar stores], you know, what's the gallon of gas now? ...So we can look at the distance to see how much of an impact that can have. Usually 3 miles, or more.”
- Community Member, Food Retail Employee from Belair-Edison

There was more support amongst policy makers for leveraging existing stores in addition to limiting how many there are:

“...much more interested in the 57 existing stores like it's, you know, this whole previous conversation is about new dollar stores, which is good to have. But we already have 57. So how can - and I'm encouraged to see from the survey that, you know, limiting new stores or like closing existing stores was the lowest on the list because I think these stores are already here. I'd rather think through how they can provide, you know, more healthy food than just wanting to close them like thinking through how they could be an asset for the community rather than a detriment.” - Policy Maker

Is there support for closing existing dollar stores, and banning all new dollar stores from opening?

No. This was not supported by most interviewees or in the survey which showed the least support for closing existing dollar stores (23%) and banning new dollar stores (29%) among the list of options provided. See **Tables 13 and 14.**

Community members, regardless of opinion or utilization of dollar stores or food security status, did not support banning dollar stores from Baltimore City. They recognized that people rely on dollar stores for household items, cleaning supplies, paper products, and food.

“I think that they do meet a local need. I mean they wouldn't be able to succeed, they wouldn't be able to get financing if they didn't have a business plan that showed some connection to the need... I think that the unfortunate truth is that they probably are meeting a clear need by providing that basket of goods at a cheaper price point.”
- Community Member from Radnor Winston

“I have tons of people that love these stores. My concern is not to necessarily take them away, but to limit the amount of them that can proliferate so that we can bring in alternative options... I'm not saying that they don't serve a purpose, and the people that are using them can be using them to survive or like I just said, create art.”

- Community Member from Ashburton

Table 13: Level of Support for dollar store policy strategies among survey respondents, (n=120)

Do you agree or disagree with the following statements as it relates to <u>your neighborhood</u>?	% Agree* Overall	% Agree Food Insecure
A new policy should...		
Do more to improve the cleanliness and appearance <u>inside</u> of dollar stores	77.5%	73.3%
Do more to improve the cleanliness and appearance on the <u>outside</u> of dollar stores	76.7%	73.3%
Help attract other food retailers, besides dollar stores, that would be beneficial to my neighborhood	75.0%	66.7%
Outline proper staffing and wages at dollar stores	74.2%	70.0%
Require dollar stores to stock food items such as fresh fruits and vegetables, milk, eggs, dairy, fresh meat, and whole grains.	65.8%	56.7%
Support improved security at dollar stores	65.8%	70.0%
Require dollar stores to source produce locally or regionally	60.8%	50.0%
Only allow a dollar store to open if a portion of their floor space is dedicated to stocking healthy food items	57.5%	55.0%
Require that the surrounding neighborhood be notified of a new dollar store opening	56.7%	45.0%
Require approval from the surrounding neighborhood before a new dollar store can open	55.8%	45.0%
Should require a new dollar store to be a certain distance away from an existing dollar store	55.0%	43.3%
Allow existing dollar stores to stay open, but should not allow new dollar store to open	33.3%	21.7%
Ban new dollar stores from opening	29.2%	15.0%
Close existing dollar stores	22.5%	15.0%

*Percentages reflect those who responded “Strongly Agree” or “Somewhat Agree” with each statement.

Table 14: Dollar store policy ideas, support, and key considerations, summarized across data sources

Policy	Supporters	Support Level	Perceived Benefits	Perceived Challenges
Conditional use/permitting	Policy makers, community members	Moderate	Requires approval before a new one can open	Perceived difficulty to target only dollar stores* Inequitable for neighborhoods with limited resources
Dispersal ordinance	Policy makers, community members	Moderate	Decreases dollar store saturation Makes way for local business	Perceived difficulty implementing in a smaller city
Community agreements	Policy makers, community members	Moderate	Empowers communities	Difficult to enforce
Staple foods ordinance	Community members	High	Improves healthy food access	Difficult to enforce
Efforts to attract other retailers	Community members	High	Better alignment with neighborhood development plans	Lack of clarity about how existing policies can be improved
Closure of existing stores/banning of new stores	None	Low	N/A	N/A

*Other municipalities have been able to successfully differentiate dollar stores in their policy language

How can we enforce these potential new policies?

Implement business licenses in Baltimore City.

Challenges related to enforcing new dollar store policies came up frequently in discussions with policy makers and community members. One solution that emerged in interviews with policy makers is to implement business licenses in Baltimore City in order to be able to hold dollar stores accountable for compliance with new policies. Currently, businesses are licensed at the state level only. Implementing this in Baltimore would, of course, extend to all businesses, not just dollar stores.

There was support for this among policy makers:

“A license is able to get at the “Who?”, zoning normally deals with the “What?” So if I establish a particular business that's allowed in this zoning district and I am a problem guy, but I sell it to you, you're going to do the exact same use, but you're a good operator. Zoning code doesn't see the difference between that. But licensing can get at the actual operator because it's to an individual. If you misbehave, we can take the license away.” - Policy Maker

“...but the best way to attack this is probably through a business license rather than trying to change the zoning code.” - Policy Maker

There were also challenges discussed related to implementation and cost:

*“[Policy makers] balk a little bit because [business licenses] takes creating an entirely new thing, which, by the way, usually needs new staff which needs funding...”
- Policy Maker*

“Yeah, I don't think it's possible. Yeah, and they would have to, in order to be able to do something like that, the City, they lack the staff, they lack the funding they lack...They can't do it.” - Local Retailer

But interviewees also proposed solutions for bringing in new revenue to the City while improving the food environment:

*“If there was a new specific revenue stream, obviously, that would make things easier. I know that they're, I haven't been fully looped into it yet, but I know that there is a Council member currently working on SSB tax, which obviously would bring new revenue to the city. And the only way I think that that would be a good thing is if it specifically went towards, you know, implementing a more equal resilient urban food system in general.”
- Policy Maker*

Research Question 4: What do community members and policy makers think of the proposed conditional use policy language?

At each workshop, we presented the initial findings from the first three phases of the research: in-depth interviews, store observations, and the online survey. Then, we presented the draft conditional use dollar store bill and solicited feedback and initial reactions to the bill.

Community Members

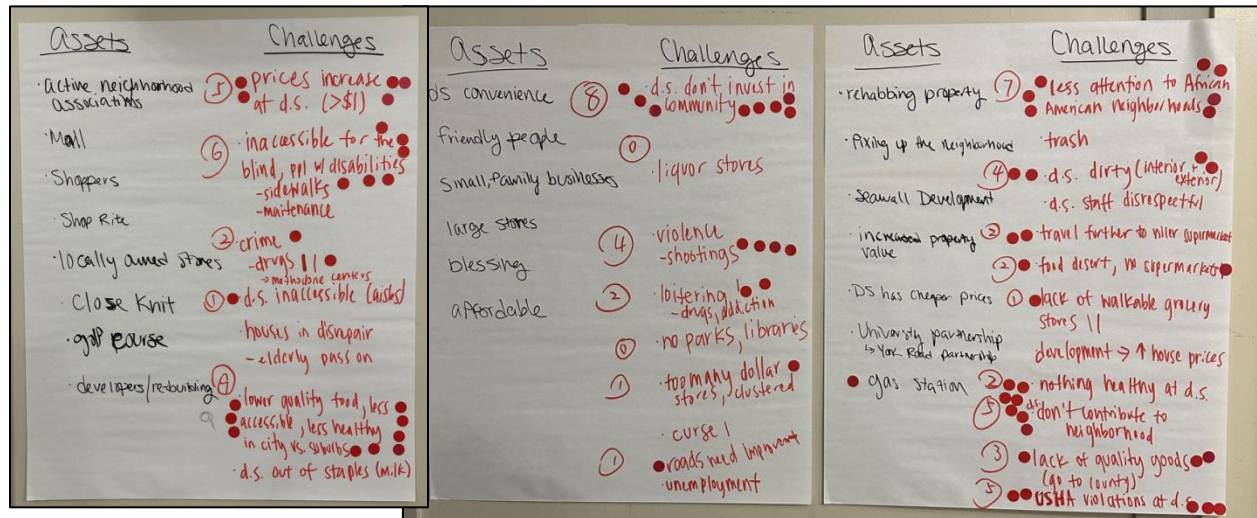
Community members were pleased with several aspects of the bill, such as the dispersal ordinance and community benefits agreement. However, they were disappointed to learn 1) that there was no language around healthy food access, and 2) that the policy only applied to new dollar stores, not existing stores.

During the workshop we asked participants to generate strengths and challenges in their neighborhoods (see **Figure 2**).



Figure 2: Dr. Joel Gittelsohn reviewing neighborhood strengths and challenges generated by participants

Following this activity, we then asked participants to vote on top challenges using red dots (Figure 3).



We then tallied the votes and generated the top three challenges:

- (1) Difference in quality of products in dollar stores and other retailers depending on location – 17 votes
- (2) Lack of healthy options/fresh produce in dollar stores, and overall, within the neighborhood – 13 votes
- (3) Lack of dollar store investment in the community - 13 votes

Given these top challenges, there was strong desire among participants to include language surrounding healthy food access and investment in the community in the proposed bill. Relatedly, participants expressed a desire to understand what policy options were feasible to address the offerings and appearance of the existing 50+ dollar stores in the city.

Figure 3: Participant votes for the top challenges in their neighborhoods (note, this image does not include all pages/votes)

Policy Makers

Policy makers were supportive of the proposed bill, but highlighted the lack of alignment with community priorities.

At the policy maker workshop, we presented the initial findings from the first three phases of the study (interviews, store observations, online survey) as well as our findings from the community member workshop held a few days prior. As a result, we were able to highlight community priorities and generate discussion around the proposed dollar store bill.

Several policy makers expressed interest in better aligning the dollar store policy with community priorities.

“But, how much effort has been put in to say, OK, well, what do these dollar stores need to be for you to be happy with them? And then... what we should be working on, trying to make them better, like 57 stores is a lot. So, it's like, what can we do about the 57 more so than worrying about 58, 59, and 60 showing up.” – Policy Maker

“So, it's like, how can we evaluate and utilize these multinational companies, that are gaining profit off of our residents, in order to incentivize them or make them fulfill a need that we have?” - Policy Maker

In summary, they supported the components of the proposed bill and strategized ways to improve it. Policy maker participants underscored potential difficulties enforcing policies with stocking requirements or specific components within community benefits agreements. One strategy generated to address enforcement is to reduce the length of occupancy permits such that every few years, the city could gather community feedback about how the store is doing, and check-in to assess whether they are meeting the requirements. The strategies generated have been incorporated into the policy recommendations section below.

Policy Recommendations

We consider the findings of this study, the workshop recommendations, and dollar store policy language successfully passed in other municipalities to recommend policy options for Baltimore City.

1. Council Bill 23-0431 should be amended to:

- a. Suggest that parties to a community benefits agreements agree that the store subject to the agreement will provide healthy foods.
- b. Include the conditional use language related to grocery stores that already exists in the enabling statute, Md. Land Use Code § 10-306(b)(3)(ii) and (iii).
- c. Increase the minimum dispersal distance in § 14-336.1(A) to 1 mile.

Additionally, Baltimore City should consider suggesting that parties to the community benefits agreements agree to terms related to the following topics. These topics are based on community input.

- **Regular inspection of store cleanliness and appearance.**
Baltimore City code already outlines certain requirements for storing and discarding trash, covering up graffiti, and health-related standards. However, more regular inspection is necessary to increase dollar store accountability. Study participants suggested that Baltimore City and dollar stores each post a phone number on the exterior of each store for community members to call to report issues.

- **Sourcing food from local vendors and producers.**
Dollar stores should partner with Baltimore City and local community-based organizations to identify local businesses to source food and non-food products from.
- **Soliciting and incorporating community input on the design of a new store to ensure the exterior appearance and façade aligns with the neighborhood strategic plan.**
Participants discussed how much they value the historic appearance of Baltimore City. Dollar stores often do not match the historic aesthetic of the existing brick buildings, and instead create concrete buildings with no windows facing the street.
- **Staffing standards.**
Dollar stores could commit to hiring local staff, for example by hiring within store zip code. Dollar stores could also consider providing additional benefits to employees such as stock options or some form of ownership, and healthcare stipends.
- **Dollar stores investment back into the neighborhood they serve.**
Neighborhoods should work with dollar stores to decide what investment back into the neighborhoods they serve looks like. Initial ideas that came up included dollar store participation in local programs (Fresh Crate program, Business Improvement District), and providing community grants and/or scholarships for schools in the area.
- **Store accessibility.**
Dollar stores should improve accessibility for those who are physically or visually impaired so they have an easier time navigating the store and finding what they need. This largely goes back to keeping the store clean and free of clutter in the aisles.

2. In future policy, include language to address all existing dollar stores in Baltimore City, not just new dollar stores that open.

- a. Key components to address in such a policy include:
 - i. Store appearance and cleanliness (e.g., trash/debris, cluttered aisles)
 - ii. Stocking requirements to improve healthy food access

Example Staple Foods Ordinance from The Center for Science in the Public Interest:

(which can also be accessed [here](#))

Staple foods ordinances require small box discount stores to stock certain healthier food and beverage items.

###.###. Staple Foods Standards.

Each small box discount store shall continuously offer for sale at least three (3) stocking units of at least seven (7) different varieties for each of following four (4) staple food categories:

- A. Dairy/dairy alternatives: Milk (unsweetened, fluid cow’s milk (only skim, 1% or 2%)) or milk alternatives (unsweetened or “plain” soy milk or other cow’s milk alternatives), yogurt, kefir, or cheese.
- B. Animal and vegetable proteins: Fresh or frozen meat and poultry, canned fish packed in water, fresh eggs, or vegetable proteins such as nut butter and tofu. Containers of nut butter may not contain any other food products such as jelly, jam, chocolate, or honey.
- C. Fruits and vegetables: Fresh, frozen, or canned fruits and vegetables that do not contain added ingredients, including sweeteners, salt, sauces, or seasonings, at least four (4) varieties of which must be fresh and perishable.
- D. Whole grains: 100% whole grain products such as bread, corn tortillas, brown rice, or oatmeal.

Such staple foods and beverages shall be non-expired, not spoiled, and maintained according to established industry standards for food safety. To count towards the staple foods standards, perishable items, including fresh fruits and vegetables, shall be offered in good condition, meaning not overripe or seriously deformed, and free from decay, discoloration, bruising, and surface damage.

In this subsection, “stocking unit” means an individual food or beverage item. If a food or beverage is not usually sold individually, then it does not individually constitute a stocking unit. Such food items are usually sold in bunches, boxes, bags, or packages, and these instances the bunch, box, bag, or package is one stocking unit. For food items stored singly in a common container and sold to a customer by weight (for example, grains, dried fruits, nuts, deli cold cuts), one pound (1 lb.) is one stocking unit.

In this subsection, “variety” means foods that differ from each other by distinct main ingredient or product kind.

[CITY/COUNTY ENTITY] shall bi-annually review the staple foods standards. Changes to the staple foods standards shall take effect [#] days after publication of such changes.

Note: Consider providing examples of varieties in a regulation or guidance related to this ordinance. Section IV List of Examples in Enhancing Retailer Standards in the Supplemental Nutrition Assistance Program, which provides examples of varieties that retailers can stock to comply with federal SNAP stocking standards can serve as a template.

Community members and policy makers came up with numerous strategies for improving healthy food access in dollar stores:

- **Work with local suppliers.**
Some suppliers are already delivering produce to other places (like restaurants) in the city on a daily basis. This system could be leveraged to make getting produce easy for dollar stores.
- **Make dollar stores aware of federal grants.**
Dollar store corporations could consider applying for funding through the Healthy Food Financing initiative (HFFI) or Gus Schumacher Nutrition Incentive Program (GusNIP). HFFI provides loans, grants, and technical assistance to improve and support access to

fresh, healthy, affordable food.²³ Dollar stores could also partner with a local community organization on a GusNIP grant to increase demand for fresh produce.²⁴

- **Encourage participation in local programs like Fresh Crate.¹**
Other small business in Baltimore, such as corner stores, participate in Fresh Crate. Dollar stores could be encouraged to participate by demonstrating the success of the program in other store types.
- **Use the building code to require certain amount food refrigeration.**
One idea generated was that the city could provide building space, and dollar stores could lease the building from the City. In this approach, the City would take on the burden and cost of maintaining the building, which lowers overhead costs for dollar stores. The City could then require the refrigeration and stocking of healthy food items in order for dollar stores to win the lease.
- **Encourage dollar stores to take advantage of existing tax credit opportunities.**
Baltimore City offers personal property tax credits to grocery stores opening or making significant renovations within healthy food priority areas in the city.²⁵ However, some community members and policy makers were not in favor of allowing dollar stores to take advantage of these mechanisms, as they were meant to help attract full-service grocery stores, not dollar stores.
- **Increase the number of dollar stores who are Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) authorized.**
To our knowledge there are currently no dollar stores accepting WIC in Baltimore City. By becoming WIC certified, dollar stores would be required to stock certain healthy food items like fresh produce and meat, whole grains, beans and legumes, and low-fat dairy products.

3. Enforcement

Institute Business Licenses to Create Accountability

Business licenses were suggested as an enforcement strategy for dollar store policies (see page 29). Business licenses would apply to all businesses, not just dollar stores. Unlike zoning code, business licenses deal with what the business is and its operations. Creating business licenses provides leverage for the City to hold dollar stores accountability for adherence to ordinances regulating dollar stores.

Shorten Lease/Permit Renewal Period

Recently, some dollar stores in Baltimore City have signed 10-year leases with the building they occupy. The City could consider shortening the allowable length of leases and/or permits, to allow evaluation of policy compliance before renewing. Again, by doing so, the City and the community would have a chance to evaluate how well dollar stores are meeting the requirements outlined by policies.

Conclusions

This study and the emerging recommendations were informed by community members and local policy makers most knowledgeable about the neighborhoods effected by the proliferation of dollar stores. Dollar stores are meeting a need in Baltimore City by offering every-day household items, and some food items, at affordable prices. However, they are not fully serving the communities in which they are located, as indicated by desire among community members and policy makers to improve them by adding healthier, fresh food options, improving their cleanliness and appearance, and investing in the community by hiring locals and support their programs. Dollar stores can be leveraged to improve healthy food access and uphold neighborhood plans for positive development and growth. This can be accomplished through policies that require things like community benefits agreements and stocking of healthy foods. Policy makers should also consider effective enforcement strategies, such as establishing business licenses or shorter lease agreements in order to hold dollar stores accountable for the policies they pass.

References

1. Fresh Crate. Govan's Market Website. <https://govansmarket.weebly.com/freshcrate-healthy-corner-stores.html>. Accessed November 2023.
2. Mitchell, Stacy, Kennedy Smith, and Susan Holmberg. 2023 Report: The Dollar Store Invasion. Institute for Local Self-Reliance. February 28 2023. <https://ilsr.org/report-dollar-store-invasion/>.
3. Chuck Grigsby, Conner Mullally, Richard Volpe. 2021. The Geography of Dollar Stores. 2021 Agricultural & Applied Economics Association Annual Meeting, Austin, TX, August 1 – August 3
https://scholar.archive.org/work/wbkvqjwuhbdchdoxbplib2f7wu/access/wayback/https://tind-customer-agecon.s3.amazonaws.com/79996c40-0bb9-4dca-bed8-aac9e7cf8287?response-content-disposition=attachment%3B%20filename%2A%3DUTF-8%27%27Abstracts_21_06_18_09_02_51_94_128_227_1_47_0.pdf&response-content-type=application%2Fpdf&X-Amz-Algorithm=AWS4-HMAC-SHA256&X-Amz-Expires=86400&X-Amz-Credential=AKIAXL7W7Q3XHXDQYS%2F20210804%2Feu-west-1%2Fs3%2Faws4_request&X-Amz-SignedHeaders=host&X-Amz-Date=20210804T130823Z&X-Amz-Signature=97f603215564e2f9b5176c2e51af12015bd3dfc37e0500c732559e5d721bb50b.
4. Maps Show Alarming Pattern of Dollar Stores' Spread in U.S. Cities. Institute for Local Self-Reliance Website. <https://ilsr.org/new-maps-dollar-stores-spread/>. Published February 2019. Accessed April 2022.
5. McCarthy, J, Minovi, D, Singleton, C.R. Local Measures to Curb Dollar Store Growth: A Policy Scan. *Nutrients* 2022, 14, 3092. <https://doi.org/10.3390/nu14153092>
6. Md. SB 869. 444th Leg. Session (2022).
7. Place and Health: CDC/ATSDR Social Vulnerability Index. Agency for Toxic Substances and Disease Registry. <https://www.atsdr.cdc.gov/placeandhealth/svi/index.html>. Updated July 12, 2023. Accessed September 28, 2023.
8. Dollar General. 2022 Annual Report. Accessed July 21, 2023. <https://investor.dollargeneral.com/download/companies/dollargeneral/Presentations/DG%20Annual%20Report%202022%20Final.pdf>.
9. 2007 Annual Report. Dollar Tree, Inc. Available at: https://corporate.dollartree.com/_assets/_99eed9a9bd30f8dff547c5e133bfc051/dollartreeinfo/db/893/7739/annual_report/2007_Annual_Report.pdf. Accessed August 2022.
10. Feng W, Page ET, Cash SB. Dollar Stores and Food Access for Rural Households in the United States, 2008–2020. *Am J Public Health*. Mar 2023;113(3):331-336. doi:10.2105/AJPH.2022.307193
11. Winkler MR, Lenk KM, Caspi CE, Erickson DJ, Harnack L, Laska MN. Variation in the food environment of small and non-traditional stores across racial segregation and corporate status. *Public Health Nutr*. 06 2019;22(9):1624-1634. doi:10.1017/S1368980019000132
12. National Academies of Sciences, Engineering, and Medicine; Health and Medicine Division; Board on Population Health and Public Health Practice; Committee on Community-Based Solutions to Promote Health Equity in the United States; Baciu A,

- Negussie Y, Geller A, et al., editors. *Communities in Action: Pathways to Health Equity*. Washington (DC): National Academies Press (US); 2017 Jan 11. 2, The State of Health Disparities in the United States. Available from: <https://www.ncbi.nlm.nih.gov/books/NBK425844/>.
13. Racism and Health. Center for Disease Control and Prevention Website. <https://www.cdc.gov/minorityhealth/racism-disparities/index.html>. Updated September 2023. Accessed November 2023.
 14. Racine EF, Batada A, Solomon CA, Story M. Availability of Foods and Beverages in Supplemental Nutrition Assistance Program-Authorized Dollar Stores in a Region of North Carolina. *J Acad Nutr Diet*. 10 2016;116(10):1613-1620. doi:10.1016/j.jand.2016.03.014
 15. Coughenour C, Bungum TJ, Regalado MN. Healthy Food Options at Dollar Discount Stores Are Equivalent in Quality and Lower in Price Compared to Grocery Stores: An Examination in Las Vegas, NV. *Int J Environ Res Public Health*. Dec 07 2018;15(12)doi:10.3390/ijerph15122773
 16. Canales E, Fan L, Buys DR, Cantave MD. A Market Basket Assessment: Prices and Availability of Healthy Foods Across SNAP-Authorized Food Outlets in Counties With High Obesity Rates in Mississippi. *Prev Chronic Dis*. 12 02 2021;18:E99. doi:10.5888/pcd18.210173
 17. John S, Sundermeir SM, Gardner K. Stretching the Dollar: Community-Informed Opportunities to Improve Healthy Food Access through Dollar Stores. Center for Science in the Public Interest. 2023. Available at: <https://www.cspinet.org/resource/stretching-dollar>
 18. Caspi CE, Pelletier JE, Harnack L, Erickson DJ, Laska MN. Differences in healthy food supply and stocking practices between small grocery stores, gas-marts, pharmacies and dollar stores. *Public Health Nutr*. Feb 2016;19(3):540-7. doi:10.1017/S1368980015002724
 19. Caspi CE, Pelletier JE, Harnack LJ, Erickson DJ, Lenk K, Laska MN. Pricing of Staple Foods at Supermarkets versus Small Food Stores. *Int J Environ Res Public Health*. 08 15 2017;14(8)doi:10.3390/ijerph14080915
 20. Baltimore City's Food Environment: 2018 Report. The Center for a Livable Future Website. <https://clf.jhsph.edu/sites/default/files/2019-01/baltimore-city-food-environment-2018-report.pdf>. Published January 2018. Accessed December 2021.
 21. Mapping Baltimore City's Food Environment: 2015 Report. Center for a Livable Future Website. <https://clf.jhsph.edu/sites/default/files/2019-02/Baltimore-Food-Environment-Report-2015-1.pdf>. Published 2015. Accessed July 28, 2021.
 22. Hager ER, Quigg AM, Black MM, et al. Development and validity of a 2-item screen to identify families at risk for food insecurity. *Pediatrics*. 07 2010;126(1):e26-32. doi:10.1542/peds.2009-3146
 23. U.S. Department of Agriculture Rural Development. Healthy Food Financing Initiative Accessed May 23, 2023. <https://www.rd.usda.gov/about-rd/initiatives/healthy-food-financing-initiative>.
 24. U.S. Department of Agriculture National Institute of Food and Agriculture. REQUEST FOR APPLICATIONS The Gus Schumacher Nutrition Incentive Program Competitive Grants Program. Accessed April 13, 2023. <https://www.nifa.usda.gov/sites/default/files/2023-02/FY23-GusNIP-RFA-508.pdf>.

25. Grocery Store Personal Property Tax Credit. Baltimore Development Corporation Website. <https://www.baltimoredevelopment.com/doing-business/grocery-store-tax-credit>. Accessed November 2023.